



# CY2023 THIRD QUARTER REPORT



ComEd has received the ENERGY STAR Partner of the Year Award for Sustained Excellence for the 11th consecutive year. ComEd customers have saved more than \$8.7 billion on energy bills and avoided close to 67 billion pounds of carbon through its energy efficiency programs.

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# Portfolio Summary

**1,006,863**

Actual Net MWh YTD

**1,599,866**

2023 MWh Forecast

**\$298,979,196**

Actual Spend YTD

**\$439,746,496**

2023 Budget

## PORTFOLIO

- Through Q3, the portfolio has achieved approximately 63% of its 2023 savings forecast.
- Since its inception in 2008, the ComEd Energy Efficiency Program has saved ComEd customers over \$8.7 billion on their electric bills.

## RESIDENTIAL IMPLEMENTATION

- Through Q3, market rate residential programs have achieved 70% of their combined 2023 savings forecast of 122,413 MWh, not including converted therms.
- Through Q3, income eligible residential programs have achieved 70% of their combined 2023 savings forecast of 425,551 MWh, not including converted therms.
- Customers have received over 1,779,900 incentives through Q3.
- Over 18,700 homeowners & tenants – consisting of over 12,400 income eligible participants - have received direct install products from assessments through Q3.

## C&I IMPLEMENTATION

- Through Q3, private sector programs have achieved 66% of their combined 2023 savings forecast of 547,133 MWh.
- Public sector programs have achieved 65% of their combined 2023 savings forecast of 108,863 MWh.
- Through Q3 over 6,200 private sector projects and over 900 public sector projects have been completed.

# Residential Implementation Programs

## Residential Direct to Consumer Program Highlights

- **Home Energy Savings (HES) - Home Energy Assessment (Market Rate and Income Eligible)** – In Q3, the offering successfully completed the transition to Utility Energy Services (UES), a minority-owned business as the new vendor delivering assessment and direct installation services. UES is actively serving ComEd customers with both in-home and virtual Home Energy Assessment options, working as a subcontractor to Resource Innovations. In July, the offering introduced four new thermostat options for customers which has since resulted in a 4% increase in overall installation rates. The offering was also able to expand relationships with community partners in Q3. The Metropolitan Mayors Caucus (MMC) conducted asset mapping research in the HES offering's nine target communities to identify opportunities for municipal pathways to engage customers in the offering. MMC identified 120 opportunities to promote HES through pathways such as municipal committees, newsletters, and departments. To leverage these opportunities, MMC is hiring a full-time outreach staff member dedicated to supporting municipal outreach efforts on behalf of HES. This outreach will support the goal of increasing income eligible participation.
- **Home Energy Savings (HES) - Income Eligible Retrofits** – In Q3, a new HES Energy Efficiency Service Provider, Comfort 1st, began production in Rockford in partnership with Habitat for Humanity of Rockford, which is a new HES enrollment partner. To date, Comfort 1st has completed four retrofit projects and has 28 in production, 23 of which are referrals from Habitat for Humanity. Overall, the retrofit offering completed over 400 projects in Q3, including 48 that were braided with the Illinois Home Weatherization Assistance Program (IHWAP).
- **Multi-Family Energy Savings (MFES) - (Market Rate, Income-Eligible, and Public Housing)** – In Q3, 979 projects were completed in income eligible properties, resulting in over 14,000 net MWhs of savings and over \$8.3M in incentives distributed, of which \$3.2M went to Diverse Business Enterprises (DBEs). The EESP network increased month over month production for income eligible customers resulting in a monthly incentive disbursement of \$2.1M in July, \$2.4M in August, and \$3.8M in September. The MFES program completed projects in 53 Public Housing properties resulting in \$693,380 in total incentives and 1,040 MWhs of savings. The DeKalb County Housing Authority (CHA) took advantage of the heat pump incentives, converting inefficient electric resistance systems in three of the DeKalb CHA buildings (19 units), which amounted to \$228,000 in incentives and saved 560 MWhs. Overall, in Q3, the MFES program installed 192 heat pumps in income eligible and public housing properties. The MFES team exhibited and presented at the Illinois National Association of Housing and Redevelopment Officials Annual Meeting on August 10-11 which resulted in assessments being scheduled for Lake County Housing Authority (LCHA). LCHA is expected to begin completing projects in early 2024. Attendees of the meeting included PHA executive staff from throughout Illinois and several HUD representatives. The MFES Program currently has 106 EESPs in the network, with 25% being certified DBEs.
- **Whole Home Electrification (Single and Multi-Family Upgrades Electrification - IE)** – In Q3, the Whole Home Electrification offering converted an additional 26 single family income eligible homes to all electric. Thus far in 2023, the offering has fully electrified 59 income eligible single-family homes throughout the service territory. All participants were modeled to have energy bill savings before proceeding with the project. The program team continued

# Residential Implementation Programs

scoping and construction across five income-eligible multi-family properties representing 169 units, with all work expected to complete in 2023. The team is focusing Q4 efforts on reaching back to customers that were previously served with weatherization upgrades that are identified to be a good fit for the Whole Home Electrification offering based on the known characteristics of their home.

- **Home Energy Reports (HER)** – For Q3, Home Energy Reports completed a High Usage Alert (HUA) auto-enrollment for 350,000 Home Energy Report recipients, which will enable these customers to receive an alert if their current billing cycle usage is 30% higher or more compared to the same period last year. The idea is that customers will have the opportunity to take action to reduce their usage before their next bill. Also, within Q3, the new version of Home Energy Reports officially launched. The version 3.0 report features a fresh look and feel, an Energy Use Benchmark (replacing smiley faces used historically), an updated self-comparison view to allow customers to quickly compare their current usage to the same time during the previous year, the ability to have customized seasonal reports, and more.

Program	Net MWh YTD	% Savings Achieved of YE Forecast	Program Participation YTD	Unit Definition
Home Energy Savings – Market Rate Assessment	242	41%	5,159	Homes
Home Energy Savings – Income Eligible Assessment	3,512	67%	4,518	Homes
Home Energy Savings – Income Eligible Retrofits	4,288	59%	2,441	Homes
Multi-Family Energy Savings – Income Eligible	15,847	74%	Tenant Unit Direct Installation: 7,892 Building Upgrades: 1,967	Projects
Multi-Family Energy Savings – Public Housing	1,422	88%	Tenant Unit Direct Installation: 0 Building Upgrades: 37	Projects
Multi-Family Energy Savings – Market Rate	5,290	99%	Tenant Unit Direct Installation: 1,163 Building Upgrades: 147	Projects
Whole-Home Electrification	1,722	36%	Single Family Homes: 59 Multi-Family Buildings: 0 Tenant Unit Conversions: 0	Projects
Home Energy Reports	48,264	76%	Home Energy Reports (print): 3,088,501 Home Energy Reports (email): 7,067,489 High Usage Alerts: 1,798,866 Weekly Usage Reports: 6,332,957	Reports and Alerts

# Residential Implementation Programs

## Residential Channels Program Highlights

- **Retail (Market Rate and Income Eligible)** – In Q3, the program enhanced efforts to serve income-eligible customers with unique, higher post purchase rebates on qualifying products. Higher rebates range from \$35 to \$300 for various ENERGY STAR certified products including water dispensers, air purifiers, dehumidifiers, refrigerators, induction cooktops, clothes washers, electric clothes dryers, and heat pump clothes dryers. A “Back to School” limited time offer (LTO) was launched in August to select income-eligible customers, which included an advanced power strip, desk lamp, and two nightlights. During the LTO’s timeframe of 8/24/23 to 9/12/23, 7,828 total orders were redeemed from 28,811 sessions resulting in a 27.2% conversion rate. Q3 marketing campaigns included two promotional email campaigns in August for air purifiers, the Back to School LTO, and September bill insert featuring smart thermostats. For Q3, we engaged with approximately 2,800 customers at 62 in-store events at participating retailers such as The Home Depot, Lowes, Menards, Walmart, and Ace Hardware. Large floor decals were also added to showcase ComEd presence in-store during engagements. The floor decals allow customers to easily find the ComEd representative inside the store for any questions about ComEd discounts and rebates available on energy-efficient appliances and home products. Due to unforeseen organizational changes with the Midstream Recycling vendor, that offering concluded in Q3.
- **Product Distribution (Market Rate and Income Eligible)**
  - **Food Bank Distribution** – The program has distributed almost 2,700,000 products year to date, including over 2,600,000 ENERGY STAR certified lighting products plus 38,200 water-saving products, 18,424 advanced power strips, and almost 29,000 weatherization measures, through 4 major food bank partners (Greater Chicago Food Depository; Northern Illinois Food Bank; River Bend Food Bank; Illinois Partners In Hope) and 821 participating food pantries. In addition, the program hosted 23 in-person events during Q3 where outreach staff interacted directly with customers about ways to save energy; an additional 13 events were supported as grab-and-go due to pantry space constraints. A food distribution event in July at Elgin Community College, sponsored by Northern Illinois Food Bank, provided an opportunity to distribute energy saving products and informational material to an estimated 800 income eligible customers who attended.
  - **Income Eligible Kits** – The program has distributed almost 41,000 kits through the end of Q3 of the total year-end target of 67,309 kits for 2023. Over 34,000 of these kits were initiated from leads provided by Community and Economic Development Association of Cook County (CEDA), 2,000 through leads from Community Action Partnership of Lake County, and 3,000 through leads from Tri-County Opportunities Council. There are currently 8 total participating Community Action Agencies (CAAs); these organizations continue to be a key provider of customer outreach, recruitment, and enrollment leads for kit distribution efforts.

# Residential Implementation Programs

- **School Kits** – Through the end of Q3, activity within this channel exceeded 95% of the total year-end goal of 49,565 kits for 2023. This activity includes kits received by almost 33,000 students whose classrooms participated during the spring and early fall school terms plus over 14,000 students whose classrooms have registered to participate during Q4.
- **Residential New Construction (Affordable Housing and Electric Homes)** – Through the end of Q3, the Affordable Housing New Construction offering completed 1 project with a total of 104 housing units, of which 84 were designed for income eligible customers. To date the program has completed 4 projects. The program was showcased on the Chicago Tribune for its contributions to reduce carbon footprint, improve air quality and lower the cost for tenants through its Passive House pilot. The Electric Homes New Construction (EHNC) offering has completed 36 all-electric projects year-to-date. Electric Homes and Affordable Housing new construction have been coordinating with IL Green Alliance to profile high-performance all electric housing and connection to affordable housing, neighborhood revitalization, and workforce development.
- **Heating and Cooling** – Year-to-date, the program has processed 7,014 incentives. These consist of 2,337 air source heat pumps, 1,143 mini split heat pumps, 1,254 smart thermostats, and 1,718 central air conditioners (CACs). Incentives for central air conditioner concluded as of July 1, with service providers able to submit incentives for projects installed prior to July 1 for 60 days. During Q3, the program held webinars to help roll out several program announcements, which included SEER2 industry and eligibility changes, incentive changes to heat pumps and future heat pump training requirements in order to help contractors properly prepare for 2024.

Program	Net MWh YTD	% Savings Achieved of YE Forecast	Program Participation YTD	Unit Definition
Retail – Market Rate	18,775	50%	Home Products: 298,800	Appliances
Retail – Income Eligible	65,881	54%	Home Products: 153,801 Lighting: 1,320,307	Appliances; Light Bulbs
Product Distribution – Market Rate	3,367	62%	17,783	School Kits
Product Distribution – Income Eligible	207,303	77%	2,690,473	Bulbs and weatherization measures
Residential New Construction – Affordable Housing	830	95%	4	Projects
Residential New Construction – All Electric	81	37%	36	Homes
Heating and Cooling - Midstream/ Rebates	9,560	100%	7,014	Units

# C&I Implementation Programs

## Business Program Highlights

- **Small Business (Private and Public)** – Year to date 4,823 projects are completed resulting in 186,871 net MWh. The program incentive budget was fully reserved as of 9/30/2023 and is on target to meet 2023 goals. Completing those projects will be the focus for Q4 along with a campaign to build 2024 project pipeline in Disadvantaged Communities.
- **Standard (Private and Public)** – The program's closed service provider network has grown throughout the year to include a total of 84 providers. This growth and the Q1 LTO is contributing to a high volume of projects expected to submit final applications by 10/31. Aside from gearing up for the anticipated application volume, marketing resources are focused on building project pipeline for 2024 in Disadvantaged Communities.

Program	Net MWh YTD	% Savings Achieved of YE Forecast	Program Participation YTD	Unit Definition
Small Business - Private	158,439	89%	4,379	Projects
Small Business – Public	28,432	82%	444	Projects
Incentives – Standard - Private	96,763	57%	1,344	Projects
Incentives – Standard – Public	16,028	47%	364	Projects



# C&I Implementation Programs

## Technical Program Highlights

- **Custom** – The team has been focused on innovations to streamline the process and improve the customer experience. Both pre-applications and final applications have been updated to reduce duplicate data entries and time spent by the customer while participating in the program. In addition, the Custom team has improved internal processes to further accelerate the pre-application review process.
- **Retro-Commissioning (RCx)** – Year to date, RCx has 36 completed projects in Disadvantaged Communities, with over 7 GWh of savings already verified (comparing that to 3.9 GWh of savings from these communities for all of 2022). The public sector is performing ahead of plan for Q1/Q2/Q3. A Google Display campaign was launched to increase social media presence which has performed very well with higher than industry average Click Thru Rates (CTR). The team also initiated work with CDA (Chicago Department of Aviation) on the implementation of a RCx project at Midway Airport and enrolling O'Hare Airport in the near future for a RCx project once the facility is prepared.
- **Industrial Systems (IS)** – 22 treasure hunts completed year to date, with 26 IS study opportunities identified that typically have about 5 Energy Conservation Measures (ECM) per study or 130 ECM projects, including 4 comprehensive study applications received in Q3 totaling 1.5 GWh. Held an in-person EESP Roundtable in September to deepen EESP engagement, share program updates, and discuss new safety guidelines for metering of energized equipment. Added 2 new EESPs, including CrossnoKaye, who also kicked off 2 refrigeration projects in Q3. Launched LinkedIn and IS video campaigns to improve customer awareness of the offerings.
- **Strategic Energy Management (SEM)** – The program is staggering its cohort recruiting to implore a better distribution of realized savings across the year. As a result of this strategy, 21 customers completed their 12-month performance period claiming 25% of the 2023 energy savings goal so far. The Q3 virtual roundtable was held on September 21<sup>st</sup>, with the topic “SEM and Sustainability”. Nine additional workshops were held for customers in Q3. Participants of SEM’s wastewater cohort had the opportunity to earn 6 Continuing Education Units (CEU) over three workshops in 2023; in total 40 people achieved 138 total CEUs.
- **C&I New Construction (CINC)** – The CINC team performed an outreach blitz in Q3 for the Retail and Grocery segment which involved direct emails to past participants, emails to contacts that have not participated in the program before, and broader outreach to contacts matching the specific SIC codes for retail and grocery. Additionally, the team has been invited to present at Village of Oak Park Electrification webinar and in-person event in October. The team also had a booth in October at the Chicago Build Expo to represent CINC program with ComEd outreach team Waypoint. The panel seeking opportunities took place on October 12 with the topic “Powering the Future: Optimization of Energy Efficiency”. The team has received more than 200 business cards during these two days event.

## C&I Implementation Programs

- **Midstream/Upstream (Instant Discounts) –** The Fork Truck offering experienced unprecedented demand and became fully subscribed in Q3. By the end of October 2023, the savings attributed to Fork Trucks participation will have achieved their YE savings targets and contributed approximately 3,725 MWh in Energy Efficiency Electrification (EEE) savings along with issuing \$2.9 million in incentives.
- **Commercial Food Services (CFS) –** In Q3, CFS saw growth in Demand Controlled Kitchen Ventilation units (DCKV) which helped accelerate the pace to our savings goal while also increasing the cost effectiveness of the offering. DCKV returned approximately 5,000 kWh in savings at a cost effectiveness well below the expected average for the offering.

Program	Net MWh YTD	% Savings Achieved of YE Forecast	Program Participation YTD	Unit Definition
Incentives – Custom – Private	6,439	52%	48	Projects
Incentives – Custom – Public	668	61%	11	Projects
Retro-commissioning – Private	10,659	35%	86	Projects
Retro-commissioning – Public	10,750	61%	57	Projects
Industrial Systems	16,591	37%	215	Projects
Strategic Energy Management – Private	7,020	21%	109	Participating Customers
Strategic Energy Management – Public	3,019	45%	36	Participating Customers
C&I New Construction – Private	4,167	54%	38	Projects
C&I New Construction – Public	593	42%	11	Projects
Midstream/Upstream – Private	62,464	92%	801,762	Lighting products; battery chargers; HVAC, Fork Trucks
Midstream/Upstream – Public	10,941	91%	219,367	Lighting products; battery chargers; HVAC, Fork Trucks
Commercial Food Services - Private	796	67%	354	Units
Commercial Food Services - Public	36	64%	14	Units

# C&I Implementation Programs

## Engineering Program Highlights

- **Facility Assessments/Operational Measures** – In Q3, 17 operational savings projects have been verified, for a total savings of 362 MWh. Additionally, 5.4 GWh were added to the pipeline in Q3, for a total pipeline of 17.6 GWh. Operational measures typically take a few months to be implemented after identification or require cold weather in Q4 for savings verification. Savings from these measures identified are anticipated in Q4 this year.

Program	Net MWh YTD	% Savings Achieved of LRP YE	Program Participation YTD	Unit Definition
Assessments – Private	112	4%	19	Verified Wins
Assessments – Public	250	20%	14	Verified Wins

# Voltage Optimization

## Voltage Optimization Highlights

- No changes from the prior Q2 report. Savings below are equivalent to 11.8 million pounds of carbon dioxide reduction or removing 1,166 passenger vehicles driven each year.

Program	Net MWh YTD	% Savings Achieved of YE Forecast	Program Participation YTD	Unit Definition
Voltage Optimization	13,932	12%	2 stations; 32 feeders	Stations Activated; Feeders Activated

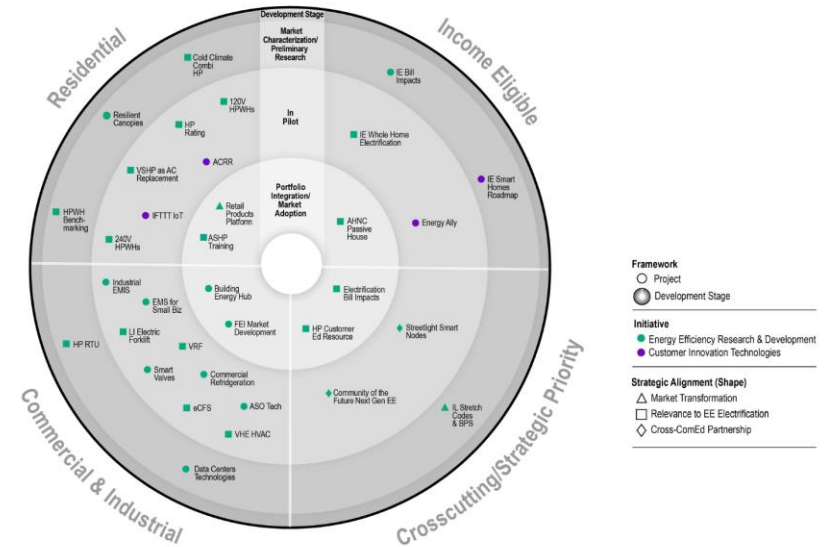
# Emerging Technologies and Market Transformation (“R&D”)

## R&D Highlights

The mission of the R&D team is to identify, test, validate, and integrate new energy-saving technologies and program delivery strategies into the ComEd Energy Efficiency Program so that it continues to meet customers’ needs and its energy savings goals cost-effectively. For the first time, this quarterly report also includes projects active with Customer Innovation Technologies, a parallel team within ComEd Customer Solutions focused on the non-EE range of demand side management innovation concepts, such as peak load reduction, distributed energy resources, and home energy management systems. The report is renamed “Customer Innovation” to reflect this broader team, but energy efficiency R&D projects are still identified throughout.

- Please refer to the *Customer Innovation* section in the Appendix for a summary of active Energy Efficiency Emerging Technologies and Market Transformation projects.

ComEd Customer Innovation Portfolio Summary 2023 Q3



This visualization provides an overview of the Customer Innovation Team’s selected research concepts and projects for 2023, organized by stage of research and relevant customer segments. Further information about each project may be found in the following table. Project descriptions are available on the ComEd Customer Innovation website at [Innovate.ComEd.com](https://innovate.comed.com).

# Marketing Education & Awareness

## Marketing Education & Awareness Q3 Highlights

### Energy Efficiency Business Campaign 2023 (Education & Awareness/Private Sector/Public Sector)

*Overview: The campaign promotes awareness of energy efficiency offerings for business customers. Customers were driven to ComEd.com/PoweringBiz.*

- In-market: 1/2/23 - 12/31/23
  - 2023 Q3 paid media consisted of:
    - Radio :30s and in-game units during Chicago White Sox & Bears WMVP radio broadcasts
    - Facebook paid social (display units)
    - Basis digital display
    - StackAdapt digital display
    - Spanish Print
- The campaign generated 8,695,715 total digital impressions as of September 30, 2023
  - Facebook paid social = 2,856,134 impressions
  - Basis digital display = 1,815,888 impressions
  - StackAdapt digital display = 839,835 impressions
  - LinkedIn paid social = 3,183,858 impressions

### Energy Efficiency Education & Awareness Campaign, Residential 2023

*Overview: This campaign drives customer (market rate & LMI) education and awareness of residential offerings of the ComEd Energy Efficiency Program. Customers were driven to ComEd.com/HomeSavings.*

- In-market: 4/24/23-12/30/23
  - 2023 Q3 paid media consisted of:
    - TV & Cable :30s (English and Spanish)
    - Radio :30s (English & Spanish)
    - Basis digital display
    - Facebook paid social (English and Spanish, display units)
    - Convenience Store units in Rockford & Chicago (OOH)
    - Defender.com digital
    - TBT digital
    - Print
    - CTA Bus Shelters
    - Chicago Parent Program (print & digital)
- The campaign generated 7,407,198 total digital impressions as of September 30, 2023
  - Facebook paid social = 5,885,545 impressions
  - Basis digital display = 1,521,653

### Energy Efficiency (EE) Education & Awareness (E&A) Grassroots Campaign

*Overview: This campaign utilized E&A Residential social, print, and radio ads to drive market rate and LMI customer education and awareness of residential offerings available from the ComEd Energy Efficiency Program. Customers were driven to ComEd.com/HomeSavings. This campaign also supported the promotion of two Resource Fairs, in May and July. The campaign notified customers of the upcoming Resource Fair and that ComEd would be on site to assist with enrollment in specific financial assistance programs. Resource Fair ads drove customers to ComEd.com/ResourceFair.*

- In-market: 5/8/23 – 9/25/23
- 2023 Q3 paid media consisted of:
  - Radio

# Marketing Education & Awareness

- Print
- Facebook Paid Social (English and Spanish)
- The campaign generated 500,810 total digital impressions as of September 30, 2023
  - Facebook Paid Social (English and Spanish) = 500,810 impressions

## **Energy Efficiency (EE) Retail Campaign, 2023**

*Overview: This campaign drives market rate and LMI customer awareness of energy efficiency rebates and discounts on ENERGY STAR® certified appliances and home products being offered by the ComEd Energy Efficiency Program. Customers were driven to ComEd.com/HomeSavings.*

- In-market: 4/3/23 -12/30/23
- 2023 Q3 paid media consisted of:
  - TV & Cable :30s (English & Spanish)
  - Radio :30s (English & Spanish, Chicago & Rockford)
  - Cinema
  - Expressway digital billboards (OOH)
- No social or digital running in Q3 for Retail, therefore no digital impressions to report.

## **Income Eligible (IE) Single Family Campaign, 2023**

*Overview: This campaign drives primarily LMI customer awareness and encourages participation in the FREE Home Energy Savings assessment being offered by the ComEd Energy Efficiency Program. Customers were driven to ComEd.com/Assessment.*

- In-market: 5/1/23 - 10/29/23
- 2023 Q3 paid media consisted of:
  - Basis digital display
  - Nexxen digital display
  - Facebook Paid Social
  - Print
- The campaign generated 8,921,356 total digital impressions as of September 30, 2023
  - Facebook paid social = 1,517,185 impressions
  - Basis digital display = 4,709,424 impressions
  - Nexxen digital display = 2,694,747 impressions

## **Energy Efficiency Electrification (EEE) Residential & Business Campaign, 2023**

*Overview: This campaign builds residential and business customer awareness of the benefits of making the switch to electric products and equipment. Customers were driven to ComEd.com/CleanEnergy.*

- In-market: 9/25/23 - 12/31/31
- 2023 Q3 paid media consisted of:
  - Volta EV Charging Stations (OOH)
  - Hybrid Bus Wrap (OOH/Transit)
  - :30s Radio (English and Spanish)
  - :5s, :10s and :15s Radio live reads (English)
- Note: No digital in media plan

# Stipulations

## Plan 6 Stipulations

As part of the Revised 2022-2025 Energy Efficiency & Demand Response Plan 6 Stipulation Agreement (“RSA”), and in compliance with the Clean Energy Jobs Act (“CEJA”), ComEd has agreed to report out on the following stipulations:

**RSA § IV (A-6a)** ComEd commits to work with stakeholders to develop progress metrics for ICC-filed Quarterly Reports in the second quarter of 2022 and present progress on energy efficiency and financial assistance efforts described above at a joint Committee and SAG meeting.

**Metric 1** Number and percentage of customers receiving utility bill assistance that were referred to EE measures/programs, broken down by:

- Number of customers, in total, referred to EE programs, broken down by program and SF/MF designation
- Number of customers referred to EE programs, broken down by program and SF/MF designation for the population of bill assistance customers as a whole
- Number of customers referred to EE programs, broken down by program and SF/MF designation for the top 20 zip codes (and/or census tracts) with the highest disconnection rate

**Metric 2** The number and percentage of IQ EE applicants/participants that were referred to energy assistance programs or other financial assistance support (including, the Low Income Home Energy Assistance Program (LIHEAP), the Percentage of Income Payment Plan Program (PIPP), any utility-sponsored assistance program, and the ability to wave customer deposits & late fees, per CEJA provisions) broken down by:

- SF and MF, total and tracked separately
- By zip code and/or census tract

**Metric 3** Details on which programs and measures were recommended including:

- The implementer they were recommended by
- Type of referral/recommendation (e-mail, flyer, direct assistance/hand-holding)

**Metric 6** Narrative updates on current efforts and future planned efforts to coordinate utility bill assistance and credit and collections with energy efficiency programs

**Metric 8** Description of how the company intends to increase outreach in top 20 communities with disconnections (i.e., presentations, materials

distributed, which community organizations, information on how to apply, streamlined application process, etc.)

## Q3 Updates

- **Metric 1:** During Q3 of 2023, over 54,000 customers receiving utility bill assistance also received information about Energy Efficiency programs.
  - Local Administering Agencies, by process, offer Energy Efficiency kits to LIHEAP and PIPP recipients and review the weatherization program with them.
    - There were 7,000 LIHEAP customers and 19,000 PIPP customers in Q3
  - Supplemental Arrearage Reduction Program (SARP) customers receive Energy Efficiency information from ComEd packaged as Ways to Save
    - There were 26,000 SARP customers in Q3

ComEd’s customer-facing digital tool, the Smart Assistance Manager (or SAM), serves as a way for customers seeking assistance to receive tailored recommendations for ways to assist with managing their electric bills. During Q3, customers who leveraged the ‘assistance finder’ functionality within SAM received referrals to/information about the following programs:

Program	Sessions*
Budget Billing	260
Due Date Extensions	175
Free Energy Savings Products	400
Give A Ray	360
Home Energy Savings	840
Multi Family Energy Savings	297
Payment Arrangements	462
Retail Discounts	287
SARP	1,700

\*Sessions include authenticated and unauthenticated users and can include duplicate visits from the same customer/user.



# Stipulations

The following list represents a breakdown of customers referred to Energy Efficiency programs broken down by program for the top 20 zip codes with the highest disconnection rates (zip codes 60958, 61057, 60472, 60944, 60428, and 60484 did not have any customer participation):

Zip Code / Program	Number of Customers		
<b>60409</b>	<b>65</b>	<b>60624</b>	<b>41</b>
Free Energy Savings Products	15	Free Energy Savings Products	11
Give A Ray	6	Give A Ray	4
Home Energy Savings	6	LIHEAP	4
LIHEAP	10	Multi Family Energy Savings	4
Payment Arrangements	11	Payment Arrangements	10
Retail Discounts	11	Retail Discounts	5
SARP	6	SARP	3
<b>60419</b>	<b>54</b>	<b>60628</b>	<b>80</b>
Free Energy Savings Products	12	Free Energy Savings Products	3
Give A Ray	2	Give A Ray	12
Home Energy Savings	2	Home Energy Savings	14
LIHEAP	14	LIHEAP	15
Retail Discounts	12	Multi Family Energy Savings	15
SARP	12	Payment Arrangements	11
<b>60426</b>	<b>54</b>	Retail Discounts	6
Free Energy Savings Products	15	SARP	4
Give A Ray	5	<b>60636</b>	<b>51</b>
Home Energy Savings	1	Free Energy Savings Products	6
LIHEAP	7	Give A Ray	10
Payment Arrangements	11	Home Energy Savings	7
Retail Discounts	4	LIHEAP	12
SARP	11	Retail Discounts	7
<b>60619</b>	<b>47</b>	SARP	9
Free Energy Savings Products	12	<b>60637</b>	<b>49</b>
Give A Ray	2	Free Energy Savings Products	9
Home Energy Savings	3	Give A Ray	10
LIHEAP	2	LIHEAP	5
Payment Arrangements	7	Multi Family Energy Savings	8
Retail Discounts	11	Payment Arrangements	2
SARP	10	Retail Discounts	9
<b>60620</b>	<b>90</b>	SARP	6
Budget Billing	10	<b>60644</b>	<b>46</b>
Due Date Extensions	6	Free Energy Savings Products	12
Free Energy Savings Products	8	Give A Ray	1
Give A Ray	6	Home Energy Savings	13
Home Energy Savings	12	LIHEAP	3
LIHEAP	3	Retail Discounts	11
Multi Family Energy Savings	12	SARP	6
Payment Arrangements	3	<b>60649</b>	<b>89</b>
Retail Discounts	15	Budget Billing	3
SARP	15	Free Energy Savings Products	15
<b>60621</b>	<b>77</b>	Give A Ray	5
Budget Billing	9	Home Energy Savings	14
Free Energy Savings Products	15	LIHEAP	14
Give A Ray	14	Multi Family Energy Savings	8
Home Energy Savings	5	Payment Arrangements	14
LIHEAP	15	Retail Discounts	6
Payment Arrangements	6	SARP	10
Retail Discounts	12	<b>60827</b>	<b>36</b>
SARP	1	Free Energy Savings Products	13
<b>60623</b>	<b>78</b>	Home Energy Savings	14
Budget Billing	10	Retail Discounts	3
Free Energy Savings Products	4	SARP	6
Give A Ray	14		
Home Energy Savings	1		
LIHEAP	13		
Multi Family Energy Savings	15		
Payment Arrangements	2		
Retail Discounts	12		
SARP	7		

# Stipulations

- *Metric 2:* In Q3, all (100%) recipients of the Home Energy Savings' Income Eligible Home Energy Assessment (IE HEA) and Income Eligible Retrofits, as well as Product Distribution's Income Eligible Kits program offerings received referrals to the financial assistance programs. In addition to the referrals shown in the tables (*Table 1*, *Table 2*, & *Table 3*), customers who received an energy savings kits from a participating school or attended program sponsored food pantry event through the Product Distribution program received additional information to further help them manage their energy bills, including ComEd's financial assistance programs. These program offerings do not track customer level participation information to allow for zip code level reporting.

Table 1

Product Distribution Income Eligible Kits Participation Counts Q3 2023									
Service Zip Code	Customer Counts	Service Zip Code, cont.	Customer Counts	Service Zip Code, cont.	Customer Counts	Service Zip Code, cont.	Customer Counts	Service Zip Code, cont.	Customer Counts
60002	35	60148	3	60451	2	60621	227	61046	6
60004	5	60150	1	60452	16	60622	106	61047	7
60005	2	60152	1	60453	71	60623	327	61048	6
60007	2	60153	27	60455	8	60624	316	61050	1
60008	1	60154	4	60456	5	60625	90	61051	3
60010	7	60155	7	60457	4	60626	48	61052	3
60014	1	60156	1	60458	5	60628	596	61054	35
60015	8	60160	8	60459	13	60629	515	61060	4
60016	9	60162	4	60461	3	60630	78	61061	23
60018	5	60164	4	60462	9	60631	15	61062	2
60020	11	60165	2	60463	1	60632	323	61064	15
60025	1	60169	3	60464	1	60633	46	61067	3
60026	1	60172	1	60465	8	60634	156	61068	3
60030	21	60173	1	60466	68	60636	276	61070	2
60031	31	60176	2	60469	8	60637	243	61071	7
60033	1	60177	2	60471	25	60638	142	61075	1
60035	8	60178	2	60472	21	60639	382	61078	3
60040	2	60187	2	60473	49	60640	47	61081	77
60041	11	60188	2	60475	10	60641	158	61084	2
60042	3	60193	4	60476	4	60642	28	61085	9
60044	4	60194	3	60477	22	60643	304	61087	7
60046	14	60195	2	60478	59	60644	376	61089	2
60047	10	60201	9	60480	1	60645	78	61091	1
60048	5	60202	9	60482	10	60646	31	61101	5
60051	6	60203	1	60484	1	60647	232	61102	5
60053	4	60301	1	60487	11	60649	278	61103	5
60056	7	60302	9	60490	1	60651	418	61104	11
60060	18	60304	1	60501	7	60652	196	61107	6
60061	9	60305	1	60502	1	60653	159	61108	4
60064	41	60401	1	60504	4	60654	1	61109	7
60067	1	60402	24	60505	3	60655	28	61111	4
60069	1	60403	1	60506	6	60656	16	61114	2
60070	1	60404	1	60513	3	60657	9	61115	7
60073	78	60406	40	60516	1	60659	86	61230	1
60074	3	60408	1	60517	6	60660	19	61250	2
60076	10	60409	113	60518	13	60661	1	61251	1
60077	16	60410	1	60525	4	60678	1	61252	7
60081	7	60411	139	60527	1	60706	5	61261	5
60083	3	60415	9	60531	7	60707	45	61270	13
60084	17	60416	2	60534	3	60714	3	61277	7
60085	149	60417	3	60538	2	60803	35	61283	3
60087	35	60418	11	60543	1	60804	32	61310	13
60089	7	60419	102	60544	5	60805	23	61318	3
60090	5	60420	1	60545	1	60827	104	61321	3
60096	5	60421	1	60546	2	60901	6	61325	2
60097	1	60422	6	60548	13	60914	4	61334	2
60099	148	60423	1	60552	3	60915	2	61341	3
60101	1	60425	8	60555	2	60941	1	61342	50
60103	3	60426	92	60561	1	60950	2	61349	4
60104	19	60428	61	60586	1	61001	2	61350	3
60106	1	60429	62	60601	2	61006	8	61360	6
60107	8	60430	25	60605	3	61008	6	61364	126
60108	1	60431	4	60607	21	61010	15	61367	1
60110	3	60432	2	60608	222	61018	3	61369	7
60112	1	60433	2	60609	244	61019	3	61370	5
60115	5	60435	4	60610	26	61020	9	61376	8
60118	2	60438	73	60611	2	61021	114	61377	4
60120	3	60439	2	60612	202	61025	1	61378	2
60123	2	60440	7	60613	29	61030	10	61531	1
60130	11	60441	1	60614	10	61031	2	61764	1
60131	3	60443	25	60615	91	61032	285		
60133	6	60444	1	60616	204	61036	1		
60137	1	60445	20	60617	615	61039	2		
60139	4	60447	3	60618	148	61041	1		
60140	1	60449	1	60619	472	61042	2		
60142	1	60450	2	60620	607	61043	1		

# Stipulations

Table 2

Income Eligible - Home Energy Assessments Participation Counts Q3 2023							
Service Zip Code	Customer Counts	Service Zip Code, cont.	Customer Counts	Service Zip Code, cont.	Customer Counts	Service Zip Code, cont.	Customer Counts
60002	2	60156	2	60473	13	60642	1
60004	2	60164	2	60475	2	60643	17
60005	1	60165	1	60477	3	60644	10
60007	2	60169	3	60478	4	60645	7
60008	1	60171	1	60481	1	60647	6
60010	7	60175	1	60482	2	60649	15
60012	1	60177	3	60484	2	60651	28
60013	1	60178	2	60487	3	60652	10
60014	2	60181	1	60490	1	60653	6
60015	4	60185	2	60501	1	60655	2
60016	1	60187	1	60502	4	60656	1
60018	7	60188	1	60503	3	60657	1
60020	3	60193	2	60504	1	60659	3
60021	1	60194	2	60505	6	60660	1
60030	3	60195	1	60506	4	60706	1
60031	5	60201	2	60513	2	60707	4
60033	2	60202	1	60515	1	60712	2
60035	2	60302	4	60516	1	60803	4
60043	1	60304	1	60517	1	60804	5
60044	1	60402	4	60521	2	60805	4
60045	2	60403	2	60525	1	60827	13
60047	1	60406	3	60530	1	60901	6
60050	2	60408	2	60538	2	60914	2
60053	2	60409	13	60542	1	60915	2
60056	2	60411	20	60543	2	60964	1
60060	4	60415	2	60544	4	61008	3
60061	2	60416	1	60545	1	61010	1
60062	2	60417	2	60548	1	61021	1
60064	2	60418	4	60550	2	61031	1
60067	1	60419	12	60554	1	61032	5
60069	1	60423	1	60558	1	61046	1
60070	2	60425	3	60559	2	61050	1
60073	2	60426	11	60560	3	61052	1
60074	1	60428	3	60561	3	61061	1
60076	3	60429	5	60563	1	61081	1
60077	3	60430	2	60565	1	61085	1
60081	3	60431	2	60605	1	61101	6
60083	1	60432	2	60608	5	61102	6
60084	3	60433	2	60609	7	61103	6
60085	5	60435	4	60611	1	61104	2
60089	3	60436	6	60612	6	61107	1
60090	4	60438	15	60613	3	61108	5
60091	4	60439	2	60614	2	61109	1
60096	1	60440	1	60615	2	61111	1
60098	3	60442	2	60616	2	61114	1
60099	6	60443	4	60617	45	61115	3
60101	1	60445	1	60618	5	61270	1
60102	2	60446	6	60619	33	61364	2
60103	2	60448	2	60620	35	61377	1
60104	7	60449	1	60621	7	61760	2
60107	1	60450	1	60622	8	61764	2
60110	1	60451	2	60623	5		
60115	4	60452	4	60624	7		
60120	4	60453	8	60625	1		
60123	4	60455	3	60626	3		
60126	2	60457	1	60628	40		
60130	1	60458	2	60629	17		
60133	1	60459	1	60630	10		
60137	1	60461	1	60632	6		
60139	4	60462	5	60633	4		
60142	5	60465	2	60634	12		
60143	1	60466	3	60636	11		
60148	3	60467	3	60637	11		
60150	1	60468	1	60638	5		
60153	5	60471	7	60639	13		
60155	5	60472	1	60641	6		

Table 3

Income Eligible - Single-Family Retrofits Q3 2023			
Service Zip Code	Customer Counts	Service Zip Code, cont.	Customer Counts
60020	1	60473	18
60025	2	60477	2
60053	1	60478	12
60062	1	60482	1
60073	1	60484	1
60098	1	60487	3
60104	6	60490	2
60107	1	60504	3
60110	1	60505	1
60120	2	60506	2
60123	3	60538	1
60131	1	60542	1
60139	2	60544	1
60142	1	60585	1
60153	7	60608	2
60155	2	60609	1
60160	1	60617	12
60162	1	60619	12
60164	1	60620	39
60175	2	60621	25
60178	1	60623	7
60181	1	60624	1
60402	1	60628	25
60403	2	60629	9
60406	9	60631	1
60409	15	60633	4
60411	9	60634	1
60417	2	60636	3
60418	4	60637	4
60419	23	60638	8
60422	1	60639	11
60423	1	60640	1
60425	1	60641	2
60426	16	60643	18
60428	13	60644	2
60429	13	60647	4
60430	4	60649	7
60436	1	60651	7
60438	5	60652	8
60443	6	60655	7
60445	5	60707	2
60446	2	60803	4
60452	2	60804	8
60453	11	60805	5
60456	1	60827	4
60459	1	61021	1
60461	2	61054	1
60462	2	61101	3
60463	2	61102	2
60466	8	61103	2
60471	4	61104	1
60472	4	61111	1

# Stipulations

- *Metric 3:*
  - Home Energy Savings – Resource Innovation is the program implementer
    - Income Eligible Assessment: Utility Energy Solutions (UES), a subcontractor to Resource Innovation performs the Home Energy Assessments and provides customers with information on ComEd’s financial assistance programs in the assessment report customer receive at the conclusion of the assessment appointment.
    - Income Eligible Retrofits: Customers receive a brochure from a program EESP after their retrofit describing additional programs, including financial assistance, to further help them manage their energy bills.
  - Product Distribution – Walker Miller is the program implementer
    - Income Eligible (IE) and School Kits: Green Home Experts, a program subcontractor, ships IE kits directly to eligible customer’s homes who request a kit or to participating schools to distribute to students. Included in the kit is a brochure describing additional programs, including financial assistance, to help customers manage their energy bills.
    - Food Bank: Program representatives distribute brochures during program sponsored food pantry events to customers. The brochure describes additional programs, including financial assistance, to help customers manage their energy bills.
- *Metric 6:* All residential brochures distributed by ComEd residential energy efficiency programs and through sponsored events, include financial assistance information. Additionally, and as described in the “*Mapping of Assistance Needs...*” section, energy efficiency, financial assistance and revenue management departments coordinated on a marketing campaign (Targeted Hardship Campaign) targeting income eligible customers experiencing payment issues, like arrearages and financial assistance, to drive awareness of and participation in energy efficiency programs. This campaign leveraged email and social media tactics to reach targeted customers. The campaign originally launched in 2022, relaunched in March 2023 and will continue for throughout 2023. Lastly, and as described in the “*Pilot Connecting Customers with Payment Trouble...*” section, energy efficiency coordinated with

financial assistance launched a new program, Catch Up & Save, in January 2023 which brings together the benefits of energy efficiency with an energy savings kits and a payment plan offered through the Supplemental Arrearage Reduction Program (SARP) historically limited to LIHEAP recipients through a single enrollment process. To date, 955 income eligible customers have been enrolled in SARP and also received an energy savings kit, with 317 of those occurring in Q3.

- *Metric 8:* Energy efficiency has been expanding its marketing campaigns and strategies to better target income eligible customers, particularly those living in communities whose residents are predominately income eligible. Typically, most if not all, communities experiencing high disconnections are also those communities whose residents are predominately low income. So, energy efficiency’s marketing campaigns and tactics that target predominately low-income zip codes are also reaching those top 20 communities with disconnections and are now better targeted and informed of energy efficiencies programs and services to help them reduce energy usage and energy bills. The Targeted Hardship campaign described above and in the “*Pilot Connecting Customers with Payment Trouble...*” section and the resource fairs and community events detailed in the Marketing Education & Awareness section are good examples of efforts focusing on reaching customers experiencing payment troubles including those living in these top 20 communities with disconnections to inform them of energy efficiency offerings.

**RSA § IV (A-6b)** *Mapping of Assistance Needs and Targeting Delivery of Weatherization Services:* During the Plan 6 Period, ComEd will collect a variety of data for purposes of mapping areas of financial assistance needs and targeting energy efficiency and weatherization efforts. Data will be reported quarterly in the ICC-filed Quarterly Report and updates on targeting efforts will be provided in the ICC-filed Quarterly Report, and at least annually at joint SAG and Committee meetings, with commitment to seek input from interested stakeholders.

## Q3 Updates

- The 2023 Targeting Hardship Customers campaign relaunched in March with targeted emails and social media messaging. For 2023, the campaign execution has expanded from a quarterly refresh to bi-monthly to promote energy efficiency and financial assistance programs and services. For social media, the campaign continues to utilize paid posts through Facebook and Instagram concurrently in

# Stipulations

English and Spanish. In Q3, the campaign delivered 251,483 emails and was viewed by 88,163 customers, approximately 35.06% of the target group. For Q3 targeted English and Spanish social media messaging yielded a total reach of 327,334 customers, cultivating engagement with approximately 4,726 customers, approximately 1.44% of the target group. The following table (*Table 4*) includes the list of historical top 20 zip codes to receive disconnections and the year-to-date participation in the various income eligible Energy Efficiency programs.

Table 4

Top 20 Disconnect Zip Codes	City Name	Single-Family Income Eligible - Retrofits		Multi-Family Income Eligible and Public Housing		Other Income Eligible EE Programs*		Totals	
		MWh YTD	Participants YTD	MWh YTD	Participants YTD	MWh YTD	Participants YTD	Income Eligible Energy Savings (MWh YTD)	Income Eligible Participants (YTD)
60409	Calumet City	20,275	63	0	9	4,586	38,194	24,861	38,266
60419	Dolton	19,951	59	4	26	1,857	15,377	21,813	15,462
60426	Harvey	25,353	105	0	0	5,130	47,884	30,483	47,989
60428	Markham	25,114	72	0	0	375	2,291	25,489	2,363
60472	Robbins	5,250	18	0	0	838	8,451	6,089	8,469
60484	University Park	830	9	0	0	146	1,645	976	1,654
60619	Chicago	25,716	95	161	764	20,960	183,979	46,838	184,838
60620	Chicago	50,312	145	180	869	9,106	72,493	59,599	73,506
60621	Chicago	5,369	32	118	441	4,136	35,638	9,624	36,111
60623	Chicago	6,634	19	9	93	8,919	77,360	15,562	77,472
60624	Chicago	2,263	10	14	219	7,420	64,770	9,696	64,999
60628	Chicago	42,576	108	33	211	13,125	117,039	55,735	117,358
60636	Chicago	6,149	31	13	8	6,323	55,889	12,485	55,928
60637	Chicago	2,837	15	62	459	7,389	65,114	10,289	65,587
60644	Chicago	6,753	23	207	568	4,227	33,613	11,186	34,203
60649	Chicago	8,152	24	268	1,382	3,604	28,135	12,024	29,541
60827	Riverdale	2,762	24	11	266	2,559	21,089	5,331	21,379
60944	Hopkins Park	0	0	0	0	0	0	0	0
60958	Pembroke Township	0	0	0	0	665	6,002	665	6,002
61057	Nachusa	0	0	0	0	0	0	0	0

\*Includes Product Distribution (IE Kits, Food Bank Distribution, and IE School Kits), Income Eligible Retail, and Home Energy Assessments

**RSA § IV (A-6d) Pilot Connecting Customers with Payment Trouble to Energy Efficiency:** ComEd Energy Efficiency will work directly with relevant ComEd business units to create a pilot or program that recruits customers who are payment troubled (e.g., customers at risk of being disconnected; with high arrears) into its IE energy efficiency programs, with commitment to incorporate ideas and input from interested stakeholders on pilot design and modifications, as practicable. ComEd will direct its independent evaluator to perform an impact and a process evaluation of the pilot. ComEd will provide updates to the SAG and Committee in joint meetings on pilot progress and the evaluation results, and include updates in ICC filed Quarterly Reports, as appropriate.

## Q3 Updates

- To date, 955 income eligible customers have been enrolled in SARP and also received an energy savings kit, with 317 of those occurring in Q3 through the Catch Up and Save program. Catch Up & Save, in coordination with ComEd Energy Efficiency (EE) and Financial Assistance (FA), is designed to provide additional assistance to customers experiencing payment trouble. This offering provides eligible customers the benefits of energy efficiency with an energy savings kits and a payment plan offered through the Supplemental Arrearage Reduction Program (SARP) historically limited to LIHEAP recipients through a single enrollment process. Included in each kit is a product and installation guide to assist customers with installing the items to begin saving energy and reducing energy costs.

**RSA § IV (A-7a,7b) ComEd will track bill impacts and reduced energy burden based on deemed savings across all IE customers, for each IE offering.** ComEd will also pilot ways to track actual bill impacts and reduced energy burden for a portion of IE Single-Family and Multi-Family customers, which will be for the purpose of facilitating follow up with customers to determine if actual savings were in line with projections. This pilot initiative and its associated data are for research and development purposes, and parties acknowledge that the pilot results are not intended or designed to inform changes to the IL-TRM. However, to the extent the pilot results are relevant and applicable, nothing in this Revised Stipulation would preclude consideration of the results in shaping future evaluation activities. ComEd will provide updates on this pilot in its ICC-filed Quarterly Reports, including, but not limited to, an overall comparison of deemed savings projections with actual bill impacts broken out between Single Family and Multi-Family. ComEd will work with interested stakeholders at the SAG to define energy burden and discuss ideas for piloting the tracking of EE bill impacts and related reduced energy burden. The funds spent on the pilot(s) will be considered IE R&D funds.

## Q3 Updates

- In Q3 2023, the study team presented the completed IE bill impacts analysis to the SAG. The study, which was led by Resource Innovations selected via RFP by ComEd, Nicor Gas, Peoples Gas and North Shore Gas, used customer billing data from sponsoring utilities to estimate achieved energy and bill savings impacts across five different income eligible customer programs. ComEd sees that study as Phase 1 of a multi-step process toward a pilot on this topic. Phase 2

# Stipulations

is now underway, in which the R&D team is working with internal-ComEd data analytics specialists to develop a set of tools to support the ongoing identification of weatherization program participant outcomes. This will make it possible to categorize IE weatherization program participants by post-retrofit bill impacts using customer AMI electric usage data. Once this approach is established and tested, R&D will use the study recommendations to develop a communication strategy with customers flagged as having less-than-expected savings outcomes (this will be Phase 3 of this initiative).

**RSA § IV (A-8e)** Income Eligible (“IE”) - Low Income Energy Efficiency Accountability Committee (“LIEEAC” or “Committee”) Facilitator Independence, Budget, and Process e) ComEd acknowledges that Section 8-103B imposes certain quarterly reporting obligations on ComEd relative to the operation of the Committee. ComEd agrees to include in the narrative section of each such quarterly report updates on all of the reporting requirements set forth in Section 8-103B(c) of the PUA, and including new approaches or changes to program approaches adopted by ComEd pursuant to the recommendations of the LIEEAC. ComEd also agrees to attach the LIEEAC’s quarterly budget report to ComEd’s quarterly report filed with the Commission.

## Q3 Updates

- ComEd has not received input or recommendations from the committee regarding the design, implementation, or evaluation of our income eligible energy efficiency programs. As reported in Q2, the IQ-N Leadership Team terminated the Facilitator contract in April of 2023 and a new facilitator has not been identified and approved at this time.

**RSA § V (D-1b)** ComEd commits to providing the following IE Multi-Family reporting metrics in its ICC-filed Quarterly Reports:

- Actuals (YTD)
  - 1) Participation – buildings by zip code and apartment units
  - 2) Spending – incentives, non-incentives, total
  - 3) Savings (1st year) – MWh, therms

## Q3 Updates

- **Participation – buildings by zip code and apartment units**  
In Q3, the Multi-Family Energy Savings program served verified income eligible (IE) and public housing (PH) multi-family properties in 78 unique zip codes throughout ComEd’s service territory. In total, 227

IE and PH buildings participated with 4,898 tenant units receiving free products such as smart thermostats, LEDs, low flow showerheads and faucet aerators. Following table (*Table 5*) shows the breakout of the number of buildings and tenant units served, by program component (income eligible, public housing) and by zip code.

- *# of Building Participants (Income-Eligible & Public Housing):* Assuming each building under an account is participating, including both direct install and rebate projects with a date install in Q3 of 2023.
- *# of Apartment Units:* Each project with a recorded project type of “Direct Install” represents a unit served.

# Stipulations

Table 5, continued

Zip Code	# of Building Participants (Income-Eligible)	# of Apartment Units Served (Income-Eligible)	# of Building Participants (Public Housing)	# of Apartment Units Served (Public Housing)
60005	1	20	0	0
60008	7	178	0	0
60016	1	20	0	0
60026	1	20	0	0
60064	2	40	0	0
60073	1	20	0	0
60076	1	3	0	0
60077	1	13	0	0
60085	2	26	0	0
60088	1	20	0	0
60101	1	20	0	0
60106	1	4	0	0
60110	1	20	0	0
60123	2	82	0	0
60130	1	20	0	0
60152	1	20	0	0
60160	1	20	0	0
60176	3	33	0	0
60202	4	62	0	0
60301	2	101	0	0
60302	2	56	0	0
60402	7	129	0	0
60433	1	20	0	0
60435	2	40	0	0
60438	2	26	0	0
60442	1	20	0	0
60466	1	20	1	20
60468	2	40	0	0
60475	1	20	0	0
60505	1	97	0	0
60515	1	20	0	0
60525	1	20	0	0
60532	1	20	0	0
60534	1	20	0	0
60548	2	40	0	0
60607	1	3	0	0
60608	4	26	0	0
60609	1	20	0	0
60615	5	100	0	0
60616	2	40	1	20
60618	1	20	0	0
60619	8	162	0	0
60620	7	181	0	0
60621	1	20	0	0
60623	10	183	0	0
60624	1	20	0	0
60625	4	88	0	0
60626	7	140	0	0
60628	5	127	0	0
60629	7	135	0	0

60630	1	20	1	20
60637	11	224	0	0
60639	2	40	0	0
60640	4	112	0	0
60644	4	76	0	0
60645	1	20	0	0
60647	1	20	0	0
60649	22	409	0	0
60651	1	20	0	0
60653	3	58	0	0
60653	0	0	1	81
60659	3	60	0	0
60660	4	213	0	0
60707	1	20	0	0
60827	2	40	0	0
60950	1	20	0	0
61008	2	26	0	0
61032	4	80	0	0
61081	1	20	0	0
61101	2	40	0	0
61103	4	80	0	0
61103	0	0	1	151
61104	1	20	0	0
61107	3	60	1	20
61109	2	9	0	0
61111	3	60	0	0
61114	12	224	0	0
61115	1	20	0	0

○ **Spending – Incentives, non-incentives and 1<sup>st</sup> year savings by MWh and Therms**

In Q3, the Multi-Family Energy Savings program allocated \$7,999,381 in ComEd incentives for efficiency upgrades within income eligible and public housing buildings and achieved 16,221 net MWhs and 265,127 net therms (to be converted to MWhs). Below (*Table 6*) is a breakout of savings and spend by program component (income eligible, public housing).

- The incentive and savings data are specific to ComEd and not the full program (the gas incentives and savings have been removed).

# Stipulations

Table 6

	Incentive Spend	Non-Incentive Spend	Net MWh Savings Achieved	Net Therms Achieved
<b>Income-Eligible</b>	\$7,382,299.42	\$1,585,322.00	15,180	265,127
<b>Public Housing</b>	\$617,081.96	\$56,347.37	1,040	0
<b>Total</b>	<b>\$7,999,381</b>	<b>\$1,641,669.37</b>	<b>16,221</b>	<b>265,127</b>

**RSA § V (D-3a)** ComEd commits to providing the following in its ICC-filed EE Quarterly Reports:

- 1) Number or proportion of diverse vendors by category (i.e., MBE, WBE and VOSB), as well as by primary contractors and subcontractors, and network service providers)
- 2) Breakdown of diverse vendors by category (i.e., MBE, WBE and VOSB)
- 3) Percent of or amount of portfolio dollars (excluding pass-through incentives) for diverse spend, by category (i.e., MBE, WBE and VOSB)

## Q3 Updates

- Year to date, ComEd has utilized 25 diverse prime contractors (Tier 1) and 108 diverse sub-contractors and service providers (Tier 2). The following tables (*Table 7 and Table 8*) show a breakdown of vendor diversity and spend, by category.

Table 7

Tier 1 Diverse Category	Spend	# of Vendors YTD
<b>MBE</b>	\$21,289,657	9
<b>MWBE</b>	\$14,750,550	1
<b>WBE</b>	\$6,836,315	13
<b>VOSB</b>	\$1,351,335	2
<b>Total</b>	<b>\$44,227,857</b>	<b>25</b>

Table 8

Tier 2 Diverse Category	Spend	# of Vendors YTD
<b>MBE</b>	\$9,164,632	37
<b>WBE</b>	\$24,870,435	50
<b>VOSB</b>	\$8,147,185	6
<b>Total</b>	<b>\$42,182,252</b>	<b>93</b>

### • Data Definitions:

- **Tier 1 vendors:** Prime diverse vendor
- **Tier 2 vendors:** Prime non-diverse vendor, subcontracting to a diverse vendor
- **Minority-owned Business Enterprise (MBE):** A for-profit enterprise, regardless of size, physically located in the United States, which is 51% owned, operated, and controlled by minority group members, defined by the following:
  - **Asian-Indian-owned business enterprise:** A U.S. citizen whose origins are from India, Pakistan, or Bangladesh
  - **Asian-Pacific-owned business enterprise:** A U.S. citizen whose origins are from Japan, China, Indonesia, Malaysia, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Thailand, Samoa, Guam, the U.S. Trust Territories of the Pacific, or the Northern Marianas
  - **African-American-owned business enterprise:** A U.S. citizen having origins in any of the Black racial groups of Africa
  - **Hispanic-owned business enterprise:** A U.S. citizen of Hispanic heritage, from any of the Spanish-speaking areas of the following regions: Mexico, Central America, South America, or the Caribbean Basin
  - **Native-American-owned business enterprise:** A person who is an American Indian, Eskimo, Aleut, or Native Hawaiian, and is regarded as such by the community of which the person claims to be a part
- **Woman-owned Business Enterprise (WBE):** An independent business concern that is at least 51% owned and controlled by one



# Stipulations

or more women who are U.S. citizens or Legal Resident Aliens; whose business formation and principal place of business are in the U.S. or its territories; and whose management and daily operation is controlled by one or more of the women owners

- **Veteran-owned Small Business (VOSB):** A business that is at least 51% owned, operated, and controlled by one or more veterans
- **Minority- and Woman-owned Business Enterprise (MWBE):** A business falling under both MBE and WBE categories.

**RSA § V (D-4a)** ComEd commits to annually providing the following Health & Safety-related metrics for IE Whole Building Retrofit Programs at joint SAG and Committee meetings, in 4th quarter quarterly SAG reports, and in ICC-filed Annual Reports.

- 4) Number of properties deferred because of health and safety issues and general trends in the type of related H&S issues (will also be provided in ICC-filed Quarterly Reports).
- 5) The percentage and/or dollar amount of the Health and Safety Fund that has been spent down (will also be provided in ICC-filed Quarterly Reports)

## Q3 Updates

- The following tables (*Table 9* and *Table 10*) show a breakdown of health and safety related deferrals and total spend year to date for IE retrofit programs. The type of health and safety issues identified include:
  - Structural issues
  - Roof issues
  - Asbestos
  - Mold
  - Standing Water
  - Mechanical Issues
  - Plumbing Repair
  - Electrical Issues
  - Emergency Boiler

*Table 9*

Health and Safety Related Deferrals*	
Home Energy Savings	0
Multi-Family Energy Savings	0

\*Note: Deferrals do not include IHWAP project deferrals.

*Table 10*

Health and Safety Related Spend YTD*	
Home Energy Savings	\$5,346,090
Multi-Family Energy Savings	\$2,715,143

\*Note: Spend includes dollars spent on exhaust fans and emergency HVAC replacement, which also contribute to energy savings.

**RSA § VIII (B-3)** ComEd will report to the ICC in its ICC-filed Quarterly Reports on the progress of the Market Development Initiative (MDI) with the ICC-filed Annual Reports summarizing annual progress.

## Q3 Updates

- During Q3, ComEd completed work with a diverse vendor (Walker-Miller Energy Services) to translate the results of the research conducted in 2022 into a high-level program design. An RFP was sent in late Q3 for selection of an implementation contractor. Selection and award of the implementation contract will be completed in Q4 followed by a kick-off in the same quarter.

# Total Resource Cost

## CY2023 New Measures

All measures in the table below were launched in CY2023.

Sector	Program	Measure	IL TRC	Justification for TRC < 1.00
Residential	Retail/Online	Bath Fan	1.14	
Residential	Retail/Online	HP Dryer - Electrification	1.65	
Residential	Retail/Online	Induction Cooktop - Electrification	0.05	The savings two measures noted in the table (induction cooktop and HP dryer) were given with an assumption of an electric baseline, and thus do not have therms savings. There is limited market data on what percent of purchases for these items are due to fuel switching, so we assumed all would be electric-to-electric. The calculations and assumptions used are based on the IL TRM V11.
Residential	Retail/Online	Showerheads	23.05	
Residential	Retail/Online	Bathroom Faucets	1.55	
Residential	Retail/Online	Switch and Outlet Gaskets	38.70	
Residential	Retail/Online	Window Film	0.01	This measure is offered to improve the customer experience and provide a high level of customer satisfaction.
Residential	Retail/Online	Caulk	46.85	
Residential	Retail/Online	Spray Foam Insulation	162.28	
Residential	Retail/Online	Weatherstripping	6.13	
Residential	Retail/Online	Door Sweeps	9.96	
Residential	Multifamily Upgrades	Heat Pump Water Heaters	13.79	
Residential	Multifamily Upgrades	ASHP Heat Pump - Electrification	0.63	This electrification measure is offered in alignment with Illinois's Climate and Equitable Jobs Act (CEJA) allowance of fuel switching. ComEd may offer and promote measures that electrify space heating, water heating, cooling, drying, cooking, industrial processes, and other building and industrial end uses that would otherwise be served by combustion of fossil fuel at the premises, provided that the electrification measures reduce total energy consumption at the premises.
Residential	Multifamily Upgrades	Heat Pump Water Heater - Electrification	0.30	See above electrification measure justification
Residential	Multifamily Upgrades	Cooking Range - Electrification	0.14	See above electrification measure justification
Residential	Multifamily Upgrades	Clothes Dryer - Electrification	0.22	See above electrification measure justification
Residential	Single-Family Upgrades	Fossil to Electric or Induction Cooktop - Electrification	0.09	See above electrification measure justification
Residential	Single-Family Upgrades	Ductless Heat Pumps - Electrification	0.66	See above electrification measure justification
Residential	Single-Family Upgrades	Electric Clothes Washer - Electrification	0.22	See above electrification measure justification
Residential	Single-Family Upgrades	Electric Water Heater - Electrification	1.21	
Residential	Single-Family Upgrades	Heat Pump Water Heater (IE) - Electrification	0.21	See above electrification measure justification
Residential	Single-Family Upgrades	Air Source Heat Pump - Electrification	0.68	See above electrification measure justification
Residential	Single-Family Upgrades	Clothes Dryer (IE) - Electrification	0.18	See above electrification measure justification
Residential	Single-Family Upgrades	Dusk to Dawn LEDs	22.10	
Residential	Single-Family Upgrades	Shower Flow Reducer	36.32	
Residential	Single-Family Upgrades	Smart Socket	1.28	
Residential	Single-Family Upgrades	Air Handler Filter Replacement	3.12	
Business	Targeted Systems	Building Operator Certification	3.11	
Business	Midstream/Upstream	Fork Truck (Non-Fuel Switch)	1.42	
Business	Midstream/Upstream	Fork Truck (Fuel Switch) - EE	10.77	
Business	Midstream/Upstream	Ductless Mini-Split Heat Pump - EE	1.16	

# Appendix: Program Descriptions

## Program Descriptions

### **Home Energy Savings (Single-Family Upgrades) Home Energy Assessments (Market Rate & Income Eligible), Retrofits (Income Eligible)**

Overview: Under the Home Energy Savings program, ComEd provides three offerings for single family residential customers: Home Energy Assessments (HEA) - Market Rate, HEA – Income Eligible, and Income Eligible Retrofits. These offerings are closely linked through a centralized intake process and coordinated customer journey. Single family includes single family detached, vintage homes (30+years), manufactured homes, condo units, townhomes, two-flats, and duplex. The program offers free assessments and installation of energy savings products such as LEDs, water-saving devices, water heater pipe wrap, advanced power strips and thermostats with income eligible customers receiving all products installed for free. Certain income-eligible customers also receive comprehensive weatherization services. The program is delivered jointly with the Northern Illinois Gas Utilities (Nicor Gas, People Gas and North Shore Gas).

### **Multi-Family Energy Savings (Multi-Family Upgrades) Market Rate, Income Eligible, Public Housing**

Overview: The Multi-Family Energy Savings (MFES) program is a single comprehensive program offering that provides a full range of multi-family energy efficiency services. The MFES program consists of three offerings for 2022: Income Eligible, Public Housing, and Market Rate. This program offers efficiency upgrades for multi-family properties, including gas and electric measures for tenant units and common areas. This program offering is delivered jointly with the Northern Illinois Gas Utilities (Nicor Gas, Peoples Gas, and North Shore Gas). Income Eligible, Public Housing, and Market Rate Property owners/managers who complete weatherization and other energy efficiency improvements enjoy reduced operating costs, increased comfort in tenant spaces, increased occupancy rates, and improved property value. Additionally, building tenants experience increased comfort and reduced energy costs.

### **Whole Home Electrification**

Overview: The Whole Home Electrification program refers to ComEd's initiative to convert income-eligible single family and multi-family homes and buildings to all-electric using highly efficient technologies. The offering includes comprehensive appliance and HVAC upgrades, building weatherization, and health and safety modifications required to safely and efficiently reduce reliance on fossil fuel energy sources, like gas and propane, for homeowners and residents in multi-unit homes. Prior to proceeding with a project, the

offering models energy bill impacts to ensure the upgrades will result in overall savings to the customer.

### **Home Energy Reports**

Overview: The Home Energy Report provides select residential customers with information on how they use energy within their households. Reports and the online portal include usage comparison to that of similar, nearby households, personalized energy efficiency advice, program promotions, and application of behavioral principles and social norms to drive adoption of energy efficient behaviors.

### **Retail Market Rate, Income Eligible**

Overview: ComEd offers residential delivery customers rebates on select ENERGY STAR® certified appliance, home products and lighting products. Deeper discounts are available to income eligible customers on select products via instant discount at retail locations within zip codes where at least 60% or more of the households are at or below 80% Area Median Income (AMI) or through customized discount channels to pre-qualified income eligible customers, like Limited Time Offers (LTOs). Retail Program also includes incentives offered via the ComEd Marketplace.

### **Product Distribution Food Bank (Income Eligible), IE Kits (Income Eligible), School Kits (Market Rate and Income Eligible)**

Overview: Product Distribution includes kits (Market Rate and Income Eligible school kits and Income Eligible kits distributed through Community Action Agencies and other partners) and distribution of products through Food Banks, food pantries and other partners. By providing free energy efficiency products and education distributed through trusted channels, ComEd can reach more customers, particularly those most in need and introduce them to the wide-ranging benefits of energy efficiency including reduced energy usage, reduced energy costs, improved their quality of life and reduced environmental impacts.

### **Residential New Construction Affordable Housing New Construction, Electric Home New Construction**

Overview: Residential New Construction consists of two offerings for 2022: Affordable Housing New Construction (AHNC) and Electric Homes New Construction (EHNC). The AHNC Program offering provides technical support and incentives for whole-building energy efficiency for new construction and major renovation projects to reduce the energy burden for income eligible households by lowering their potential monthly energy costs.

# Appendix: Program Descriptions

The program supports developers building or providing major renovation to affordable housing buildings, including both single and multi-family projects. The program offering's incentives are based on the square footage of the areas serving income eligible tenants, while upgrade requirements apply to the full building. The Affordable Housing New Construction offering is delivered in partnership with Nicor Gas.

The EHNC Program promotes high performance all-electric homes that allow ComEd customers to stack the benefits of all-electric energy efficiency, demand-response, electric vehicles, solar, and new rate structures. Program works with local builders and Home Energy Rating System (HERS) raters to ensure that new homes exceed the requirements of the state's energy code for increased energy savings.

## Heating and Cooling

Overview: ComEd offers Heating & Cooling incentives to ComEd residential delivery customers that replace existing heating and cooling equipment with qualifying, high-efficiency central air conditioners, air source heat pumps, ductless mini-split heat pumps, geothermal (ground source) heat pumps, or smart thermostats. Measures including central air conditioning (CAC), air source heat pump, and ductless mini-split heat pumps, are offered through a distributor (midstream channel). Measures including smart thermostats, duct sealing, CAC tune ups, air source heat pump tune ups, and geothermal heat pumps, are offered by Energy Efficiency Service Providers (contractors) to residential customers and are downstream measures (incentives paid to customers through the participating EESP). Also offered downstream are incentives for new and replacement geothermal heat pumps that involve full loop systems.

## Small Business

### Private, Public

Overview: Offers private and public sector small business customers cost-effective turn-key energy efficiency retrofit and replacement services. These customers are typically underrepresented in energy efficiency programs due to limited staff and resources, lack of capital, and leased instead of owned facilities. To qualify for the program, private businesses and public facilities must have an electrical peak demand under 400 kW. Customer categories include, but are not limited to: warehouses, office, retail, restaurant, public libraries, police & fire stations and public K-12 schools.

## Standard Incentives

### Private, Public, ComEd Streetlights

Overview: The Standard Program provides monetary incentives to customers on a "Standard" fixed or per-unit basis. Standard offers incentives for common energy-efficiency improvements including: Indoor and outdoor lighting equipment (including networked lighting and LED streetlights), HVAC equipment (e.g., variable speed drives, chillers, roof-top

units), commercial appliances including industrial and laboratory equipment, compressed air equipment, and Energy Management Systems (EMS).

## Custom Incentives

### Private, Public

Overview: The Custom Program identifies and implements site-specific and unique cost-effective energy efficiency opportunities that are not available via the Standard program. Customized incentives based on per kWh basis and calculated for specific customer projects are offered. Measures include process efficiency improvements, IT equipment upgrades, process cooling, compressed air, VFDs on large motors, free cooling systems, refrigeration improvements, wastewater treatment plants, combined heat and power, and other measures not covered in the Standard offering.

## Retro-Commissioning (RCx)

### Private, Public

Overview: The RCx program provides customers with a fully funded engineering study to help business and public-sector customers optimize operations of existing building systems to reduce energy usage while continuing to maintain desired environmental conditions. Common energy conservation measures focus on control of HVAC and lighting using building automation systems. Typical participants include commercial office buildings, hospitals/health care facilities, and higher education buildings. RCx options include RCx Flex and a Monitoring-Based Commissioning (MBCx). Each conduct an engineering study identifying ECMs. Additionally, RCx includes a Virtual Commissioning (VCx) option which offers free identification of energy-saving measures and remote technical assistance for implementation. VCx focuses on smaller customers in which smart meter interval usage data is used to remotely identify operational savings opportunities.

## Industrial Systems

Overview: The Industrial Systems program assists industrial customers to optimize and/or identify energy efficiency measures to improve the performance of the following systems or processes: Compressed air, process cooling, industrial refrigeration, water and wastewater treatment plant, process efficiency for heating and cooling in production.

## Midstream/Upstream

### Private, Public

Overview: ComEd provides point-of-sale discounts on commercial LED lighting and HVAC equipment, as well as industrial forklift battery chargers. Purchasers can verify customer

# Appendix: Program Descriptions

and product eligibility through participating distributors using a full-service webtool, which reimburses distributors for incentives instantly provided to eligible purchasers.

## Strategic Energy Management (SEM)

Private, Public

Overview: SEM helps organizations embed energy efficiency into their operations and company culture. Efforts ultimately allow for organizations to establish energy policies, improve operating efficiencies, and build budgets for energy efficiency efforts. SEM provides tools, coaching, and technical resources to support customers' energy goals through a year-long series of workshops and one-on-one coaching. It draws on principles of continuous improvement and organizational change and integrates Lean, Six Sigma, and other cost savings and operational excellence initiatives. SEM provides incentives for behavioral energy savings as well as operational measures.

## C&I New Construction

Private, Public

Overview: The New Construction Program offering provides technical assistance, support for the Leadership in Energy and Environmental Design (LEED) rating system, and incentives for whole-building energy efficiency for new construction and major renovation projects to influence building design practices during the design and construction of new buildings, major renovations of existing buildings, and tenant build-outs in the C&I market. The program serves private commercial and industrial buildings (CINC) as well as public sector buildings (PSNC) through a combined offering. The New Construction Program offering is delivered in partnership with all the northern Illinois gas utilities.

## Illinois Commercial Food Services

Private, Public

Overview: The Illinois Commercial Food Services offering provides instant discounts to the purchaser when buying qualified commercial food service equipment utilizing channels including manufacturers, manufacturer representatives, distributors, and dealers of food service equipment. This is a joint utility program available through the state of Illinois and

includes Ameren Illinois, Nicor Gas, People's Gas and Northshore Gas. Customers benefit by receiving incentives for both qualifying electric and qualifying natural gas measures.

## Assessments

Private, Public

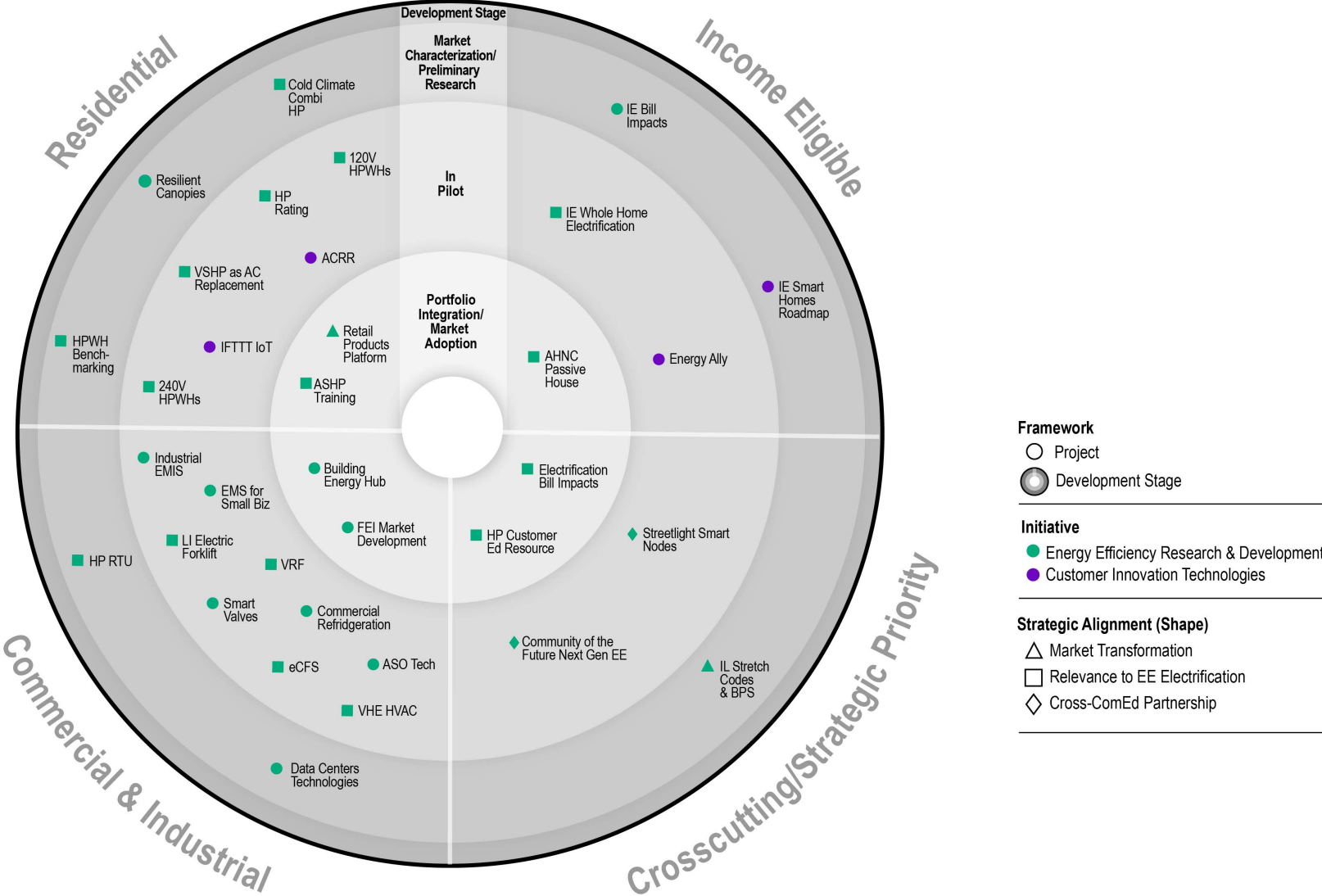
Overview: Assessments identify energy saving measures (capital cost and operational) and provide information on available financial incentives for energy efficient equipment upgrades and retrofits. Assessments save energy annually and lower operating expenses through implementation of recommended measures. The free Facility Assessment is a tool that helps customers take the first step toward making their facility more efficient by identifying opportunities to participate in the various programs within the EE portfolio. The assessments involve an initial site visit (in-person or virtual) where an engineer collects data regarding a facility. After the site visit, the engineer compiles all the opportunities with their estimated savings, costs, incentives, and simple paybacks into a report that is presented to the customer. Customers >10 MW (except for private commercial accounts that have opted out) are now eligible to have a free assessment and for the portfolio to claim operational savings measures.

## Voltage Optimization

Overview: The Voltage Optimization Program deploys circuit voltage detectors and control equipment that will effectively assess and adapt the amount of voltage traveling across a power line at any given time. Once in place, these devices will allow ComEd to more precisely monitor, manage, and deliver the voltage customers need. No additional effort by consumers will be required as the control equipment will automatically adjust to consistently deliver only the voltage each customer requires while providing energy savings.

# Customer Innovation

# ComEd Customer Innovation Portfolio Summary 2023 Q3



This visualization provides an overview of the Customer Innovation Team’s selected research concepts and projects for 2023, organized by stage of research and relevant customer segments. Further information about each project may be found in the following table. Project descriptions are available on the ComEd Customer Innovation website at [Innovate.ComEd.com](https://innovate.comed.com).

## Customer Innovation Portfolio Summary 2023 Q3

Project	Work Description	Partners	Initiative	Project Type	Customer Segment	End Date	Status Update
<b>Portfolio Integration and Market Adoption</b>							
Building Energy Resource Hub	A hub providing training and resources to customers and stakeholders across the region to support meeting aggressive climate action goals, improve building performance, and building an inclusive green economy.	Illinois Green Alliance	R&D	Market Development	Commercial and Industrial	2025 Q2	The Hub was launched in August 2023 and started its educational programming in September 2023. The first public project feature was the Oak Park Temple VHE HVAC demonstration installation.
Fan Energy Index (FEI) Market Development	Integration of savings algorithm to Illinois TRM and new savings opportunity for C&I offering.	Slipstream	R&D	Market Development	Commercial and Industrial	2023 Q4	The project team is developing recommendations for optimal integration of FEI into the existing ComEd midstream program, which requires coordination with the ComEd program implementation contractor, research of other FEI programs, analysis of fan sales data, and interviews with fan distributors. The project team will present recommendations to the ComEd program implementation team in 2023 Q4.
Air Source Heat Pump (ASHP) Training	Series of educational activities designed to develop the EESP market for heat pumps.	Slipstream	R&D	Market Development	Residential	2023 Q4	All the planned curriculum is complete and available on the online learning platform, which contractors can access at no cost. The project team scheduled trainings throughout the rest of the year with a particular focus on delivering the four modules that are required for the heat pump rebates starting in 2024.
Passive House Affordable Housing New Construction (AHNC) Portfolio Integration Pilot	Integration of a PHius+ incentive tier into the Affordable Housing New Construction offering.	Slipstream	R&D	Market Development	Income Eligible	2026	Six PHius-tier affordable multifamily projects are in the pipeline. Three projects are forecasted to complete in 2024, two projects are forecasted to complete in 2025 and one project is forecasted to complete in 2026.
EE Electrification Savings and Bill Impacts Estimation	Analysis of and calculator creation for customer bill impacts related to electrification measures.	Center for Energy and Environment	R&D	Customer Research	Crosscutting/Strategic Priority	2023 Q4	The team is currently working through updates to the bill impacts calculator, such as documenting applications to typical multifamily case studies and exploring the implications for different approaches to estimating natural gas rates.
Retail Products Platform	Testing of a national Market Transformation program delivery model which provides incentives to large retailers to use their influence with appliance manufacturers to bring more efficient models to market.	Energy Solutions	R&D	Scaled Deployment	Residential	2023 Q4	ESRPP has been performing as expected; the delayed reporting and incentive invoicing that persisted in Q2 were resolved in this quarter.
Heat Pump Customer Education Resource Development	Preparation of a web-based resource for customers and contractors to learn about the energy and bill impacts of switching to heat pumps.	Energy Solutions	R&D	Market Development	Crosscutting/Strategic Priority	2024 Q4	The first phase of the website is complete, including some basic information about heat pumps and a savings calculator to help customers understand if/how much they might save by installing a heat pump. The project team is currently in the midst of a usability study that will gather feedback about the website from customer to inform future revisions.
<b>In Pilot</b>							
120V HPWH Field Demonstration	Testing the 120V HPWH in ComEd customer homes to understand installation experience, resident experience/satisfaction, and the equipment's performance through data monitoring.	Slipstream	R&D	Field Tests & Demonstrations	Residential	2024 Q4	The project team has completed recruitment for the installation sites, ordered all necessary equipment (the HPWHs and monitoring tools), and finished developing the customer and contractor interview/survey instruments. Installations in ComEd territory are expected to begin later this month, pending the arrival of the HPWHs and contractor availability.
Residential Heat Pump Water Heaters (240V)	Testing the implementation of a "beachhead" strategy for heat pump water heater (HPWH) installations to prepare the market for broader adoption.	CLEAResult	R&D	Field Tests & Demonstrations	Residential	2023 Q4	The Residential Heat Pump Water Heater Pilot 240V has completed a total of 41 installations. The pilot team collected pre/post installation data, barriers and recommendations that will be presented in October of 2023.
Communities of the Future Next Generation HVAC Demonstration	Testing energy savings and customer experience in real-world conditions, focused on customers situated within ComEd's Communities of the Future areas.	Slipstream	R&D	Field Tests & Demonstrations	Crosscutting/Strategic Priority	2024 Q4	The project team is conducting interviews with the design team, installation team, and customer to identify lessons that can be incorporated into future Bronzeville projects. Coordination with additional sites is in progress, but will not be completed until 2024.
Lithium-Ion Electric Forklift Case Studies	Creating real-world case studies for use in future promotional efforts.	DNV	R&D	Field Tests & Demonstrations	Commercial and Industrial	2024 Q1	Fork Truck and monitoring equipment is installed at the pilot site. The project team is monitoring the energy data will develop a 3-month savings review for Q1 2024.



Commercial Food Service Electrification (eCFS)	Promotion of electrification opportunities within a high-potential commercial customer segment.	Frontier Energy	R&D	Market Characterization	Commercial and Industrial	2025 Q4	The eCFS pilot completed Phase 1 which included preparation of CFS electrification incentive pilot, induction cooktop loaner program, outreach/training and a potential demonstration facility. ComEd is comparing all commercial customer electrification opportunities before deciding on Go/No-Go for phase 2 and pilot launch.
Cold Climate Variable Refrigerant Flow (VRF) HVAC	Test of VRF systems to quantify energy savings potential and comfort benefits in cold climates.	Slipstream	R&D	Field Tests & Demonstrations	Commercial and Industrial	2023 Q4	The project completed and the final report was delivered with findings on the feasibility of adoption of the technology in the ComEd territory. The Illinois TRM document has been delivered and reviewed. The project team completed case studies on two customer sites.
Very High Efficiency (VHE) HVAC	Testing the VHE HVAC systems approach for HVAC retrofit/replacement installations to improve ventilation and indoor air quality while reducing building energy use.	Institute for Market Transformation	R&D	Field Tests & Demonstrations	Commercial and Industrial	2024 Q2	The four participating customer sites are at different stages in the pilot process. One site completed installation, two are in the process of construction/installation, and one is ready for M&V equipment to be installed.
Energy Management Systems (EMS) for Small and Medium Business	Testing a two-tiered energy management system (EMS) offering for small business customers.	Resource Innovations	R&D	Scaled Deployment	Commercial and Industrial	2024 Q3	The project team enrolled four small business customers to participate in the pilot. Customer recruitment is still ongoing and one additional service provider has been enrolled in the pilot. Service provider completed installation of an EMS at one customer site and are coordinating installation for the remaining sites.
Pressure Independent Control Valves Retrofit Study	Testing energy savings and identifying a methodology and framework to accurately estimate savings for a novel commercial HVAC technology.	Slipstream	R&D	Field Tests & Demonstrations	Commercial and Industrial	2025 Q3	Project system monitoring/data collection is ongoing. Initial findings show energy savings. The savings are also affected by other components of the chilled water system and the report will identify and explain those items.
Income Eligible Whole Home Electrification	Investigating energy savings, installation barriers and costs, and customer experience of whole-home electrification via a 100+ home field demonstration.	Elevate	R&D	Scaled Deployment	Income Eligible	2023 Q4	The project team completed whole home electrification retrofits at 56 single family homes and one 22-unit multifamily building, with two other multifamily buildings in progress. The team submitted an interim report outlining initial findings on home selection, the customer experience, project costs and bill impacts.
Industrial Energy Management Information Systems (EMIS)	Testing new program design approaches for implementing energy management information systems that help industrial customers optimize their energy use.	Leidos	R&D	Field Tests & Demonstrations	Commercial and Industrial	2024 Q1	Monitoring systems are in place at all four participant sites. The pilot team continues to work with each customer to identify savings opportunities and develop efficiency strategies. The first site will have savings evaluated for CY2023 as part of the Industrial Systems program.
Commercial Refrigeration Controls	Testing novel advanced controls for large refrigeration systems in real-world conditions.	Slipstream	R&D	Field Tests & Demonstrations	Commercial and Industrial	2024 Q2	Installation, data collection, and initial customer interviews are underway for four sites. A fifth site is still in process.
Streetlight Smart Nodes	Addition of technology to allow improved control of LED streetlights.	ComEd Internal	R&D	Scaled Deployment	Crosscutting/Strategic Priority	2024 Q2	Project team is implementing a dimming strategy and troubleshooting issues with the technology.
Variable Speed Heat Pumps as AC Replacement	Assessment of the performance, energy savings and cost savings of variable speed heat pumps as replacements for AC units.	Center for Energy and Environment	R&D	Field Tests & Demonstrations	Residential	2023 Q4	Project is in final phase of wrap-up and expecting to share a final report and final presentations in December of this year. Final deliverables include development of the best practices installation guide and final completion of data analysis.
Commercial Automated System Optimization (ASO) Technology	Use of AI-based tools to optimize energy usage in commercial buildings through automated real-time management of energy-using systems.	Hank	R&D	Field Tests & Demonstrations	Commercial and Industrial	2024 Q3	Project is in discovery phase as control requirements of integrating equipment with existing systems are being determined. The vendor has connection with the building automation system and the systems and operations that will be changed are actively being worked on.
Energy Ally	Provides customers with an in-home display that communicates real-time, actionable energy use information, including energy prices, budget trends, and weather.	The Will Group, Calico, Eire Direct Marketing, Prism	CIT	Scaled Deployment	Income Eligible	2025 Q4	To date there are 1,242 customers enrolled into the program. This year Customer Innovation partnered with the Customer Experience team on their working credit initiative to assist customers with energy management tool. Planning to evaluate energy savings for this program in early 2024 as well as focusing on transition this to a full-scale implementation. Marketing efforts are currently paused for Q4 as the team continues to improve program accessibility through a program website.

Automated Carbon Reduction Reporting (ACRR)	The ACRR project builds on the "If This Then That" (IFTTT) Internet of Internet (IoT) program, which utilizes optimization applets to enable load shifting in response to real-time price signals and/or carbon signals.	WattTime, Calico	CIT	Field Tests & Demonstrations	Residential	2024 Q2	Project team drafted a survey to assess experience with the carbon index IFTTT applets and assess interested in the ACRR. The team also assessed the number of active carbon index and ACRR customers to determine the anticipated rigor of a carbon reduction impact analysis.
"If This Then That" (IFTTT) Internet of Things	Provides customers with options for automating their participation in programs, such as Hourly Pricing and Peak Time Savings, to reduce energy and demand usage, as well as help customers react to carbon signals. The applets connect to select smart devices to enable automated control of these devices.	IFTTT, Calico	CIT	Field Tests & Demonstrations	Residential	2024 Q1	As part of implementation strategy development, the project team assessed the number of active customers across treatment groups to assess the rigor of impact analysis anticipated for this project. The team also updated the customer survey to better assess experience and satisfaction with the IFTTT applets.
Heat Pump Rating Representativeness	Research partnership to improve standardized performance testing for heat pumps.	Northeast Energy Efficiency Partnerships	R&D	Lab Testing	Residential	2024 Q1	This nationally-relevant effort is ongoing and will continue into 2024. Phase 2 lab testing is underway, but will not be complete until 2024. The project team began lab testing, which will be compared to Phase 1 field testing.
<b>Market Characterization and Preliminary Research</b>							
Heat Pump Rooftop Unit (RTU) Market Research	Market research to understand the current state of the market for heat pump RTUs, to develop program recommendations and to inform a potential field demonstration.	Center for Energy and Environment	R&D	Market Characterization	Commercial and Industrial	2023 Q4	Project team is close to completing phase 1 and is currently wrapping up contractor and customer interviews to complete their research sample. The market characterization report will be complete in November. Following this will be a go/no-go decision regarding a phase 2 for a field evaluation.
Liquid Cooling in Data Centers	Characterization of the data centers market and assessment of the barriers to adoption for an advanced energy-saving technology.	ERI	R&D	Customer Research	Commercial and Industrial	2023 Q3	The project team submitted a final report summarizing the customer research and findings for review. A final presentation of the project results and recommendations will be held in November.
HPWH Incentives Benchmarking	Market research to establish a better understanding of customer preferences, willingness to pay, and optimal program designs.	ICF	R&D	Customer Research	Residential	2023 Q4	The project team completed the conjoint surveys as well as the survey analysis and worked on incentive optimization modeling. Results to be presented in Q4.
Illinois Building Energy Code Advancement	Development of a market transformation approach to drive energy savings through advancement of energy codes and building performance standards.	Slipstream	R&D	Market Development	Crosscutting/Strategic Priority	2025	The project team completed the logic model and MPIs for stretch code and BPS, and are working on developing NMB for IL stretch code. They conducted a survey of municipalities on September 2023 and are actively working with several towns and municipalities.
Income Eligible Smart Homes Roadmap	Study to identify broadband technology solutions to provide smart home energy management to income eligible customers.	Slipstream	CIT	Market Characterization	Income Eligible	2025 Q4	The project team currently investigating and quantifying the best path forward to serve income eligible customers through HEMS, currently conducting a market scan on broadband (and non-broadband) options for energy management for income eligible customers. The objective is to identify various technologies to lab test or field test in a limited number of customer homes in 2024.
Cold Climate Combination Heat Pump Study	Development of a novel residential heat pump system with integrated thermal storage.	Lawrence Berkeley National Lab, Oak Ridge National Lab, GTI Energy, Emanant Systems	R&D	Market Characterization, Field Tests & Demonstrations	Residential	2025 Q4	The project team completed interviews for a market characterization, part of this initiative's preliminary research scope.
Income Eligible Weatherization Bill Impacts - Phase 2	Creating tools to support weatherization participant outcomes.	Internal	R&D	Customer Research	Income Eligible	2024 Q1	The Phase 1 research completed earlier in 2023 by Resource Innovations was successfully presented to SAG members in September. Phase 2 is now underway, in which the R&D team is working with internal-ComEd data analytics specialists to develop a set of tools to support the ongoing identification of weatherization program participant outcomes.
Resilient Canopies in the Chicago Region	Study of the localized impact of afforestation to mitigate urban heat island effects in ComEd communities.	University of Illinois	R&D	Market Characterization	Residential	2024 Q2	Project team is developing the climate simulations in preparation for analysis.

## Appendix: Corrections

### Corrections to ComEd's CY2023 Second Quarter Report:

- On the title page, the carbon impact of the portfolio was mistakenly reported as *76 billion pounds of carbon reduced*. The correct value is *65 billion pounds of carbon reduced*.
- On page 3, *Retail/Online IE* savings were incorrectly grouped as *Market Rate* programs, resulting in erroneously reported forecasts under the "Portfolio Summary" section. This section should have read: "*Through Q2, market rate residential programs have achieved 44% of their combined 2023 savings forecast of 120,763 MWh, not including therms.*" and "*Through Q2, income eligible residential programs have achieved 46% of their combined forecast of 418,998 MWh, not including therms.*"
- On page 5, *Whole Home Electrification* participation included projects that began in Q2 but were not yet completed at the time of reporting. This has been corrected and Q3 updates in this report now include only completed projects YTD.