

**Q1 PY2024**  
Quarterly Report | Jan. – March  
Ameren  
ILLINOIS  
ENERGY EFFICIENCY PROGRAM



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**ENERGY EFFICIENCY  
PROGRAM**

# Q1 PY2024 Ameren Illinois Energy Efficiency Program Quarterly Report

**JAN. – MARCH**

Data presented in this document is based on preliminary results and is subject to revision and evaluation adjustments. Ameren Illinois Energy Efficiency is funded by Ameren Illinois customers in compliance with Illinois Public Act 95-0481.



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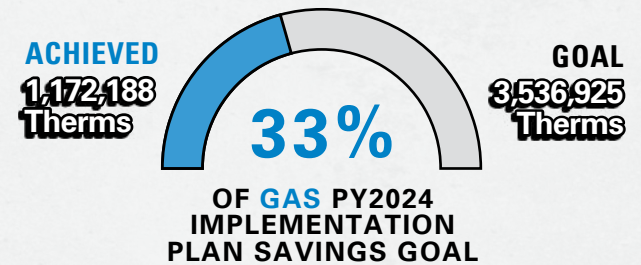
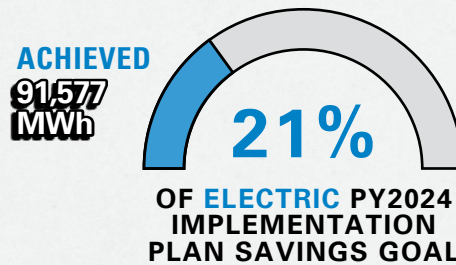
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# PORTFOLIO SUMMARY

Ameren Illinois Company (AIC) d/b/a Ameren Illinois ("Ameren Illinois") provides this quarterly report for the period of January – March 2024 pursuant to Section 6.5 of the Illinois Energy Efficiency Policy Manual Version 3.0 (effective January 1, 2024). Consistent with Section 6.5, Ameren Illinois provides this report using a common template developed in collaboration with other Illinois utilities and stakeholders and designed to provide the categories of information set forth in Section 6.5. The information in this quarterly report may be based on preliminary results and will be assessed for revision, evaluation, and adjustment, with updates and changes being made on a quarterly basis. As set forth in Section 6.5, interested stakeholders should raise any questions regarding the programs addressed in this report through the Illinois Stakeholder Advisory Group process or with Ameren Illinois directly, including to identify any updates or changes made since prior reports. As has been done previously, AIC will address questions, when practicable, through the appropriate channels, including updates to this report.

- Through Q1, the Overall Portfolio has achieved 91,577 or 21% of its electric PY2024 implementation plan savings goal of 437,545 MWh and 1,172,188 or 33% of its gas PY2024 implementation plan savings goal of 3,536,925 therms.



## PORTFOLIO OVERALL SPEND ACHIEVEMENT



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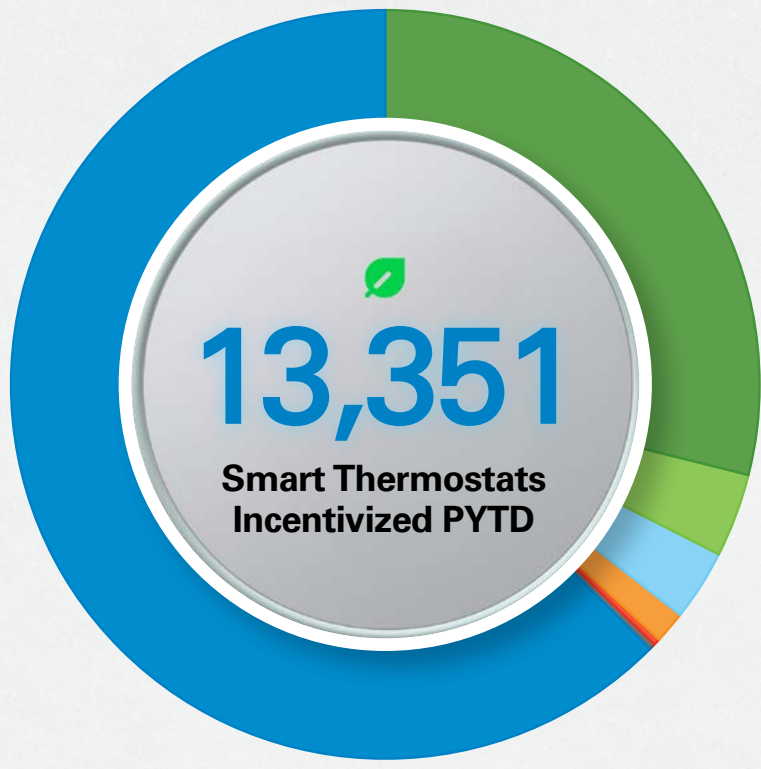


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# SMART THERMOSTATS INCENTIVIZED



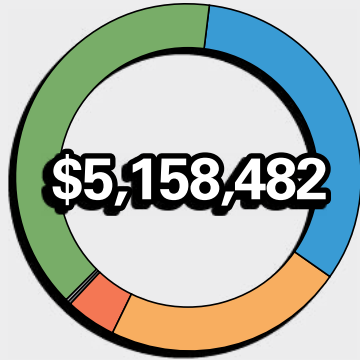
## TOTALS:

■ RETAIL PRODUCTS	8,348
■ INCOME QUALIFIED	3,875
■ MARKET RATE MULTIFAMILY	463
■ MARKET RATE SINGLE FAMILY	442
■ BUSINESS STANDARD	156
■ PUBLIC HOUSING	56
■ BUSINESS MIDSTREAM	11



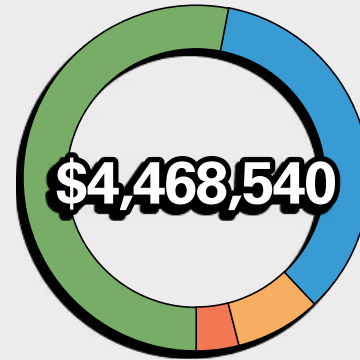
# DIVERSE SPEND METRICS

## DIVERSE PROGRAM ALLY SPEND



CLASSIFICATION	SPEND TOTAL	NUMBER OF PROGRAM ALLIES
Woman-Owned	\$2,036,472	17
Minority-Owned & Woman-Owned	\$1,693,004	4
Minority-Owned	\$1,169,955	13
Veteran-Owned	\$241,767	9
Veteran-Owned & Minority-Owned	\$11,035	3
Veteran-Owned & Woman-Owned	\$6,250	1
<b>Total Spend</b>	<b>\$5,158,482</b>	<b>47</b>

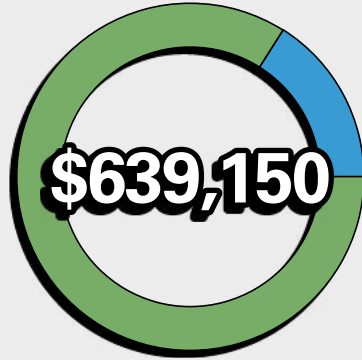
## DIVERSE SUPPLIER SPEND



CLASSIFICATION	SPEND TOTAL	NUMBER OF SUPPLIERS	TIER 1	TIER 2
Minority-Owned & Woman-Owned	\$2,400,979	4	\$71,652	\$2,329,328
Woman-Owned	\$1,548,740	13	\$164,389	\$1,384,351
Veteran-Owned & Minority-Owned	\$357,774	1	\$0	\$357,774
Minority-Owned	\$161,048	5	\$26,899	\$134,149
<b>Total Spend</b>	<b>\$4,468,540</b>	<b>23</b>	<b>\$262,939</b>	<b>\$4,205,601</b>

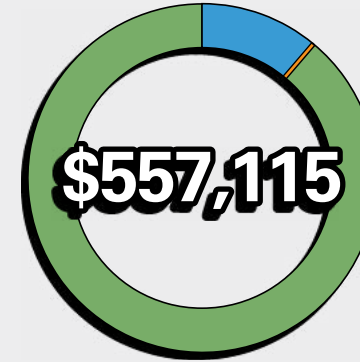
# PORTFOLIO SPEND METRICS





## NON-PROFIT SPEND



DESCRIPTION	SPEND TOTAL
 Time & Materials Spend	\$530,193
 Incentive Spend	\$108,957
<b>Total Spend</b>	<b>\$639,150</b>

## HEALTH & SAFETY SPEND



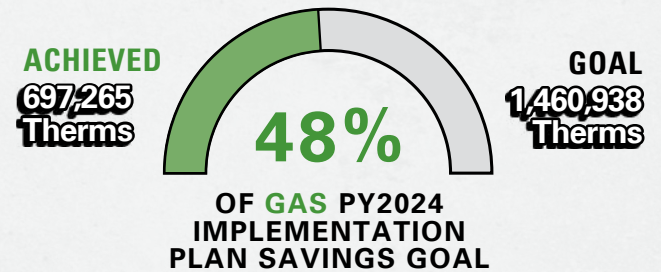
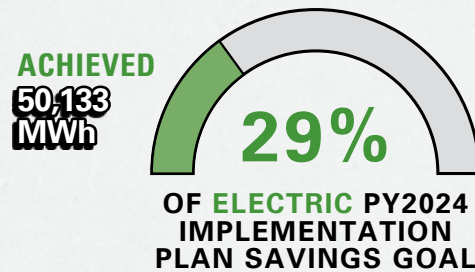
CHANNEL	SPEND TOTAL
 Income Qualified Single Family	\$495,019
 Income Qualified Community Action Agency	\$60,546
 Income Qualified Mobile Homes	\$1,550
 Income Qualified Multifamily	-
<b>Total Spend</b>	<b>\$557,115</b>



# RESIDENTIAL PROGRAM SUMMARY

The Residential Program includes six initiatives that address key electric and natural gas end-uses in single-family homes and multifamily properties. The Residential Program offers a range of educational opportunities and incentives for consumers to implement a series of energy efficiency improvements. Direct installation initiatives, targeted primarily to low- to moderate-income customers, are designed to achieve reductions in energy consumption within participants' homes, followed by comprehensive weatherization services. Each initiative is a potential entry point for consumers into the Program, which is structured to facilitate cross-promotion between initiatives and maximize participation. There is a significant focus on assisting low- to moderate-income customers to reduce their energy costs, with much of that focus within the Income Qualified (IQ) Initiative. Ameren Illinois' large geographic service territory encompasses over 43,700 square miles and serves more than one million residential customers of which over 640,000 receive both electric and gas service.

- Through Q1, the Residential Program has achieved 50,133 MWh or 29% of its electric PY2024 implementation plan savings goal of 173,865 MWh and 697,265 Therms or 48% of its gas PY2024 implementation plan savings goal of 1,460,938 Therms.



**Note:** SAG (Stakeholder Advisory Group) reporting template has Residential initiatives separated by Non-IQ, IQ, and a BTU Conversion component; however, some Residential initiatives categorized as non-IQ in the template include components that are low to moderate income focused.

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### RETAIL PRODUCTS INITIATIVE

- A rotational promotion plan was launched to feature a different thermostat brand every quarter for the remainder of the year to provide a variety of customer options with different thermostat manufacturers.
- 73 customers purchased a heat pump water heater in Q1 due to a \$500 incentive increase. This indicates a large increase in participation, as only 125 heat pumps were purchased within Retail Products throughout PY2023.
- Customers responded robustly to the promotion of air purifiers in independent retail stores during Q1 with over 7,000 units sold. In comparison, 185 rebates were redeemed for this measure through the online rebate portal.

### MARKET RATE SINGLE FAMILY INITIATIVE: MIDSTREAM HVAC CHANNEL – 3<sup>RD</sup> PARTY

- New eligibility requirements for seasonal energy efficiency ratios, test equipment and incentive levels were applied during Q1, including an increased incentive amount for Ducted and Ductless Air Source Heat Pump (ASHP) measures. The new eligibility requirements are needed due to new federal standards that decreased energy savings for the Channel starting in 2024.
- In Q1, a new feature was added to the distributor portal, providing an efficient way for distributors to enter information when multiple pieces of equipment are purchased. This streamlined feature was added based on distributor feedback received in PY2023.
- 30 distributors submitted market data during Q1, which indicated the largest participation in this Channel since inception.

### MARKET RATE SINGLE FAMILY INITIATIVE: HOME EFFICIENCY CHANNEL

- The energy efficiency team attended several home shows throughout the territory to discuss the benefits of weatherization and to encourage participation in this channel.
- A large mailing of marketing postcards was distributed in early March to generate website traffic and increase participation. The postcards also emphasized the ability for customers to leverage the Inflation Reduction Act (IRA) tax credits for their home upgrades, which should be especially meaningful while customers have tax impacts on their mind.
- Program Allies continued to offer American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) focused solutions for ventilation retrofits during Q1, as an effort to promote health and safety within the Program.

### MARKET RATE MULTIFAMILY INITIATIVE

- The multifamily tenant nomination form (where multifamily tenants can request their building receive an audit) was updated during Q1 to include hyperlinks, directing customers to other applicable Energy Efficiency Programs.
- Through Q1, the channel served 37 buildings, including 401 direct installations of units. This was a substantial increase in participation from the previous program year.





### **PUBLIC HOUSING INITIATIVE**

- During Q1, program staff prioritized efforts to increase building envelope participation, which resulted in the identification of 227 buildings eligible for insulation and air sealing.
- The Sensi smart thermostat was incorporated as an alternative to current product offerings during Q1, ensuring customers are provided a user-friendly option that preserves smart features and promotes energy savings.

### **DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: SCHOOL KITS CHANNEL – 3<sup>RD</sup> PARTY**

- 4,432 kits were reserved through Q1, comprising of 75 schools, 195 teachers, and 4,237 students. This fully subscribed the channel, preparing for a robust fall semester.
- Program staff continued a partnership with Community in Action (CIA) during Q1 which plans for Science, Technology, Engineering and Math (STEM) educational events at low-income school districts with students and parents in attendance. Program staff will provide LED light bulbs to attendees at these events and provide energy efficiency information.
- Participation was 93% at end of Q1 for the spring semester, with two months remaining for enrollment.

### **DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: JOINT-UTILITY SCHOOL KITS CHANNEL**

- The Channel will kick off in the fall semester to give time to co-brand materials.

### **DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: HIGH SCHOOL INNOVATION CHANNEL – 3<sup>RD</sup> PARTY**

- Channel participation increased from 2023, with 1,169 kits reserved through Q1, reaching 15 schools, 27 teachers, and 1,142 students. Participation continues to increase year-over-year as this offering gains momentum.
- During Q1, planning for high school STEM camp in a low-income school district began. The camp will focus on workforce development and careers in energy efficiency.





## INCOME QUALIFIED INITIATIVE

ELECTRIC INCOME QUALIFIED SPEND		
CHANNEL	2024 ACTUALS (PYTD)	2024 PLAN BUDGET (FOR THE YEAR)
IQ New Construction	\$13,591	\$183,407
IQ CAA	\$1,025,455	\$4,499,696
IQ Community Kits	\$51,787	\$500,647
IQ Electrification	\$314,843	\$4,004,434
IQ Healthier Homes	\$142,464	\$949,992
IQ Mobile Homes	\$219,922	\$1,712,574
IQ Multi Family	\$1,065,720	\$7,653,746
IQ Multifamily Joint Utility	\$9,489	\$117,596
IQ Retail Products	\$2,743,319	\$8,222,195
IQ Single Family	\$3,707,551	\$17,330,230
IQ Single Family Joint Utility	\$45,433	\$409,251
IQ Smart Savers	\$158,636	\$1,250,723
<b>Total Electric</b>	<b>\$9,452,778</b>	<b>\$46,425,240</b>

IQ HOMES SERVED (PYTD)	
Single Family Channel - Direct Install	579
Single Family Channel - Comprehensive Retrofits	254
Single Family Channel - Joint Utility Retrofits	0
Single Family Channel - Joint Utility Kits	0
CAA Channel - Comprehensive Retrofits	100
Multifamily Channel - In-Unit (including Public Housing)	1,215
Smart Savers Channel	138
Mobile Homes Weatherization and Air Sealing Channel	14
Community Kits Channel	793
School Kits	23
<b>Total IQ Homes Served</b>	<b>3,116</b>

### IQ INITIATIVE: SINGLE FAMILY CHANNEL

- 274 projects were completed in Q1, due to the large pending pipeline at the end of 2023. This was a shift in participation from the previous program year, as this time last year, there were several applications but very few completed projects.
- Program Ally roundtable meetings were completed during Q1. Channel leadership reviewed and assessed all feedback to identify opportunities for program enhancement. Strategies for increased communication were created and rolled out to Program Allies in Q1 because of these meetings.
- Due to a significant reduction in the availability of Energy Star Certified Power Vented Water Heaters, the Channel is installing Energy Star Certified Heat Pump Water Heaters if a bill impact analysis identifies opportunities for overall customer savings. Utilizing the Energy Star Certified mechanical ensures the Channel will be able to achieve significant savings with the measure.

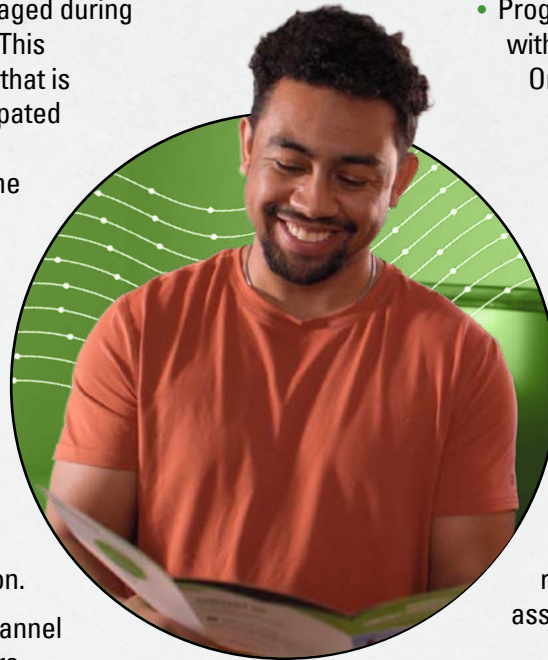


### **IQ INITIATIVE: SINGLE FAMILY & MULTIFAMILY CHANNEL (JOINT UTILITY OFFERING)**

- One 5-unit multifamily building participated during Q1. Total participation for joint utility multifamily for the year is expected to be 50 units; while this is only 10% of the total unit goal for the year, it was a good start given that this is a new effort.
- Eight Community Based Organizations were engaged during Q1 to seek enrollment from eligible participants. This participation is significant given the limited area that is served by both utilities. One Program Ally participated in serving both single and multifamily projects, a positive outcome of multifamily being added to the Joint Utility offering.

### **IQ INITIATIVE: SINGLE FAMILY CHANNEL (ELECTRIFICATION)**

- 15 communities were approved during Q1 for Electrification marketing to increase participation. The outreach team is targeting these communities for electrification presentations and education. 454 individual homes within these communities will receive segmented marketing to encourage electrification.
- To help expedite Electrification opportunities, Channel staff met during Q1 to identify and resolve barriers to project completion when an increase to the customer's electrical load is needed.
- A diverse vendor was identified to support Electrification projects in Q1. This diverse vendor will be utilized when the Program Ally cannot source the electric appliances. This vendor will be able to procure appliances and deliver them to the home for Program Ally installation.



### **IQ INITIATIVE: SINGLE FAMILY CHANNEL (ACCESSIBILITY PILOT)**

- In Q1, program staff determined the suite of smart home measures and services that will be available to customers during Q2. These measures include many of the Google Nest line of products as well as Smart LED lightbulbs and water saving devices.
- Program staff engaged, enrolled, and conducted training with the lead Program Ally and lead Community Based Organization (CBO) partner during Q1 to refer and serve other Ameren Illinois partners and additional Ameren Illinois customers. Outreach efforts by the Program Ally and CBO partner identified as many as 25 customers to serve, with an initial six customers already enrolled.

### **IQ INITIATIVE: SINGLE FAMILY CHANNEL (COMMUNITY ENERGY AMBASSADOR PILOT)**

- Three part-time Community Energy Ambassadors (CEAs) were hired during Q1, to engage low-income customers in Decatur, Carbondale, and East St. Louis and assist them in completing applications for the Income Qualified Single-Family Channel. The CEAs received training from Program staff and are actively assisting customers in the field.





### **IQ INITIATIVE: COMMUNITY ACTION AGENCY CHANNEL**

- The Channel successfully braided its first ever multifamily property via a 12-unit complex in the Champaign-Urbana area, extending the reach of the Energy Efficiency program.
- Due to a significant reduction in water heaters with Energy Star designation, the Channel issued a temporary exemption to the Energy Star requirement to accommodate agencies who had pre-purchased water heaters during Q1.
- Free mobile home weatherization training was provided to local CAAs, contractors, and Program Allies in Q1 to allow for higher quality installations and improved mobile home building science literacy throughout the service territory.

### **IQ INITIATIVE: MULTIFAMILY CHANNEL**

- In the ongoing effort to boost participation within the window inserts pilot, a second property was identified during Q1 with 14 Quanta Panel window inserts ordered.
- In Q1, the targeted heat pump goal of 468 units was met with 104 units complete and 364 units pending, significantly driven by the PY2023 pipeline that contained over 600 heat pumps at the end of the program year. This is a significant increase in participation, compared to 586 installations completed during the entire 2023 program year.

### **IQ INITIATIVE: SMART SAVERS CHANNEL – 3<sup>RD</sup> PARTY**

- 93 customer applications were submitted in Q1, which was less than forecasted. Due to this slow start, plans were initiated during Q1 to conduct a marketing webinar with Program Allies to offer guidance on how to conduct marketing efforts and increase participation in the Channel.
- 119 of the 241 eligible zip codes were covered by the current Program Ally network during Q1, with new strategies implemented to target new Program Allies that will provide coverage for additional zip codes necessary to expand the Channel reach.

### **IQ INITIATIVE: COMMUNITY KITS CHANNEL – 3<sup>RD</sup> PARTY**

- 1,373 kits were distributed through Q1, which more than doubled the pace of the previous program year's distribution.
- In Q1, the Channel added four new partners to distribute community kits. The addition of these new partners has increased the impact of this Channel by expanding the geographic regions that are served throughout the Ameren Illinois service territory.





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### **IQ INITIATIVE: MOBILE HOMES WEATHERIZATION AND AIR SEALING CHANNEL – 3<sup>RD</sup> PARTY**

- The Channel sponsored a mobile home weatherization training for Program Allies during Q1 to improve overall project quality as well as individual Program Allies’ capabilities. Feedback received will be reviewed and recommendations will be implemented based on need.
- The customer application was updated during Q1, reducing the overall paperwork by roughly 50% to avoid repetitive and unnecessary work by the customer and Community Action Agency (CAA) partners. Paperwork was a key barrier identified during roundtable discussions in PY2023.

### **IQ INITIATIVE: HEALTHIER HOMES CHANNEL – 3<sup>RD</sup> PARTY**

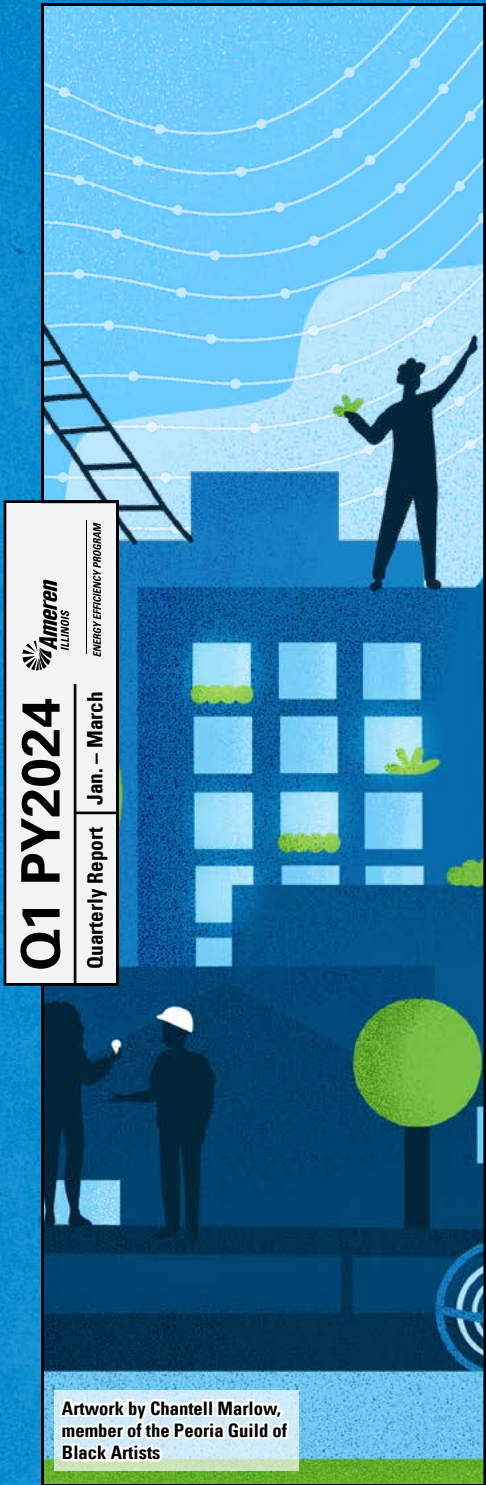
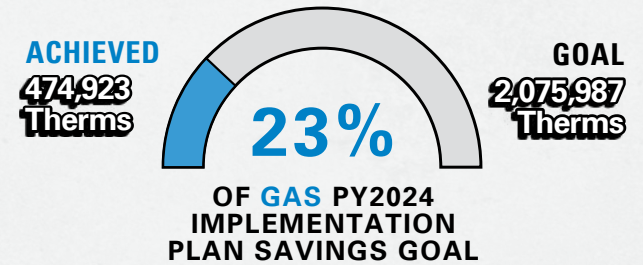
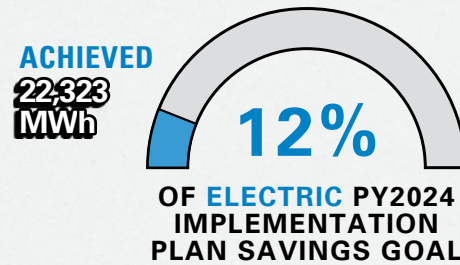
- Services and measure offerings were finalized during Q1, with savings impact and energy modeling considered to prepare for the launch of the Channel.
- A relationship with the Illinois Department of Public Health was built during Q1 through regular check-in meetings. This partnership was established to devise paths for clinicians and community groups to refer Ameren Illinois customers to this Channel.
- A Channel research study was completed during Q1, with results provided to program staff and implementation partners. Incorporated recommendations included a single source for project communications, as well as gaining a deeper understanding of various health care entities’ motivations to successfully participate as a referring partner.



# BUSINESS PROGRAM SUMMARY

The Business Program is comprised of six core initiatives that provide incentives and services to non-residential customers, excluding exempt and self-direct customers, to achieve electric and natural gas energy savings. The core initiatives for the Business Program are Standard, Small Business, Custom, Midstream, Retro-Commissioning (RCx), and Streetlighting. Financial incentives to customers are the cornerstone of the program, and drive them to identify and complete energy efficiency projects and reduce their energy usage. Other aspects include education and training for customers and market professionals, energy efficiency marketing, advancement of energy management, monitoring and building control systems beyond standard industry practices. There are 160,000 business customers spanning the 43,700 square mile Ameren Illinois service territory.

- Through Q1, the Business Program has achieved 22,323 MWh or 12% of its electric PY2024 implementation plan savings goal of 184,046 MWh and 474,923 Therms or 23% of its gas PY2024 implementation plan savings goal of 2,075,987 Therms.



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## BUSINESS STANDARD INITIATIVE

- Five applications were submitted by a large federal customer during Q1. If completed as anticipated, these projects will be a large contributor to the Initiative achieving savings targets this program year.
- Nine Building Operator Certification (BOC) trainings were conducted during Q1, with several more planned for the remainder of the program year. BOC provides an opportunity to both educate and train customers to manage their facilities for long-lasting energy savings.
- Outreach efforts during Q1 intentionally focused on energy efficiency opportunities that typically deliver cost-effective savings in a relatively short amount of time. An example of this is the development of a targeted list of variable frequency drive (VFD) distributors throughout the service territory. VFD project savings are cost-effective and can typically be implemented relatively quickly.
- Outreach efforts for mid-sized accounts in terms of annual energy usage were planned in Q1, with the goal of increasing program engagement and capturing cost-effective savings.
- In Q1, the Initiative received 12 applications containing over 970 MWh in the Networked Lighting Controls offering. This participation quadrupled from the previous program year, resulting in 40 times as much savings. This rise in participation was a direct result of the concerted effort taken during the previous program year with enhanced outreach, education, and training.

## BUSINESS MIDSTREAM INITIATIVE: LIGHTING CHANNEL – 3<sup>RD</sup> PARTY

- Two lighting distributors were enrolled in direct deposit during Q1, allowing the distributors faster payment turn-around time which will lead to faster product delivery. In total, 192 lighting distributors are enrolled in the Channel, which should lead to elevated participation throughout the program year.
- Program staff assigned account managers to each distributor during Q1 to provide additional support. This effort was based on feedback received from roundtable discussions with top participating distributors on resources offered by the program and pain points experienced. The account managers will continue reaching out to all distributors and will incorporate feedback as needed.

## BUSINESS MIDSTREAM INITIATIVE: HVAC CHANNEL – 3<sup>RD</sup> PARTY

- New eligibility requirements for seasonal energy efficiency ratios, test equipment, and incentive levels were applied during Q1, including an increased incentive amount for Ducted and Ductless Air Source Heat Pump (ASHP) measures. The new eligibility requirements are needed due to new federal standards that decreased energy savings for the Initiative starting in PY2024.
- In Q1, a new feature was added to the distributor portal, providing an efficient way for distributors to enter information when multiple pieces of equipment are purchased. This streamlined process was added based on distributor feedback received in PY2023.
- Ductless ASHPs were approved for the Channel during Q1, with eligibility criteria and the incentive mirroring the Residential Program's Midstream HVAC Channel.



## BUSINESS MIDSTREAM INITIATIVE: FOOD SERVICE CHANNEL

- Increased participation by large chain stores and the PY2023 pipeline paused gas incentives during Q1. Program staff met with all utilities to discuss the gas budget for the remainder of the program year, with incentive amounts for several equipment measures reduced to still allow participation.
- Participant messaging was primarily one-on-one from state-wide as well as local outreach teams during Q1, with communication being focused on electric incentives still being available.

## SMALL BUSINESS INITIATIVE: DIRECT INSTALL CHANNEL

- Program staff implemented a tiered co-pay model during Q1 to prioritize diverse business enterprises, non-profit entities, and Empowered/Disadvantaged Communities. This new model both streamlines and provides equity in the request and approval process for additional assistance with Small Business Direct Install Channel projects.
- Program Allies were encouraged to provide regular feedback to Small Business Energy Advisors to help identify potential barriers to participation due to market changes and new requirements. This critical feedback led to the application process being streamlined with changes incorporated during Q1.
- The Small Business Initiative had 62 projects resulting in over 880 MWh specifically in the Networked Lighting Controls offering during Q1. This was a significant increase over the previous program year, with 7 times as many projects and savings as a result.



## SMALL BUSINESS INITIATIVE: ENERGY PERFORMANCE CHANNEL

- 23 customer sites filled the pipeline in Q1, compared to two in the previous program year, indicating a much stronger start for this Channel.
- Channel standardization was further developed during Q1 to provide an easier process for customers to complete projects with small business weatherization measures.
  - Participation was strengthened due to coordination with the Public-School Carbon Free Assessment program that fully launched in Q1. This collaboration helped emphasize weatherization measures as good energy efficiency measures for schools.
  - The Program Ally network bandwidth presented a challenge during Q1, with the list of qualified and willing Program Allies being limited. Program staff will continue collaborating with other program staff, to identify diverse Program Allies to target and enroll.

## BUSINESS CUSTOM INITIATIVE

- The Initiative experienced a slower start to participation during Q1. Though, final paperwork was completed for a very large industrial boiler project, representing approximately one-fourth of the Initiative's savings target for the year.
- Program staff implemented additional outreach strategies during Q1 to identify customers for Process Energy Advisor visits and Feasibility Study participation.





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## **BUSINESS RETRO-COMMISSIONING INITIATIVE**

- Enhanced outreach to Registered Service Providers (RSPs) took place throughout the previous program year which caused a high impact on participation during Q1. Program staff enhanced RSP outreach to identify additional opportunities that will lead to increased participation.
- While no actual savings were recorded during Q1, there are several pre-approved Large Facility Retro-Commissioning projects with a PY2024 anticipated completion date that represent approximately one-third of the Initiative's savings target for the year.
- Program staff identified additional outreach efforts during Q1, focused on customer outreach to market segments with higher energy savings potential, such as large healthcare facilities and campuses.

## **BUSINESS STREETLIGHTING INITIATIVE: MUNICIPAL-OWNED CHANNEL**

- In Q1, program staff prepared for typical increases in activity during the warm weather months with marketing ad campaigns placed in various media.

## **BUSINESS STREETLIGHTING INITIATIVE: AMEREN-OWNED CHANNEL**

- The diverse Streetlighting Implementation Partner subcontract was executed during Q1 in preparation for the Q2 launch. The partner's previous program experience is critical for Channel implementation this year given the logistical challenges from the remoteness of projects.





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# VOLTAGE OPTIMIZATION

Voltage Optimization (“VO”) is the use of automation on distribution voltage control devices (switched capacitor banks, voltage metering, voltage regulators and Load Tap Changers LTC’s) to reduce the reactive power (VAR) flows on a circuit and lower the voltage within regulatory limits to reduce end-use customer energy consumption and utility distribution system losses. As part of its portfolio, Ameren Illinois plans to deploy VO to an estimated 1,047 cost-effective circuits from 2019-2025 while using its best efforts to identify and prioritize circuits with low-income customers.

- **Through Q1, Voltage Optimization has achieved 19,121 MWh or 24% of its electric PY2024 implementation plan savings goal of 79,634 MWh.**





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# MARKET DEVELOPMENT INITIATIVE

As a part of the overall goal, Ameren Illinois uses approved Market Development Initiative funding to provide access to customers that have not yet participated, increase the number of local and diverse candidates filling energy efficiency jobs, and expand existing or launch new local and diverse businesses in the energy efficiency field.

## DIVERSE VENDOR PROCUREMENT

As part of the Market Development Initiative, the Diverse Procurement Channel focuses on identifying and preparing diverse owned businesses for utility procurement opportunities.

- The Channel successfully matched a large diverse digital marketing agency to an energy efficiency procurement opportunity for the Retail Products Online Store channel valued at over \$200,000. This match occurred as the result of an outreach event with the local Hispanic Chamber of Commerce.

## COMMUNITY-BASED ORGANIZATION MANAGEMENT

As part of the Market Development Initiative, the Community Based Organization Management Channel focuses on cultivating partnerships with organizations within the Ameren Illinois service territory to perform outreach through referrals and provide energy efficiency measures to Ameren Illinois customers.

- In Q1, the Market Development Initiative awarded resource grants to 18 community based organizations (CBOs) as part of the CBO Management Channel. Each CBO partner was awarded \$1,000 for the purchase of items that would be most helpful for them to continue the work they are doing for the Ameren Illinois Energy Efficiency Program.
- The CBO Management Channel added four new partners in Q1, bringing the total number of CBO partners to 24. These additions expanded the geographic reach of the Market Development Initiative throughout the Ameren Illinois service territory.
- 344 customer referrals were provided by CBO partners to the Income Qualified Single-Family Channel during Q1, resulting in 60 completed projects. This number of referrals is approximately 46.5% of the total referrals provided throughout all of PY2023 and the conversion percentage of approximately 17.4% is higher than any point during the previous program year.





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## WORKFORCE DEVELOPMENT

As part of the Market Development Initiative (MDI), the Workforce Development Channel focuses on identifying and preparing EE jobseekers for open EE positions as well as connecting qualified jobseekers with employers. This channel also includes internships, scholarships, and Energy Efficiency jobs board management.

- Program staff launched the AmeriCorps Housing effort during Q1, with five applications for AmeriCorps positions approved. The AmeriCorps positions are funded for a one-year term and are intended to complete projects that aim to build the capacity of local organizations to meet community needs. Five organizations were selected to host an AmeriCorps participant during Q1.
- The Channel provided one Building Science Principles (BSP) and one Building Analyst-Technician (BA-T) training during Q1, with 18 participants in the BSP training and 11 participants in the BA-T training. All BSP participants passed the exam; BA-T participants are still awaiting exam results. Passing this exam will allow the participants to enroll as program partners in the Residential Program, as these certifications are required to complete projects.

## MARKET DEVELOPMENT ACTION PLAN

The Market Development Action Plan (MDAP) contains both diagnostic and action-oriented strategies that have been identified to foster a more inclusive Implementation Portfolio and create opportunities for underserved communities. Identified strategies are either measure-focused or derived from a need to create Energy Efficiency synergies across customer segments. MDAP approaches are executed from within the Implementation Portfolio and lead to claimed energy savings, Portfolio leveraging and/or workforce development. Team members across all implementation segments are involved in the development and delivery of the concepts contained below with the goal of each strategy having full integration into standard Portfolio operations.

- The MDAP tracked 127 commitments to infuse equity throughout the Ameren Illinois Energy Efficiency Portfolio, with 21 completed commitments during Q1. Examples of completed MDAP commitments include:
  - The PY2024 Community Partner Marketing and Communications Toolkit was created. This toolkit was designed to equip community partners with Smart Savers Channel coupons, home efficiency assessment applications and small business resources.
  - The Community Action Agency (CAA) Channel provided free mobile home weatherization training to local CAAs, contractors, and Program Allies to allow for higher quality installations and improved mobile home building science literacy throughout the service territory.
  - The Small Business Direct Install (SBDI) Channel provided copay assistance for diverse-owned businesses and non-profits facing barriers to SBDI participation. A tiered copay assistance model was created that prioritized diverse business enterprises, non-profit entities, and Empowered/Disadvantaged Communities to streamline the request and approval process.



# OTHER PORTFOLIO ELEMENTS

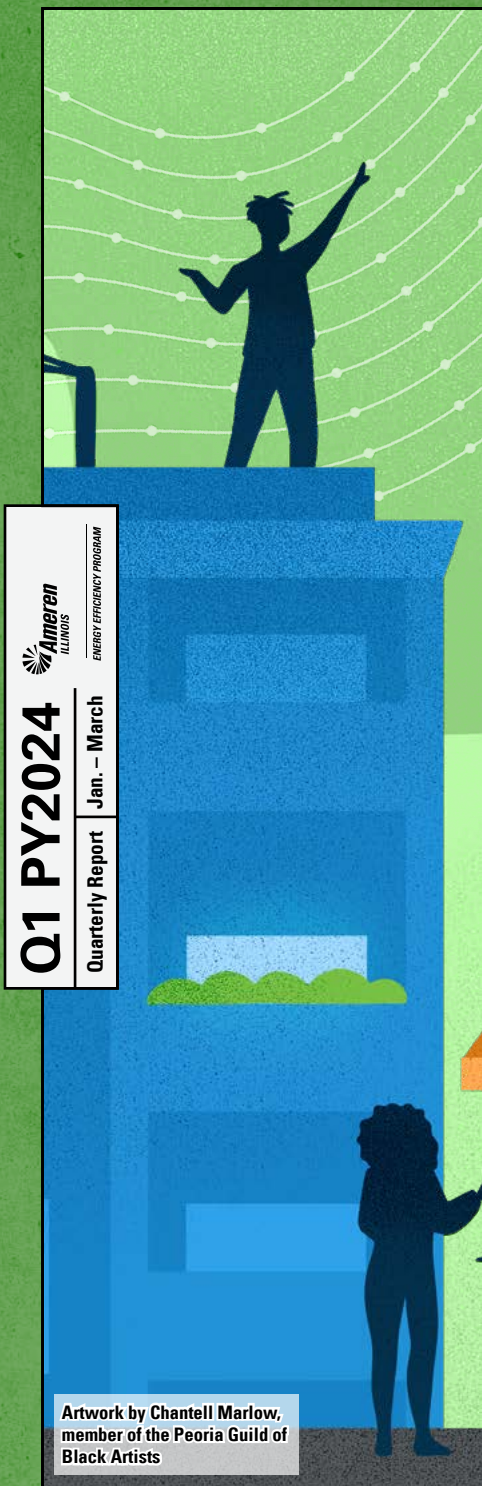
## MARKET TRANSFORMATION

Market transformation is the strategic process of intervening in a market to create lasting change in market behavior by removing identified barriers or exploiting opportunities to accelerate the adoption of cost-effective energy efficiency as a matter of standard practice. The intent is to transform markets, meaning changes in the market structure or function, so that efficient products, services, and practices are adopted within specific target markets on an accelerated, sustained, and permanent basis.

- Program staff developed the scope for the Luminaire Level Lighting Controls (LLLC) Market Transformation offering during Q1 and collected proposals from potential vendors to provide Program Ally training and education, as well as customer and Program Ally marketing collateral.
- Program staff developed the scope the High Performance Windows (HPW) Market Transformation offering during Q1 and worked toward alignment with Nicor Gas on co-funding three HPW opportunities: new construction pilot potential, future Program Ally engagement, and manufacturer engagement. Additionally, program staff engaged with Partnership for Advanced Windows Solutions (PAWS) Utility and Equity Working Groups to support HPW efforts.

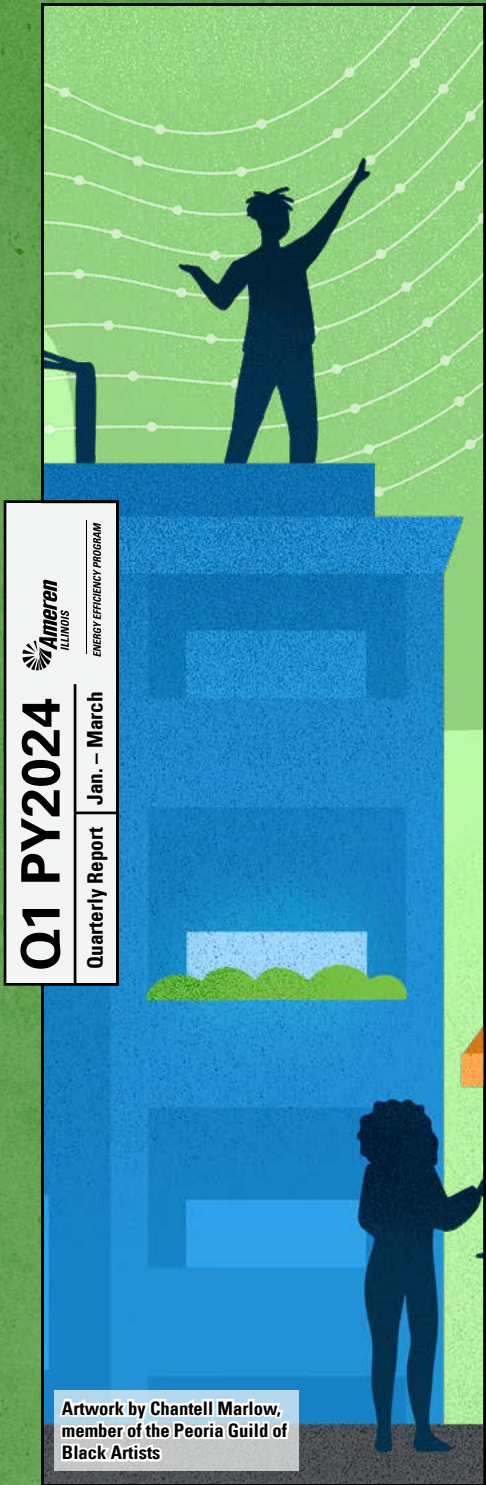
## LOW INCOME ENERGY EFFICIENCY ACCOUNTABILITY COMMITTEE (LIEEAC)

- Leadership and subcommittee meetings were held during Q1 to solicit and discuss ideas for new energy efficiency programs. These meetings were well attended and resulted in good engagement. The following five ideas were submitted to the SAG facilitator for presentation at the 2026-2029 Planning Process meeting on April 17.
  - ▶ Increasing Number of and Support for Diverse Contractors
  - ▶ Supporting Returning Citizens entering the Clean Energy Workforce
  - ▶ AC/High Heat Energy Efficiency Pilot Program to address High Heat Days
  - ▶ Clean Energy Plans and Grant Resources for CBOs, CAAs and Local Governments
  - ▶ Mobile Home Initiative to deliver Energy Efficiency Measures to Mobile Homes



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## CUSTOMER COORDINATION EFFORTS

- Program staff received final approval from Customer Experience (CX) leadership to distribute an informational energy efficiency placemat to CX agents for reference during customer calls. Supervisor team presentations and Q&A sessions have been scheduled.
- The Customer Experience/Energy Efficiency quarterly collaboration calls were reset to monthly Customer Experience Training and Change Management (CX-TCM) /Energy Efficiency calls to ensure timely flow of information between the groups. Outreach was completed with Credit and Collections group to provide energy efficiency and smart thermostat information to customers who receive energy assistance.
- In Q1, program staff provided energy efficiency training to a Customer Experience (CX) New Hire group of 13 team members. Personal experience of a CX agent who recently received an energy efficiency upgrade to their home provided an unexpected testimonial to the process and represented the impact that their energy efficiency program participation delivered for the family.



# MARKETING, EDUCATION AND OUTREACH

## OVERALL PORTFOLIO

- The Ameren Illinois Energy Efficiency Program released a joint winter tip press release with Ameren Missouri for program media coverage during Q1, as a utility collaboration effort.

## RESIDENTIAL PROGRAM

- During Q1, program staff participated in 15 community outreach events throughout the service territory, three of which were annual home shows, promoting channels and offerings. These events were held to increase customer participation and enhance the reach of program messaging.
- A bill insert was distributed to customers during Q1 that promoted energy efficiency opportunities during the Spring seasonal transition.
- Program staff launched an email campaign during Q1, targeting Smart Savers customers for a free smart thermostat and professional installation. In addition, the Online Marketplace released several promotional deals to highlight this campaign as well.

## MARKET DEVELOPMENT INITIATIVE

- The PY2024 Community Partner Marketing and Communications Toolkit was created and distributed to 24 CBO partners during Q1, in response to partner feedback. The toolkit was designed to equip community partners with a Smart Savers Initiative coupon, home efficiency assessment applications, and small business resources.

## BUSINESS PROGRAM

- During Q1, program staff participated in 14 business outreach events throughout the service territory, promoting incentives and offerings to increase participation and expand program reach.
- The Business Insider monthly newsletter was segmented into four distinct audiences during Q1: Small Business, Public Sector, Industrial/Manufacturing, and Commercial. Relevant messaging was targeted to each audience.
- The March monthly bill insert and message for business customers promoted the Early Completion Bonus and Made in Illinois Bonus.



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# APPENDIX A: PROGRAM INITIATIVE AND CHANNEL OVERVIEWS

## RESIDENTIAL

**RETAIL PRODUCTS INITIATIVE:** The Retail Products Initiative intervenes at the point of sale (POS) to encourage residential customers to purchase high- efficiency products through “brick and mortar” retail stores and online e-commerce sites. Customers receive instant discounts and/ or mail-in cash rebates as an incentive to upgrade to ENERGY STAR® and other qualified high-efficiency lighting products, home appliances and smart thermostats.

**MARKET RATE SINGLE FAMILY INITIATIVE:** The Market Rate Single-Family Initiative includes a home weatherization channel for single family customers that do not qualify for the Income Qualified Initiative. This channel is promoted under the name Home Efficiency. The Market Rate Single Family Initiative also includes a Midstream HVAC channel to promote high efficiency equipment.

**MIDSTREAM HVAC CHANNEL:** Midstream HVAC collaborates with manufacturers, wholesalers, and distributors, leveraging their relationships and existing communication channels with installation contractors to distribute information/incentives to increase the number of high- efficiency systems being sold and installed.

**HOME EFFICIENCY CHANNEL:** Home Efficiency partners with Building Envelope Program Ally contractors to offer incentives to homeowners for multiple insulation and air sealing measures, covering a portion of the cost for projects completed by a Program Ally.

**MARKET RATE MULTIFAMILY INITIATIVE:** The Market Rate Multifamily Initiative achieves electric and natural gas energy savings in multifamily buildings that do not qualify under the criteria for the Income Qualified Initiative. Property owners, managers, and tenants can still qualify for similar services, including the direct installation of free low-cost energy saving measures in individual living units and common areas. The direct installation service is provided at no cost to eligible property owners and tenants, with educational materials provided in each unit that explain the energy and money saving benefits associated with installed products and other Ameren Illinois Initiatives that may be of benefit. Additional measures beyond in unit incentives are also identified during the assessment of the property. Through all multifamily channels, a one stop shop approach is offered to multifamily properties managers/in unit tenants. A comprehensive audit is provided to customers to identify eligible measures inclusive of all Residential, Small Business, and Commercial offerings.

**PUBLIC HOUSING INITIATIVE:** The Public Housing Initiative targets public sector housing owned by government entities including federal, state, and municipal housing authorities. Multifamily living units and properties of 3 or more units are eligible for incentives. Similar to the Income Qualified Multifamily Channel, customers receive a comprehensive audit to identify the eligible weatherization services to be provided. Low-cost energy saving products are also installed in conjunction with the audit at no cost.

**DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE:** The Direct Distribution Initiative targets students and schools located within zip codes with high percentages of low- and moderate-income households. Teachers receive energy education curriculum and training by a qualified professional. Students are provided with a “take-home” kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas, and water consumption.

**SCHOOL KITS CHANNEL:** The School Kits Channel primarily targets students in 5th grade, providing energy efficiency and conservation awareness to families in the Ameren Illinois service territory. Participating classes receive an energy education presentation and measures directly installed by qualified professionals. Students are provided with a ‘take-home’ kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas and water consumption.



**JOINT-UTILITY SCHOOL KITS CHANNEL:** The Joint-Utility School Kits Channel primarily targets students in 5th grade, providing energy efficiency and conservation awareness to families in the Ameren Illinois electric service territory and Nicor Gas service territory. Participating classes receive an energy education presentation and measures directly installed by qualified professionals. Students are provided with a 'take-home' kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas and water consumption.

**HIGH SCHOOL INNOVATION CHANNEL:** The High School Innovation Channel primarily targets students in grades 9 through 12. In conjunction with providing energy efficiency and conservation awareness through energy efficiency kits, the channel offers an afterschool innovation camp designed to support long-term development of energy workforce professionals.

**INCOME QUALIFIED INITIATIVE:** The Income Qualified (IQ) Initiative helps low- and moderate-income customers manage their energy consumption, create a comfortable home, and can address health and safety concerns through multiple offerings. Ameren Illinois will also target electrification efforts towards low- and moderate-income homes and multifamily buildings using propane as their heating and/or water heating source. There are 9 channels in the income qualified initiative.

**SINGLE FAMILY CHANNEL:** The IQ-Single Family Channel provides comprehensive home efficiency upgrades and weatherization to single family homes.

**JOINT UTILITY OFFERING:** The Joint Utility Offering coordinates with Nicor Gas to deliver energy efficiency retrofits in the Single-Family channel when customers are both Ameren Illinois Electric and Nicor Gas customers, utilizing the successful Community Based Organization customer outreach delivery model.

**ACCESSIBILITY PILOT:** The accessibility pilot provides smart home technology and efficient direct install measures that contribute to energy savings and a higher level of usability for the homeowner.

**COMMUNITY ENERGY AMBASSADOR PILOT:** The Community Energy Ambassador Pilot compensates community members to act as community energy savings ambassadors who connect residents with the EE Program, starting with the Income Qualified Single-Family Channel.

**COMMUNITY ACTION AGENCY CHANNEL:** The IQ-Community Action Agency Channel partners with Community Action Agencies (CAA) located in Ameren Illinois' service territory providing comprehensive home efficiency upgrades and weatherization to low-income single-family homes.

**MULTIFAMILY CHANNEL:** The IQ- Multifamily Channel targets low-income, multifamily properties and uses a diverse vendor in its outreach to facility managers.

**SMART SAVERS CHANNEL:** The IQ-Smart Savers Channel offers an entry point into energy efficiency by providing low-income residential customers the ability to acquire a smart thermostat at no cost.

**COMMUNITY KITS CHANNEL:** The Community Kits Channel primarily distributes kits through community-based partners and other outreach efforts.

**MOBILE HOMES WEATHERIZATION AND AIR SEALING CHANNEL:** The Mobile Homes Weatherization and Air Sealing Channel targets energy-efficient building envelope and heating system improvements in the unique residential dwelling type of mobile homes for low-income Ameren Illinois Electric and Gas customers.

**HEALTHIER HOMES CHANNEL:** The Healthier Homes channel assists low-to-moderate income customers by completing comprehensive home health assessments during a standard energy assessment. During the assessment, key variables are examined to determine overall air quality and identify any trouble spots.



## BUSINESS

**STANDARD INITIATIVE:** The Standard Initiative provides incentives to customers that purchase energy efficient products. Measures included within this initiative will have predetermined savings values consistent with the Illinois Statewide Technical Reference Manual or industry-accepted savings calculations and have fixed incentive levels. Applications are filled out and delivered to program staff via participating Program Allies (e.g., contractors and trade allies) and/or directly by participating customers. Applications can be submitted a variety of ways, including the program websites at [AmerenIllinoisSavings.com](https://www.AmerenIllinoisSavings.com). Various measures may require a simple calculation to identify measure savings, but the measure level incentives will remain fixed regardless of individual project characteristics.

**MIDSTREAM INITIATIVE:** The Midstream Initiative provides simple access to incentives for business customers via a network of distributors supplying equipment to the trade allies. The Initiative also recruits distributors and wholesalers of lighting and incentivized HVAC and commercial kitchen equipment to increase the adoption of high efficiency measures such as HVAC equipment, heat pump water heaters, and new electric and gas kitchen appliances.

**LIGHTING CHANNEL:** The Lighting Channel provides incentives for energy-efficient lighting to customers at the point of sale. Ameren Illinois customers can visit the [AmerenIllinoisSavings.com](https://www.AmerenIllinoisSavings.com) website to find a list of enrolled distributors offering incentives on lighting products such as linear TLED, high lumen screw-in lights and other common commercial lighting fixtures.

**HVAC CHANNEL:** The HVAC Channel provides incentives for energy-efficient HVAC equipment to customers at the point of sale. Ameren Illinois customers can visit the [AmerenIllinoisSavings.com](https://www.AmerenIllinoisSavings.com) website to find a list of enrolled distributors offering incentives on HVAC equipment such as central air conditioners, air source heat pumps, smart thermostats, heat pump water heaters and notched V-belts.

**FOOD SERVICE CHANNEL:** The HVAC Channel provides incentives for energy-efficient HVAC equipment to customers at the point of sale. Ameren Illinois customers can visit the [AmerenIllinoisSavings.com](https://www.AmerenIllinoisSavings.com) website to find a list of enrolled distributors offering incentives on HVAC equipment such as central air conditioners, air source heat pumps, smart thermostats, heat pump water heaters and notched V-belts.

**SMALL BUSINESS INITIATIVE:** The Small Business Initiative incentivizes customers to install energy efficient products and perform energy savings retrofits. Small Business Direct Install (SBDI) and Small Business Energy Performance measures are marketed and installed by a group of Program Allies experienced and trained to assist small business, non-profits, schools, and local government in becoming more energy efficient. Customer eligibility is primarily based upon delivery service rates DS-2 and DS-3A (400 kW demand or less) for electric and GDS-2 for natural gas. In all Small Business channels, measures are heavily incentivized to increase participation and ensure a high degree of trade ally interest and focus in serving these customers.

**DIRECT INSTALL CHANNEL:** Small non-residential customers receive lighting and refrigeration upgrades through this Channel.

**ENERGY PERFORMANCE CHANNEL:** Small non-residential customers receive HVAC and weatherization upgrades through this Channel.

**CUSTOM INITIATIVE:** The Custom Initiative applies to measures in compressed air, lighting, HVAC, refrigeration, motors/drives, waste/water treatment, and process upgrades that do not fall into the Standard or Streetlighting Initiatives. Complex and largescale new construction and building renovation projects also qualify under the Custom Initiative. These projects normally are complex and unique, requiring separate incentive applications and measurement and verification plans in place to calculate estimated energy savings.



**RETRO-COMMISSIONING INITIATIVE:** The Retro-commissioning Initiative identifies and implements no cost/low cost (zero- to one-year payback) energy efficiency measures to optimize the operation of existing systems for building automation, compressed air, industrial ventilation, industrial refrigeration, and healthcare-related systems. The plan developed for each project provides a roadmap of capital projects that may be implemented and incentivized under the Custom and Standard Initiatives. The energy efficiency measures in this Initiative are generally beyond what is offered by the Standard Initiative. Healthcare and compressed air studies also work together with recommending Standard incentives where applicable.

**STREETLIGHTING INITIATIVE:** For the Street Lighting Initiative, the Municipal-Owned channel incentivizes municipal customers to upgrade their streetlight fixtures to LED technology. AIC-owned streetlights are incentivized via the Ameren-Owned channel and include both early replacement and replace on failure retrofits.

**MUNICIPAL-OWNED CHANNEL:** The Municipal-Owned channel incentivizes municipal customers to upgrade their streetlight fixtures to LED technology.

**AMEREN-OWNED CHANNEL:** The Ameren-Owned Streetlights are incentivized and include both early replacement and replace on failure retrofits.



# APPENDIX B: BUDGET SHIFTS

## ELECTRIC BUDGET

Program	Initiative	Implementation Plan 2023 Rev02	Implementation Plan 2024 Rev00	Variance
Residential	Market Rate Single Family	\$4,119,348	\$4,470,454	\$351,106
Residential	Market Rate Multifamily	\$841,519	\$624,899	(\$216,620)
Residential	Direct Distribution Efficient Products	\$948,904	\$957,763	\$8,859
Residential	Retail Products	\$6,027,696	\$5,266,018	(\$761,678)
Residential	Residential Market Transformation	\$54,664	\$54,664	\$0
Residential	Income Qualified	\$45,492,661	\$46,425,240	\$932,579
Residential	Public Housing	\$1,873,967	\$1,690,873	(\$183,094)
<b>Residential</b>	<b>Subtotal</b>	<b>\$59,358,759</b>	<b>\$59,489,911</b>	<b>\$131,152</b>
Business	Standard	\$9,997,439	\$11,695,972	\$1,698,533
Business	Small Business	\$18,085,457	\$17,568,149	(\$517,308)
Business	Midstream	\$5,449,565	\$5,114,889	(\$334,676)
Business	Custom	\$9,581,597	\$10,015,406	\$433,809
Business	Retro-Commissioning	\$1,389,408	\$1,442,328	\$52,920
Business	Streetlighting	\$1,803,531	\$1,337,613	(\$465,918)
Business	Business Market Transformation	\$519,711	\$518,207	(\$1,504)
<b>Business</b>	<b>Subtotal</b>	<b>\$46,826,708</b>	<b>\$47,692,564</b>	<b>\$865,856</b>
Below the Line	Portfolio Administration	\$7,191,818	\$7,444,092	\$252,274
Below the Line	Evaluation	\$3,240,800	\$3,189,673	(\$51,127)
Below the Line	Marketing	\$3,452,576	\$3,337,601	(\$114,975)
Below the Line	MDI	\$3,561,030	\$3,561,030	\$0
<b>Below the Line</b>	<b>Subtotal</b>	<b>\$17,446,224</b>	<b>\$17,532,396</b>	<b>\$86,172</b>
<b>Portfolio</b>	<b>Total</b>	<b>\$123,631,691</b>	<b>\$124,714,871</b>	<b>\$1,083,180</b>



# APPENDIX B: BUDGET SHIFTS

## ELECTRIC SAVINGS (MWh)

Program	Initiative	Implementation Plan 2023 Rev02	Implementation Plan 2024 Rev00	Variance
Residential	Market Rate Single Family	8,112	7,456	(656)
Residential	Market Rate Multifamily	1,276	1,156	(120)
Residential	Direct Distribution Efficient Products	5,973	6,022	49
Residential	Retail Products	25,805	19,169	(6,636)
Residential	Residential Market Transformation	0	0	0
Residential	Income Qualified	104,114	110,867	6,753
Residential	Public Housing	1,609	1,569	(40)
<b>Residential</b>	<b>Subtotal</b>	<b>146,889</b>	<b>146,239</b>	<b>(650)</b>
Business	Standard	32,604	42,785	10,181
Business	Small Business	51,408	48,525	(2,883)
Business	Midstream	23,161	25,762	2,601
Business	Custom	24,070	32,003	7,933
Business	Retro-Commissioning	4,842	6,039	1,197
Business	Streetlighting	19,783	14,130	(5,653)
Business	Business Market Transformation	0	0	0
<b>Business</b>	<b>Subtotal</b>	<b>155,868</b>	<b>169,244</b>	<b>13,376</b>
Below the Line	Gas Conversions (Residential)	20,454	27,626	7,172
Below the Line	Gas Conversions (Business)	15,520	14,802	(718)
Below the Line	Voltage Optimization	78,500	79,634	1,134
<b>Below the Line</b>	<b>Subtotal</b>	<b>114,474</b>	<b>122,062</b>	<b>7,588</b>
<b>Portfolio</b>	<b>Total</b>	<b>417,231</b>	<b>437,545</b>	<b>20,314</b>



# APPENDIX B: BUDGET SHIFTS

## GAS BUDGET

Program	Initiative	Implementation Plan 2023 Rev02	Implementation Plan 2024 Rev00	Variance
Residential	Market Rate Single Family	\$903,750	\$653,577	(\$250,172)
Residential	Market Rate Multifamily	\$56,680	\$58,461	\$1,781
Residential	Direct Distribution Efficient Products	\$157,650	\$161,799	\$4,149
Residential	Retail Products	\$1,349,813	\$1,140,505	(\$209,308)
Residential	Residential Market Transformation	\$7,454	\$7,454	\$0
Residential	Income Qualified	\$7,130,193	\$6,622,355	(\$507,838)
Residential	Public Housing	\$197,621	\$232,260	\$34,639
<b>Residential</b>	<b>Subtotal</b>	<b>\$9,803,161</b>	<b>\$8,876,411</b>	<b>(\$926,749)</b>
Business	Standard	\$3,652,765	\$2,702,468	(\$950,297)
Business	Small Business	\$385,884	\$727,523	\$341,639
Business	Midstream	\$185,616	\$175,719	(\$9,897)
Business	Custom	\$1,840,876	\$2,083,606	\$242,730
Business	Retro-Commissioning	\$160,722	\$166,209	\$5,487
Business	Business Market Transformation	\$70,665	\$70,665	(\$0)
<b>Business</b>	<b>Subtotal</b>	<b>\$6,296,528</b>	<b>\$5,926,190</b>	<b>(\$370,338)</b>
Below the Line	Portfolio Administration	\$828,698	\$868,341	\$39,643
Below the Line	Evaluation	\$441,927	\$498,800	\$56,873
Below the Line	Marketing	\$470,806	\$455,127	(\$15,679)
Below the Line	MDI	\$0	\$0	\$0
<b>Below the Line</b>	<b>Subtotal</b>	<b>\$1,741,431</b>	<b>\$1,822,268</b>	<b>\$80,837</b>
<b>Portfolio</b>	<b>Total</b>	<b>\$17,841,120</b>	<b>\$16,624,870</b>	<b>(\$1,216,250)</b>



# APPENDIX B: BUDGET SHIFTS

## GAS SAVINGS (THERMS)

Program	Initiative	Implementation Plan 2023 Rev02	Implementation Plan 2024 Rev00	Variance
Residential	Market Rate Single Family	194,725	178,151	(16,574)
Residential	Market Rate Multifamily	18,785	26,828	8,043
Residential	Direct Distribution Efficient Products	139,589	122,950	(16,639)
Residential	Retail Products	477,602	453,602	(24,000)
Residential	Residential Market Transformation	0	0	0
Residential	Income Qualified	1,105,577	631,075	(474,502)
Residential	Public Housing	46,351	48,332	1,981
<b>Residential</b>	<b>Subtotal</b>	<b>1,982,629</b>	<b>1,460,938</b>	<b>(521,691)</b>
Business	Standard	1,306,400	845,484	(460,916)
Business	Small Business	91,428	90,361	(1,067)
Business	Midstream	52,585	47,989	(4,596)
Business	Custom	545,129	1,037,566	492,437
Business	Retro-Commissioning	32,411	54,587	22,176
Business	Business Market Transformation	0	0	0
<b>Business</b>	<b>Subtotal</b>	<b>2,027,953</b>	<b>2,075,987</b>	<b>48,034</b>
Below the Line	Breakthrough Equipment & Devices	0	0	0
Below the Line	MDI	0	0	0
<b>Below the Line</b>	<b>Subtotal</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Portfolio</b>	<b>Total</b>	<b>4,010,582</b>	<b>3,536,925</b>	<b>(473,657)</b>



# APPENDIX C: NEW OR DISCONTINUED MEASURES

Measure Name	Sector	Measure-Level TRC Ratio – with Societal NEIs	Measure-Level TRC Ratio – without Societal NEIs
Water-Cooled Chiller	Non-Residential	3.22	3.05



# APPENDIX D: MULTIFAMILY REPORTING

a. Percent of buildings/projects (and number of apartments within those buildings) served YTD that received whole building assessments.



b. Percent of buildings/projects and apartments served YTD that received only Direct Install measures (either in-unit or common area).

Projects	Buildings	Units
90.9%	95.7%	96.9%

c. Percent of buildings/projects and apartments YTD that only received in-unit (Direct Install) measures.

Projects	Buildings	Units
74.2%	17.0%	40.4%

d. Percent of buildings/project and apartments YTD that received only common-area measures.

Projects	Buildings	Units
16.7%	78.7%	56.6%

## IQ - MULTIFAMILY MEASURE TYPES

End Use	Measure	Measure Type
Building Shell	Air Sealing	Major
Building Shell	Ceiling/Attic Insulation	Major
Consumer Electronics	Advanced Power Strip	Direct Install
HVAC	Advanced Thermostat	Direct Install
HVAC	Air Source Heat Pump	Major
HVAC	Duct Insulation and Sealing	Major
HVAC	Ductless Heat Pump	Major
Lighting	Commercial LED Exit Sign	Direct Install
Lighting	LED Specialty Lamp, Candelabra Base	Direct Install
Lighting	2 LED Specialty Lamp, Directional	Direct Install
Lighting	LED Specialty Lamp, Globe	Direct Install
Miscellaneous	Health and Safety	Direct Install
Water Heating	Domestic Hot Water Pipe Insulation	Direct Install
Water Heating	Low-Flow Faucet Aerator	Direct Install
Water Heating	Low-Flow Showerhead	Direct Install



# APPENDIX D: MULTIFAMILY REPORTING

(A) Number of IQ MF buildings in which efficiency measures were installed and number of apartments in those treated buildings, by zip code;

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units
60952	1	1	6
61525	1	2	20
61614	1	8	88
61616	1	2	24
61761	1	2	20
61801	3	3	21
61802	1	1	8
61821	1	4	40
61832	4	12	364
61920	1	1	3
61938	4	4	12
62024	1	1	9
62040	2	2	7
62060	1	1	3
62208	2	7	41
62220	4	6	65
62225	2	501	1088
62226	5	18	192
62246	2	10	84
62274	2	2	90
62301	1	6	18
62401	5	27	262
62471	2	10	84
62526	4	28	572
62568	2	4	24
62656	4	9	64
62664	1	1	6
62903	1	1	49
60936	1	1	24
60938	1	6	12
62226	1	2	16
62501	1	3	12
62665	1	12	28
62668	1	6	12
<b>Total</b>	<b>66</b>	<b>704</b>	<b>3368</b>

(B) Number of IQ MF buildings in which major measures (building envelop and/or HVAC mechanicals) were installed and number of apartments in those treated buildings, by zip code;

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units
60936	1	1	24
60938	1	6	12
62226	1	2	16
62501	1	3	12
62665	1	12	28
62668	1	6	12
<b>Total</b>	<b>6</b>	<b>30</b>	<b>104</b>



# APPENDIX E: LIEEAC BUDGET REPORT

	Facilitation Labor	Unallocated	Leadership Team Stipends or Grants	Committee Participation Stipends	Education and Outreach Grants	Total	
<b>Contract Total</b>	\$168,502.87	\$34,999.65	\$26,250.00	\$27,000.00	\$40,000.00	\$296,752.52	
<b>Year to Date</b>	<b>\$67,847.00</b>	<b>\$ -</b>	<b>\$1,312.50</b>	<b>\$750.00</b>	<b>\$ -</b>	<b>\$69,909.50</b>	<b>Comments</b>
January	\$27,743.00	\$ -	\$ -	\$ -	\$ -	\$27,743.00	
February	\$14,164.50	\$ -	\$525.00	\$ -	\$ -	\$14,689.50	
March	\$25,939.50	\$ -	\$787.50	\$750.00	\$ -	\$27,477.00	
April						\$ -	
May						\$ -	
June						\$ -	
July						\$ -	
August						\$ -	
September						\$ -	
October						\$ -	
November						\$ -	
December						\$ -	


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# APPENDIX F: INCOME QUALIFIED LIGHTING STORE LIST

## ADDITIONS TO FULL LIST PREVIOUSLY PROVIDED

Location Type	Store Name	Address	City	ZIP
DOLLAR	Family Dollar	1608 Georgetown Rd	Danville	61833
DOLLAR	Family Dollar	2 E Main St	Danville	61832
DOLLAR	Family Dollar	503 S Seventh St.	Wyoming	61491
DOLLAR	Family Dollar	709 N Court St	Grayville	62844
DOLLAR	Family Dollar	13 E Main St	Albion	62806