



## ENERGY EFFICIENCY PROGRAMS

# PY2021 QUARTERLY REPORT

## First Quarter Report (January – March)

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

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# Portfolio Summary

Ameren Illinois Company (AIC) d/b/a Ameren Illinois ("Ameren Illinois") provides this quarterly report for the period of January - March 2021 pursuant to Section 6.6 of the Illinois Energy Efficiency Policy Manual Version 2.0 (effective Jan. 1, 2020). Consistent with Section 6.6, Ameren Illinois provides this report using a common template developed in collaboration with other Illinois utilities and stakeholders and designed to provide the categories of information set forth in Section 6.6(i)-(viii). The information in this quarterly report may be based on preliminary results and will be assessed for revision, evaluation, and adjustment quarterly, with updates and changes being made on a quarterly basis. As set forth in Section 6.6, interested stakeholders should raise any questions regarding the programs addressed in this report through the Illinois Stakeholder Advisory Group process or with Ameren Illinois directly, including to identify any updates or changes made since prior reports. As has been done previously, AIC will address questions, when practicable, through the appropriate channels, including updates to this report.

» **Through Q1, the portfolio has achieved 24% of its electric PY2021 electric implementation plan savings goal of 432,211 MWh and 33% of its gas PY2021 implementation plan savings goal of 3,485,708 therms.**

# Portfolio Summary

## *Business Program Implementation Staff Timeline*

COVID-19 Implementation Impacts

Initiative	Q1 (March)
Standard *	Cont. Face-to-Face interaction limited to mission critical activities only
Custom *	Cont. Face-to-Face interaction limited to mission critical activities only
RCx	Cont. Face-to-Face interaction limited to mission critical activities only
Streetlighting *	No Impact

# Portfolio Summary

## Residential IQ Program Implementation Staff Timeline

COVID-19 Implementation Impacts

Initiative	Q1 (March)
<b>IQ – Registered Program Ally *</b>	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>IQ - CAA</b>	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>IQ – Multifamily *</b>	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>IQ – Smart Savers *</b>	Cont. Program Ally installation

## Residential Program Implementation Staff Timeline

COVID-19 Implementation Impacts

Initiative	Q1 (March)
<b>Appliance Recycling</b>	Cont. re-entry into home interior when necessary
<b>DDEP *</b>	Continued delivery of alt. option(s)
<b>Retail Products</b>	Store visits continue
<b>Heating &amp; Cooling</b>	Initiative continues to be delivered by non program staff
<b>Multifamily *</b>	Cont. delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only

*\*Alternative (alt.) options identified on page 6*

## *Alternative Options from 2020 Continuing into 2021*

### » Residential Program

- *Registered Program Ally Channel* – Implementation of energy efficiency kits, virtual instant savers assessments, and the addition of a customer bonus.
- *Multifamily/PHA Channel* – Implementation of energy efficiency kits, virtual property in-unit assessments with energy efficiency products shipped to site.
- *Direct Distribution of Efficient Products (School Kits)* – Implemented a multi-faceted approach on presentations and kit delivery.
- *Distribution of Efficient Products (Non School Kits)* – Implemented a virtual solution to provide energy efficiency to low-income customers receiving bill pay assistance.

# Portfolio Summary

## Portfolio Overall Savings Achievement PYTD

### Electric Savings Goal



### Gas Savings Goal



## Portfolio Overall Spend Achievement PYTD

**PY2021 Budget:**  
**\$114,421,544**

**Actual Spend:**  
**\$20,988,867**

**Income Qualified Spend:** **\$4,640,129**

**Third-Party Electric Spend:**  
**\$2,724,177**

**Diverse Vendor Spend:**  
**\$2,504,668**

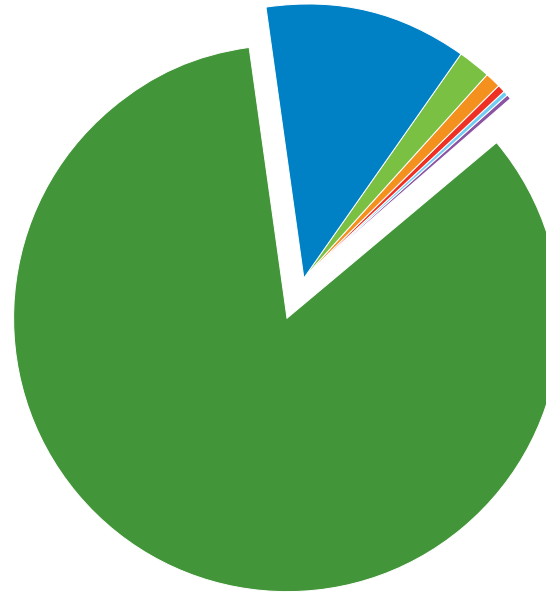
**Diverse Program Ally Spend:** **\$853,000**

# Portfolio Summary

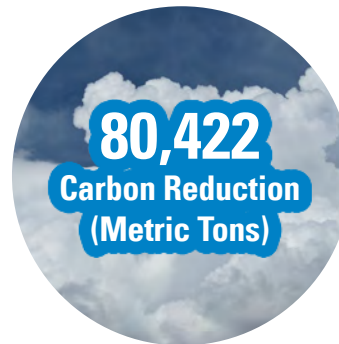
## Smart Thermostats Incentivized

Total Number of Smart Thermostats Incentivized: 19,018

Retail Products 15,961	Smart Savers 2,317	IQ MF 343	HVAC 173
IQ - Mod Income 80	Business 75	MF 68	Home Efficiency 1
Public Housing 0	IQ-CAA 0		



## Environmental Impacts





# Residential Program

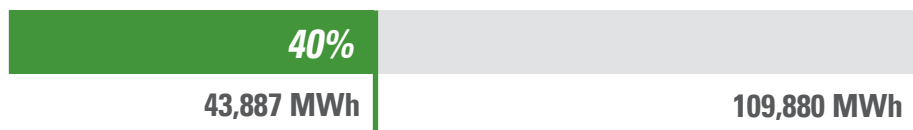
The Residential Program includes six primary initiatives and two third party initiatives that address key electric and natural gas end-uses in single family homes and multifamily properties. The Residential Program offers a range of educational opportunities and incentives for customers to implement a series of energy efficiency improvements. Direct installation initiatives, targeted primarily to low-and moderate-income customers, are designed to achieve reductions in energy consumption within participants' homes through the installation of low-cost energy savings measures followed by comprehensive weatherization services. Each initiative is a potential entry point for consumers into the Program, which is structured to facilitate cross-promotion between initiatives and maximize participation.

Ameren Illinois' large geographic service territory encompasses over 43,700 square miles and serves more than one million residential customers of which over 640,000 receive both electric and gas service.

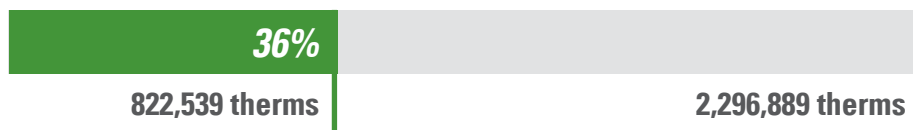
## Q1 Update Residential Program (All Initiatives):

» Through Q1, the Residential Program has achieved:

### Electric PY2021 Implementation Plan Savings Goal <sup>1</sup>



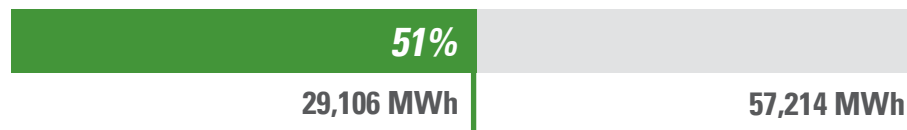
### Gas PY2021 Implementation Plan Savings Goal <sup>1</sup>



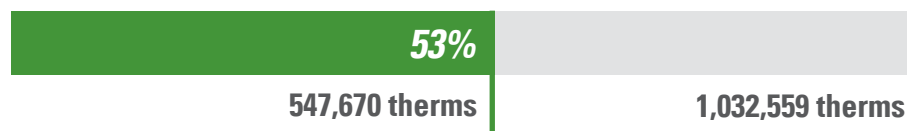
## Q1 Update Residential Program (Non-IQ):

» Through Q1, the Residential Program (Non-IQ) has achieved:

### Electric PY2021 Implementation Plan Savings Goal



### Gas PY2021 Implementation Plan Savings Goal



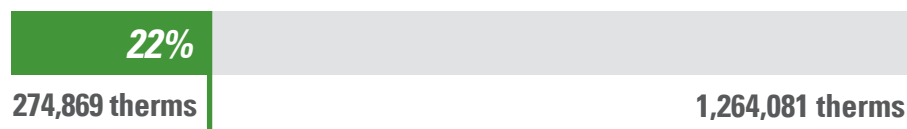
## Q1 Update Residential Program (IQ Channels):

» Through Q1, the Residential Program (IQ) has achieved:

### Electric PY2021 Implementation Plan Savings Goal <sup>2</sup>



### Gas PY2021 Implementation Plan Savings Goal <sup>2</sup>



Note: SAG (Stakeholder Advisory Group) reporting template has Residential initiatives separated by Non-IQ, IQ, and a BTU Conversion component; however, all Residential Initiatives have an IQ component. Numbers are reported here to be as consistent with SAG reporting template as possible.

<sup>1</sup> Savings and goal inclusive of projected gas to electric fuel conversion savings

<sup>2</sup> Savings and goal inclusive of projected gas to electric fuel conversion savings

# Residential Program

## Residential HVAC Initiative

*Overview: The HVAC Initiative partners with HVAC contractors to offer instant discounts and/or mail-in cash-back rebates on efficient electric heating and cooling equipment, and smart thermostats. HVAC contractors get midstream incentives through their distributors for Heat Pump Water Heaters.*

### Q1 Update:

- » **Through Q1, 436 net MWh savings achieved (18% of electric implementation plan savings goals).**
  - 173 smart thermostats were incentivized.
  - 82 Air Source Heat Pumps, 457 Central Air Conditioning (CAC) units and 88 Heat Pump Water Heaters (HPWH) were incentivized.
  - Opinion Dynamics published HPWH market characterization in Q1. Results are being incorporated into implementation efforts to increase market actor adoption of the technology.
  - Heat Pump Water Heater Midstream Pilot gained momentum during Q1, with 48 distributor branches enrolled.
  - 650 customers were served with 800 unique measures installed.

## Residential Home Efficiency Initiative

*Overview: Home Efficiency partners with Building Envelope Program Ally contractors to offer incentives to homeowners for multiple insulation measures and air sealing, covering part of the project cost completed by a Program Ally.*

### Q1 Update:

- » **Through Q1, 7 net MWh and 2,396 net therm savings achieved (1% and 2%, respectively, of implementation plan savings goals).**
  - 9 projects were completed.
  - Collaborated with Program Allies to capture motivating factors and develop effective marketing efforts to increase participation.

## Residential Appliance Recycling Initiative

*Overview: In the Appliance Recycling Initiative, operable, inefficient refrigerators, freezers, and window air conditioners are permanently removed and recycled in an environmentally responsible manner. The pickup service is paid for by energy efficiency funds without additional cost to the customer, who also receives a cash reward for each qualified appliance they turn in.*

### Q1 Update:

- » **Through Q1, 417 net MWh and 1,189 net therm savings achieved (13% and 6%, respectively, of implementation plan savings goals).**
  - 862 customers participated with 155 freezers, 706 refrigerators, and 120 Room Air Conditioners successfully recycled.
  - Cross promotion with Multifamily Initiative yielded 50 window air conditioners added to the pipeline.
  - Contactless pickups continued through Q1, with 85% of pickups occurring outdoors.
  - 109 appliance recycling kits were distributed.

## Residential Public Housing Initiative

*Overview: The Public Housing Initiative targets public sector housing owned by government entities including federal, state, and municipal housing authorities. The initiative mirrors the comprehensive multifamily weatherization service offered through the IQ Initiative in terms of income eligibility, home assessment, weatherization services, and incentive structure.*

### Q1 Update:

- » **Through Q1, 13 net MWh and 130 net therm savings achieved (1% and 0%, respectively, of implementation plan savings goals).**
  - 3 properties were served through a combination of drop ship and doorknob kit efforts during Q1, with a total of 95 units receiving direct install measures.
  - Increased smart thermostat outreach and education to maintenance staff during virtual conference.
  - Cross promotion occurred with MDI in Q1, to actively recruit properties.

# Residential Program

## Residential Multifamily Initiative

*Overview: The non-IQ Multifamily Initiative provides electric and gas energy savings in multifamily buildings for market rate, low- and moderate-income customers that are not a part of the IQ Initiative through the direct installation of free, low-cost energy saving measures in individual living units and common areas.*

### Q1 Update:

» **Through Q1, 46 net MWh and 3,037 net therm savings achieved (5% and 13%, respectively, of implementation plan savings goals).**

- 10 properties were completed, with 81 units served.
- 168 smart thermostats were incentivized.
- In Q1, DHP (Ductless Heat Pump) installations, replacing electric resistance heat, were completed at 3 properties containing 14 units.

## Residential Income Qualified Initiative

*Overview: The Income Qualified (IQ) Initiative specifically focuses on helping low- and moderate-income customers manage their electric and/or natural gas energy consumption through comprehensive home weatherization services, enhanced rebates on HVAC equipment, LED lighting and direct distribution of energy saving kits. Single family homes and multifamily living units and properties with average household incomes up to 300% of Federal Poverty Guidelines may receive a free, comprehensive home assessment, including a health and safety evaluation, to identify the energy efficiency services to be offered. Low-cost energy saving devices are installed in conjunction with the assessment at no cost. Comprehensive weatherization measures are also installed for eligible customers at no cost including insulation, air sealing, duct sealing, and ECM blower replacement. In addition, eligible customers receive enhanced incentives on energy efficient HVAC equipment. Energy savings kits are distributed at no cost through special events and other direct distribution efforts.*

» **The IQ Initiative is implemented through five channels:**

- IQ-Registered Program Ally Channel – serving low-and moderate-income single-family homes
- IQ-Community Action Agency Channel – serving low-income single-family homes
- IQ-Multifamily Channel– serving low- and moderate-income multifamily homes
- IQ-Smart Savers Channel – serving low- and moderate-income family homes
- IQ-DDEP Channel - serving low- and moderate income customers by distributing kits through community and other outreach efforts

PY2021 IQ Homes Served	
Community Kits (includes MDI)	1,385
CAA Channel Comprehensive Retrofits	91
Registered Program Ally Channel Direct Install	95
Registered Program Ally Channel Comprehensive Retrofits	133
Joint Pilot with Nicor	2
Smart Savers Channel	2,317
School Kits (IQ Only)	0
Multifamily In-Units	736
<b>Total Number of Homes</b>	<b>4,759</b>

# Residential Program

## **Residential IQ: Registered Program Ally Channel (Low & Moderate Income)**

*Overview: The IQ-Registered Program Ally Channel is in its third year of implementation – with a commitment to develop community-focused energy efficiency initiatives.*

### **Q1 Update:**

- » **Through Q1, 422 net MWh and 39,300 net therm savings achieved (6% and 8%, respectively, of implementation plan savings goals).<sup>3</sup>**
  - During Q1 Program staff and Program Allies helped customers improve comfort, manage usage, and reduce costs by providing energy efficiency upgrades that included:
    - 307 virtual and 95 on-site assessments, addressing 49 "no heat" situations with new furnace installations
    - 133 comprehensive retrofit projects
    - 80 smart thermostat installations
  - Continuous improvement efforts regarding customer experience are underway. These efforts include in-depth customer interviews, project reviews and meetings with Program Allies to ensure consistency in the Program services being delivered and have resulted in the addition of a concierge like service we are calling the "Personal Energy Advisor". This addition provides an additional advocate for the customer from start to finish and acts as a single point of contact throughout the entire lifecycle of the project.
  - Joint efforts with AIC/Nicor continued through Bloomington Normal joint utility pilot, with 21 assessments and 2 projects completed.

## **Residential IQ: Community Action Agency Channel (Low Income)**

*Overview: The IQ-Community Action Agency Channel partners with Community Action Agencies (CAA) located in Ameren Illinois' service territory and is in its third year of serving low-income customers.*

### **Q1 Update:**

- » **Through Q1, 209 net MWh and 11,965 net therm savings achieved (23% and 11%, respectively, of implementation plan savings goals).**
  - 91 homes were served, by 18 participating agencies.
  - Collaborative efforts are underway regarding finding solutions to serve waitlisted customers. During Q1 we launched an effort with ERBA (Embarras River Basin Agency) to begin identifying processes and providing energy efficiency opportunities for these customers.

## **Residential IQ: Multifamily Channel (Low & Moderate Income)**

*Overview: The IQ- Multifamily channel targets low- and moderate-income multi-family properties and uses a diverse vendor in its outreach to facility managers.*

### **Q1 Update:**

- » **Through Q1, 512 net MWh and 667 net therm savings achieved (21% and 2%, respectively, of implementation plan savings goals).**
  - 18 properties completed, 560 units served, and 343 smart thermostats were installed.
  - 7 Building Envelope projects completed.
  - Focus continued on rural outreach communities during Q1, concentrating on USDA (United States Department of Agriculture) and HUD (United States Department of Housing and Urban Development) properties.



<sup>3</sup> Savings and goal inclusive of projected gas to electric fuel conversion savings

# Residential Program

## Residential IQ: Smart Savers Channel (Low Income)

Overview: This IQ-Smart Savers Channel offers low- and moderate-income residential customers the ability to acquire a smart thermostat at no cost.

### Q1 Update:

- » Through Q1, 8,510 net MWh and 6,540 net therm savings achieved (75% and 41% respectively, of implementation plan savings goals).<sup>4</sup>
  - 2,317 smart thermostats were incentivized.
    - 60% of installations were delivered by local/diverse Program Allies
    - 4% of installations were delivered by non-profit Program Allies
  - 11 Program Allies were active and completed projects.
  - Cross promotion of the initiative resulted in serving a large multifamily property containing 331 units.

## Residential IQ: DDEP Channel (Non School Kits) (Low & Moderate Income)

Overview: The Direct Distribution of Efficient Products (Non School Kits) Initiative primarily distributes kits through community and other outreach efforts.

### Q1 Update:

- » Through Q1, 488 net MWh and 10,480 net therm savings achieved (37% and 19%, respectively, of implementation plan savings goals).
  - Community partners distributed 1,385 energy efficiency kits to customers seeking assistance. In collaboration with our credit & collection team we also provided 395 kits to customers receiving bill pay assistance credit.
  - Launched co-branded marketing materials in Q1 to support MDI Community Partner outreach.



Ameren Illinois Energy Efficiency Group,

Thank-you for the wonderful gift, you have given me! HVAC and weatherization for my home. Words cant express my Gratitude! The Green Home and Air King teams were exceptional!

Thank you again from the bottom of my heart!  
Blessed and Grateful  
Karen Robbins

<sup>4</sup> Savings and goal inclusive of projected gas to electric fuel conversion savings

# Residential Third-Party Programs

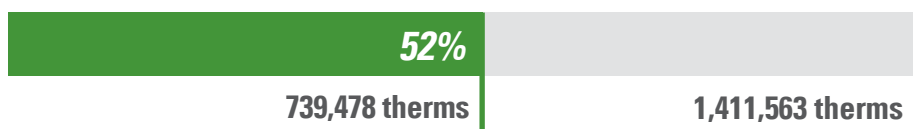
Consistent with the Sections 8-103B(g)(4) of the Illinois Public Utilities Act 220 ILCS 5/8-101, the following two initiatives are being funded by Ameren Illinois as part of the third-party energy efficiency programs and are separately reported in this section.

» **Through Q1, Third-Party Programs have achieved:**

## *Electric PY2021 Implementation Plan Savings Goal*



## *Gas PY2021 Implementation Plan Savings Goal*



## Residential Retail Products Initiative

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

### **Q1 Update:**

- » **Through Q1, 32,513 net MWh and 739,478 net therm savings achieved (42% and 55%, respectively, of implementation plan savings goals).**
- 15,961 smart thermostats, 13,538 advanced power strips, 193,577 specialty bulbs and 41,764 standard bulbs were incentivized.
  - 1,547 large appliances and 2,283 small appliances were incentivized.
  - HPWH and Room Air Conditioners became eligible for rebates during Q1.

## Residential DDEP School Kits Initiative

*Overview: The Direct Distribution of Efficient Products Initiative primarily targets students in grades 5 through 8 providing energy efficiency and conservation awareness to families in the Ameren Illinois service territory. Participating classes receive an energy education presentation and direct install measures by qualified professionals. Students are provided with a 'take-home' kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas, and water consumption.*

### **Q1 Update:**

- » **Through Q1, 314 net MWh and 0 net therm savings achieved (14% and 0%, respectively, of implementation plan savings goals).**
- Spring enrollment exceeded expectations with 55 low-income schools registered.
  - Received positive feedback from teachers pertaining to implemented gamification effort, "Become an Energy Champion".
  - Scheduled a home school enrollment interview, with the first experience planned for one home school family.



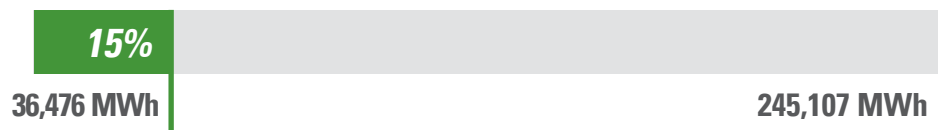
# Business Program

The Business Program provides incentives and services to non-residential customers to achieve electric and gas energy savings. The core initiatives for the Business Program include Standard, Midstream Lighting, Midstream HVAC, Small Business Direct Install, Custom, Retro-commissioning (RCx) and Street Lighting. Financial incentives are provided to business customers to drive them to conduct energy efficiency projects. Other aspects include education and training for customers and market professionals, energy efficiency marketing, and advancement of energy systems construction and monitoring beyond standard industry practices.

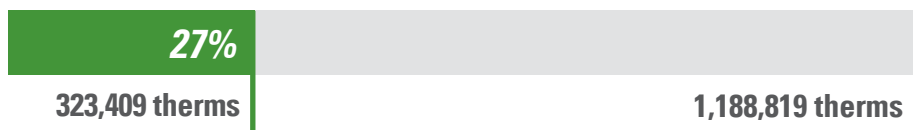
There are 160,000 business customers spanning the 43,700 square mile Ameren Illinois service territory.

» **Through Q1, the Business Program has achieved:**

## *Electric PY2021 Implementation Plan Savings Goal*<sup>5</sup>



## *Gas PY2021 Implementation Plan Savings Goal*<sup>5</sup>



## Business Standard Initiative

*Overview: The Business Standard Initiative incentivizes customers to purchase energy efficient products. Applications are filled out and delivered to Ameren Illinois customers via Program Allies or through the [AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com) website. Program allies – including contractors, retailers, and distributors, along with program Energy Advisors, are the main sales force promoting and educating customers about the Standard Initiative.*

» **Through Q1, 3,200 net MWh and 85,653 net therm savings achieved (5% and 34%, respectively, of implementation plan savings goals).**

- In Q1, 75 smart thermostats were incentivized.
- 431 standard electric and 159 standard gas applications were submitted for a total of 483 applications received.
- 227 standard electric projects and 68 standard gas projects were completed.
- Initiatives and offerings completed and obtained the following net savings through Q1:
  - Standard Lighting – 2,851 MWh
  - HVAC Electric – 235 MWh
  - Steam Traps – 42,434 Therms
  - HVAC Gas – 36,781 Therms

## Business Midstream Lighting Initiative

*Overview: The Business Midstream Lighting Initiative provides incentives for energy efficient lighting to customers at the point of sale. Ameren Illinois customers can visit the [AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com) website to find a list of enrolled distributors that offer incentives on lighting products such as linear TLED, screw-in lights and downlight fixtures.*

**Q1 Update:**

» **Through Q1, 11,317 net MWh savings achieved (47% of electric implementation plan savings goals).**

- During Q1, 179 lighting distributor branches participated in the initiative, with 136,300 lighting products were incentivized.
- 367 unique customers received incentives through the Midstream Lighting Initiative.

<sup>5</sup> Savings and goal inclusive of projected gas to electric fuel conversion savings

## Business Midstream HVAC Initiative

*Overview: The Business Midstream HVAC Initiative provides incentives for energy efficient HVAC equipment to customers at the point of sale. Ameren Illinois customers can visit the [AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com) website to find a list of enrolled distributors that offer incentives on HVAC equipment such as central air conditioners, air source heat pumps, smart thermostats, and heat pump water heaters.*

### Q1 Update:

- » **Through Q1, 59 net MWh and 143 net therm savings achieved (36% and 13%, respectively, of implementation plan savings goals).**
- 41 HVAC distributor branches were enrolled with 39% of the branch locations being diverse owned.
- 48 HPWH distributors were enrolled during Q1.
- Midstream for HPWH moved from pilot stage to a full initiative in Q1. Opinion Dynamics published HPWH market characterization with results incorporated into implementation efforts to increase market actor adoption of the technology.

## Small Business Direct Install (SBDI) Initiative

*Overview: Small businesses, including non-profits, schools, and local government facilities, receive prescribed direct install measures with higher incentives through a network of Program Allies experienced and trained to assist facilities receiving delivery services under the electric DS-2/DS-3A delivery service rates.*

### Q1 Update:

- » **Through Q1, 13,848 net MWh savings achieved (16% of electric implementation plan savings goal).**
- 161 active Program Allies performed 2,128 total assessments completed.
- 548 projects were completed.
- Assessment to pipeline conversion rate was 52% in Q1.

- Launched SBDI Program Ally training pilot with a new diverse supplier, with 2 Program Allies already reaching their minimum savings goal for the effort.
- Large participation of refrigeration measures with 122 projects in the pipeline.

## Business Custom Initiative

*Overview: The Business Custom Initiative offers incentives, training, and education for improving efficiency of any non-prescriptive measure, including compressed air, lighting, HVAC, refrigeration, motors/drives, waste/water treatment, and manufacturing processes, etc. Complex and large-scale new construction and building renovation projects also qualify under the Custom Initiative. Services such as the Staffing Grant, Metering & Monitoring, Strategic Energy Management (SEM), and the Feasibility Study are funded under the 'custom' initiative incentives.*

### Q1 Update:

- » **Through Q1, 3,018 net MWh and 237,613 net therm savings achieved (8% and 27%, respectively, of implementation plan savings goals).<sup>6</sup>**
- 45 Competitive Large Incentive Projects (CLIP) were received, with 8 complete and 31 in progress.
- 2 Metering and Monitoring projects were receiving during Q1.
- 23 Feasibility applications were received, with 13 complete and 10 in progress.
- 1 Public Sector Energy Assessment application was received.
- In Q1, customers were still reluctant to have outside visitors in their facility due to the pandemic with 4 Process Energy Advisor visits completed.

<sup>6</sup> Savings and goal inclusive of projected gas to electric fuel conversion savings



## Business Retro-Commissioning (RCx) Initiative

*Overview: The Business RCx Initiative identifies no cost/low cost (zero- to one-year payback) energy efficiency measures to optimize the operation of existing systems for compressed air, healthcare, commercial and public sector building facilities, industrial ventilation systems, industrial refrigeration, and grocery stores. The energy efficiency measures in this Initiative generally go beyond what is offered by the Standard Initiative.*

### Q1 Update:

- » **Through Q1, 81 net MWh and 0 net therm savings achieved (2% and 0%, respectively, of implementation plan savings goals).**
  - 4 Large Facility projects were received.
  - 6 Virtual Commissioning projects were received, with savings confirmed by M&V.
  - Launched Monitoring Based Commissioning (MBCx) pilot during Q1.
  - 5 Registered Service Providers were active in Q1, with 2 newly trained and 1 working on their first project.

## Business Street Lighting Initiative

*Overview: The Street Lighting Initiative incentivizes municipal customers to upgrade both their utility-owned and municipal-owned street light fixtures to LED technology. Ameren Illinois-owned street light fixtures are incentivized to encourage replacement with a per fixture incentive provided to the customer.*

### Q1 Update:

- » **Through Q1, 4,953 net MWh savings achieved (19% of implementation plan savings goal).**

## Business Municipal-Owned Street Lighting

- » Large municipality received approval for highway street light upgrades during Q1 and will submit their application soon.
- » 1 application was received from a municipality for 30 street lights.

## Business Ameren-Owned Street Lighting

- » Began preparations for upgrades in 44 communities with a total of 10,000 early replacement street lights. In addition, replace on failure street light upgrades are taking place throughout the service territory with over 8,000 street lights upgrades in Q1.



# Voltage Optimization

Overview: Voltage Optimization ("VO") is the use of automation on distribution voltage control devices (switched capacitor banks, voltage metering, voltage regulators and LTC's) to reduce the reactive power (VAR) flows on a circuit and lower the voltage within regulatory limits to reduce end-use customer energy consumption and utility distribution system losses. As part of its portfolio, Ameren Illinois plans to deploy VO to an estimated 1047 cost-effective circuits from 2019-2025, while using its best efforts to identify and prioritize circuits with low-income customers.

## Q1 Update:

- » **Through Q1, 24,562 net MWh savings achieved (33% of implementation plan savings goal).**
  - A total of 180 circuits are planned for deployment by end of 2021.



# Breakthrough Equipment & Devices

Overview: Ameren Illinois provides funding for the research and development of new products and services to invest in new energy efficiency concepts critical to the future of energy efficiency. Two main efforts are being supplied Breakthrough Equipment & Devices (BED) funding in Q1 2021. Ameren Illinois intends to monitor the energy efficiency landscape throughout 2021 and may fund other BED projects pursuant to the Illinois regulatory framework as new opportunities arise.

## Market Development Initiative

*Overview: As part of its portfolio goals and activities, Ameren Illinois deploys targeted funding to meet the goals of the Market Development Initiative (MDI), which include developing the energy efficiency workforce, the energy efficiency markets in unserved or underserved communities in the Ameren Illinois service territory as well as developing and supporting local and diverse businesses.*

### Q1 Update:

- » MDI partners spent the first quarter completing 2021 onboarding training, including presentations of program updates, and set up of their new 2021 projects in the MDI database. Virtual engagement continues to be a key focus area for partners due to COVID, with many utilizing the partner communications toolkit for social media and email newsletter outreach to their clients.
  - 9,982 customers were engaged.
  - 63 Partner events were held.
- » Recruited and selected 2021 internship employers, with 22 internships awarded to 21 employers.
- » 183 partner referral projects were completed, with \$67,817.51 of incentives provided.
- » Approximately \$1,202,791.41 of incentive spend was paid to diverse Program Allies, with \$1,023,151.43 for Business and \$179,639.98 for Residential.
- » Provided 14 customers SBDI Co-Pay Assistance grants for a total of \$65,487.

- » Minority Business Development Center completed winter cohort of their boot-camp, with 10 participating Energy Efficiency contractors.
- » Launched workforce development pilot during Q1 in partnership with Smart Energy Designed Assistance Center (SEDAC) and SEEL, with Peoria selected as the Pilot region.
- » Launched new project with SEDAC offering central grant writer to network of community partners to help them apply for additional funding to further the impact of their energy efficiency work.
  - The grant writing project will assist our partner network with applying for 4 external funding opportunities that can be leveraged to expand the impact of their energy efficiency work.
- » Senior Services Plus, a community partner, continues their work to become a full Program Ally by sending two of their staff to become BPI certified with Ameren Illinois MDI funding support.
- » Received 6 community partner referrals from Standard Business Energy Advisors during Q1.
- » Continued partnership with Peoria Guild of Black Artists, incorporating their design work into Ameren Illinois Energy Efficiency marketing materials. One of their designs is now the branding for the internship Program.



Artwork by the Peoria Guild of Black Artists

## Market Development Action Plan (MDAP)<sup>7</sup>

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

### Q1 Update:

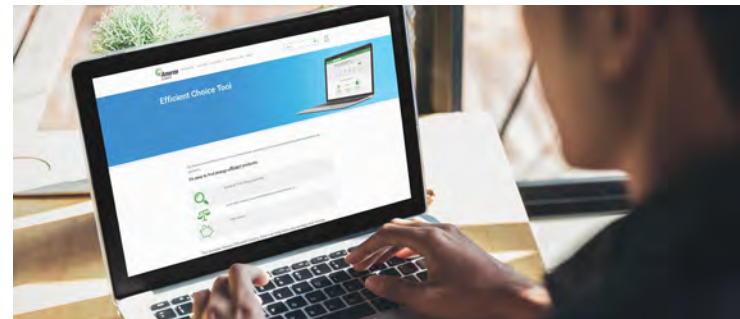
- » On-boarded high-performing diverse business Program Ally into first implementation opportunity training lower performing Program Allies to increase their success and revenue through the SBDI Initiative.
- » Community partner Southtown Construction completed their first knob and tube remediation project for an HEIQ (Home Efficiency Income Qualified) customer in Q1, with 5 additional remediation projects to be completed.
- » Expanded involvement of program staff in recruitment for Internship Program, resulting in largest number of applications ever received.

## Efficient Choice Tool

*Overview: This new online platform is meant to serve as a “kayak.com” and “Consumer Reports” type search and compare engine for residential energy-efficient home appliances. It allows customers to compare the efficiency ratings of different household appliances and make informed purchasing decisions. Several additional website features differentiate Ameren Illinois' Efficient Choice Tool from other sites on the internet.*

### Q1 Update:

- » Over 105,000 visits to the Efficient Choice Tool site occurred, with over 90,000 of those visits being first time visitors.
- » Survey analysis by Opinion Dynamics launched during Q1 with results expected in Q2.
- » Developed air purifier email campaign with a Q2 launch.



<sup>7</sup> Quantitative results for MDAP strategies are provided within Business, Residential, and MDI sections

## Overall Portfolio

### Q1 Update:

- » New website completed by KSV, a woman-owned agency, was launched in Q1 with the following top changes and new features:
  - Improved accessibility and availability through search engine optimization and responsive design for people with disabilities based on the review and audit recommendations from Mind's Eye.
  - Converted to Google Analytics allowing for more robust and comprehensive reporting and data analytics.
  - Personalized content based on products and industry.
  - Form integration with Program CRM (Customer Relationship Management) tool reducing data entry needed to document and follow-up on leads.
- » Created a partnership with Peoria Guild of Black Artists (PGOBA) to provide additional creative concepts and ideas to be utilized Portfolio wide.

## Residential Program

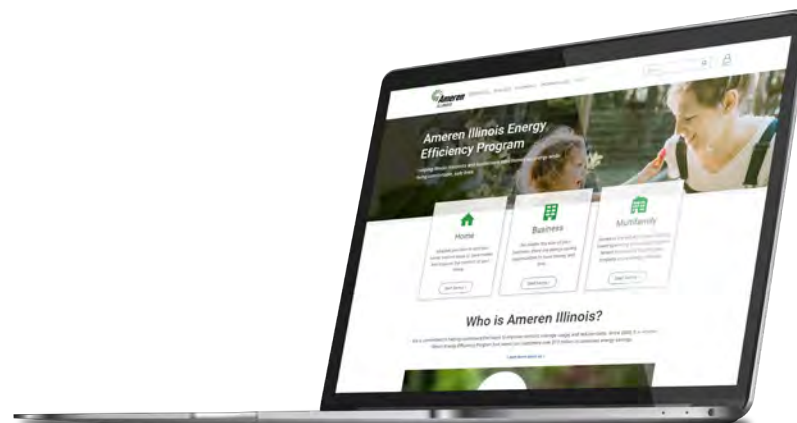
### Q1 Update:

- » Created new co-branded HEIQ marketing materials for Program Allies during Q1.
- » Deployed over 100,000-piece direct mail campaign for Appliance Recycling Initiative.
- » Launched HEIQ SAVE Kit campaign in Q1 and introduced the Personal Energy Advisor as an available customer resource.

## Business Program

### Q1 Update:

- » Executed a campaign, including email, promotional ads, and radio interviews to promote the Agriculture Energy Assessment Pilot during Q1.
- » Conducted sector specific email marketing and a reengagement campaign to customers with open assessments to successfully increase the SBDI project pipeline.
- » Placed all business customers and Program Allies on a Marketing Cloud journey to promote the Early Completion Bonus throughout the year, focusing on the Q1 bonus of 15%.



# New Measure Tables

Measure Name	Program	Measure-Level TRC Ratio
ENERGY STAR Uninterruptible Power Supply	Business	2.15
ENERGY STAR Uninterruptible Power Supply - restricted	Business	4.17
Energy Efficient Rectifier	Business	5.17
Add Doors to Open Refrigerated Display Cases	Business	3.27
Smart Sockets	Business	1.45

# Electric Budget Shifts

Initiatives	2018-2021 Filing Plan PY2021	Implementation Plan Rev00 PY2021	Variance	Variance (%)
HVAC	\$3,815,187	\$3,915,663	\$100,476	+3%
Multifamily	\$708,973	\$976,339	\$267,366	+38%
Appliance Recycling	\$1,428,571	\$2,097,040	\$668,469	+47%
Direct Distribution Efficient Products	\$649,418	\$691,313	\$41,895	+6%
Retail Products	\$6,682,829	\$5,119,663	\$(1,563,166)	-23%
Behavioral Modification	\$695,000	\$-	\$(695,000)	-100%
Public Housing	\$661,581	\$1,633,612	\$972,031	+147%
Income Qualified	\$15,695,192	\$17,440,719	\$1,745,527	+11%
<b>Residential Program Total:</b>	<b>\$30,336,751</b>	<b>\$31,874,349</b>	<b>\$1,537,598</b>	<b>+5%</b>
Standard	\$34,757,086	\$37,058,610	\$2,301,524	+7%
Custom	\$15,798,293	\$11,330,595	\$(4,467,698)	-28%
Retro-Commsissioning	\$2,316,507	\$1,414,760	\$(901,747)	-39%
Street Lights	\$575,954	\$1,791,015	\$1,215,061	+211%
<b>Business Program Total:</b>	<b>\$53,447,840</b>	<b>\$51,594,980</b>	<b>\$(1,852,860)</b>	<b>-3%</b>
Portfolio Administration	\$4,934,490	\$5,801,953	\$867,463	+18%
Evaluation	\$2,960,694	\$2,831,446	\$(129,248)	-4%
Marketing	\$3,454,143	\$3,121,193	\$(332,950)	-10%
Breakthrough Equipment & Devices	\$3,555,882	\$3,465,880	\$(90,002)	-3%
<b>Portfolio Administration Total:</b>	<b>\$14,905,210</b>	<b>\$15,220,472</b>	<b>\$315,262</b>	<b>+2%</b>
<b>Portfolio Total:</b>	<b>\$98,689,801</b>	<b>\$98,689,801</b>	<b>\$0</b>	<b>+0%</b>

# Electric Budget Shifts

Initiatives	Implementation Plan PY2020	Implementation Plan PY2021	Variance	Variance (%)
	Rev03	Rev00		
HVAC	\$4,585,806	\$3,915,663	\$(670,143)	-15%
Multifamily	\$870,621	\$976,339	\$105,718	+12%
Appliance Recycling	\$1,802,833	\$2,097,040	\$294,207	+16%
Direct Distribution Efficient Products	\$776,250	\$691,313	\$(84,936)	-11%
Retail Products	\$7,112,028	\$5,119,663	\$(1,992,366)	-28%
Behavioral Modification	\$-	\$-	\$-	N/A
Public Housing	\$1,782,692	\$1,633,612	\$(149,080)	-8%
Income Qualified	\$17,594,353	\$17,440,719	\$(153,634)	-1%
<b>Residential Program Total:</b>	<b>\$34,524,583</b>	<b>\$31,874,349</b>	<b>\$(2,650,234)</b>	<b>-8%</b>
Standard	\$38,049,275	\$37,058,610	\$(990,665)	-3%
Custom	\$8,657,540	\$11,330,595	\$2,673,055	+31%
Retro-Commsissioning	\$889,526	\$1,414,760	\$525,234	+59%
Street Lights	\$1,602,880	\$1,791,015	\$188,135	+12%
<b>Business Program Total:</b>	<b>\$53,447,840</b>	<b>\$51,594,980</b>	<b>\$(1,852,860)</b>	<b>-3%</b>
Portfolio Administration	\$5,845,879	\$5,801,953	\$(43,926)	-1%
Evaluation	\$2,703,595	\$2,831,446	\$127,851	+5%
Marketing	\$2,973,175	\$3,121,193	\$148,018	+5%
Breakthrough Equipment & Devices	\$3,443,348	\$3,465,880	\$22,532	+1%
<b>Portfolio Administration Total:</b>	<b>\$14,965,997</b>	<b>\$15,220,472</b>	<b>\$254,474</b>	<b>+2%</b>
<b>Portfolio Total:</b>	<b>\$98,689,801</b>	<b>\$98,689,801</b>	<b>\$(0)</b>	<b>-0%</b>



# Gas Budget Shifts

Initiatives	2018-2021 Filing Plan PY2021	Implementation Plan Rev00 PY2021	Variance	Variance (%)
HVAC	\$333,825	\$490,819	\$156,994	+47%
Multifamily	\$166,379	\$158,835	\$(7,543)	-5%
Appliance Recycling	\$-	\$95,197	\$95,197	N/A
Direct Distribution Efficient Products	\$112,207	\$163,431	\$51,224	+46%
Retail Products	\$703,734	\$1,340,287	\$636,553	+90%
Behavioral Modification	\$-	\$-	\$-	N/A
Public Housing	\$281,362	\$256,043	\$(25,319)	-9%
Income Qualified	\$5,268,137	\$6,530,322	\$1,262,185	+24%
<b>Residential Program Total:</b>	<b>\$6,865,644</b>	<b>\$9,034,935</b>	<b>\$2,169,291</b>	<b>+32%</b>
Standard	\$3,590,650	\$1,499,837	\$(2,090,812)	-58%
Custom	\$2,258,062	\$2,691,892	\$433,829	+19%
Retro-Commsissioning	\$736,284	\$508,338	\$(227,946)	-31%
Street Lights	\$-	\$-	\$-	N/A
<b>Business Program Total:</b>	<b>\$6,584,996</b>	<b>\$4,700,067</b>	<b>\$(1,884,929)</b>	<b>-29%</b>
Portfolio Administration	\$786,587	\$945,170	\$158,583	+20%
Evaluation	\$471,952	\$451,349	\$(20,603)	-4%
Marketing	\$550,611	\$508,101	\$(42,510)	-8%
Breakthrough Equipment & Devices	\$471,952	\$92,120	\$(379,832)	-80%
<b>Portfolio Administration Total:</b>	<b>\$2,281,103</b>	<b>\$1,996,741</b>	<b>\$(284,362)</b>	<b>-12%</b>
<b>Portfolio Total:</b>	<b>\$15,731,743</b>	<b>\$15,731,743</b>	<b>\$(1)</b>	<b>-0%</b>

# Gas Budget Shifts

Initiatives	Implementation Plan PY2020	Implementation Plan PY2021	Variance	Variance (%)
	Rev03	Rev00		
HVAC	\$519,842	\$490,819	\$(29,023)	-6%
Multifamily	\$159,472	\$158,835	\$(637)	-0%
Appliance Recycling	\$-	\$95,197	\$95,197	N/A
Direct Distribution Efficient Products	\$239,478	\$163,431	\$(76,047)	-32%
Retail Products	\$2,277,567	\$1,340,287	\$(937,280)	-41%
Behavioral Modification	\$-	\$-	\$-	N/A
Public Housing	\$213,071	\$256,043	\$42,972	+20%
Income Qualified	\$5,715,686	\$6,530,322	\$814,637	+14%
<b>Residential Program Total:</b>	<b>\$9,125,116</b>	<b>\$9,034,935</b>	<b>\$(90,181)</b>	<b>-1%</b>
Standard	\$2,013,454	\$1,499,837	\$(513,617)	-26%
Custom	\$2,523,448	\$2,691,892	\$168,443	+7%
Retro-Commsissioning	\$376,905	\$508,338	\$131,433	+35%
Street Lights	\$-	\$-	\$-	N/A
<b>Business Program Total:</b>	<b>\$4,913,808</b>	<b>\$4,700,067</b>	<b>\$(213,741)</b>	<b>-4%</b>
Portfolio Administration	\$437,255	\$945,170	\$507,915	+116%
Evaluation	\$467,279	\$451,349	\$(15,929)	-3%
Marketing	\$483,909	\$508,101	\$24,192	+5%
Breakthrough Equipment & Devices	\$88,452	\$92,120	\$3,668	+4%
<b>Portfolio Administration Total:</b>	<b>\$1,476,895</b>	<b>\$1,996,741</b>	<b>\$519,846</b>	<b>+35%</b>
			<b>\$-</b>	
<b>Portfolio Total:</b>	<b>\$15,515,819</b>	<b>\$15,731,743</b>	<b>\$215,924</b>	<b>+1%</b>

## A. Workshop Commitment Table

Initiative/Offering	Commitment	Status	Action
<b>Joint Programs</b>	Pilot joint delivery of incentives with other utilities	Satisfied & On-Going	Bloomington Normal offering in partnership with Nicor continues in PY21, with multiple projects in the pipeline.
<b>Midstream/Upstream</b>	Midstream/upstream working group in SAG	Satisfied & On-Going	Actively participated in working group and now enrolling HPWH and HVAC distributors and manufacturers that distribute their own equipment. Customer participation has begun.
<b>Income Qualified</b>	Explore One-stop Shop	Satisfied & On-Going	Implemented multifamily One stop shop model. The model is focused on providing a central point of contact, ensuring a comprehensive assessment, and assisting the customer with project coordination throughout the project.
<b>Income Qualified</b>	Window A/C Replacement Pilot	Satisfied & On-Going	Window A/C pilot was implemented in PY20 with good success (296 PH units and 167 IQ units), Window A/C pilot continues for PY21.
<b>Commercial New Construction</b>	Pilot offering with new application	Satisfied & On-Going	New application in PY20 in conjunction with rollout of new construction guide. AIC continues to receive new construction applications in PY21, and has industrial expansions under discussions with several customers.
<b>Custom</b>	Add specialized agricultural offering	Satisfied & On-Going	Pilot included in PY20 design and continues with fully subscribed offering in PY21.
<b>Income Qualified</b>	Evaluate Mini-split pilot participation	Satisfied & On-Going	Pilots reviewed to determine appropriate level of implementation based on savings. A formal DHP offering is available for MF buildings of all income levels in PY21.
<b>General</b>	Conversions with NRDC	Satisfied & On-Going	AIC continues engaging stakeholders on IQ program design/implementation. Next EE plan includes path to address IHWAP capacity issues by increasing funding for high performing CAA's.
<b>Income Qualified</b>	Adopt MFIQ eligibility requirements consistent with IL Policy Manual	Satisfied & On-Going	Eligibility requirements from IL Policy Manual Ver. 2.0 built into Multifamily process.
<b>Custom</b>	Enhance marketing and outreach	Satisfied & On-Going	AIC focused on marketing and outreach to different sections of business custom sector, via Competitive Large Incentive Project and case studies, with PY20 participation and savings improved compared to PY19.
<b>Custom</b>	Add more sector specific expertise	Satisfied & On-Going	Implemented outside audit assistance in conjunction with the EAs by form of Process Energy Advisor. Several of these visits were completed in 2020, with 4 completed in Q1 PY21.
<b>Standard</b>	Guide for national accounts on Installer Certification	Satisfied & On-Going	Guide is completed and has been implemented. Included in Appendix B.
<b>Market Transformation</b>	Engage with the Midwest Market Transformation Collaborative	Satisfied & On-Going	AIC continues to engage and support projects with Midwest MT Collaborative on code compliance, Retail Products Platform, and Luminaire Level Lighting Controls.

## B. Installer Recertification Guide

### INSTALLER RECERTIFICATION GUIDE

## THE ROAD TO INSTALLER RECERTIFICATION

The Illinois Commerce Commission requires all Certified Installers to renew their certifications by June 1 annually. There is no cost to renew, but there are late fees ranging from \$100 - \$1,000 for missing the renewal due date. Please refer to our Installer Recertification Guide below to determine what you need to submit in order to complete your renewal.

### Follow these 8 steps to complete your recertification

- 1 Visit the [ICC website](#) to view the list of Certified Installers.
- 2 Search for your company name.

- 3 If you do not see your company name, then you are not currently certified. You will need to complete the First-Time Installer Certification Application. Instructions can be found on our [Installer Certification webpage](#).  
If you see your company name, CONTINUE TO STEP 4.

#### 4 Here's how to find out where your company stands:

- If the date underneath your Energy Efficiency Installer authority says 2017 or 2018 and there *is not* a box that says Compliance Filings, then you are overdue with your renewal. **CONTINUE TO NUMBER 5.**
- If the date underneath your Energy Efficiency Installer authority says 2017 or 2018 and there *is* a box titled Compliance Filings, then click the Compliance Filings box. **SKIP TO NUMBER 6.**
- If the date underneath your Energy Efficiency Installer authority says 2019, then you will need to renew your certification by **June 1, 2020. SKIP TO NUMBER 7.**
- If the date underneath your Energy Efficiency Installer authority says 2020, then you will not need to renew your certification again until **Jan. 1 - June 1, 2021. SKIP TO NUMBER 8.**

Below is an example of a contractor who became certified at the end of 2017:

#### 5 When you are overdue on your renewal, here are steps you need to take to become recertified:

- Visit the [ICC website](#) to complete the 2019 and 2020 Recertification Reports shown below.
- The ICC will levy a late charge of \$1,000 for the overdue 2019 Recertification Report. You do not need to submit the late fee payment with your report. The ICC will send you information in the mail regarding payment.
- The 2020 Recertification Report is due by **June 1, 2020.**
- You must download and complete each report separately. There are instructions on page three of each report.
- You will be asked to provide a docket number, which can be found underneath your listing; please refer back to #4 of these instructions. Your docket number is the number formatted as XX-XXXX next to the word, "Activated."
- You are now finished with these instructions and may proceed with completing and submitting the renewal reports. Remember, recertification reports will need to be submitted annually between **Jan. 1 - June 1.**

Below is an example of the Recertification Reports:

#### 6 After clicking "Compliance Filings", be sure the description says, "EE Installer Annual Recertification Report".

- If the "EE Installer Annual Recertification Report" description is **NOT** listed, do not continue these instructions any further. Instead, go back and complete **STEP 5.**
- If you see the correct description, you need to complete the 2020 Recertification Report, which you can find on the [ICC website](#), shown below. There are instructions on page three of the report.
- You will be asked to provide a docket number, which can be found underneath your listing; please refer back to #4 of these instructions. Your docket number is number formatted as XX-XXXX next to the word, "Activated."
- You are now finished with these instructions and may proceed with completing and submitting the 2020 Recertification Report. Remember, recertification reports will need to be submitted annually between **Jan. 1 - June 1.**

Below is an example of the Recertification Reports:

#### 7 You originally became certified in 2019.

- Complete the 2020 Recertification Report on the [ICC website](#), shown below. There are instructions on page three of the report.
- You will be asked to provide a docket number, which can be found underneath your listing; please refer back to #4 of these instructions. Your docket number is number formatted as XX-XXXX next to the word, "Activated."
- You are now finished with these instructions and may proceed with completing and submitting the 2020 renewal report. Remember, these recertification reports need to be submitted annually between **Jan. 1 - June 1.**

Below is an example of the Recertification Reports:

#### 8 You originally became certified in 2020.

- You can wait to complete your Recertification Report until 2021. Your report will need to be submitted between **Jan. 1 - June 1, 2021.** At that time, complete the renewal report on the [ICC website](#).

Contact one of our Program Ally staff members for more questions:

**Kasey Campbell**  
Program Ally Manager  
kcampbell@ameren.com  
309.677.7951

**Jordan Nelson**  
Program Ally Coordinator  
jnelson2@ameren.com  
309.677.5702



[AmerenIllinoisSavings.com/Apply](http://AmerenIllinoisSavings.com/Apply)

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