



ENERGY EFFICIENCY PROGRAMS



ENERGY EFFICIENCY PROGRAMS

# 4<sup>TH</sup> QUARTER REPORT

Program Year 2020 | 01.01.20 – 12.31.20

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*Data presented in this document is based on preliminary results and is subject to revision and evaluation adjustments.*

## PORTFOLIO SUMMARY

Ameren Illinois Company d/b/a Ameren Illinois (“Ameren Illinois”) provides this quarterly report for the period of January - December 2020 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 Q4, the portfolio has achieved 125% of its electric PY2020 electric implementation plan savings goal of 356,347 MWh and 114% of its gas PY2020 implementation plan savings goal of 3,436,634 therms.**

# PORTFOLIO SUMMARY

## BUSINESS PROGRAM IMPLEMENTATION STAFF TIMELINE

### COVID-19 Implementation Impacts

Initiative	Q1 (March)	Q2 (April – June)	Q3 (July – Sept.)	Q4 (Oct. – Dec.)
<b>Standard *</b>	Face-to-Face interaction limited to mission critical activities only	<b>April</b> - Alt. option(s) approved <b>May</b> - Initiated implementation of alt. option(s) <b>June</b> - Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Continue (Cont.) delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Continue (Cont.) delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>Custom *</b>	Face-to-Face interaction limited to mission critical activities only	<b>April</b> - Alt. option(s) approved <b>May</b> - Initiated implementation of alt. option(s) <b>June</b> - Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>RCx</b>	Face-to-Face interaction limited to mission critical activities only			
<b>Streetlighting *</b>	No Impact	<b>April</b> - Alt. option(s) approved <b>May</b> - Initiated implementation of alt. option(s) <b>June</b> - No Impact	No Impact	No Impact

*\*Alternative (alt.) options identified on page 7*

# PORTFOLIO SUMMARY

## RESIDENTIAL IQ PROGRAM IMPLEMENTATION STAFF TIMELINE

### COVID-19 Implementation Impacts

Channel	Q1 (March)	Q2 (April – June)	Q3 (July – Sept.)	Q4 (Oct. – Dec.)
<b>IQ – Registered Program Ally *</b>	Suspended field activities	<b>April</b> - Alt. option(s) approved <b>May</b> - Initiated implementation of alt. option(s) <b>June</b> - Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>IQ - CAA</b>	Activities suspended	<b>April/May</b> - Activities suspended <b>June</b> - Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>IQ – Multifamily *</b>	Limited visits to customers already in pipeline	<b>April</b> - Limited visits to customers already in pipeline <b>May</b> - Alternative option approved <b>June</b> - Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only
<b>IQ – Smart Savers</b>	Self Install Free Thermostat Only	Self Install Free Thermostat Only	Program Ally installation began	Program Ally installation continued

*\*Alternative (alt.) options identified on page 7*

# PORTFOLIO SUMMARY

## RESIDENTIAL PROGRAM IMPLEMENTATION STAFF TIMELINE

### COVID-19 Implementation Impacts

Initiative	Q1 (March)	Q2 (April – June)	Q3 (July – Sept.)	Q4 (Oct. – Dec.)
<b>Appliance Recycling</b>	Activities suspended	<b>April/May</b> - Activities suspended <b>June</b> - Authorized curbside/garage pickup	Re-entry into home interior authorized when necessary	Cont. re-entry into home interior when necessary
<b>DDEP *</b>	School kit presentations suspended	<b>April</b> - Alt. options(s) approved <b>May/June</b> - Initiated implementation of alt. option(s)	Delivery of alt. option(s)	Continued delivery of alt. option(s)
<b>Retail Products</b>	Field staff suspended from in-store visits	<b>April/May</b> - Field staff suspended from in-store visits <b>June</b> - Store visits authorized	Store visits continue	Store visits continue
<b>Heating &amp; Cooling</b>	Initiative continues to be delivered by non-program staff			
<b>Multifamily *</b>	Limited visits to customers already in pipeline	<b>April</b> - Limited visits to customers already in pipeline <b>May</b> - Alternative option approved <b>June</b> - Delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only	Cont. delivery of alt. option(s). Face-to-Face interaction limited to mission critical activities only

*\*Alternative (alt.) options identified on page 7*

### ALTERNATIVE OPTIONS THROUGH Q4

#### » Business Program

- **Instant Incentives Promotion** – 30% increase in incentives on all instant incentives midstream products
- **Streetlights** – additional 200 added to 2020 schedule
- **Standard Lighting Bonus** – Increased incentive on standard lighting measures, with a 20% coupon offered to customers who register for the Energy Analyzer tool
- **Small Business Direct Install Extension** – Additional funding to extend offering through the end of the year

#### » Residential Program

- **Registered Program Ally Channel** – Implementation of energy efficiency kits, virtual instant savers assessments, addition of customer bonus, and reduction in number of work scopes for the year
- **Multifamily/PHA Channel** – Implementation of energy efficiency kits, virtual property in-unit assessments with energy efficiency products shipped to site \*(approved on 05.29.20)
- **Direct Distribution of Efficient Products (School Kits)** – Multi-faceted approach on presentations, all presentations began in Q3
- **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

### PY2020 PORTFOLIO SUMMARY

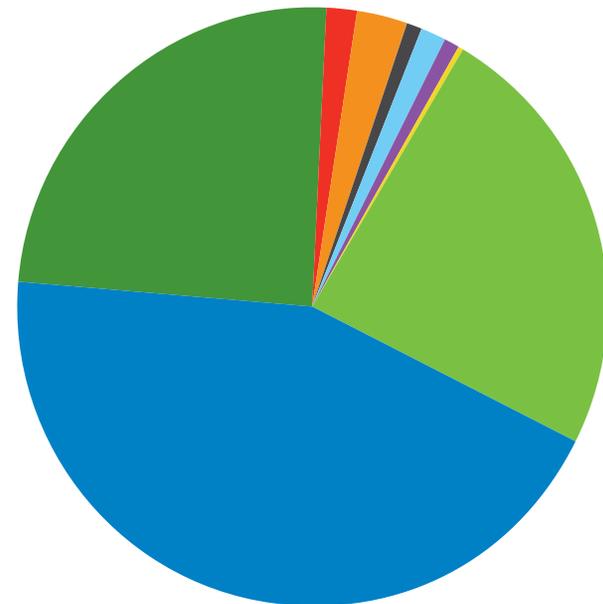
Electric Implementation Plan Savings Goal Achieved.....	125%
Gas Implementation Plan Savings Goal Achieved.....	114%
Actual Net MWh.....	445,689
Actual Net Therm.....	3,912,003
PY2020 MWh Implementation Plan Savings Goal.....	356,347
PY2020 Therm Implementation Plan Savings Goal.....	3,436,634
PY2020 MWh Filed Goal .....	378,767

PY2020 Therm Filed Goal.....	3,074,613
Third Party Electric Spend .....	\$8,716,202.93
Diverse Vendor Spend.....	\$13,796,743.00
Diverse Program Ally Spend.....	\$7,872,000.00
Income Qualified Spend .....	\$21,441,271.34
Actual Spend.....	\$110,647,222.18
PY2020 Budget.....	\$114,265,756.01

### PY2020 ENVIRONMENTAL IMPACT



### SMART THERMOSTATS INCENTIVIZED



Retail Products	21,344
Helpfulness Campaign	11,730
Smart Savers	11,634
HVAC	1,421
Business	833
IQ SF	700
IQ MF	440
MF NON-IQ	291
PHA	66
IQ-CAA	8

Total Number of Smart Thermostats Incentivized: 48,467

## RESIDENTIAL PROGRAM

### PORTFOLIO-LEVEL NARRATIVE

The Residential Program includes seven initiatives that address key electric and natural gas end-uses in single family homes and multifamily properties. The Residential Program offers a range of educational opportunities and incentives for consumers to implement a series of energy efficiency improvements. Direct installation initiatives, targeted primarily to low-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.

#### Q4 Update Residential Program (All Initiatives):

» Through Q4, the Residential Program achieved 121,519 MWh (126%) of its electric PY2020 implementation plan savings goal of 96,766 MWh and 2,302,950 therms (114%) of its gas PY2020 implementation plan savings goal of 2,014,051 therms.<sup>1</sup>

#### Q4 Update Residential Program (Non-IQ):

» Through Q4, the Residential Program (Non-IQ) achieved 72,866 MWh (117%) of its electric PY2020 implementation plan savings goal of 62,210 MWh and 1,525,240 therms (116%) of its gas PY2020 implementation plan savings goal of 1,320,037 therms.

#### Q4 Update Residential Program (IQ Channels):

» Through Q4, the Residential Program (IQ) achieved 48,653 MWh (141%) of its electric PY2020 implementation plan savings goal of 34,556 MWh and 777,710 therms (112%) of its gas PY2020 implementation plan savings goal of 694,014 therms.<sup>2</sup>

*Note: SAG 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.*

### 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, heat pump water heaters, and smart thermostats.*

#### Q4 Update:

- » Through Q4, 4,546 net MWh and 71,781 net therm savings achieved (137% and 66%, respectively, of implementation plan savings goals).
- » 1,419 smart thermostats were incentivized in PY2020.
- » 544 Air Source Heat Pumps (including early replacement), 4,195 Central Air Conditioning (CAC) units (including early replacement) and 20 Heat Pump Water Heaters (HPWH) were incentivized in PY2020.
- » Heat Pump Water Heater Midstream Pilot kick-off completed with 33 distributors enrolled.
- » Online HVAC incentive portal implemented and is being utilized by over 30 Program Allies.
- » 4,979 projects and 42 building envelope projects completed in PY2020.



<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 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.*

#### Q4 Update:

- » **Through Q4, 2,468 net MWh savings achieved (87% of electric implementation plan savings goal).**
- » 4,201 customers participated with 909 freezers, 3,703 refrigerators, and 120 Room Air Conditioners successfully recycled in PY2020.
- » Contactless pickups continued through Q4, with 84% of pickups occurring outdoors.
- » In Q4, cross collaboration with Multifamily yielded recycling of over 260 large appliances and window air conditioners.

### 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.*

#### Q4 Update:

- » **Through Q4, 735 net MWh and 8,232 net therm savings achieved (52% and 34%, respectively, of implementation plan savings goals).**
- » 88 properties completed with a total of 1,582 units receiving direct install measures, through Q4.
- » 41 Building Envelope projects completed through Q4.
- » 66 smart thermostats installed, through Q4.
- » Through Q4, 28 DHP units were completed within 2 buildings.
- » Expanded outreach to regional Public Housing properties and USDA contacts for Window/Wall A/C pilot.

### 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.*

#### Q4 Update:

- » **Through Q4, 392 net MWh and 3,214 net therm savings achieved (77% and 39%, respectively, of implementation plan savings goals).**
- » 15 properties with 786 units completed in PY2020.
- » 291 smart thermostats installed in PY2020.



## RESIDENTIAL PROGRAM

### 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:

1. IQ-Registered Program Ally Channel – serving low- and moderate-income single family homes
2. IQ-Community Action Agency Channel – serving low-income single family homes
3. IQ-Multifamily Channel– serving low- and moderate-income multifamily homes
4. IQ-Smart Savers Channel – serving low- and moderate-income family homes
5. IQ-DDEP- distribute kits through community and other outreach efforts

### IQ Homes Served PY2020

Community Kits (includes MDI)	2,456
CAA Channel Comprehensive Retrofits	298
Registered Program Ally Channel Direct Install	688
Registered Program Ally Channel Comprehensive Retrofits	877
Joint Pilot with Nicor	11
Smart Savers Channel	11,634
School Kits (IQ Only)	6,378
Multifamily In-Units	4,093
SAVE Kits	8,895
Food Bank Kits	5,000
Total Number of Homes	40,330

#### ***IQ: Registered Program Ally Channel – Low- to 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.*

#### **Q4 Update:**

- » **Through Q4, 9,242 net MWh and 592,555 net therm savings achieved (118% and 113%, respectively, of implementation plan savings goals).<sup>3</sup>**
- » In PY2020, 688 instant savers assessments were completed.
- » 877 projects were completed, through Q4.
- » Through Q4, 700 smart thermostats were installed.
- » Safe and Virtual Energy-Efficiency (SAVE) Kit offering was implemented through Q4, with 8,895 distributed.
- » In Q4, completed foodbank offering with 5,000 kits delivered.
- » Implemented a joint pilot with Nicor in Bloomington-Normal area throughout Q4, with 11 projects completed by a diverse Program Ally.

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

## RESIDENTIAL PROGRAM

### **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.

#### **Q4 Update:**

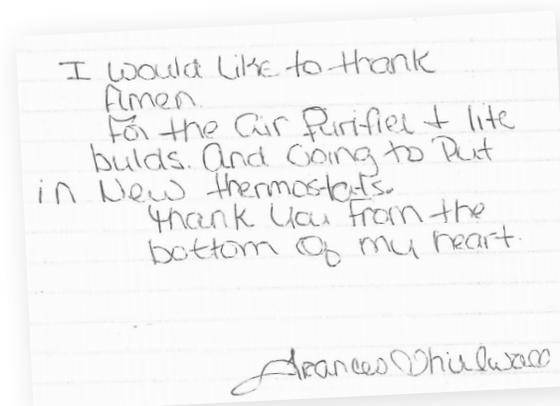
- » Through Q4, 565 net MWh and 45,328 net therm savings achieved (58% and 50%, respectively, of implementation plan savings goals).
- » 298 homes served with 8 smart thermostats installed, through Q4.
- » Throughout PY2020, partnered with 21 agencies.
- » Attended calls with DCEO/IACAA/Utility staff to increase collaboration and communication amongst parties.

### **IQ: Multifamily Channel – Low- and Moderate-Income**

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

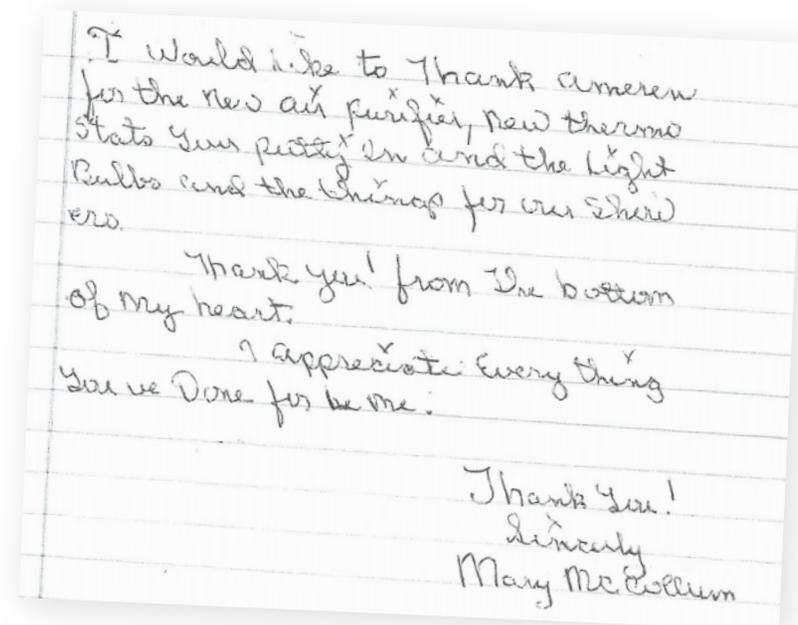
#### **Q4 Update:**

- » Through Q4, 1,225 net MWh and 5,278 net therm savings achieved (72% and 23%, respectively, of implementation plan savings goals).
- » 105 Direct Install Measure projects completed, 1,725 units served, and 440 smart thermostats installed in PY2020.
- » 90 Window Air Conditioning units installed through Q4.
- » 49 ductless heat pumps installed through Q4.
- » Continued using a data driven approach to identify properties with a high probability of electric resistance heat.
- » In Q4, distributed over 1,000 air purifiers at no cost to the properties or customers with a focus on serving seniors and individuals with disabilities.



I would like to thank  
Ameren  
for the Air Purifier + life  
bulbs. And going to put  
in New thermostats.  
Thank You from the  
bottom of my heart.

Aracelis Chiles



I would like to Thank Ameren  
for the new air purifier, new thermo  
stats your pretty in and the light  
Bulbs and the things for our share  
ers.

Thank you! from the bottom  
of my heart.

I appreciate every thing  
you've done for me.

Thank You!  
Sincerely  
Mary McWilliam

## RESIDENTIAL PROGRAM

### ***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.*

#### **Q4 Update:**

- » **Through Q4, 15,139 net MWh and 116,254 net therm savings achieved (149% of electric implementation plan savings goals).<sup>4</sup>**
  - 11,634 smart thermostats incentivized in PY2020.
  - During Q4, 14 program allies were active and completed projects.
  - 62% of Program Ally incentives paid to diverse or local Program Allies.
  - 6% of Program Ally incentives paid to Non Profit Program Allies.

### **RESIDENTIAL DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE (NON SCHOOL KITS)**

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

#### **Q4 Update:**

- » **Through Q4, 5,965 net MWh and 18,295 net therm savings achieved (574% and 32%, respectively, of implementation plan savings goals).**
- » 372 Appliance Recycling kits and 1,136 Community Kits distributed through Q4.
- » Due to the inability to host 'in person' events, grants were applied, customers received a letter, and Payment Assistance kits were mailed to customers, with 1,919 distributed, through Q4.
- » During Q4, distributed over 44,000 energy efficiency products to 75 local food banks in the Ameren Illinois service territory.



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

## RESIDENTIAL THIRD-PARTY PROGRAMS

### PORTFOLIO-LEVEL NARRATIVE

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 Q4, Third-Party Programs achieved 75,735 MWh (128%) of its electric PY2020 implementation plan savings goal of 59,303 MWh and 1,629,972 therms (113%) of its gas PY2020 implementation plan savings goal of 1,440,870 therms.**

### 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.*

#### Q4 Update:

- » **Through Q4, 73,534 net MWh and 1,563,403 net therm savings achieved (128% and 113%, respectively, of implementation plan savings goals).**
- » 33,074 smart thermostats, 66,438 advanced power strips, 1,247 air purifiers, and 1,137,255 specialty bulbs were incentivized during PY2020.
- » 1,390 refrigerators, 81 freezers, 2,587 clothes washers, 1,357 electric clothes dryers, and 5,767 dehumidifiers were incentivized during PY2020.
- » Approximately 1,638,838 units were sold through this initiative during PY2020

### RESIDENTIAL DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE (SCHOOL KITS)

*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.*

#### Q4 Update:

- » **Through Q4, 2,201 net MWh and 66,569 net therm savings achieved (111% and 110%, respectively, of implementation plan savings goals).**
- » 7,503 school kits distributed in PY2020.
- » Conducted 94 virtual classroom presentations in PY2020.

## BUSINESS PROGRAM

### PORTFOLIO-LEVEL NARRATIVE

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, 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. Ameren Illinois has 358 commercial and industrial customers with demands between 1 and 10 MW.

- » **Through Q4, the Business Program achieved 248,266 MWh (120%) of its PY2020 electric implementation plan savings goal of 206,721 MWh and 1,609,053 therms (113%) of its PY2020 gas implementation plan savings goal of 1,422,583 therms.**<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](https://www.amerenillinois.com/savings) website. Program Allies – including contractors, retailers, and distributors, along with program Energy Advisors, are the main sales force promoting and educating consumers about the Standard Initiative. Midstream offerings in lighting technologies provide simple access to incentives for business customers from product distributors.*

#### Q4 Update:

- » **Through Q4, 188,515 net MWh and 448,467 net therm savings achieved (111% and 129%, respectively, of implementation plan savings goals).**
- » 2,010 instant incentive projects processed, through Q4.

- » 833 smart thermostats were incentivized, in PY 2020.
- » 12,700 electric applications and 470 gas applications received, through Q4.
- » Initiatives and offerings completed and obtained the following savings through Q4:

- Standard Lighting – 36,405 net MWh
- Small Business Direct Install – 92,079 net MWh
- Instant Incentives – 40,449 net MWh
- HVAC – 213,677 net therms
- VFD's – 12,890 net kWh

### SMALL BUSINESS DIRECT INSTALL

*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.*

#### Q4 Update:

- » 145 active Program Allies performed 4,863 total assessments within Small Business Direct Install in PY2020.
- » In Q4, assessment to pipeline conversion rate was 62%.
- » 2,991 projects completed in PY2020.
- » 20 Program Allies received training on new refrigeration measures throughout Q4.
- » Completed 74 Building Envelope projects focusing on low-income communities in 22 school districts, through Q4.

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

### 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.*

#### Q4 Update:

- » **Through Q4, 23,743 net MWh and 1,100,935 net therm savings achieved (88% and 112%, respectively, of implementation plan savings goals).<sup>6</sup>**
- » 18 Competitive Large Incentive Projects (CLIP) were completed in PY2020.
- » Through Q4, financing discussions occurred with 48 specific large customers and 11 referred to list of financing companies.
- » 7 Metering and Monitoring and 30 Feasibility Studies in progress throughout the year with 8 fully completed.
- » 3 Public Sector Energy Assessments were completed through Q4.
- » Completed 20 process energy advisor (PEA) visits in PY2020.



<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.*

#### Q4 Update:

- » **Through Q4, 4,688 net MWh and 59,651 net therm savings achieved (113% and 62%, respectively, of implementation plan savings goals).**
- » 6 Compressed Air projects completed in PY2020.
- » 3 Large Facility projects completed in PY2020.
- » In Q4, 4 newly trained Registered Service Providers worked on their first project.
- » Virtual Commissioning performed well throughout Q4, with over 453 MWh finalized.

## BUSINESS PROGRAM

### 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.*

#### Q4 Update:

- » Through Q4, 31,320 net MWh savings achieved (504% of implementation plan savings goals).

#### *Street Lighting: Municipal-Owned*

- » 11 projects were completed in PY2020.
- » Throughout Q4, 1,566 streetlights were upgraded.
- » One of the largest municipalities in the Ameren Illinois service territory upgraded 1,530 streetlights.

#### *Street Lighting: Ameren-Owned*

- » 51 communities completed upgrades in PY2020.
- » Through Q4, 47,948 streetlights were upgraded.



## 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.*

### **Q4 Update:**

- » **Through Q4, 75,904 net MWh savings achieved (144% of implementation plan).**
- » VO achieved an average of 4.31% reduction across the 125 circuits deployed and measured in PY2020.



## BREAKTHROUGH EQUIPMENT & DEVICES

### 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.*

#### Q4 Update:

- » Market Development Initiative 2020 Recap Video: <https://vimeo.com/489084388>
- » The MDI completed the following through Q4:
  - 129,912 customers engaged.
  - 287 outreach events, including virtual events launched during COVID.
  - 13 internship positions within 11 organizations.
    - Also provided 7 staffing grants to 5 employers who were focused on employee retention due to COVID.
  - 16 scholarships awarded at 6 schools.
  - 12 staffing grants funded through MDI projects with community partner.
  - 3 equipment grants provided to community partner network.
  - 10 outreach grants provided to community partner network.
  - 36 co-pay grants totaling \$102,949.03 awarded to assist small businesses, diverse businesses, and non-profit organizations to remove financial barriers to participation in SBDI offering.
  - 446 partner referral projects to residential and business programs.
  - Distributed 668 smart home kits to PY2020 Smart Savers participants at no cost to the customer. Kits were distributed via opt-out emails and contained a Google Home Mini, 4 smart LED bulbs, 1 advanced power strip, and 2 smart plugs. Each kit also included detailed instructions for use to help customers continue their journey with energy efficiency and energy management through smart devices.
  - 9,161 energy efficiency kits (SAVE kits and standard kits) provided to customers through community partner referrals.

#### » Additional highlights:

- Launched project with Peoria Guild of Black Artists to provide new concepts and review of existing marketing materials.
- Completed 3 smart thermostat education videos geared towards senior audience in partnership with Senior Independent Living Collaborative:
  - Video 1: [Benefits of an Smart Thermostat](#)
  - Video 2: [Step-by-Step Installation Instructions](#)
  - Video 3: [Mobile Application Set-up](#)

### ENERVEE 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.*

#### Q4 Update:

- » Efficient Choice Tool continued in Q4 with over 57,000 customer visits since launch in Q3.
- » In Q4, the top products searched were refrigerators, electric water heaters, washers, and smart thermostats.



## Clayton Jones

### AMEREN ILLINOIS OPPORTUNITIES SCHOLARSHIP

- My field of study is industrial technology.
- It means a lot to me to have a scholarship. It helped me financially.
- I'm thankful for the scholarship.



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## Thomas Miller

### AMEREN ILLINOIS OPPORTUNITIES SCHOLARSHIP

- My goal is to learn and better myself. I am currently working toward certificates in Renewable Energy and Welding.
- This generous donation to my financial well being, is perceived as grace. A sign/signal that I am doing something right.
- Thank you, I truly appreciate your kindness and generosity.



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## Nyptian Pelempoko

### AMEREN ILLINOIS OPPORTUNITIES SCHOLARSHIP

- I am a student in an industrial technology field. I already have an industrial maintenance certificate and an automation certificate and am looking to further my career.
- Receiving this scholarship gave me hope to continue my studies. This scholarship is a great help for paying my educational expenses and will allow me to concentrate more.
- Thank you for your generosity and support. Thank you for making my dreams come true.



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## William Asbury IV

### AMEREN ILLINOIS OPPORTUNITIES SCHOLARSHIP

- I am currently finishing up my AAS in industrial technology this year, and I am studying a plethora of subjects that will help me secure the career that I want. I have been learning electrical, hydraulics, pneumatics, welding, HVAC, and renewable energy among others.
- This has been an exceedingly difficult year, and we have all been affected greatly by the pandemic. While this year has been extremely trying, you have managed to help make it a phenomenal year for me. It may have been a year of quarantine, disease, job-loss, and a devastated economy, but it has also been a year for achieving goals, self-improvement, and growth.
- I am honored that you have selected me for the Ameren Illinois Opportunity Scholarship. You are helping me reach my potential, to have an opportunity to obtain a career that is meaningful to me, and have an amazing chance to learn and evolve, it means the world to me.



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## MARKETING EDUCATION AND AWARENESS

### PORTFOLIO

- » COVID-19 recovery website reached over 6,000 customers throughout 2020.
- » Held Program Ally PY21 kickoff virtual events in Q4, with 457 in attendance.
- » Offered 3 heat pump water heater informational webinars for manufactures to increase participation through Q4.

### RESIDENTIAL

#### Through Q4 Update:

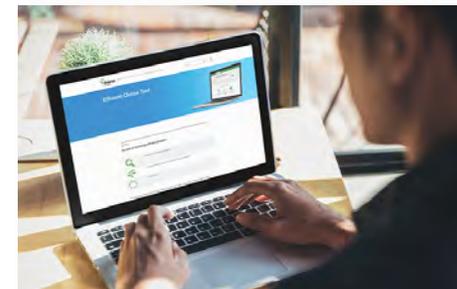
- » Launched “Efficient Choice Tool”, powered by Enervee, campaign to all residential customers in Q4 and saw tremendous engagement with over 57,000 customers utilizing the Tool.
- » In Q4, received E Source award for creative excellence in utility advertising for a spring smart thermostat promotion.
- » Energy Efficiency along with customer service and credit & collections worked together in PY2020 to develop a COVID-19 recovery website allowing customers to find the following steps to recovery including:
  - Payment assistance - various ways to obtain financial assistance (Fresh Start Funding for Low/Mod customers, LIHEAP funding etc.).
  - Payment Options—promoting flexibility/customer choice and deferred pay agreements (pick your due date, budget billing etc.).
  - Contact information for customers to reach an Ameren Illinois Customer Service Representative (residential and business customer service contact information).
  - Lower your future bills section promoting energy efficiency options for residential & business customers along with contact information.
- » Flyers containing information about the COVID-19 recovery website were developed and distributed to community action agencies and community based organizations throughout the service territory in Q4.

### BUSINESS

#### Through Q4 Update:

- » In Q4, held the 11th Annual Business Symposium, and first ever virtual event, on October 21 and 22 with over 650 participants, exceeding our goal of 500.
- » Launched a second Competitive Large Incentive Project (CLIP) marketing campaign in Q4, aimed at increasing the custom project pipeline, which resulted in 52 applications more than doubling the 22 applications received during the previous CLIP effort.
- » In PY2020, 150 small facility assessment requests were received with a strong Q4 of 52 requests compared to 37 in Q3.
- » Published a case study for Fondulac Library air purification project, representing a success in the midst of COVID-19 in Q4.
- » In Q4, completed 3 Business Program videos highlighting Energy Advisors and successful projects completed safely due to COVID-19.

The screenshot shows a virtual event interface. On the left, there are two time slots: 11:30am - 12:15pm for a keynote titled "Beyond Energy Efficiency" and 12:30pm - 1:20pm for a breakout session titled "Session 1 - Incentives 101". On the right, there is a video feed of a speaker and a promotional graphic for "The 2020 Ameren Illinois Business Symposium". The graphic includes the text "Healthy Buildings and Energy Efficiency Nexus" and lists speakers: Nora Wang, Esq., P.E., Esq., and Service Director for Resiliency, American Council for Energy Efficiency Economy.



A promotional graphic for the "2021 CUSTOM CLIP COMPETITIVE LARGE INCENTIVE PROJECT". The graphic features a large green dollar sign on a background of blue and green paper clips. At the bottom, the website "AmerenIllinoisSavings.com/CLIP" is displayed.

## NEW MEASURES

No new measures.

## BUDGET SHIFTS - ELECTRIC

No budget shifts.

## BUDGET SHIFTS - GAS

No budget shifts.