



Opinion **Dynamics**

2024 AMEREN ILLINOIS MULTIFAMILY INITIATIVES PROCESS RESEARCH REPORT

JUNE 27, 2025



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I. EXECUTIVE SUMMARY

This report presents the results of the 2024 Multifamily Initiatives process research that was conducted by Opinion Dynamics on behalf of Ameren Illinois Company (AIC). The Multifamily Initiatives include the Multifamily channel of the Income Qualified Initiative, the Market Rate Multifamily Initiative, and the Public Housing Initiative. They offer multifamily customers comprehensive property assessments, health and safety evaluations, in-unit and common area direct install measures (DIMs), and deeper energy-saving weatherization and HVAC measures.

The Initiatives use a “one-stop shop” (OSS) model as described in the Illinois Energy Efficiency (IL EE) Policy Manual Version 3,¹ where AIC provides property managers with a concierge, called an Energy Advisor, to support them as they participate in one or more offerings across the entire AIC portfolio. Using the OSS delivery strategy, AIC and its implementation partners strive to provide a seamless participation experience designed to overcome traditional barriers to participation in and implementation of a broad set of energy efficiency upgrades typically offered through multiple discrete AIC offerings.

This year’s process evaluation targeted three research topics:

1. Assessment of the evaluability of the OSS model to determine whether the Multifamily Initiatives are meeting the OSS criteria as defined by the IL EE Policy Manual;
2. Provide results of interim participation analysis, including building and tenant unit counts;² and,
3. Survey participant multifamily property managers to gain a better understanding of their experience with the Multifamily Initiatives given recent design and implementation changes.

In addressing these research topics, the evaluation team explored the following research questions:

- To what extent do the key elements, including the design and implementation of AIC’s OSS model, and the availability of pertinent data, meet the criteria for a OSS as defined by the Illinois (IL) Energy Efficiency (EE) Policy Manual? Is it feasible, with current data, to evaluate whether the Multifamily Initiatives are meeting the OSS criteria?
- How many multifamily projects were completed? How many tenant units were served? What types of projects were completed, and in what sectors? Did participation meet expectations? If not, why?
- How do participating property managers/owners experience the Initiatives? Are they satisfied with their experience? What feedback do they have about the OSS approach?
- According to property managers, is the OSS design (e.g., the single point of contact, streamlined approach) achieving its intended goal of influencing participation in other AIC Initiatives? What motivators and barriers exist among property managers to implement broader energy-efficient upgrades? How do Initiative staff address the barriers?

Table 1 summarizes the process research activities that were conducted for the Multifamily Initiatives in 2024.

Table 1. Summary of Process Research Activities

Task	Details
Initiative Material and Database Review	Reviewed relevant administrative reports, marketing and outreach materials, and the 2024 Multifamily Initiatives program tracking database to document Initiative design and any changes.

¹ The criteria for a OSS program design is described in Section 4.5 (“One Stop Shop Program Design Definition for Income Qualified Multifamily”) of the IL EE Policy Manual that is accessible via this link: <https://icc.illinois.gov/downloads/public/edocket/601129.PDF>

² Overall counts are provided by Multifamily Initiatives, by building size, and by measure type as agreed upon by stakeholders according to the criteria set forth in the IL Energy Efficiency (EE) Policy Manual.

Task	Details
Initiative Staff Interviews	Conducted interviews with AIC and implementation staff to document Initiative design and implementation for 2024 and explore Initiative performance.
OSS Evaluability Assessment	Conducted an evaluability assessment of AIC's OSS model using Initiative tracking data and any other relevant information from property manager interviews and Initiative staff interviews, in alignment with OSS criteria set forth in the IL EE Policy Manual.
Participation Analysis	Conducted a comprehensive participation analysis of Multifamily Initiatives by assessing the Initiatives' penetration in the AIC service territory.
Property Manager Survey	Conducted surveys with property managers who participated in Multifamily Initiatives. The evaluation team gathered feedback on various aspects of property managers' participation experience, including the OSS design.

I.I KEY FINDINGS AND RECOMMENDATIONS

OSS EVALUABILITY ASSESSMENT

- The evaluation team determined that it is now feasible to evaluate the Multifamily Initiatives based on the OSS criteria defined by the IL EE Policy Manual. Past attempts to assess the evaluability of the Multifamily Initiatives were unsuccessful because the evaluation team was unable to accurately merge numerous program data due to the lack of a single unique participant identifier (also known as OSS unique ID). However, a comprehensive review of program tracking data, including participant data from January to September 2024 for the Multifamily Initiatives, revealed that the availability of a unique identifier for participant applications through the OSS makes it possible to track a property's participation across all eligible AIC Initiatives.
- **Recommendation:** Continue using the OSS unique ID (OSS_Name__c) to track participation activities of multifamily properties across the various AIC Residential and Commercial Energy Efficiency Programs to ensure evaluability of the OSS and multifamily participation across various initiatives and channels.
- The OSS unique ID makes it possible to determine and assess whether the design and implementation of the OSS meets OSS criteria of making the participation process easier through integration of initiative services, streamlining and simplifying the application process, providing comprehensive technical assistance and energy efficient measure offerings. This is because each participating property is assigned a single OSS unique ID regardless of how many initiatives it participates in. The OSS unique ID provides a way for implementation staff and evaluators to track each participating multifamily property's participation not just within one initiative and/or channel but all other initiatives or channels it participates in as long as the same OSS unique ID is assigned to the property across various program tracking databases.
- While OSS data is complete in most of the Multifamily Initiatives' Excel worksheets, a detailed review of program tracking data suggests that data in the Multifamily Unit worksheet may be incomplete. Per the evaluation team's understanding, the Multifamily Unit table includes tenant unit level data for tenant units that received DIMs. The program tracking data received in September 2024 recorded the installation of DIMs for six unique properties identifiable via OSS unique IDs (Opportunity.OSS_name__c) in the Multifamily Unit table. However, the participation analysis conducted as part of the 2024 process research suggests that 163 properties received at least one type of DIM.
- **Recommendation:** Consider doing checks for both quality and completeness of data in each worksheet in the Excel-based program tracking database as these may be used for the year-end impact analysis. Doing checks should eliminate delays in completing both the impact analysis and the annual report, should updated data need to be provided.

PARTICIPATION ANALYSIS

- Between January and September 2024, there were a total of 192 unique properties that participated in Multifamily Initiatives and received at least one energy-saving upgrade or equipment. Most of these properties participated through the Income Qualified Initiative followed by the Market Rate Multifamily Initiative, and then the Public Housing Initiative. Across the properties, 5,500 unique tenant units were served in 1,138 buildings. There were no mentions of participation goals by the number of properties, buildings, or tenant units in the 2024 AIC Energy Efficiency Program Implementation Plan nor by the Multifamily Initiatives' implementation staff. However, implementation staff reported that the Multifamily Initiatives were on track to meet 2024 energy savings goals during the staff interviews conducted by the evaluation team in June and July 2024.

PROPERTY MANAGER SURVEY

- Most property managers and/or owners who participated in the survey process were satisfied with their participation in the Multifamily Initiatives and were also satisfied with AIC overall. Factors that contributed to participant satisfaction include positive interactions with implementation staff and implementation partners such as CMC Energy Services, Program Allies (PAs) and/or contractors;³ energy-saving upgrades or equipment offered by the Initiatives; actual upgrades or equipment installed on properties; and post-energy audit recommendations. Property managers and/or owners reported satisfaction with the application process and found it easy, which suggests that the design and implementation of the OSS satisfies the OSS criteria set forth in the IL EE Policy Manual, i.e., make the application process easy and less burdensome to participants.
- Despite high levels of satisfaction, a couple of participants reported some dissatisfaction with their Initiative experience as they expected to receive certain upgrades or equipment but did not.
 - Recommendation:** While Multifamily Initiative staff typically informs participants of any measures that their properties are not be eligible for, it may be worth further emphasizing this communication to ensure participants fully understand why they may be ineligible for certain measures.
- Through the OSS design, some participants expressed additional interest in whole building measures, including insulation, HVAC equipment, door sweeps, window upgrades, and air sealing, all of which are offered by the Multifamily Initiatives. However, for some larger retrofits, the OSS framework allows for equipment to be installed over multiple years based on time and budget constraints.
 - Recommendation:** Ensure that eligible participants are consistently and proactively informed about the potential for certain measures to be deferred to future years.
- In general, the cost of equipment and cost of labor remain key barriers to pursuing future energy efficiency upgrades among multifamily participants. Factors that may encourage more multifamily property managers and/or owners to participate or install more energy efficient measures in the future include the availability of measures not currently offered such as furnace upgrades and newer models of Nest thermostats, incentives/rebates, and additional information or education on energy-saving measures available to multifamily customers.
 - Recommendation:** Consider creating more awareness of the OSS and how the OSS makes it easier for multifamily properties to participate in other AIC Initiatives, including both residential and commercial and what other energy-saving measures multifamily properties may qualify for through other AIC Initiatives.

³ AIC PAs are contractors who are partnered with AIC in the implementation of various energy efficiency initiatives. PAs usually install energy efficiency upgrades or equipment in customers properties on behalf of AIC.

2. MULTIFAMILY PROCESS RESEARCH FINDINGS

2.1 OSS EVALUABILITY ASSESSMENT

2.1.1 OSS EVALUABILITY ASSESSMENT OVERVIEW

The purpose of this assessment was to examine if it is feasible, with existing data, to evaluate whether the Multifamily Initiatives are meeting the OSS criteria as defined by the IL EE Policy Manual (Figure 1). Prior to late 2023, attempts to assess the evaluability of the OSS were stymied by a lack of clarity in how program tracking data was structured, what data had been made available to the evaluation team, and what information was necessary to complete evaluation activities. Examining this topic was intended to help determine whether AIC's approach to the OSS model, implementation of the OSS model, and/or ongoing data collection needed to be modified to ensure the Initiatives are meeting the OSS criteria. Through this assessment, the evaluation team sought to answer the following research questions:

- To what extent do the key elements, including the design and implementation of AIC's OSS model, and the availability of pertinent data, meet the criteria for a OSS, as defined by the IL EE Policy Manual?⁴ Is it feasible, with current data, to evaluate whether the Multifamily Initiatives are meeting the OSS criteria (described in Figure 1)?

Figure 1. One-Stop Shop (OSS) Program Definition

4.5 One Stop Shop Program Design Definition for Income Qualified Multifamily Retrofit

When Program Administrators commit to one-stop shop approaches to delivering income qualified multi-family Energy Efficiency Programs, and other Programs as applicable, in order to help Participants navigate a complex Program landscape, the approaches are defined as including the following:

- i. Program navigation support – making the process of participating in the income qualified multi-family Energy Efficiency Program easier through integrated program services. This includes a primary point of contact; application and enrollment support; coordinating seamless access to other programs; assisting with coordination of rebates, incentives, and financing options; and monitoring progress.
- ii. Application ease – reducing application burdens, which typically includes a single or universal intake application and ensuring that all written and electronic Customer-facing materials are presented in the Customer's preferred language when there is a demonstrated need.
- iii. Comprehensive technical assistance – supporting Participants with technical assistance, which can include navigating audits and auditors, reviewing scopes of work proposed, discussing available rebates, incentives, and financing options, providing a list of potential contractors, supporting post-project quality inspections and annual benchmarking services, and more.
- iv. Comprehensive offers of all potentially applicable Measures and Programs – clearly articulating to building owners and/or tenants the full range of Measures which the Program Administrator offers and incentivizes; access to additional resources on local, state and federal incentives or subsidies that would further reduce the cost of participation in the Program; and other related offerings and/or tools that can help tenants reduce energy bills.

This policy is effective as early as possible, but no later than January 1, 2024.

Source: IL EE Policy Manual Version 3.0. Accessed on December 16, 2024.

<https://icc.illinois.gov/downloads/public/edocket/601129.PDF>

⁴ The criteria for a OSS program design is described in Section 4.5 ("One Stop Shop Program Design Definition for Income Qualified Multifamily") of the IL EE Policy Manual that is accessible via this link: <https://icc.illinois.gov/downloads/public/edocket/601129.PDF>

2.1.2 OSS EVALUABILITY ASSESSMENT METHODOLOGY

To conduct the evaluability assessment of AIC's OSS model, the evaluation team requested and reviewed all program tracking data across the Multifamily channel of the Income Qualified Initiative, the Market Rate Multifamily Initiative, and the Public Housing Initiative.⁵ The program tracking data review focused on identifying data that could be used to track OSS participation from application to an initiative to energy audit, measure installation, and determine participant or project-level reported energy savings. The evaluation team also met with Initiative staff to clarify questions that resulted from the review of OSS-specific data. The next section (section 2.1.3) describes the findings from the data review.

2.1.3 OSS EVALUABILITY ASSESSMENT DETAILED FINDINGS

After a comprehensive review of program tracking data, including participant data from January to September 2024 for the Multifamily Initiatives, the evaluation team determined that it is now feasible to evaluate the Multifamily Initiatives based on the OSS criteria defined by the IL EE Policy Manual. Tracking of data has been made possible by the inclusion of a unique identifier (OSS unique ID) assigned to properties that participated in the Multifamily Initiatives through the OSS in the Excel-based program tracking data provided by implementation staff. The implementation team refers to this OSS unique ID as "OSS_Name__c" or "Opportunity.OSS_Name__c" and defines it as "unique OSS project name." Through a thorough review of program tracking data, the evaluation team found that it is possible to link each of the worksheets presented in the individual worksheets of the program tracking data using the OSS_Name__c field.

To illustrate this linking, the evaluation team created a figure (Figure 2) that represents the program tracking data received for the process research activities for 2024. The Excel database includes seven worksheets (Excel tabs):

- Opportunity worksheet: contains a list of all projects completed with overall savings and incentives
- Opportunity Product worksheet: contains a list of all measures installed on projects with measure savings and incentives
- Account worksheet: contains customer contact information utilized to link projects to AIC electric or gas accounts
- Task worksheet: lists project tasks completed per project with associated notes
- One-Stop Shop worksheet: contains property information with overriding OSS number to unify all projects
- Instant Assessment worksheet: contains assessment details captured during property review to identify all OSS measures available
- Multifamily Unit worksheet: tracks DIMs by tenant unit

The color-coded fields listed in Figure 2 are the various fields that could be used to link data in each worksheet together to create one database and allow for both process and impact evaluation of participation and energy-saving measures that were installed through OSS participation.

Past program tracking databases had limited evaluability and lacked the data needed to evaluate the OSS. Before the addition of the OSS unique ID, tying tables together was neither straightforward nor precise. The evaluation team would need to use various combinations of project numbers (Project_Number__c), service addresses (Service_Address__c), and electric or gas account numbers (Account_Number_Electric__c and Account_Number_Gas__c, respectively) to link data in the Opportunity, Opportunity Product, and Account worksheets together. The result was an imprecisely combined measure level file as multifamily properties commonly have multiple electric and/or gas account numbers, service addresses, and project numbers associated with them. More problematic, however, was that without the OSS

⁵ Data fulfilling our request was provided by program staff on September 17, 2024.

unique ID, there was no way for the evaluation team to link this measure level data with the tenant unit level data from the Multifamily Unit worksheet, as the latter was presented at the service address and tenant unit level. The incorporation of the OSS unique ID makes it possible to easily and more precisely link data together to support evaluation tasks against the OSS model described in Figure 1.

Figure 2. Multifamily Initiatives Program Tracking Data Worksheets and Unique IDs

Opportunity	Opportunity Product	Account	Task	One Stop Shop	Instant Assessment	Multifamily Unit
<ul style="list-style-type: none"> • Id • AccountId • Name • OSS_Name__c • Project_Number__c • Customer_Name__c • Service_Address__c • Account_Name__c • Account_Number_Electric__c • Account_Number_Gas__c • Account_Customer_Number__c • OSS_Project_Number__c 	<ul style="list-style-type: none"> • OpportunityId • Name • Project_Number__c • Opportunity.OSS_Name__c 	<ul style="list-style-type: none"> • Id • Name • Customer_Number__c • Participant_Name__c • SVC_ADD__c • Account_Number_Electric__c • Account_Number_Gas__c • Opportunity.OSS_Name__c 	<ul style="list-style-type: none"> • WhatId • AccountId • Opportunity.OSS_Name__c 	<ul style="list-style-type: none"> • Id • Name • Account__c • OSSNumber__c • Opportunity.OSS_Name__c 	<ul style="list-style-type: none"> • Opportunity.OSS_Name__c 	<ul style="list-style-type: none"> • Service_Address__c • Opportunity.OSS_Name__c

Note: Like-colored fields indicate that the same unique ID exists across the worksheets listed in this figure. For instance, “Id” in the Opportunity worksheet is the same as “OpportunityId” in the Opportunity Product worksheet, and “WhatId” in the Task worksheet.

In addition to confirming the evaluability of the OSS model, the evaluation team also reviewed the completeness of the OSS unique IDs in each worksheet and found the following:

- There are a total of 192 individual OSS unique IDs and all 192 were found and matched across the Opportunity, Opportunity Product and OSS worksheets.
- As the remaining worksheets contain fewer OSS unique IDs than did the Opportunity, Opportunity Product, and OSS worksheets, it would be advisable to review worksheets for completeness in future program tracking databases provided for evaluation purposes. For example:
 - The Account worksheet contains 102 OSS unique IDs, which is not necessarily an issue as some property contacts (managers or owners) manage or own multiple participating properties. However, to be consistent, complete, and proper in future data tracking exercises, contacts for each OSS unique ID should be listed even though it may cause duplicates so that each property that participates through the OSS is also accounted for in the Account worksheet.
 - The evaluation team looked at the Task worksheet and found 188 OSS unique IDs. On further investigation into the four OSS unique IDs missing from the Task worksheet, it was found that those four participants had energy-saving measures associated with them and should have been included in the Task worksheet.
 - The Instant Assessment worksheet includes records for 109 OSS unique IDs. It is unclear exactly why 83 projects were missing from the Instant Assessment worksheet; it is most likely that the assessments for those projects were completed prior to 2024 and were therefore unavailable.

- Although the implementation team provided all available data at the time of this research, the Multifamily Unit worksheet only contained records for six unique OSS projects. However, there were 163 unique OSS projects that installed at least one type of DIM, which suggests that the Multifamily Unit worksheet provided to the evaluation team in September 2024 is missing data for at least 157 OSS projects. While incomplete Multifamily Unit data does not limit this study, it is important to ensure that the data provided to the evaluation team for the 2024 yearend impact evaluation is complete.

Using OSS unique IDs makes it possible for the evaluation team to determine and assess whether the design and implementation of the OSS meets the OSS criteria as each participating property is assigned one OSS unique ID regardless of how many initiatives in which the property itself participates. Additionally, the OSS unique ID provides a way for implementation staff and evaluators to track each multifamily property's participation not just within one initiative and/or channel but all other initiatives or channels in which the property participates. The addition of the OSS unique ID in each of the Excel worksheets in the program tracking database for the Multifamily Initiatives allows for tracking of multifamily participant activity from the time when the participant applied to an Initiative, through to the subsequent energy audit or assessment, measure installation, project completion, and/or incentive payment (if any). Importantly, an ID also allows the evaluation team to see if the corresponding property received energy-saving upgrades or equipment from more than one Multifamily Initiative. Assuming that the same OSS unique ID is used and tracked in other AIC initiatives or channels, such as Small Business Direct Install (SBDI) or Custom, evaluation efforts could also determine if participating multifamily properties received measures from other initiatives or channels.

For instance, between January and September 2024, the evaluation team found that there were three properties that participated through at least two channels of the Multifamily Initiatives. One property in Urbana, Illinois received heat pumps through the Market Rate Multifamily Initiative but also received air sealing, attic insulation, and health and safety remediation through the Income Qualified Initiative. These completed measure installations are represented by two different project IDs (project_number__c) due to having been completed through two different initiatives under the Residential Program. However, there is only one OSS unique ID assigned to the property, which enabled the evaluation team to easily determine that this property participated in more than one initiative. Additionally, through the use of its OSS unique ID, the participant needed to apply only once to receive measures from multiple initiatives. Prior to the implementation of OSS unique IDs, a property would have had to apply to the Market Rate and Income Qualified Initiatives separately. Clearly, this case demonstrates that the OSS and OSS unique ID has made the application process easier and more streamlined, facilitating the installation of more energy-saving upgrades offered by multiple Multifamily Initiatives through a single application, energy audit, and installation process.

2.2 PARTICIPATION ANALYSIS

This section was completed well in advance of 2024 year end program tracking data analysis, and the findings in this section are now supplanted by Appendix D of the *Ameren Illinois Company 2024 Residential Program Impact Evaluation Report*.⁶ We have left this section intact for posterity but readers interested in the most up to date information available should reference that report's findings.

2.2.1 PARTICIPATION ANALYSIS OVERVIEW

The evaluation team conducted a participation analysis of the Multifamily Initiatives to evaluate their penetration into the AIC service territory. The analysis included the identification of participation criteria, compilation of participant data, and exploration of the geographical distribution of participation within the AIC service area. Utilizing both quantitative and qualitative methods, the evaluation team aimed to provide insights into the effectiveness and reach of the Multifamily Initiatives, offering valuable information for Initiative improvement and strategic decision-making. The results of the participation analysis aimed to address the following research questions:

- How many multifamily properties completed projects? How many tenant units were served? What types of projects were completed, and in what sectors?

⁶ Available at: <https://www.ilsag.info/wp-content/uploads/2024-AIC-Residential-Program-Impact-Evaluation-Report-FINAL-2025-04-24.pdf>
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2.2.2 PARTICIPATION ANALYSIS METHODOLOGY

In 2024, the Illinois Program Administrators and non-financially interested stakeholders reached an agreement on a set of IQ Multifamily metrics that each utility must report on annually. As such, the evaluation team conducted a participation analysis on a partial set of 2024 program tracking data based on the agreed upon metrics ahead of conducting a year-end analysis that will be included in our 2024 impact evaluation reports.

In preparation for the participation analysis, the evaluation team conducted a detailed review of the program tracking data, including data for participating multifamily properties from January through September 2024. Through this data review, the evaluation team identified program tracking data fields necessary to calculate participation counts as described in the IL EE Policy Manual.⁷ The evaluation team also met with implementation staff to ensure alignment on methodology.

To conduct the participation analysis, the evaluation team utilized the OSS unique ID, project numbers, and program tracking data fields indicating the number of buildings and the number of tenant units. The evaluation team performed additional manual data review after calculating participation counts for accuracy and quality assurance purposes. In addition to the participation counts, the evaluation team also utilized program tracking data to map out the geographic locations of multifamily participants in 2024 using service address ZIP codes. Findings from these analyses are detailed in Section 2.2.3.

2.2.3 PARTICIPATION ANALYSIS DETAILED FINDINGS

Between January and September 2024, there were a total of 192 unique properties that participated in AIC’s Multifamily Initiatives covering a total of 5,500 tenant units. Most (135 of 192) of the properties that participated in the Multifamily Initiatives in 2024 were Income Qualified Initiative customers, followed by Market Rate Initiative (31 of 192), and Public Housing Initiative properties (29 of 192) (Table 2). Notably, in 2024, neither the program implementation plan nor implementation staff mentioned participation goals in terms of the number of properties, buildings, or tenant units served. However, during the implementation staff interviews conducted in June and July 2024, implementation staff reported that the Multifamily Initiatives had met staff expectations as of mid-2024 and were on track to meet energy savings goals for 2024.

Table 2. Participation by Multifamily Initiative

Initiative	Number of Properties ^a	Number of Buildings	Number of Tenant Units
Income Qualified	135	926	4,086
Market Rate	31	102	940
Public Housing	29	110	474
Total	192	1,138	5,500

^a The sum of the number of properties will not add up to the total number of properties as some participating properties participated in more than one Initiative.

While nearly all participating properties had buildings with less than 20 tenant units (Table 3), there were two income qualified properties with more than 50 units, which provided approximately one-fifth of all tenant units served.

⁷ For reference, metrics for multifamily reporting agreed upon by stakeholders are described in this document: https://www.ilsag.info/wp-content/uploads/IQ-Multi-Family-Reporting-Metrics_FINAL-Clean-6-20-2024_v2.pdf
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Table 3. Building Types Treated

Size	Housing Type ^a	Number of Properties	Number of Buildings	Number of Tenant Units
Buildings < 20 Units	Income Qualified	132	391	2,852
	Subsidized	55	246	1,532
	Unsubsidized	77	145	1,320
	Market Rate	31	102	940
	Public Housing	28	87	396
Buildings 20 – 49 Units	Income Qualified	1	34	146
	Subsidized	1	34	146
	Unsubsidized	0	0	0
	Public Housing	1	23	78
	Market Rate	0	0	0
Buildings ≥ 50 Units	Income Qualified	2	501	1,088
	Subsidized	0	0	0
	Unsubsidized	2	501	1,088
	Public Housing	0	0	0
	Market Rate	0	0	0

Note: The program tracking data received in September 2024 is limited or lacks data to differentiate properties, buildings, and/or tenant units that have primary central heating systems or individual heating systems. As such, for interim process reporting, this table reports on the total number of properties, buildings, and tenant units.

Most of the measures installed in participating multifamily properties were direct install in-unit and common area lighting, followed by heat pumps, which include both ductless and air source heat pumps (Table 4).

Table 4. Number of Participating Buildings and Tenant Units by Measures Installed

	Income Qualified		Market Rate		Public Housing		Total	
	Buildings ^a	Apartments ^a	Buildings ^a	Apartments ^a	Buildings ^a	Apartments ^a	Buildings ^a	Apartments ^a
Total Participants	926	4,086	102	940	110	110	1,138	5,136
Total Participants w/ Electric Heat	329	2,121	84	811	57	198	470	3,129
Direct Install In-Unit	350	2,642	96	876	93	409	539	3,927
Common Area Lighting	536	1,512	0	0	0	0	536	1,512
Heat Pumps ^b	79	434	6	65	23	78	108	577
Air Sealing	8	78	N/A	N/A	16	61	24	139
Attic Insulation	8	78	N/A	N/A	16	61	24	139
Other (Window Inserts)	1	12	0	0	0	0	1	12
Gas Heating System Replacements	0	0	0	0	0	0	0	0
Heat Pump Water Heaters	0	0	0	0	0	0	0	0
Other HVAC Equipment Measures	0	0	0	0	0	0	0	0

	Income Qualified		Market Rate		Public Housing		Total	
	Buildings ^a	Apartments ^a	Buildings ^a	Apartments ^a	Buildings ^a	Apartments ^a	Buildings ^a	Apartments ^a
Other Insulation	0	0	0	0	0	0	0	0

^a The sum of the counts by measure will not add up to the total participants as some participating properties received more than one type of measure.

^b Includes ductless heat pumps and air source heat pumps.

A minority of Income Qualified (8 buildings with 78 apartments) and Public Housing (16 buildings with 61 apartments) participants received building envelope measures in 2024. The leading reason for not installing building envelope measures is due to the installation being deferred to a future program year. As shown in Table 5, a total of 167 buildings qualified for building envelope measures but installation was deferred to a future year. Most buildings (178) and/or apartments (1,043) that did not qualify for building envelope measures already installed or upgraded these measures.

Table 5. Reasons Building Envelope Measures Not Installed

	Income Qualified		Market Rate		Public Housing		Total	
	Buildings	Apartments	Buildings	Apartments	Buildings	Apartments	Buildings	Apartments
Total Buildings / Units Served ^a	1,091	5,705	129	1,270	144	692	1,364	7,667
Total Buildings / Units Assessed ^b	926	4,086	102	940	110	474	1,138	5,500
<i>Note: The following data is associated with buildings served with a Multifamily Energy Savings assessment.</i>								
Installed Insulation/Air Sealing Measures	8	78	0	0	16	61	24	139
Did Not Install Insulation/Air Sealing Measures	918	4,008	102	940	94	413	1,114	5,361
A. Not qualified for measures	180	1,426	102	940	89	391	348	2,596
1. Measure already there/already upgraded	112	762	N/A	N/A	63	226	178	1,043
2. Not cost-effective	30	71	102	940	2	3	106	779
3. Cannot access attic or other space	8	111	N/A	N/A	23	58	31	169
4. Not applicable (e.g., no attic)	29	476	N/A	N/A	1	104	32	599
5. Health and safety cost too high or extensive	1	6	N/A	N/A	0	0	1	6
B. Qualified and offered measure, but didn't install	155	1,079	N/A	N/A	5	22	168	1,131
1. Building owner not willing to make co-pay	0	0	N/A	N/A	0	0	0	0

		Income Qualified		Market Rate		Public Housing		Total	
		Buildings	Apartments	Buildings	Apartments	Buildings	Apartments	Buildings	Apartments
	2. Building owner sees no benefit	0	0	N/A	N/A	0	0	0	0
	3. Building owner will not accept disruption	0	0	N/A	N/A	0	0	0	0
	4. Deferring to a future year	154	1,073	N/A	N/A	5	22	167	1,125
	5. Building owner dislikes aesthetics	0	0	N/A	N/A	0	0	0	0
	6. Building owner non-responsive	0	0	N/A	N/A	0	0	0	0
	7. Building owner not willing/able to address Health & Safety work or deferrable conditions	1	6	N/A	N/A	0	0	1	6
C. Unknown^c		583	1,502	N/A	N/A	0	0	598	1,634

^a Total Buildings / Units Served includes buildings and/or apartment units that received only and energy audit in 2024 as well as buildings and/or units that received at least one energy-saving upgrade or equipment.

^b Total Buildings /Units Assessed includes buildings and/or units that received both an audit either in 2024 or prior and received at least one energy-saving upgrade or equipment in 2024.

^c Data indicating reasons for not installing air sealing and/or insulation were not required or recorded prior to 2024; hence, data for properties that were audited prior to 2024 is either limited or unavailable.

Close to one-quarter (108 of 470 or 23%) of total participating multifamily buildings installed either an air source heat pump or ductless heat pumps in 2024 (Table 6). Most buildings (149) and/or apartments (1,052) that qualified for heat pumps but did not receive heat pumps were deferred to a future year. Implementation staff reported that the budget for heat pumps in 2024 was exhausted around mid-year. As such, participants that qualified and were offered heat pumps were included in the pipeline for 2025.

Table 6. Reasons Building Heat Pump Measures Not Installed

	Income Qualified		Market Rate		Public Housing		Total	
	Buildings	Apartments	Buildings	Apartments	Buildings	Apartments	Buildings	Apartments
Total Electrically Heated Buildings / Units Served ^a	436	3,274	107	1,082	85	282	628	4,637
Total Electrically Heated Buildings/Units Assessed ^b	329	2,121	84	811	57	198	470	3,129
<i>Note: The following data is associated with buildings served with a Multifamily Energy Savings assessment.</i>								
Installed Heat Pumps	79	434	6	65	23	78	108	577
Did Not Install Heat Pumps	250	1,687	78	746	34	120	362	2,552

		Income Qualified		Market Rate		Public Housing		Total	
		Buildings	Apartments	Buildings	Apartments	Buildings	Apartments	Buildings	Apartments
A. Not qualified for measures		9	27	1	5	14	50	24	82
	1. Measure already there/already upgraded	1	12	1	5	13	48	15	65
	2. Not cost-effective	8	15	0	0	1	2	9	17
	3. No good location or space	0	0	0	0	0	0	0	0
B. Qualified and offered measure, but didn't install		122	819	25	227	2	6	149	1,052
	1. Building owner not willing to make co-pay	0	0	0	0	0	0	0	0
	2. Building owner sees no benefit	1	49	0	0	0	0	1	49
	3. Building owner will not accept disruption	0	0	0	0	0	0	0	0
	4. Deferring to a future year	121	770	25	227	2	6	148	1,003
	5. Building owner dislikes aesthetics	0	0	0	0	0	0	0	0
	6. Building owner non-responsive	0	0	0	0	0	0	0	0
	7. Building owner not willing/able to address Health & Safety work or deferrable conditions	0	0	0	0	0	0	0	0
	8. Desired heat pump does not meet program specification requirements	0	0	0	0	0	0	0	0
C. Unknown^c		119	841	52	514	18	64	189	1,419

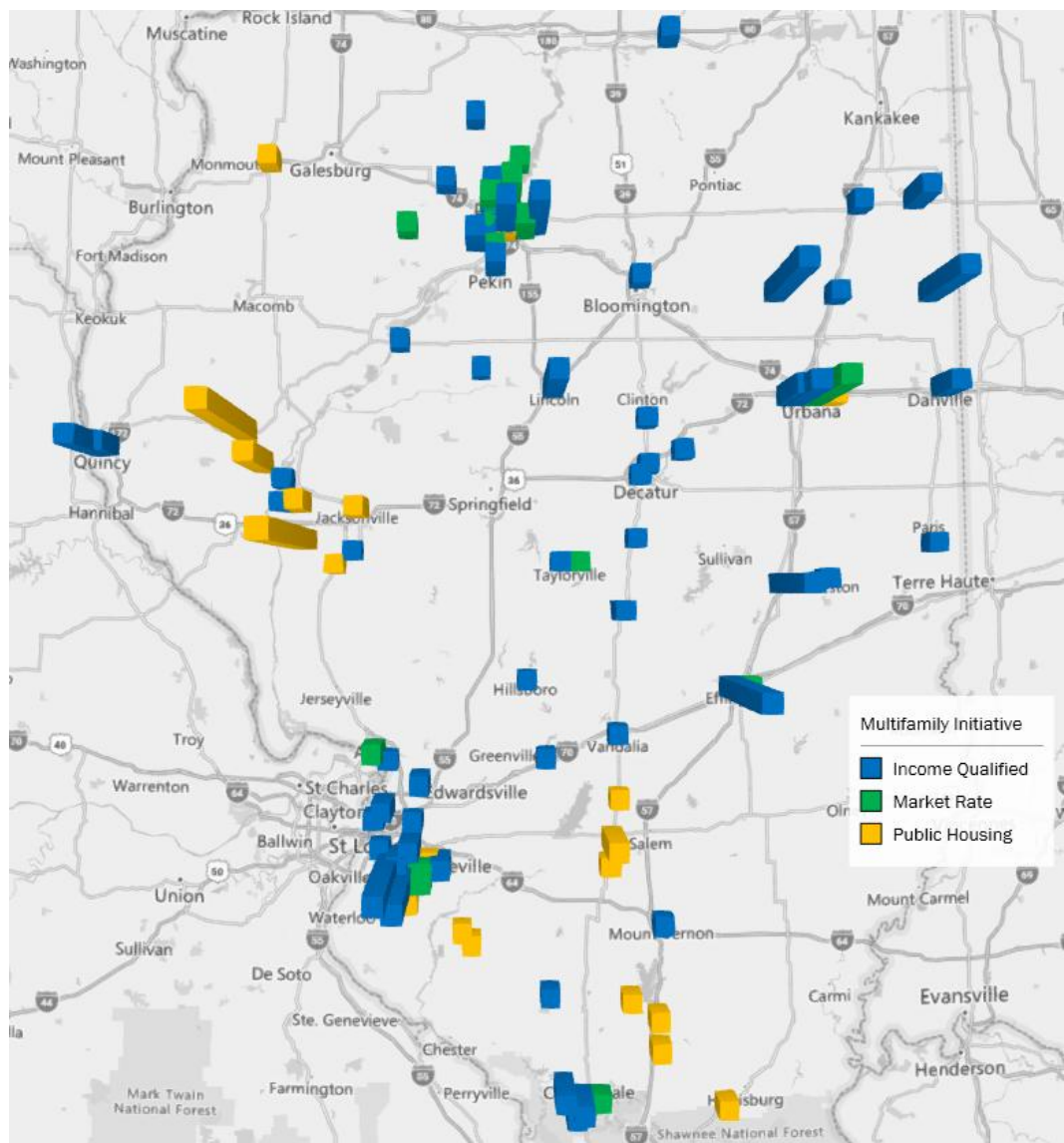
^a Total Buildings / Units Served includes electrically heated buildings and/or apartment units that received only an energy audit in 2024 as well as buildings and/or units that received at least one energy-saving upgrade or equipment.

^b Total Buildings /Units Assessed includes electrically heated buildings and/or units that received both an audit either in 2024 or prior and received at least one energy-saving upgrade or equipment in 2024.

^c Data indicating reasons for not installing heat pumps were not recorded or required prior to 2024; hence, data for properties that were audited prior to 2024 is either limited or unavailable.

The Multifamily Initiatives reached customers throughout Illinois (Figure 3). Unsurprisingly, program tracking data show that participation was higher in more densely populated areas like Peoria and St. Louis. Both cities include a mix of Market Rate Multifamily Initiative and Income Qualified Initiative properties, as well as a few public housing properties.

Figure 3. Location of 2024 Multifamily Participants by Initiative



Note: Bar heights vary due to the number of properties (represented by unique OSS unique IDs) located in each ZIP code. The taller the bar, the more properties located in that ZIP code.

2.3 PROPERTY MANAGER SURVEY

This section presents the results of a web survey given to property managers or owners of multifamily properties that participated in the Multifamily Initiatives between January and September 2024.

2.3.1 PROPERTY MANAGER STUDY OVERVIEW

As part of the 2024 process research, the evaluation team conducted a web survey as a follow-up to in-depth interviews and web surveys conducted among participating multifamily property managers in 2022. The 2024 web survey aimed

to gather feedback on various aspects of property managers' participation experience with the OSS approach, including the OSS design, and explored the influence of the Initiatives and Energy Advisors on subsequent decisions to implement additional energy-saving upgrades or equipment. The 2024 web survey sought to answer the following research questions:

- How do participating property managers/owners experience the Initiatives? Are they satisfied with their experience?
- What feedback do property managers/owners have about the OSS approach? Based on the property managers' experiences, is the OSS design (e.g., the single point of contact, streamlined approach) achieving its intended goal of influencing participation in other AIC Initiatives?
- What motivators and barriers do property managers/owners face in implementing broader energy-efficient upgrades? How do Initiative staff address the barriers?

The evaluation team also included the following questions per implementation (Leidos) staff's request to help inform and enhance marketing, communication, and outreach activities toward property managers:

- Do participating properties receive energy bills from third-party utility companies?
- Do property managers/owners use property management software that enables them to communicate with tenants?

2.3.2 PROPERTY MANAGER STUDY METHODOLOGY

WEB SURVEY

To answer the research questions stated in Section 2.3.1, the evaluation team designed and conducted a web survey with property managers, owners, or key property contacts (e.g., resident building managers, tenants who interacted with Initiative staff during the Energy Audit or implementation of energy-saving upgrades or equipment) who participated in a Multifamily Initiative between January and September 2024. The evaluation team fielded the survey from September 30 to October 25, 2024 (see survey instrument in Appendix A).

A census approach was used whereby the evaluation team attempted to contact all participants included in the sample at least four times. Initial email invitations were sent, followed by two email reminders to property managers, owners, or key contacts within participating properties with valid email addresses. Phone outreach was also conducted to those who had not responded after the second reminder to increase the response rate. A total of 20 respondents completed the survey out of a sample of 154 unique property contacts (Table 7) for an overall response rate of 17% (Table 8).⁸ Appendix B details the survey dispositions and the methodology for computing the response rate.⁹

⁸ The evaluation team used the American Association for Public Opinion Research (AAPOR) Response Rate 3 (RR3) methodology to determine the response rate.

⁹ 'Dispositions' are defined as the results for each potential response to a survey. These could include survey bounce-backs, ineligible respondents, or respondents who may end the survey prior to completion. Each of these dispositions were used to calculate response rates for surveys.

Table 7. Property Manager Survey Sample Summary¹⁰

Initiative	Population ^a	Percent of Population ^b	Sample	Percent of Sample	Survey Respondents	Percent of Respondents
Income Qualified	121	56%	90	58%	15	75%
Market Rate	31	14%	23	15%	5	25%
Public Housing	69	32%	41	27%	0	0%
Total	216 ^a	102%	154	100%	20	100%

^a The total population is not equal to the sum of the population counts by Initiative as some project managers manage multiple buildings across the three Initiatives.

^b The sum of these percentages is greater than 100% due to some property managers managing multiple properties across the three initiatives.

Table 8. Property Manager Survey Response Rate

Disposition	Number of Respondents
Sample Size	154
Survey Completes	20
Response Rate	17%

PROPERTY MANAGER STUDY LIMITATIONS

As part of the web survey and sample development process for the Property Manager Survey, the evaluation team reviewed and processed program tracking data provided by Multifamily Initiative staff on September 23, 2024. Through a detailed review of program tracking data, the evaluation team identified two limitations to this study:

- Along with the research questions already stated, the property manager survey was also intended to provide estimates for an updated net-to-gross (NTG) ratio for ductless heat pumps. The Initiative had a 2024 target of installing 40 ductless heat pumps and as of September 2024, that target was met. However, these 40 installs were only associated with two properties. As a result, the evaluation team decided to defer estimating NTG for ductless heat pumps until a later evaluation as any estimate based on a sample size of two would not be robust or generalizable to the population.
- The number of unique contacts is lower than the actual number of properties that participated. Some property contacts listed in the program tracking data manage multiple properties (e.g., property owners can own more than one property within the AIC service territory or contacts can work for third-party property management companies that manage multiple properties). Further, some contacts listed appear to be tenants rather than property managers or owners. The evaluation team included language in the survey (Appendix A) intended to capture resident property managers or tenants acting as key contacts for the property, but only if they recalled the property being part of an AIC program that provided energy-saving upgrades and/or equipment. If the tenant did not recall the property participating, their participation in the survey was terminated. Tenants serving as key contacts may have a more limited level of knowledge about the property compared to an owner and, as such, may lack the knowledge needed to respond to all the survey questions sufficiently.

¹⁰ The sample is based on the unique property contacts provided in the program tracking data and may be different from the number of properties and tenant units reported in the Participation Analysis section (section 2.2) of this report.

2.3.3 PROPERTY MANAGER STUDY DETAILED FINDINGS

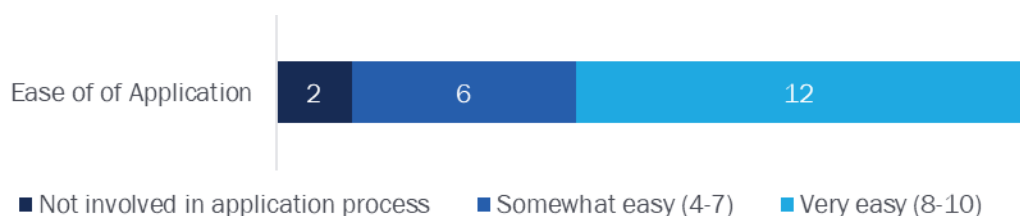
This section details the findings of the Property Manager Web Survey.¹¹

PROPERTY MANAGER PARTICIPATION EXPERIENCE

Overall, survey results suggest that participating property managers had positive experiences with the AIC Multifamily Initiatives as indicated by the high levels of satisfaction with the various aspects of Initiative participation.

Participants found the application process for the Multifamily Initiatives easy. Of the 20 respondents, on a scale from 0 – 10, 12 reported that their experience applying for the Initiative was very easy, while six reported their experience as somewhat easy (Figure 4). Notably, none of the respondents reported their application experience as not easy. Similarly, the 17 respondents who were involved in finalizing the participation agreement did not experience any difficulties in doing so (results not shown).¹²

Figure 4. Ease of Initiative Application



n=20

Most participants were satisfied with the Initiatives' participation processes, with few encountering challenges that resulted in dissatisfaction. When asked to rate their level of satisfaction with seven components of the Initiatives on a scale from 0 - 10, at least 17 of 20 participants in total reported being at least somewhat satisfied. As a corollary, no more than three of the 20 participants indicated any level of dissatisfaction with any element (see Figure 5).

As shown in Figure 5, nearly all respondents reported either being very satisfied (16 of 20) or somewhat satisfied (2 of 20) with the PAs or contractors who installed their upgrades or equipment. Respondents also reported being similarly satisfied with their interactions with Multifamily Initiative staff such as their designated Energy Advisors and CMC Energy staff. Knowledgeability, friendliness, and effective communication skills were among the reasons that contributed to the high levels of satisfaction with Initiative staff. This is notable as Initiative staff reported having difficulties contacting and coordinating with property management staff and encountering canceled energy audits due to staffing shortages at participating multifamily properties. The high level of respondent satisfaction in interactions with Initiative staff suggests that additional outreach activities conducted by Initiative staff to engage and schedule or reschedule canceled energy audits were successful. In addition to satisfaction with their interactions with Initiative staff, all 20 respondents reported being satisfied with the application process. A total of 18 out of 20 respondents who were exposed to the Initiatives' marketing, education, and/or outreach (ME&O) activities (two respondents were not exposed to ME&O) also reported being satisfied with the information in the ME&O materials. Similarly, 18 of 20 respondents reported being satisfied with the recommendations they received after the energy audit.

¹¹ Note that the evaluation team decided not to split the results by Multifamily Initiative Channel due to the low response rate. Most of the questions in the survey are general and, given that the respondents participated through the OSS, they would be expected to have very similar participation experiences.

¹² Three respondents reported not being involved with or knowledgeable of the participation agreement.

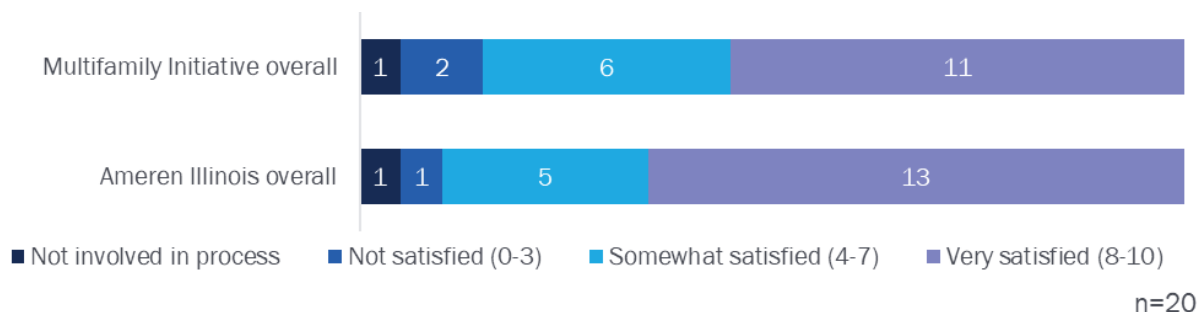
Despite high levels of satisfaction with the energy-saving upgrades offered or received through the Multifamily Initiatives, two respondents reported low levels of satisfaction with the energy-saving upgrades or equipment that was either available or installed in their properties. Both respondents who reported being dissatisfied with the energy-saving upgrades or equipment installed on their properties noted that the upgrades or equipment they were expecting to be installed on their properties were not installed.¹³

Figure 5. Satisfaction with Initiative Components



Most participants reported being satisfied with both the Multifamily Initiatives and AIC overall (Figure 6). Participants who reported being satisfied with the Multifamily Initiatives and AIC overall were similarly either somewhat satisfied or very satisfied with various components of the Initiative (reported in Figure 5). Some reasons for satisfaction include observed reductions in energy bills after installation of energy-saving upgrades or equipment, satisfaction with the energy-saving upgrades or equipment installed, and the installation process. Despite the satisfaction of the majority of respondents, one respondent reported dissatisfaction with the Initiative while another reported being dissatisfied with both the Initiative and AIC overall. Survey findings suggest that dissatisfaction with the Multifamily Initiatives and AIC overall was driven by the energy-saving upgrades and/or equipment offered by the program as well as upgrades or equipment the participants expected to receive but did not.

Figure 6. Satisfaction with the Multifamily Initiatives and AIC Overall



PROPERTY MANAGER EXPERIENCE WITH OSS APPROACH

In 2020, the Multifamily Initiatives launched the OSS approach through which a multifamily Energy Advisor (EA) builds long-term partnerships with property managers and connects them with energy-saving upgrades or equipment

¹³ Neither of these respondents mentioned what measures they expected or provided additional details about their situations.

incentivized by the AIC Residential and Business Programs. Through the OSS approach, the multifamily EA also supports and educates property managers as they work toward making their properties more energy efficient.

There is an interest in more whole-building measures among participants who have discussed additional energy-saving measures with multifamily EAs. When asked if they have spoken with their EAs about other energy-saving upgrades or equipment, nearly half (9 of 20) of the respondents reported discussing future energy-saving upgrades with their EAs. Among the energy-saving upgrades or equipment offered, respondents noted discussing the possibility of implementing measures such as insulation, HVAC equipment, door sweeps, window upgrades, and air sealing. Some respondents also discussed DIMs such as showerheads or shower upgrades, LED lighting, advanced power strips, and advanced thermostats (Table 9).

Table 9. Other Whole-Building Energy-Saving Upgrades Discussed (Multiple Response)

Whole-Building Energy-Saving Upgrades Discussed with Multifamily EAs	Number of Respondents (n=9)
Attic insulation	5
Heating or cooling equipment (i.e., window air conditioners, furnaces, water heaters)	5
Door sweeps	4
Pipe insulation	4
Window upgrades (including storm windows and window inserts)	4
Air sealing	3
Weatherstripping	2
Shower upgrades (including showerheads, shower handles, shower flow reducers, and/or restrictor shower valves)	2
Outlet or wall plate gaskets	2
LED lighting	2
Heat pumps (i.e., ducted or ductless air source heat pumps or ductless mini splits)	2
Faucet aerators for bathroom and/or kitchen faucets	2
Advanced power strips	2
Advanced thermostats	1

The cost of equipment and cost of labor remain key barriers to pursuing future energy efficiency upgrades among multifamily participants. Of the 17 respondents who are responsible for making decisions about their properties, nine (eight managed income qualified properties, while one managed a market rate property) cited equipment cost as a barrier to installing more energy-saving measures in their properties, while seven (six managed income qualified properties, while one managed a market rate property) cited the cost of labor to install or replace equipment as a barrier.¹⁴ Other barriers to the pursuit of energy efficiency upgrades include a lack of awareness or knowledge of eligible equipment, installing all energy efficiency upgrades that could be installed through the Initiatives, and a previous unsatisfactory experience with the Initiatives (Table 10).

Table 10. Barriers to Energy-Saving Upgrades (Multiple Response)

Barriers to Energy-Saving Upgrades	Number of Respondents (n=17) ^a
Equipment cost	9

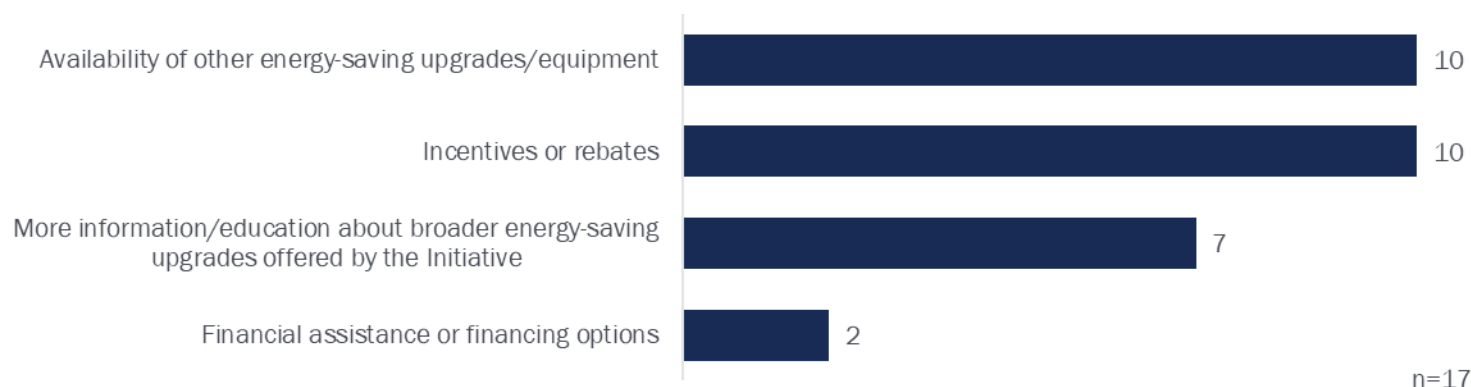
¹⁴ Note that some respondents may be tenants who serve as key contacts for properties they live in, but they may not have authority to make decisions regarding their properties. As such, some questions were only asked if the respondent was either a property manager or owner, or someone who can make decisions about their properties. Of the 20 respondents, 17 were either property managers or owners; hence, the total respondent count of 17 for some questions instead of 20.

Barriers to Energy-Saving Upgrades	Number of Respondents (n=17) ^a
Cost of labor to install/replace equipment	7
Lack of awareness or knowledge of eligible equipment	6
Equipment compatibility with other equipment on the property or site conditions	3
Have already made all the energy efficiency upgrades possible at the property	2
Previous unsatisfactory program experience	2
Schedule or timing of installation	2
Unavailability of equipment needed	1
Need for maintenance work after energy-saving upgrades	1

^a This question was only asked of decision-makers for the property (i.e., property managers and/or owners). Three respondents served as contacts for the property but were not decision-makers and were not asked this question.

Including or adding necessary measures not currently offered by the Initiatives, incentives/rebates, and information/education were mentioned as key drivers for installing more energy-saving upgrades. Offering other energy-saving equipment not currently available through the Multifamily Initiatives, incentives or rebates, and more knowledge about energy-saving upgrades available through the Multifamily Initiatives are the three main drivers to encourage participants to install more energy-saving upgrades or equipment in their properties (Figure 7). Notably, while cost is a barrier, survey results suggest that respondents would be more motivated by incentives or rebates rather than the availability of financing options or assistance.

Figure 7. Drivers to Installing Additional Energy-Saving Upgrades



^a This question was only asked of the property's decision-makers (i.e., property managers and/or owners). Three respondents served as contacts for the property but were not decision-makers and were not asked this question.

When asked about the types of energy-saving upgrades or equipment needed in their properties that were not offered to them when they participated, respondents mentioned window upgrades, more insulation, Nest smart thermostats, and furnace upgrades (Table 11).

Table 11. Other Energy-Saving Upgrades/Equipment Needed by Participants

Other Energy-Saving Upgrades/Equipment Needed	Number of Respondents (n=20)
Window upgrades	3
More building envelope measures such as insulation	2
Other/newer models of Nest smart thermostats	2

Other Energy-Saving Upgrades/Equipment Needed	Number of Respondents (n=20)
Furnace upgrades	1
Other	2
None	2
Did not talk to EA about other energy-saving upgrades	9

SUGGESTIONS FOR IMPROVEMENT

When asked if they had any suggestions for improvement, more than half of the respondents indicated that they did not have any suggestions. Respondents who did provide suggestions for improvement mentioned including more energy-saving upgrades or equipment options and providing more information on energy efficient upgrades or equipment available to multifamily customers. Other suggestions included speeding up installation times and further simplifying the application process (Table 12).

Table 12. Suggestions for Improvement

Suggestions	Number of respondents (n=20) ^a
More energy-saving upgrade/equipment options in general	2
More information on energy efficient upgrades/equipment available to multifamily properties	2
Faster installation times	1
Further simplify application process	1
Improve online billing system for vacant tenant units	1
More proactive and face-to-face interaction with program staff to discuss other ways of working together toward energy efficiency	1
More HVAC upgrade/equipment options	1
Site visits after installation of upgrades/equipment	1
Ways to track/measure energy savings after installation of energy efficient upgrades/equipment	1
No suggestions	12

^a The sum of respondents is greater than the total number of respondents due to multiple responses.

PROPERTY MANAGEMENT TOOLS

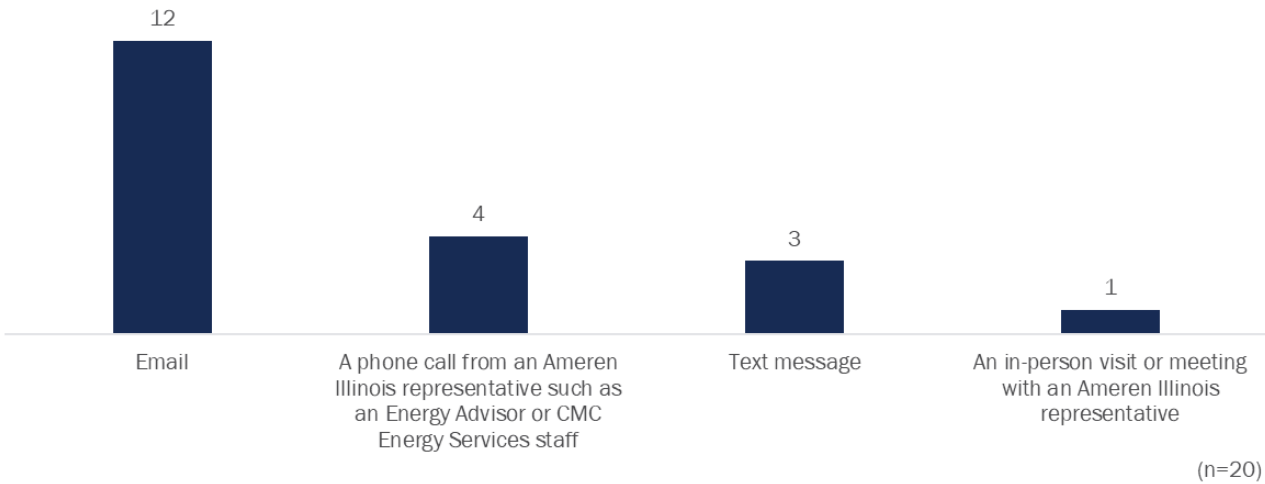
To better and more effectively serve and reach multifamily customers (including property managers, owners, and tenants), the evaluation team asked respondents about property management communication tools and how tenants receive their energy bills.

Survey results suggest that most property managers or owners do not use third-party property management software to communicate with tenants. Most (12 of 17) property managers or owners who responded to the survey reported not using any third-party software to communicate with their tenants. Respondents who reported using property management software to communicate with tenants noted using Buildium (2 of 17), Avail (1 of 17), OneSite (1 of 17), and Rent Manager (1 of 17).¹⁵

¹⁵ Note that some respondents may be tenants who serve as key contacts for properties they live in, but they may not have authority to make decisions regarding their properties. As such, some questions were only asked if the respondent is either a property manager or owner, or someone who can make decisions about their properties. Of the 20 respondents, 17 were either property managers or owners; hence the total respondent count of 17 for some questions.

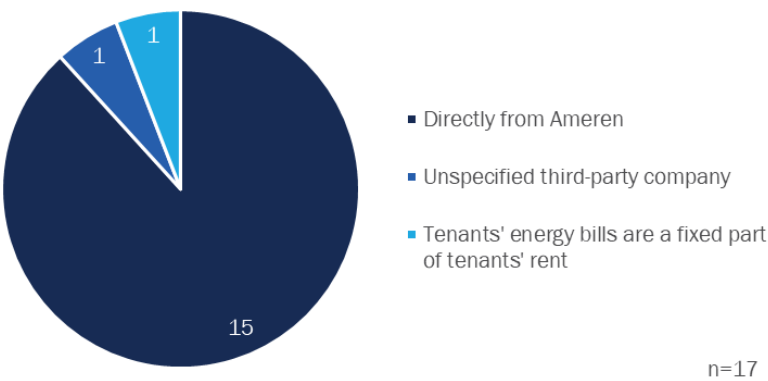
Email is the best way to reach property managers or owners. Respondents noted that the best way to reach them regarding future energy-saving opportunities is through email (12 of 20), followed by phone (4 of 20), and then text messaging (3 of 20) (Figure 8).

Figure 8. Best Way to Contact Property Managers



Most tenants receive their energy bills directly from AIC. The majority (15 of 17) of respondents reported that their tenants receive their bills directly from AIC. As such, when it comes to conducting outreach to tenants, the best way to reach them would likely be through bill inserts.

Figure 9. Source of Tenants' Energy Bills



APPENDIX A. PROPERTY MANAGER SURVEY INSTRUMENT

AMEREN ILLINOIS 2024 MULTIFAMILY INITIATIVES EVALUATION: PROPERTY MANAGER SURVEY

DATE: DECEMBER 15, 2024

WEB SURVEY

STUDY OVERVIEW

Table 1 includes key characteristics of the instrument.

Table 1. Study Overview

Descriptor	This Instrument
Instrument Type	Web survey
Estimated Time to Complete	5 – 10 minutes
Population Description	2024 participants
Sampling Strata Definitions	75 unique property contacts by email address (53 Income Qualified, 22 Market Rate, 9 Public Housing)
Population Size ^a	101 unique property contacts by email (68 Income Qualified, 24 Market Rate, 18 Public Housing)
Contact List Size ^a	154 unique property contacts by email address (85 Income Qualified, 28 Market Rate, 41 Public Housing) ^b
Completion Goal(s)	30
Contact List Source and Date	Client, Q1 and Q2 2024
Type of Sampling	Census
Contact Sought	Property managers/owners
Incentive Types and Amounts	\$50 e-gift card
Outreach Methods	One initial email invite and 2 reminder emails, may follow up via outbound calls, as needed

^a Population and contact list sizes are Based on program tracking data received at the end of June 2024 and may differ from the actual as the evaluation team requested for updated program tracking data in September 2024.

^b Some property managers manage multiple buildings across the three Initiatives. As such, the contact list size may not be equal to the sum of the contacts by Initiative.

RESEARCH OBJECTIVES

Table 2 maps the research objectives and questions to specific questions in the instrument.

Table 2. Research Objectives

Research Objective/Statement	Associated Instrument Section/Questions
<ul style="list-style-type: none">How do participating property managers/owners experience the Initiatives?Are they satisfied with their experience?	Q1 - Q9

Research Objective/Statement	Associated Instrument Section/Questions
<ul style="list-style-type: none"> What feedback do they have about the One-Stop Shop approach? Is the one-stop shop design (e.g., the single point of contact, streamlined approach) achieving its intended goal of influencing participation in other AIC Initiatives? What motivators and barriers exist amongst property managers to implementing broader energy-efficient upgrades? How do Initiative staff address the barriers? 	Q10 - Q15
<ul style="list-style-type: none"> Do participating properties receive energy bills from third-party utility companies? Do property managers use a property management software that could be used to communicate with tenants? 	Q16 - Q18

PROGRAMMING INFORMATION

The variables listed in Table 3 are from the sample, database, or other external data source.

Table 3. Variables from Sample or Database

Sample Variable Name	Variable Description and Values
NAME	Property manager name
ADDRESS	Street address of the participating property
CITY	City of participating property
EMAIL	Contact email of participating property/property manager
CHANNEL	Denotes Multifamily Initiative that the property participated in (Market Rate, Income Qualified, Public Housing)
AI	AI = 1 indicates that property received attic insulation in 2024
APS	APS = 1 indicates that property received advanced power strips in 2024
AS	AS = 1 indicates that property received door and/or window air sealing in 2024
DS	DS = 1 indicates that property received door sweeps in 2024
HP	HP = 1 indicates that property received ducted or ductless air source heat pumps or ductless mini split heat pumps in 2024
HVAC	HVAC = 1 indicates that property received HVAC equipment such as window air conditioners, furnaces, water heaters in 2024
FA	FA = 1 indicates that property received faucet aerators in 2024
LED	LED = 1 indicates that property received LEDs in 2024
GKT	GKT = 1 indicates that property received outlet or wall plate gaskets in 2024
PI	PI = 1 indicates that property received pipe insulation in 2024
SHW	SHW = 1 indicates that property received shower upgrades such as showerheads, shower handles, shower flow reducers, and/or restrictor shower valves in 2024
TSTAT	TSTAT = 1 indicates that property received advanced thermostats in 2024
WS	WS = 1 indicates that property received weatherstripping in 2024
WU	WU = 1 indicates that property received window upgrades such as storm windows and window inserts in 2024

Programming note style conventions in this document:

- [PROGRAMMING] Programming instructions are in bracketed CAPS.
- [Interviewer notes] Onscreen interviewer instructions are in italics.
- <PIPED VALUE> Database inputs are inside <greater and less than symbols>

INTERVIEWER INFORMATION

PROGRAM DESCRIPTION

The Multifamily Initiatives include the Multifamily Channel of the Income Qualified Initiative, the Market Rate Multifamily Initiative, and the Public Housing Initiative. The Initiatives offer multifamily customers comprehensive property assessments, health and safety evaluations, in-unit and common area direct install measures, and deeper energy-saving weatherization and HVAC measures.

The Initiatives use a “one-stop shop” (OSS) model, where AIC provides property managers with a concierge, called an Energy Advisor, to support them as they participate in one or more offerings across the entire AIC portfolio. Using this delivery strategy, AIC and its implementation partners strive to provide a seamless participation experience designed to overcome traditional barriers to participation, as well as barriers to implementing a broad set of energy efficiency upgrades typically offered through multiple discrete AIC offerings.

OUTREACH MATERIALS

First Email Invitation

SUBJECT LINE: Requesting for Your Feedback on Ameren Illinois’ Multifamily Energy Efficiency Program



Dear <NAME>,

Our records show you manage a property that recently participated in the Ameren Illinois Multifamily Initiative. Ameren Illinois is conducting a survey of multifamily property managers, owners, or tenants like you to better improve its energy efficiency services and offerings. You are part of a small group of participants chosen for our survey, so your feedback is especially important to us. The survey should take about 10 to 15 minutes

After you complete the survey, we will send you a \$50 electronic gift card as a thank you for your time and effort.

To access the survey, please click the link below on your computer, tablet, or smartphone. You can also copy and paste the link into your web browser.

<SURVEY LINK>

If you need to stop the survey before completing it, you may use the link in this email to continue where you left off.

Your responses will be kept confidential.

Ameren Illinois has partnered with Opinion Dynamics, an independent research firm, to administer the survey. If you have any questions or difficulties completing the survey, please contact Taylor Williams at Opinion Dynamics at taylor.williams@opiniondynamics.com.

Thank you in advance for taking the time to complete this important survey!

Sincerely,

Taylor Williams, Consultant, Opinion Dynamics

First Reminder Email

SUBJECT LINE: Reminder: Your Ameren Illinois Feedback on the Multifamily Energy Efficiency Program



Dear <NAME>,

In an effort to learn more about how to improve Ameren Illinois' energy efficiency services and offerings for multifamily property managers, owners, and tenants like you, we are asking you to complete a survey about your experience with the Ameren Illinois Multifamily Energy Efficiency Program.

As a thank you, we will provide you with a \$50 electronic gift card if you qualify for and complete the survey. It should take about 10 to 15 minutes.

If you have already completed the survey, please accept our sincere thank you and ignore this email. Your gift card will be sent via email soon if you have not already received it.

To access the survey, please click the link below on your smartphone, computer, or tablet. You can also copy and paste the link into your web browser.

<SURVEY LINK>

If you need to stop the survey before completing it, you may use the link in this email to continue where you left off.

Your responses will be kept confidential.

Ameren Illinois has partnered with Opinion Dynamics, an independent research firm, to administer the survey. If you have any questions or technical difficulties with the survey, please contact Taylor Williams at Opinion Dynamics at taylor.williams@opiniondynamics.com.

Thank you in advance for taking the time to complete this important survey!

Sincerely,

Taylor Williams, Consultant, Opinion Dynamics

Second Reminder Email

SUBJECT LINE: Last Chance: Ameren Illinois Needs Your Feedback on the Multifamily Energy Efficiency Program



Dear <NAME>,

We are emailing you as a friendly reminder to complete our survey by <SURVEY END DATE> and get a \$50 electronic gift card. Your feedback about your experience with the Ameren Illinois Multifamily Energy Efficiency Program will help Ameren Illinois improve its energy efficiency services for multifamily property managers and owners like you.

You are part of a small group of participants selected for our survey and we really value your input. It should take about 10 to 15 minutes.

If you have already completed the survey, please accept our sincere thank you and ignore this email. Your gift card will be sent via email soon if you have not already received it.

To access the survey, please click the link below on your smartphone, computer, or tablet. You can also copy and paste the link into your web browser.

<SURVEY LINK>

If you need to stop the survey before completing it, you may use the link in this email to return to where you left off.

Your responses will be kept confidential.

Ameren Illinois has partnered with Opinion Dynamics, an independent research firm, to administer the survey. If you have any questions or technical difficulties with the survey, please contact Taylor Williams at Opinion Dynamics at taylor.williams@opiniondynamics.com.

Thank you in advance for taking the time to complete this important survey!

Sincerely,

Taylor Williams, Consultant, Opinion Dynamics

INSTRUMENT

INTRODUCTION/LANDING PAGE



Thank you for agreeing to participate in this survey. As part of our evaluation of Ameren Illinois energy-saving programs, Opinion Dynamics, an independent third-party research company, is surveying property managers and owners who have participated in the Ameren Illinois Multifamily Energy Efficiency Program through which the property/properties you manage or own received energy-saving updates and/or equipment. The purpose of this survey is to learn about your property's/properties' experience with the program. Your responses will be kept confidential.

This survey should take approximately 10 - 15 minutes. If you have only a short amount of time right now, you may complete part of it and return to it when you have more time. After you complete the survey, we will send you a \$50 electronic gift card as a thank you for your time and effort.

Please click the button below to get started.

SCREENING [ASK ALL]

The first set of questions is to determine if you qualify to complete this survey.

S1. You received this survey because Ameren Illinois records list you as the contact person for a property at <ADDRESS> in <CITY>, which was enrolled in the Multifamily Energy Efficiency Program in <YEAR> and installed free or rebated energy-efficient building updates and/or equipment at the property. (Note: If you manage multiple properties that participated in the Multifamily Energy Efficiency Program, for the next few questions, please focus on the property at <ADDRESS> in <CITY>.)

Do you remember this property being in the Ameren Illinois Multifamily Energy Efficiency Program that provided energy-efficient upgrades and/or equipment in <YEAR>?

1. Yes
2. No [TERMINATE]

[TERMINATE TEXT: "Thank you for your time. We are only surveying individuals familiar with their property's participation in the Ameren Illinois Multifamily Energy Efficiency Program."]

S2. At the time the property at <ADDRESS> in <CITY> was enrolled in the Ameren Illinois Multifamily Energy Efficiency Program, did you own, manage, or live in this property?

1. Yes, I was the property owner.
2. Yes, I was the property manager.
3. Yes, I was the property owner AND manager.
4. Yes, I lived in this property.
5. No, I did NOT own, manage, or live in this property. [TERMINATE]

[TERMINATE TEXT:] "Thank you for your time. We are only surveying individuals who are knowledgeable about the property's participation in the Ameren Illinois Multifamily Energy Efficiency Program."

Thanks for your responses so far – you qualify for the survey!

S3. Do you still [IF S2 = 1: “own”; IF S2 = 2: “manage”; IF S2 = 3: “own and manage”; IF S2 = 4: “live”] this property?

1. Yes
2. No

[ASK IF S2 = 1, 2, OR 3]

S4. Do you own or manage any other properties located in the Ameren Illinois service territory?

1. Yes
2. No

PROPERTY MANAGER EXPERIENCE

Now, we would like to know more about your overall experience with the Multifamily Energy Efficiency Program.

Q1. On the scale below, how easy or difficult was your experience in applying for the Multifamily Energy Efficiency Program? [NUMERIC RESPONSE 0 – 10, 9999 = I was not involved in applying for the program.”, SINGLE RESPONSE]

[ASK IF Q1 < 4]

Q2. Please explain the difficulty you experienced in applying for the program.

0. [OPEN END]

Q3. Did you experience any difficulties finalizing the participation agreement?

1. Yes
2. No
3. I was not involved with this process.

[ASK IF Q3 = 1]

Q4. Please describe the difficulties you experienced with the participation agreement.

0. [OPEN END]

Q5. On a 0 to 10 scale where 0 is ‘very dissatisfied’ and 10 is ‘very satisfied’, how satisfied were you with the following: [RANDOMIZE 1-7, 98 = Don’t Know, 99 = I was not involved in the process]

1. The application process
2. The energy-efficient updates and/or equipment installed at your property
3. Your interactions or communication with Ameren Illinois Multifamily Energy Efficiency Program staff, such as your Energy Advisor or CMC Energy Services staff
4. The Program Allies/contractors who installed the equipment
5. The types of building updates and/or equipment available through the program
6. The post-audit/assessment recommendations provided by the program
7. Information provided by the program through print or digital marketing and/or educational materials
8. The Multifamily Energy Efficiency Program overall [ANCHOR]
9. Ameren Illinois overall [ANCHOR]

[ASK IF Q5_2 < 4 or > 7 AND <> 98 OR 99]

Q6. Why did you provide a rating of <Q5_2> for the energy-efficient updates and/or equipment installed in your property?

0. [OPEN END]

[ASK IF Q5_3 < 4 or > 7 AND <> 98 OR 99]

Q7. Why did you provide a rating of <Q5_3> for the Ameren Illinois Multifamily Energy Efficiency Program staff, including your Energy Advisor or CMC Energy Services staff?

0. [OPEN END]

[ASK IF Q5_4 < 4 or > 7 AND <> 98 OR 99]

Q9. Why did you provide a rating of <Q5_4> for the Program Allies/contractors who installed the equipment and/or building updates?

0. [OPEN END]

EXPERIENCE WITH THE ONE-STOP SHOP (OSS) APPROACH

Q10. Have you talked with your Energy Advisor or the person who installed the upgrades or equipment about future energy efficiency upgrades to your property/properties? [SINGLE RESPONSE]

1. Yes
2. No, but I plan to
3. No, and I do not plan to
98. Don't know

[ASK IF Q10 = 1]

Q11. Aside from the upgrades or equipment that were installed at <ADDRESS> in <CITY> through the Multifamily Energy Efficiency Program, what other energy efficiency upgrades or equipment have you discussed with your Energy Advisor or the representative who installed the upgrades or equipment? *Please select all that apply.*

[MULTIPLE RESPONSE, RANDOMIZE 1 – 14]

1. [DISPLAY IF AI = 0] Attic insulation
2. [DISPLAY IF APS = 0] Advanced power strips
3. [DISPLAY IF AS = 0] Air sealing
4. [DISPLAY IF DS = 0] Door sweeps
5. [DISPLAY IF HP = 0] Heat pumps (i.e., ducted or ductless air source heat pumps or ductless mini split heat pumps)
6. [DISPLAY IF HVAC = 0] Heating or cooling equipment (i.e., window air conditioners, furnaces, water heaters)
7. [DISPLAY IF FA = 0] Faucet aerators for bathroom and/or kitchen faucets
8. [DISPLAY IF LED = 0] LED lighting
9. [DISPLAY IF GKT = 0] Outlet or wall plate gaskets
10. [DISPLAY IF PI = 0] Pipe insulation
11. [DISPLAY IF SHW = 0] Shower upgrades (including showerheads, shower handles, shower flow reducers, and/or restrictor shower valves)
12. [DISPLAY IF TSTAT = 0] Advanced thermostats
13. [DISPLAY IF WS = 0] Weatherstripping
14. [DISPLAY IF WU = 0] Window upgrades (including storm windows and window inserts)
15. None of the above [EXCLUSIVE, ANCHOR]
96. I was not part of this process. [EXCLUSIVE, ANCHOR]
0. Other, please specify [OPEN END] [ANCHOR]

[ASK IF S2 = 1, 2, OR 3]

Q12. What might prevent you from pursuing future energy efficiency upgrades at the property located at <ADDRESS> in <CITY>? *Please select all that apply.* [MULTIPLE RESPONSE, RANDOMIZE 1 – 10]

1. Equipment cost
2. Cost of labor to install/replace equipment
3. Lack of awareness or knowledge of eligible equipment
4. Equipment compatibility with other equipment in the property or site conditions
5. Lack of supply of desired energy-saving equipment
6. Need for repairs or remediation work necessary prior to installing equipment
7. Schedule or timing of installation
8. Need for maintenance work after energy-saving upgrades
9. Have already made all the energy efficiency upgrades we can at this property
10. Staff shortages (e.g., shortages in maintenance, administrative, or property management staff, etc.)
96. None of the above [EXCLUSIVE, ANCHOR]
0. Other, please specify [OPEN END] [ANCHOR]

- Q13. [ASK IF S2 = 1, 2, OR 3]What would help motivate property managers or owners like you to install other energy-saving upgrades in your property? [MULTIPLE RESPONSE, RANDOMIZE 1 – 4]
1. Incentives or rebates
 2. [SHOW IF CHANNEL = MARKET] Financial assistance or financing options
 3. Availability of other energy-saving upgrades and/or equipment not offered by the program
 4. More information or education about broader energy-saving upgrades offered by the program
 0. Other, please specify [OPEN END] [ANCHOR]

[ASK IF Q5_5 < 4 AND <> 98 OR Q13_3 = 1]

- Q14. What other types of energy-efficient building updates and/or equipment not currently offered by the Multifamily Energy Efficiency Program would you like to install to make your property/properties more energy-efficient?
0. [OPEN END]

- Q15. What is the best way for Ameren Illinois staff to reach you regarding future energy-saving opportunities for multifamily properties like yours?
1. A phone call from an Ameren Illinois representative such as an Energy Advisor or CMC Energy Services staff
 2. An in-person visit or meeting with an Ameren Illinois representative
 3. Email
 4. Social media
 5. Text message
 0. Other, please specify [OPEN END]

PROPERTY MANAGEMENT TOOLS [ASK IF S2 = 1, 2, OR 3]

- Q16. How do your tenants receive their energy bills?
1. Directly from Ameren
 2. From third-party company/companies (please specify): [OPEN END]
 3. My tenants don't have energy bills – they are a fixed part of their rent or they are not charged for their energy use
- Q17. How do you receive the energy bills that cover the non-tenant spaces of your property/properties?
1. Directly from Ameren Illinois
 2. From third-party company/companies (please specify): [OPEN END]
- Q18. Do you use any third-party property management software to communicate with tenants?
1. Yes (please specify what software?): [OPEN END]
 2. No

CLOSING

- Q19. From your perspective, what could Ameren Illinois do to improve your experience with the Multifamily Energy Efficiency Program?
0. [OPEN END]
 96. Nothing

Thank you for your time. Ameren Illinois appreciates your participation. As a thank you for completing this survey, we will email you a \$50 electronic gift card within a couple of weeks. Please provide the email address you would like us to send the gift card to below.

1. Name: [OPEN END]
2. Email Address: [OPEN END]
3. I do not want a gift card sent to me. [EXCLUSIVE]

[WEB SURVEYS: REDIRECT TO [HTTPS://WWW.AMERENILLINOISSAVINGS.COM](https://www.amerenillinoisavings.com)]

APPENDIX B. PROPERTY MANAGER SURVEY RESPONSE RATE

SURVEY RESPONSE RATE METHODOLOGY

The evaluation team fielded a web survey from September 30 to October 25, 2024. Table 13 summarizes the survey dispositions for the survey and includes the response rate.¹⁶

Table 13. Survey Disposition Summary

Disposition	Number of Contacts
Completes	20
Partial Completes	0
Refusals/Break-offs	4
Non-Contacts	108
Others	1
Break-offs (With Eligibility)	0
Unknown If Eligible For Survey	4
Unknown If Eligible For Survey, Other	0
Unknown If Eligible Household/Business/Respondent	108
Unknown If Eligible Household/Business/Respondent, Other	1
Unused Sample	0
Ineligible for Survey	3
Ineligible Household/Business/Respondent	0
Ineligible Sample Units	18
AAPOR RR3: No Partial Completes but Eligibility Criteria	17%

RESPONSE RATE CALCULATION

The evaluation team used the American Association for Public Opinion Research (AAPOR) Response Rate 3 (RR3) methodology to determine the response rate to the surveys. This methodology excludes estimates of eligibility for unknown sample units and partial completes. Equation 1 presents the formula used to calculate AAPOR RR3. The definitions of the letters used in the formula are listed below.

Equation 1. AAPOR RR3 Formula

$$\frac{I}{[(I+P) + (R1) + (e1*((UH1+UO1) + (e2*(UH2+UO2)) + (e3*UH3)))]}$$

Where:

I = Completes

P = Partial completes

¹⁶ ‘Dispositions’ are defined as the results for each potential response to a survey., These could include survey bounce-backs, ineligible respondents, or respondents who may end the survey prior to completion. Each of these dispositions were used to calculate response rates for surveys.

R = Refusals/Break-offs

NC = Non-contacts

O = Others

R1 = Break-offs (with eligibility)

UH1 = Unknown if eligible for survey

UO1 = Unknown if eligible for survey, other

UH2 = Unknown if eligible household/business/respondent

UO2 = Unknown if eligible household/business/respondent, other

UH3 = Unused sample

X1 = Ineligible for survey

X2 = Ineligible household/business/respondent

X3 = Ineligible sample units

e1: Estimated % of sample that is eligible to complete survey = $(I+P+R1) / (I+P+R1+X1)$

e1inverse: % of sample that is ineligible to complete survey = $100\% - e1$

e2: Estimated % of sample that is eligible HH/BUS/R = $(I+P+R1+UH1+UO1+X1) / (I+P+R1+UH1+UO1+X1+X2)$

e2inverse: % of sample that is ineligible HH/BUS/R = $100\% - e2$

e3: Estimated % of sample that is an eligible sample unit = $(I+P+R1+UH1+UO1+UH2+UO2+X1+X2) / (I+P+R1+UH1+UO1+UH2+UO2+X1+X2+X3)$

e3inverse: Estimated % of sample that is an ineligible sample unit = $100\% - e3$



Opinion **Dynamics**

CONTACTS:

Todd Malinick, PhD

Director

tmalinick@opiniondynamics.com

Stacia Dreyer, PhD

Associate Director

sdreyer@opiniondynamics.com

Karla Soriano

Lead Consultant

ksoriano@opiniondynamics.com



BOSTON

PORTLAND

SAN DIEGO

SAN FRANCISCO