



IQ MULTIFAMILY WORKSHOP

PROGRAM YEAR TO DATE METRICS

Sept. 15, 2022

AmerenIllinoisSavings.com

Overview

- Stipulated Agreement Metrics
- Reporting Results Through August
- Reporting Difficulties, Barriers and Suggestions
- Questions and Comments

Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.



Income Qualified Multifamily (MF) Metrics Listing

- m. With respect to MF IQ data, Ameren Illinois agrees to make best efforts to provide the following data to the SAG, on a quarterly basis:

Regarding Program data:

(1) Participation

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

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Income Qualified Multifamily Metrics Listing

n. Regarding comprehensiveness of treatment of efficiency opportunities within MF buildings:

- 1.% of buildings/projects (and number of apartments within those buildings) served YTD that received whole building assessments;
- 2.% of buildings/projects and apartments served YTD that received only DI measures;
- 3.% of buildings/projects and apartments YTD that only received in-unit measures;
- 4.% of buildings/project and apartments YTD that received only common-area measures;
- 5.% of buildings/projects and apartments served YTD that got recommendation to install at least one major measure;
- 6.% of buildings/projects and apartments that got recommendation for major measures 12-24 months ago that followed through and installed at least one recommended major measure, if possible;
- 7.% of buildings/projects and apartments that got recommendation for major measures 0-12 months ago that followed through and installed at least one recommended major measure, if possible.

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Welcome



Jennifer “Jen” Michael

Multifamily Initiative Manager / Leidos Inc.

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Jen is the Multifamily One Stop Shop Manager. She has over 3 years of experience working with various utility programs serving low-income residential customers and multifamily properties across the Ameren Illinois service territory.

Jen and the team from CMC Energy Services assist Ameren Illinois multifamily property owners and managers with identifying and achieving deeper levels of energy efficiency improvements and value at their properties.

Jen is also focused on developing tools for properties and education for residents on ways to reduce energy usage resulting in long-term savings.

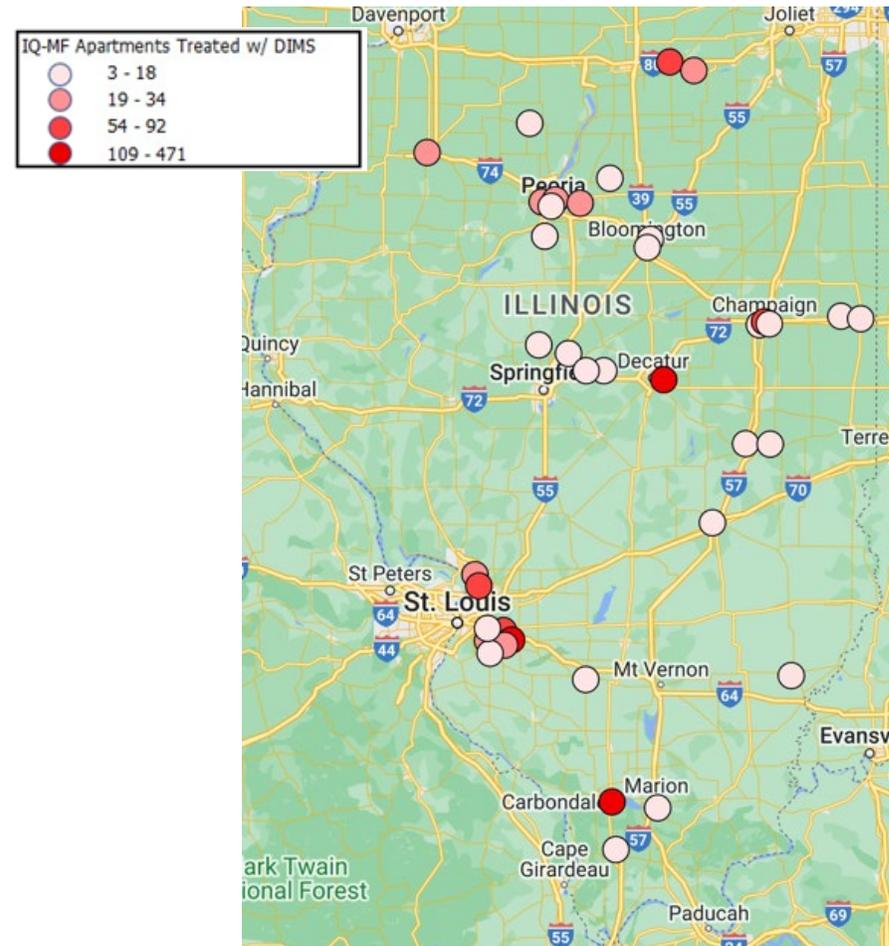
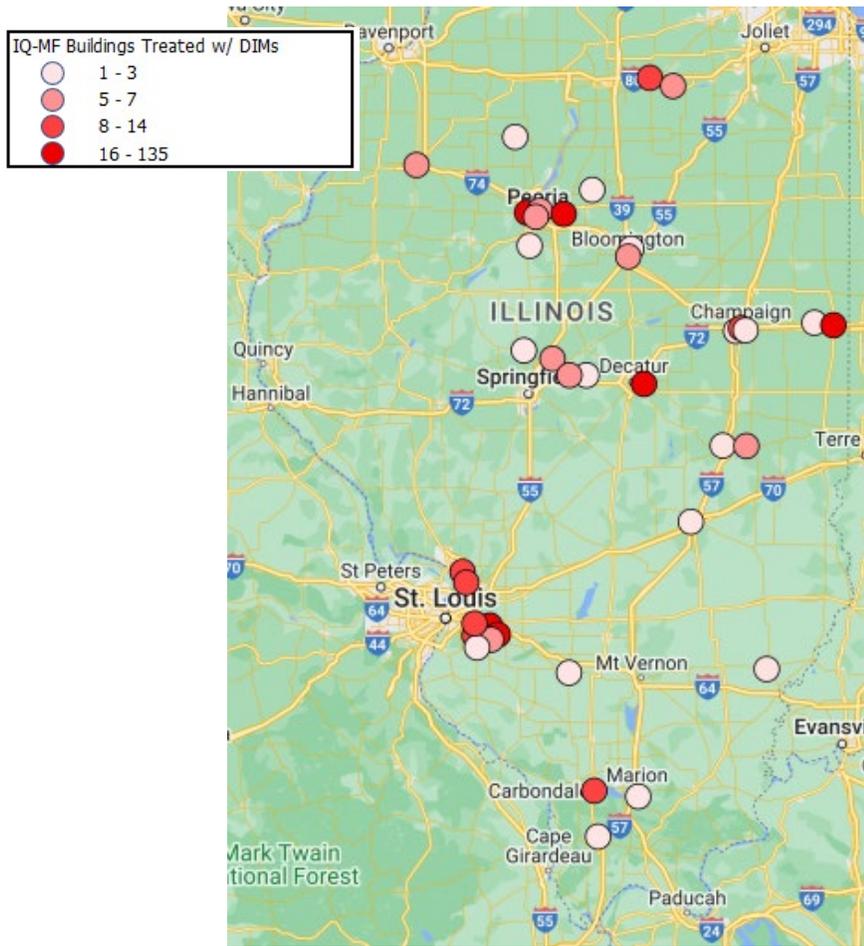
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Multifamily Income Qualified Initiative Results Year to Date

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Income Qualified Multifamily Measures

m.1.1(A) - number of IQ-MF buildings in which efficiency measures were installed and number of apartments in those treated buildings, by zip code

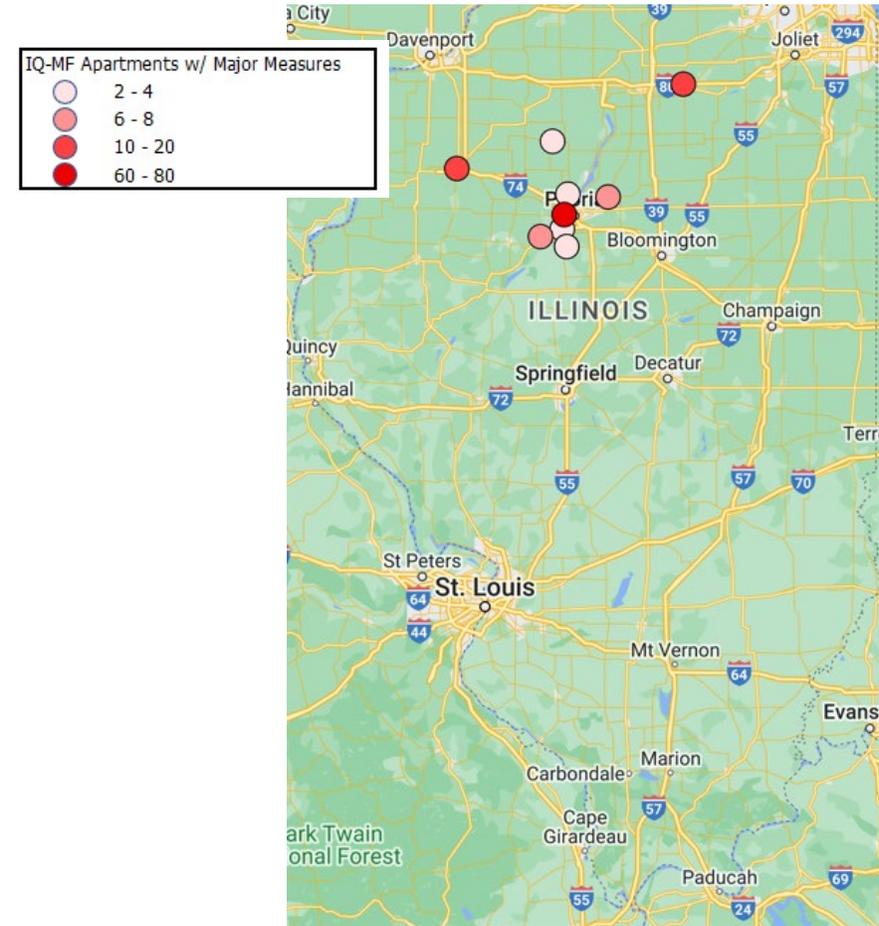
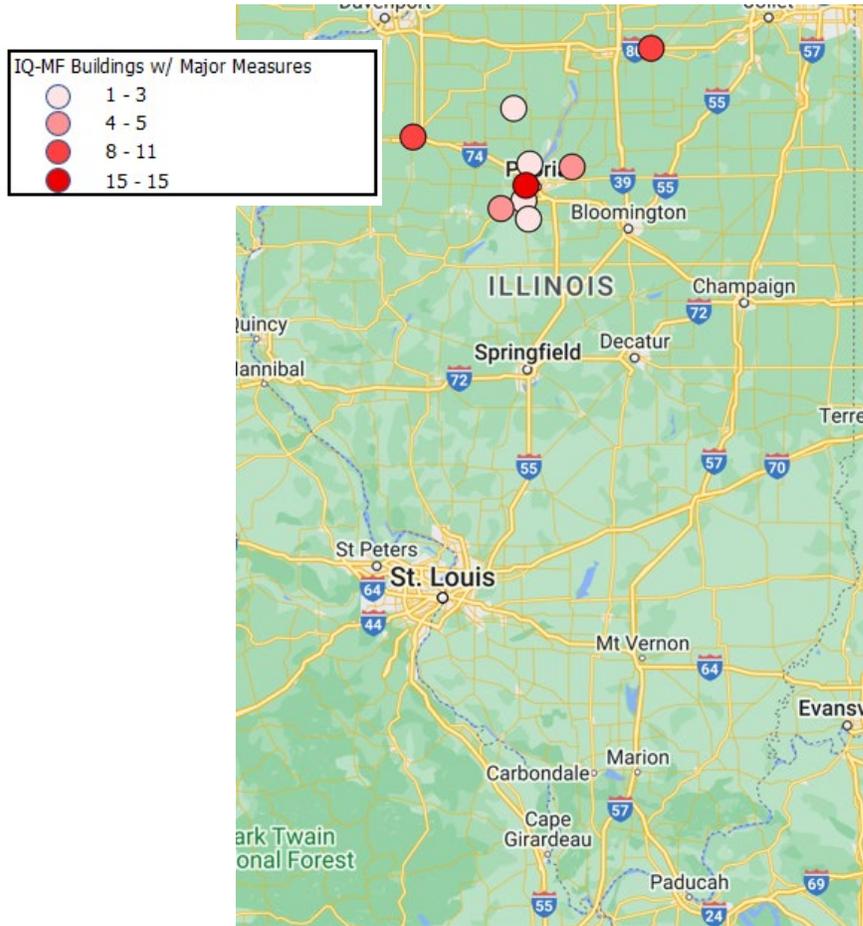


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Income Qualified Multifamily Measures



m.1.1(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



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Income Qualified Multifamily Measures

n.1. - % of buildings/projects (and number of apartments) served YTD that received whole building assessments

- **Results: 100% of One Stop Shop Energy Assessments included a whole building assessment**
 - In-unit opportunities
 - Appliances, Mechanical equipment and attic spaces
 - Interior and exterior common areas
 - If applicable, these areas are also assessed:
 - Parking lots, streetlights, external wall packs/security lighting, exit signs, pool and gym areas, commercial laundry or kitchens, laundry rooms, lobbies, offices, stairwells, mechanical spaces, elevator lighting, etc.

Income Qualified Multifamily Measures

n.2.- % of buildings/projects and apartments served YTD that received only Direct Install measures

- **Results: 80%**

- Includes completed projects only, so if other projects are in pending status (ie: major measures), those are not reflected in the results
- If the property was not eligible or did not choose other recommended projects (or they were done in a previous year), there is no differentiation in the data

Income Qualified Multifamily Measures

n.(3)- % of buildings/projects (and apartments) YTD that only received in-unit measures

- **Results: 80%**
- Interpreted as the same as DI Measures measure n.(2)
- Includes completed projects only, so if other projects are in pending status (ie: major measures), those are not reflected in the results
- If the property was not eligible or did not choose other major measures projects, there is no differentiation

Income Qualified Multifamily Measures

n.(4) - % of buildings/projects and apartments YTD that received only common area measures

- **Results: 0%** No properties assessed this year received common area measures alone
 - It is exceptionally rare that a common area project is not done in conjunction with an “in-unit” project
 - If the property was not eligible or did not choose a common area project that was recommended, there is no exclusion from the data at this time

Income Qualified Multifamily Measures

Not Yet Available Measures – Recommendations to Install

- n.(5) - % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure, if possible
- n.(6) - % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure 12-24 months ago that followed through and installed at least one recommended major measure, if possible
- n.(7) - % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure 0-12 months ago that followed through and installed at least one recommended major measure, if possible

Barriers: Prior to July 2022, Assessment recommendation data was not available in our reporting system.

Efforts in progress to implement reporting on n.5, n.6, and n.7 data:

- Ameren Illinois implemented use of a multifamily specific Energy Assessment Tool in Amplify in July 2022
- Program Staff began entering the backlog of Energy Assessment recommendations provided into the tool for to properties assessed over the past 0-12 months
- We anticipate n.5 and n.7 will be included in Q4 reporting
 - n.6 - Program will not have assessment recommendations in reporting the period of prior 12-24 months recommendations data until Q2 reporting in 2023

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Multifamily Income Qualified Initiative Reporting Barriers and Suggestions

Income Qualified Multifamily Measures

Reporting Difficulties, Barriers & Suggestions

- **m.1.1(A) & (B)** - number of IQ MF buildings YTD in which efficiency measures (or major measures) were installed and number of apartments in those treated buildings, by zip code
- **n.2 thru n.7** – all YTD measures

- **Barriers:** YTD quarterly measures do not reflect the long-term partnerships the Initiative is building with the properties, where we encourage multi-year participation or make multi-year plans that work for the property

- **Suggestion:** rolling calendar reporting of 12- or 24- month periods would be more effective in showing conversion rates of recommendations to projects
 - Suggested measures:
 - % of conversion from Assessment recommendations to DIMS project
 - % of conversion from Assessment recommendations to completed BE projects
 - % of conversion from Assessment recommendation to completed HVAC project
 - This format could be easily expanded to eventually also include:
 - Effectiveness of cross Initiative promotion thru OSS (Small Business lighting, Standard and Customer Initiatives)
 - Effectiveness of property education regarding other initiatives: appliance rebates, bulk equipment thru Midstream or Online Store – these are promoted as Initiatives available when needed if not recommended at the time of assessment (12 month or later after Assessment)

Income Qualified Multifamily Measures

Reporting Difficulties, Barriers & Suggestions

- **m.1.1(A) & (B)** - number of IQ MF buildings in which efficiency measures (or # of major measures) were installed and number of apartments in those treated buildings, by zip code
- **Barriers:**
 - Lack of clarity in operational definitions and the intention of these questions to reflect significance of the statistics reflected
 - Counts by zip code measures for buildings and units does not reflect initiative effectiveness
 - Rural vs Metro locations - # of buildings and # of units by zip code doesn't take into account that properties in metropolitan areas tend to be larger
 - rural locations tend to have fewer buildings and less units at each property
 - may lead to skewed view of effectiveness
- **Suggestions:**
 - Consider property demographics like sizes, territory location and rate types when looking at participation
 - Number of units served by property sizes (unit counts) be a more relevant representation?
 - >24 units size, 25-50 units, 60-100units, <100 units
 - Property paid utilities vs tenant paid utilities?
 - Residential only vs Commercial measure eligible properties
 - Is there a different format to better demonstrate territory areas participation?

Income Qualified Multifamily Measures

Reporting Difficulties, Barriers & Suggestions

- **n.1** - % of buildings/projects and the number of apartments served YTD that received whole building assessments
 - **Barrier:** clarity is needed to provide operational definitions to reflect the intention/significance of these questions of the statistics requested:
 - In the Initiative, 100% of properties who qualify in the Initiative and who make the property available will receive a whole building Energy Assessment receives one in the One Stop Shop format
 - In addition, major measure projects submitted by Program Allies into the program, are required to have an Energy Assessment prior to approval for project to begin
 - **Suggestions:**
 - Discontinue the measure completely or clarify the intention understanding that:
 - It is not a rare occurrence when a property completes an assessment in a previous PY especially in 4Q
 - It is very common that energy efficiency work is part of a multi-year partnership where other measures were performed
 - Report only on the % of properties
 - Reporting on the % of buildings and % of units – it does not seem meaningful if reporting on participation
 - **Recommended replacement measures:**
 - % of Program eligible multifamily properties completing a whole building Assessment PYTD
 - Total # of Program eligible properties who completed an Assessment PYTD, divided by the total number of eligible properties who completed an Assessment application in the Program Year

Income Qualified Multifamily Measures

Reporting Difficulties, Barriers & Suggestions

- **n.(2)** - % of buildings/projects and apartment within those buildings served YTD that received only DI measures
- **n.(3)** - % of buildings/projects and apartment within those buildings served YTD that received only “in-unit” measures
 - **Barriers:**
 - Both seem to represent the same data
 - Relevance of properties receiving “only” in-unit”/DI measures
 - High participation of properties that are not commercially rated locations across territory
 - Properties may not have common areas or eligibility for MM project work
 - **Suggestions:**
 - Discontinue n.(2) and n.(3)
 - neither measure considers multi-year partnerships
 - at many properties, DIMs is the only eligible project for the property
 - Especially for dual fuel and gas only properties
 - Properties that are smaller or have only tenant (residential) accts
 - Create participation measures reflecting:
 - **# of project and # of buildings, # of units served** in the reporting period in the four program buckets (In Unit, CA, BE, HVAC) versus percentages measures

Income Qualified Multifamily Measures

Reporting Difficulties, Barriers & Suggestions

- **n.(4)** - % of buildings/project and apartments YTD that received only common-area (CA) measures
 - **Barrier:** it is an exceptionally rare occurrence that common area projects are done and no other projects
- **n.(5)** - % of buildings/project and apartments YTD that received only Major Measures
 - **Barriers:** provide clarity in operational definitions and the intention of these questions to reflect significance of the statistics reflected
 - MM projects are often part of a multi-year project timeline/plan where other measures were performed previously; or when program year funding is exhausted, when new measures introduced in the next or subsequent PY (repeat customer) ex: ducted ASHPs incentives offered in PY22 but not previous years
 - Not all MM projects can report on building/project and units served
 - Buildings and projects are not interchangeable except in Building Envelope projects
 - # of buildings served is not as relevant as # of units served in HVAC measures
 - Projects that are broken into phases due to \$\$\$ outlay to program allies or due to unit sizing differences (more bedrooms, different sized units) causes hiccups to accurately counting tenant buildings and units in our system
 - **Suggestions** - n.(4) and n.(5) – clarify the definitions to reflect included conditions
 - n.(4) - % of properties assessed YTD where the property received project recommendations at the time of assessment for DIMs or eligible program major measures (HVAC or BE), AND CA measures, but completed only the recommended CA project(s)
 - n.(5) - % of properties assessed YTD where the property received project recommendations at the time of assessment for DIMs, CA, AND eligible PY offered MM measures, but completed only the recommended Major Measures project(s)

Income Qualified Multifamily Measures

Reporting Difficulties, Barriers & Suggestions

- **n.(5)** - % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure, if possible
 - **n.(6)** - % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure 12-24 months ago that followed through and installed at least one recommended major measure, if possible
 - **n.(7)** - % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure 0-12 months ago that followed through and installed at least one recommended major measure, if possible
- **Barriers:**
 - **n.(5)** – YTD reporting will overlap and double count properties in the **n.(7)** - 0-12 mo measure
 - n.(6) and n.(7) will overlap in the 12th month (0-12 mo and 12-24 mo timeframes)
 - the current measures do not capture the most common reasons regarding the “why” the property will not move forward at the time of Assessment and that it is the property’s discretion
 - **Suggestions:**
 - Eliminate **n.(5)** – not meaningful and overlapping timeframes
 - define timeframes for **n.(6)** as 13–24 mo and **n.(7)** as 0-12 mo reporting timeframes
 - consider defining buckets of reasons across all utilities (for consistency in reporting) for why properties are not moving forward with recommendations as secondary

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Feedback/Questions

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