2027 Illinois Statewide Technical Reference Manual for Energy Efficiency

Version 15.0

Volume 3: Residential Measures

FINAL

September 18, 2026

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January 1, 2027

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5. Volume 3: Residential Measures

5.1 Appliances End Use

5.1.1 ENERGY STAR Air Purifier/Cleaner

DESCRIPTION

An air purifier (cleaner) meeting the efficiency specifications of ENERGY STAR Version 3.0[1] (effective date: October 9, 2025) and ENERGY STAR Most Efficient 2025 criteria (effective date: January 1, 2025) is purchased and installed in place of a model meeting the current federal standard.

This measure was developed to be applicable to the following program types: TOS, NC.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as an air purifier meeting the efficiency specifications of ENERGY STAR as provided below.

- Must produce a minimum 30 Clean Air Delivery Rate (CADR) for $PM_{2.5}$[2] to be considered under this specification. Minimum Performance Requirement is expressed in $PM_{2.5}$ CADR/Watt and it shall be greater than or equal to the Minimum $PM_{2.5}$ CADR/Watt Requirement shown in the table below:

CADR Range	Integrated Energy Factor ($PM_{2.5}$ CADR/W)	
	ENERGY STAR	ENERGY STAR Most Efficient
$30 \le PM_{2.5}$ CADR < 100	4.4	5.4
$100 \le PM_{2.5}$ CADR < 150	5.4	6.6
$PM_{2.5}$ CADR ≥ 150	5.6	8.6

- "Partial On Mode" Requirements are to be calculated as per Section 3.4.1 of the Energy Star Eligibility Criteria [3]
- UL Safety Requirement: Models that emit ozone as a byproduct of air cleaning must meet UL Standard 867 (ozone production must not exceed 50ppb)

DEFINITION OF BASELINE EQUIPMENT

The baseline for this measure is defined as a new air purifier that meets the Code of Federal Regulations appliance federal efficiency standards. As of December 31, 2025, those are as defined below for air cleaners[4]:

CADR Range	Integrated Energy Factor ($PM_{2.5}$ CADR/W)
	Tier 2 December 31, 2025
$10 \le PM_{2.5}$ CADR < 100	1.90
$100 \le PM_{2.5}$ CADR < 150	2.40

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[1] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM. If then efficient equipment is certified under ENERGY STAR version 2 criteria, please refer to the Illinois TRM v13 edition of this measure.

[2] Measured according to the latest ANSI/AHAM AC-1 (AC-1) Standard

[3] ENERGY STAR® Product Specification for Room Air Cleaners - Eligibility Criteria Version 3.0, effective October 9, 2025.

[4] DOE Energy Conservation Standards for Air Cleaners, EERE–2021–BT–STD–0035, Federal Register, vol. 88, no.168, August 31, 2023. Effective date of conservation standard: December 31, 2025.

CADR Range	Integrated Energy Factor ($PM_{2.5}$ CADR/W)
	Tier 2 December 31, 2025
$PM_{2.5}$ CADR ≥ 150	2.90

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 12 years.[5]

DEEMED MEASURE COST

The incremental cost for this measure is dependent on the Air Purifier size in CADR of $PM_{2.5}$. [6]

Product Size	Minimum CADR/W	Average ENERGY STAR Purchase Cost ($)	Average Incremental Cost ($)	
			Non-IQ	IQ[7]
30 ≤ $PM_{2.5}$ CADR < 100	4.4	$117	$0	$19.50
100 ≤ $PM_{2.5}$ CADR < 150	5.4	$193	$76	$95.50
$PM_{2.5}$ CADR ≥ 150	5.6	$398	$55	$112.17

LOADSHAPE

Loadshape C53 – Flat

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = kWh\_base - kWh\_eff$$

$$kWh\_base = (Hours * (\frac{PM_{2.5}CADR_{base}}{IEF_{base} * 1{,}000})) * IQAdj$$

$$kWh\_eff = Hours * (\frac{PM_{2.5}CADR_{eff}}{IEF_{eff} * 1{,}000})$$

Where:

kWh_base = Annual Electrical Usage for baseline unit (kWh)

kWh_eff = Annual Electrical Usage for efficient unit (kWh)

Hours = Annual active operating hours

= 5840[8]

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[5] The lifetime assumption from the Technical Support Document for the 2019 DOE Rulemaking for portable dehumidifiers is 12 years. Given that air purifiers have similar components and operating characteristics as dehumidifiers, the TAC agreed to assume the same measure life for air purifiers.

[6] ENERGY STAR V3 Room Air Cleaners Data and Analysis. See file “ENERGY STAR Version 3.0 Room Air Cleaners Data and Analysis_VEIC”

[7] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See “IQ Appliance Calculations.xls” for information.

Consistent with DOE Test Procedures 10 CFR 430.32 calculation of IEF metric.

$PM_{2.5}$CADR_base = $PM_{2.5}$ CADR for baseline units, as provided in table below

IEF_base = Integrated Energy Factor; $PM_{2.5}$ CADR delivery rate per watt for baseline units, as provided in table below

1000 = Conversion factor from watts to kilowatts

IQAdj = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market.[9]

= 1.48 if IQ, 1.0 if non-IQ

$PM_{2.5}$CADR_eff = $PM_{2.5}$ CADR for efficient unit

= Actual, if unknown use values provided in table below

IEF_eff = Integrated Energy Factor; $PM_{2.5}$ CADR delivery rate per watt for efficient units

= Actual, if unknown use values provided in table below

Parameter assumptions for units by CADR Range:[10]

CADR Range	$PM_{2.5}$ CADR	IEF
Baseline		
30 ≤ $PM_{2.5}$ CADR < 100	58.8	1.9
100 ≤ $PM_{2.5}$ CADR < 150	121.5	2.4
$PM_{2.5}$ CADR ≥ 150	305.9	2.9
Efficient		
30 ≤ $PM_{2.5}$ CADR < 100	58.8	5.5
100 ≤ $PM_{2.5}$ CADR < 150	121.5	6.8
$PM_{2.5}$ CADR ≥ 150	305.9	7.6

	Energy Savings ΔkWh	
CADR Range	Non-IQ	IQ
30 ≤ $PM_{2.5}$ CADR < 100	118	205
100 ≤ $PM_{2.5}$ CADR < 150	191	333
$PM_{2.5}$ CADR ≥ 150	381	677

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[9] It is assumed that a second-hand unit is on average 2/3 of a measure's EUL years old (6 years). The baseline consumption from the TRM in 2018 was increased by an estimate of 0.4% * 6 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This secondhand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See "IQ Appliance Calculations.xls" for information.

[10] Baseline values are consistent with ENERGY STAR v.3.0 Room Air Cleaners Data and Analysis. See file: ENERGY STAR Version 3.0 Room Air Cleaners Data and Analysis_VEIC.xlsx. Efficient values are averages within each CADR range for all models on the ENERGY STAR Qualified products list (QPL accessed: May 20, 2025). Both Baseline & Efficient Capacities (CADR) are also sourced from the ENERGY STAR QPL. For Final Savings Calcs for this measure please see: IL TRM_AirPurifier_Summary Savings Calculations_05202025.xlsx.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \frac{\Delta kWh}{Hours} \times CF$$

Where:

ΔkWh = Gross customer annual kWh savings for the measure

Hours = Average hours of use per year

= 5840 hours[11]

CF = Summer Peak Coincidence Factor for measure

= 66.7%[12]

	ΔkW	
CADR Range	Non-IQ	IQ
$30 \leq PM_{2.5}$ CADR < 100	0.013	0.023
$100 \leq PM_{2.5}$ CADR < 150	0.022	0.038
$PM_{2.5}$ CADR ≥ 150	0.044	0.077

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

There are no operation and maintenance cost adjustments for this measure.[13]

MEASURE CODE: RS-APL-ESAP-V09-270101

REVIEW DEADLINE: 1/1/2029

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[11] Consistent with DOE Test Procedures 10 CFR 430.32 calculation of IEF metric.

[12] Assumes that the purifier usage is evenly spread throughout the year, therefore coincident peak is calculated as 5840/8760 = 66.7%.

[13] Some types of room air cleaners require filter replacement or periodic cleaning, but this is likely to be true for both efficient and baseline units and so no difference in cost is assumed.

5.1.2 ENERGY STAR Clothes Washers

DESCRIPTION

This measure relates to the installation of a clothes washer meeting the ENERGY STAR v8.0 (effective February 5, 2018)[14], CEE Tier 2 (effective May 17, 2022) or ENERGY STAR Most Efficient 2025 Criteria (effective 1/1/2025)/CEE Advanced Tier (effective May 17, 2022) minimum qualifications.

This measure was developed to be applicable to the following program types: TOS, NC.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Clothes washer must meet the ENERGY STAR, CEE Tier 2 or ENERGY STAR Most Efficient/CEE Advanced Tier minimum qualifications, as required by the program.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is a standard sized clothes washer meeting the minimum federal baseline as of January 2018.[15]

Efficiency Level	Top Loading >2.5 Cu ft	Front Loading >2.5 Cu ft
Federal Standard	≥1.57 IMEF, ≤6.5 IWF	≥1.84 IMEF, ≤4.7 IWF
ENERGY STAR	≥2.06 IMEF, ≤4.3 IWF	≥2.76 IMEF, ≤3.2 IWF
CEE Tier 2	≥2.92 IMEF, ≤3.2 IWF	
ENERGY STAR Most Efficient/CEE Advanced Tier	≥3.1 IMEF, ≤3.0 IWF	

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 14 years[16]

DEEMED MEASURE COST

The incremental cost for an efficient unit for a non-IQ participant is assumed to be: $87, for a CEE Tier 2 unit it is $85 and for an ENERGY STAR Most Efficient/CEE Advanced Tier it is $99.[17]

For an IQ participant the incremental cost is assumed to be: $214, for a CEE Tier 2 unit it is $212 and for an ENERGY STAR Most Efficient/CEE Advanced Tier it is $227.[18]

LOADSHAPE

Loadshape R01 - Residential Clothes Washer

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[14] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[15] DOE Energy Conservation Standards for Clothes Washers, Appliance and Equipment Standard, 10 CFR Part 430.32(g)

[16] Based on DOE Life-Cycle Cost and Payback Period Excel-based analytical tool.

[17] Cost estimates are based on analysis of cost data provided in the 2017 Department of Energy Technical Support Document (see IL_TRM_CW Analysis_082022.xlsx). This analysis looked at incremental cost and market data from the CEC Appliance Database and attempts to find the costs associated only with the efficiency improvements. Note that the incremental cost assumes a mix of top and front loading machines available in each efficiency tier. Since CEE T2 and Advanced Tier units are all front loading, and the incremental cost is lower for these machines, the T2 incremental cost is lower than ENERGY STAR which is based on a mix of front and top- loading machines..

[18] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See “IQ Appliance Calculations.xls” for information.

COINCIDENCE FACTOR

The coincidence factor for this measure is 3.8%.[19]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

1. Calculate clothes washer savings based on the Integrated Modified Energy Factor (IMEF).

   The Integrated Modified Energy Factor (IMEF) includes unit operation, standby, water heating, and drying energy use: *"IMEF is the quotient of the capacity of the clothes container, C, divided by the total clothes washer energy consumption per cycle, with such energy consumption expressed as the sum of the machine electrical energy consumption, M, the hot water energy consumption, E, the energy required for removal of the remaining moisture in the wash load, D, and the combined low-power mode energy consumption"* .[20]

   The hot water and dryer savings calculated here assumes electric DHW and Dryer (this will be separated in Step 2).

IMEFsavings[21] = Capacity * (IQAdj/IMEFbase - 1/IMEFeff) * Ncycles

Where

Capacity = Clothes Washer capacity (cubic feet)

= Actual. If capacity is unknown assume 4.61 cubic feet [22]

IQAdj = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market.[23]

= 1.02 if IQ, 1.0 if non-IQ

IMEFbase = Integrated Modified Energy Factor of baseline unit

= 1.58[24]

IMEFeff = Integrated Modified Energy Factor of efficient unit

= Actual. If unknown assume average values provided below.

Ncycles = Number of Cycles per year

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[19] Calculated from Itron eShapes, 8760 hourly data by end use for Missouri, as provided by Ameren.

[20] Definition provided on the ENERGY STAR website.

[21] IMEFsavings represents total kWh only when water heating and drying are 100% electric.

[22] Based on the weighted average clothes washer volume of all sold units in the ComEd ENERGY STAR Retail Product Platform Product (ESRPP) between 2023 and 2025, accessed on 5/6/2026. If utilities have specific evaluation results providing a more appropriate assumption for homes in a particular market or geographical area then that should be used.

[23] It is assumed that a second-hand unit is on average 2/3 of a measure's EUL years old (9 years). The baseline consumption of a unit meeting the pre 03/2015 Federal Standard was increased by an estimate of 0.4% * 9 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. For 2025 on, the post 03/2015 Federal Standard is utilized. This second hand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See "IQ Appliance Calculations.xls" for information.

[24] Weighted average IMEF of DOE Federal Standard rating for Front Loading and Top Loading units. Weighting is based upon all non-qualified (i.e., less efficient than ENERGY STAR v8.1 specification) sold units in the ComEd ENERGY STAR Retail Product Platform Product (ESRPP) between 2023 and 2025, accessed on 5/6/2026.

= 276[25]

IMEFsavings is provided below based on deemed values:[26]

Efficiency Level	IMEF	IMEF Savings (kWh)	
		Non-IQ	IQ
Federal Standard	1.58	0.0	0.0
ENERGY STAR	2.26	242.3	258.4
CEE Tier 2	2.92	369.6	385.7
ENERGY STAR Most Efficient/CEE Advanced Tier	3.10	394.9	411.0

2. Break out savings calculated in Step 1 for electric DHW and electric dryer

ΔkWh = [Capacity * IQAdj/IMEFbase * Ncycles * (%CWbase + (%DHWbase * %Electric_DHW) + (%Dryerbase * %Electric_Dryer))] - [Capacity * 1/IMEFeff * Ncycles * (%CWeff + (%DHWeff * %Electric_DHW) + (%Dryereff * %Electric_Dryer))]

Where:

%CW = Percentage of total energy consumption for Clothes Washer operation (different for baseline and efficient unit – see table below)

%DHW = Percentage of total energy consumption used for water heating (different for baseline and efficient unit – see table below)

%Dryer = Percentage of total energy consumption for dryer operation (different for baseline and efficient unit – see table below)

	Percentage of Total Energy Consumption[27]		
	%CW	%DHW	%Dryer
Baseline	5.7%	16.0%	78.3%
ENERGY STAR	5.8%	15.2%	79.0%
CEE Tier 2	9.9%	7.0%	83.1%
ENERGY STAR Most Efficient/ CEE Advanced Tier	10.3%	7.3%	82.4%

%Electric_DHW = Percentage of DHW savings assumed to be electric

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[25] Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region. This value was then scaled to remain consistent with the volume of laundry completed on average each week between the 2009 RECS data and the new source.

[26] IMEF values are the weighted average of the new ENERGY STAR specifications. Weighting is based upon the relative top v front loading percentage of available ENERGY STAR and CEE Tier 2 products in the CEC database. See “IL TRM_CW Analysis_082024.xlsx” for the calculation.

[27] The percentage of total energy consumption that is used for the machine, heating the hot water or by the dryer is different depending on the efficiency of the unit. Values are based on a weighted average of top-loading and front-loading units based on ComEd ESRPP program sales between 2023 and 2025, accessed on 5/6/2026. Distribution of energy consumptive components at different efficiency levels based on data from the 2024 DOE Life-Cycle Cost (LLC Analysis and Payback Period Excel-based analytical tool (see ‘EERE-2017-BT-STD-0014-0513.xls’). Calculation is provided in the IL Measure Calculation Workbook.

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[28], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People’s Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[29]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

%Electric_Dryer = Percentage of dryer savings assumed to be electric[30]

Dryer fuel	%Electric_Dryer (By Utility)					
	Ameren	**ComEd**	**PG**	**NS**	**Nicor**	**Unknown**
Electric	100%					
Natural Gas	0%					
Unknown	76%	42%	49%	30%	32%	45%

Using the default/unknown assumptions provided above, the prescriptive savings for each configuration are presented below (using unknown utility %Electric_DHW and %Electric_Dryer values):

	ΔkWH – Non IQ Participants								
	Electric DHW Electric Dryer	**Gas DHW Electric Dryer**	**Electric DHW Gas Dryer**	**Gas DHW Gas Dryer**	**Electric DHW Unknown Dryer**	**Gas DHW Unknown Dryer**	**Unknown DHW Electric Dryer**	**Unknown DHW Gas Dryer**	**Unknown DHW Unknown Dryer**
ENERGY STAR	242.3	199.2	55.9	12.8	139.8	96.7	211.7	25.3	109.2
CEE Tier 2	369.6	271.2	100.9	2.5	221.8	123.4	299.7	31.1	152.0
ENERGY STAR Most Efficient/CEE Advanced Tier	394.9	295.9	102.3	3.4	233.9	135.0	324.6	32.0	163.7

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[28] All values except for Peoples Gas and Northshore Gas are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. Peoples Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[29] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[30] Based on data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. Market type assumptions were extracted for each utility and then utility specific market share weightings applied to provide a single utility value. See "Res Baseline Study Workbook.xls" for more detail.

	ΔkWH –IQ Participants								
	Electric DHW Electric Dryer	Gas DHW Electric Dryer	Electric DHW Gas Dryer	Gas DHW Gas Dryer	Electric DHW Unknown Dryer	Gas DHW Unknown Dryer	Unknown DHW Electric Dryer	Unknown DHW Gas Dryer	Unknown DHW Unknown Dryer
ENERGY STAR	258.4	212.8	59.4	13.7	148.9	103.3	226.0	27.0	116.5
CEE Tier 2	385.7	284.7	104.4	3.5	231.0	130.0	314.0	32.7	159.3
ENERGY STAR Most Efficient/CEE Advanced Tier	411.0	309.5	105.8	4.3	243.1	141.6	338.9	33.7	171.0

<u>Secondary kWh Savings for Water Supply and Wastewater Treatment</u>

The following savings should be included in the total savings for this measure but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$\Delta kWh_{water} = \Delta Water \text{ (gallons)} / 1{,}000{,}000 * E_{water\ total}$

Where

ΔWater (gallons) = Water saved, in gallons – as calculated below.

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

=5,010[31]

Using defaults provided:

ENERGY STAR ΔkWh_{water} = 3,105/1,000,000 * 5,010

= 15.6 kWh [16.4 kWh for IQ]

CEE Tier 2 ΔkWh_{water} = 4,100/1,000,000 * 5,010

= 20.6 kWh [21.4 kWh for IQ]

ENERGY STAR Most Efficient/CEE Advanced Tier ΔkWh_{water} = 4,364/1,000,000 * 5,010

= 21.9 kWh [22.7 kWh for IQ]

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh/Hours * CF

Where:

ΔkWh = Energy Savings as calculated above. Note do not include the secondary savings in this calculation.

Hours = Assumed Run hours of Clothes Washer

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[31] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

= 276 hours[32]

CF = Summer Peak Coincidence Factor for measure.

= 0.038[33]

Using the default assumptions provided above, the prescriptive savings for each configuration are presented below (using unknown utility %Electric_DHW and %Electric_Dryer values):

	ΔkW- Non IQ Participants								
	Electric DHW Electric Dryer	Gas DHW Electric Dryer	Electric DHW Gas Dryer	Gas DHW Gas Dryer	Electric DHW Unknown Dryer	Gas DHW Unknown Dryer	Unknown DHW Electric Dryer	Unknown DHW Gas Dryer	Unknown DHW Unknown Dryer
ENERGY STAR	0.0334	0.0274	0.0077	0.0018	0.0192	0.0133	0.0291	0.0035	0.0150
ENERGY STAR Most Efficient/CEE Tier 3	0.0509	0.0373	0.0139	0.0004	0.0305	0.0170	0.0413	0.0043	0.0209
CEE Advanced Tier	0.0544	0.0407	0.0141	0.0005	0.0322	0.0186	0.0447	0.0044	0.0225

	ΔkW- IQ Participants								
	Electric DHW Electric Dryer	Gas DHW Electric Dryer	Electric DHW Gas Dryer	Gas DHW Gas Dryer	Electric DHW Unknown Dryer	Gas DHW Unknown Dryer	Unknown DHW Electric Dryer	Unknown DHW Gas Dryer	Unknown DHW Unknown Dryer
ENERGY STAR	0.0356	0.0293	0.0082	0.0019	0.0205	0.0142	0.0311	0.0037	0.0160
ENERGY STAR Most Efficient/CEE Tier 3	0.0531	0.0392	0.0144	0.0005	0.0318	0.0179	0.0432	0.0045	0.0219
CEE Advanced Tier	0.0566	0.0426	0.0146	0.0006	0.0335	0.0195	0.0467	0.0046	0.0235

Fossil Fuel Savings

Break out savings calculated in Step 1 of electric energy savings (MEF savings) and extract Natural Gas DHW and Natural Gas dryer savings from total savings:

ΔTherm = [(Capacity * IQAdj/IMEFbase * Ncycles * ((%DHWbase * %Fossil_DHW * R_eff) + (%Dryerbase * %Gas _Dryer))) – (Capacity * 1/IMEFeff * Ncycles * ((%DHWeff * %Fossil_DHW * R_eff) + (%Dryereff * %Gas_Dryer)))] * Therm_convert

Where:

Therm_convert = Conversion factor from kWh to Therm

= 0.03412

R_eff = Recovery efficiency factor

= 1.26[34]

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[32] Based on a weighted average of 276 clothes washer cycles per year assuming an average load runs for one hour (Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region. This value was then scaled to remain consistent with the volume of laundry completed on average each week between the 2009 RECS data and the new source.)

[33] Calculated from Itron eShapes, 8760 hourly data by end use for Missouri, as provided by Ameren.

[34] To account for the different efficiency of electric and Natural Gas hot water heaters (gas water heater: recovery efficiencies

%Fossil_DHW = Percentage of DHW savings assumed to be Fossil Fuel

= 100 % for Fossil fuel

= 0 % for Electric

= If unknown[35], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[36]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

%Fossil_Dryer = Percentage of dryer savings assumed to be fossil fuel[37]

Dryer fuel	%Fossil_Dryer (By Utility)					
	Ameren	ComEd	PG	NS	Nicor	Unknown
Electric	0%					
Natural Gas	100%					
Unknown	24%	58%	51%	70%	68%	55%

Other factors as defined above.

Using the default/unknown assumptions provided above, the prescriptive savings for each configuration are presented below (using unknown utility %Fossil_DHW and %Fossil_Dryer values):

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ranging from 0.74 to 0.85 (0.78 used), and electric water heater with 0.98 recovery efficiency (see ENERGY STAR Waste Water Recovery Guidelines). Therefore, a factor of 0.98/0.78 (1.26) is applied.

[35] All values except for Peoples Gas and Northshore Gas are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. Peoples Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[36] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[37] Based on data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. Market type assumptions were extracted for each utility and then utility specific market share weightings applied to provide a single utility value. See "Res Baseline Study Workbook.xls" for more detail.

	ΔTherms – Non IQ Participants								
	Electric DHW Electric Dryer	Gas DHW Electric Dryer	Electric DHW Gas Dryer	Gas DHW Gas Dryer	Electric DHW Unknown Dryer	Gas DHW Unknown Dryer	Unknown DHW Electric Dryer	Unknown DHW Gas Dryer	Unknown DHW Unknown Dryer
ENERGY STAR	0.0	1.9	6.4	8.2	3.5	5.3	1.3	7.7	4.8
CEE Tier 2	0.0	4.2	9.2	13.4	5.0	9.3	3.0	12.2	8.0
ENERGY STAR Most Efficient/CEE Advanced Tier	0.0	4.3	10.0	14.2	5.5	9.7	3.0	13.0	8.5

	ΔTherms – IQ Participants								
	Electric DHW Electric Dryer	Gas DHW Electric Dryer	Electric DHW Gas Dryer	Gas DHW Gas Dryer	Electric DHW Unknown Dryer	Gas DHW Unknown Dryer	Unknown DHW Electric Dryer	Unknown DHW Gas Dryer	Unknown DHW Unknown Dryer
ENERGY STAR	0	2.0	6.8	8.8	3.7	5.7	1.4	8.2	5.1
CEE Tier 2	0	4.3	9.6	13.9	5.3	9.6	3.1	12.7	8.4
ENERGY STAR Most Efficient/CEE Advanced Tier	0	4.4	10.4	14.8	5.7	10.1	3.1	13.5	8.8

WATER IMPACT DESCRIPTIONS AND CALCULATION

$$\Delta Water\ (gallons) = Capacity * ((IWFbase * IQAdj_{CW}) - IWFeff) * Ncycles$$

Where

ΔWater (gallons) = Water saved, in gallons

IWFbase = Integrated Water Factor of baseline clothes washer

= 6.43[38]

IWFeff = Water Factor of efficient clothes washer

= Actual. If unknown assume average values provided below.

Other factors as defined above.

Using the default assumptions provided above, the prescriptive water savings for each efficiency level are presented below:

Efficiency Level	IWF	ΔWater (gallons per year)	
		Non-IQ	IQ
Federal Standard	6.43	N/A	N/A
ENERGY STAR	3.99	3,105	3,268
CEE Tier 2	3.2	4,110	4,273
ENERGY STAR Most Efficient/ CEE Advanced Tier	3	4,364	4,528

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[38] Weighted average IWF of DOE Federal Standard rating for Front Loading and Top Loading units. Weighting is based upon all sold units in the ComEd ENERGY STAR Retail Product Platform Product (ESRPP) between 2023 and 2025, accessed on 5/6/2026

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-ESCL-V15-270101

REVIEW DEADLINE: 1/1/2031

5.1.3 ENERGY STAR Dehumidifier

DESCRIPTION

A dehumidifier meeting the minimum qualifying efficiency standard established by the current ENERGY STAR[39] Version 6.0 (effective 10/01/2025) and ENERGY STAR Most Efficient 2025 Criteria (effective 01/01/2025) is purchased and installed in a residential setting in place of a unit that meets the minimum federal standard efficiency.

This measure was developed to be applicable to the following program types: TOS, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure, the new dehumidifier must meet the ENERGY STAR standards as defined below:

Equipment Specification	Product Capacity	ENERGY STAR Criteria	ENERGY STAR Most Efficient Criteria
	(Pints/Day)	(L/kWh)	(L/kWh)
Portable Dehumidifier	≤ 25	≥1.70	≥1.85
	>25 and ≤ 50	≥2.01	≥2.20
	>50 and < 155	≥3.30	≥3.40
Whole Home Dehumidifier	**Product Case Volume**	**ENERGY STAR Criteria**	**ENERGY STAR Most Efficient Criteria**
	≤ 8.0	≥ 2.22	≥2.35
	> 8.0	≥ 3.81	≥3.81

Qualifying units shall be equipped with an adjustable humidistat control or shall require a remote humidistat control to operate.

DEFINITION OF BASELINE EQUIPMENT

The baseline for this measure is defined as a new dehumidifier that meets the Code of Federal Regulations appliance federal efficiency standards. As of June 13, 2019, those are as defined below for Dehumidifiers:

Equipment Specification	Capacity (pints/day)	Federal Standard Criteria (L/kWh)
Portable Dehumidifier	≤25	≥1.30
	>25 and ≤ 50	≥1.60
	>50 and <155	≥2.80
Whole Home Dehumidifier	**Product Case Volume**	**Federal Standard Criteria (L/kWh)**
	≤ 8.0	≥ 1.77
	> 8.0	≥ 2.41

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[39] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime for Portable Dehumidifiers is 12 years[40] and for Whole Home Dehumidifiers it is 17 years.[41]

DEEMED MEASURE COST

The incremental cost is the difference in cost between a baseline and an ENERGY STAR qualified unit. Please see the table below for cost assumptions used:

Equipment Specification	Population	ENERGY STAR	ENERGY STAR Most Efficient
Portable Dehumidifier	Non-IQ[42]	\$9	\$12
	IQ[43]	\$55	\$59
Whole Home Dehumidifier	Non-IQ[2]	\$143[44]	\$174
	IQ	N/A	N/A

LOADSHAPE

Loadshape R12 - Residential - Dehumidifier

COINCIDENCE FACTOR

The coincidence factor is assumed to be 50%.[45]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = (((Capacity * 0.473) / 24) * Hours) * (IQAdj / (L/kWh\_Base) – 1 / (L/kWh\_Eff))$$

Where:

Capacity = Water removal capacity of the unit (pints/day)

= Actual, if unknown assume capacity in each capacity range as provided in table below,

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[40] EPA Research, 2012; ENERGY STAR Appliance Calculator,

[41] TECHNICAL SUPPORT DOCUMENT: ENERGY EFFICIENCY PROGRAM FOR CONSUMER PRODUCTS AND COMMERCIAL AND INDUSTRIAL EQUIPMENT: DEHUMIDIFIERS, October 2023. https://www.regulations.gov/document/EERE-2019-BT-STD-0043-0023, Appendix 8C. Lifetime is assumed to be the age at which there is an 80% cumulative probability that the unit has failed.

[42] Incremental cost data from the TECHNICAL SUPPORT DOCUMENT: ENERGY EFFICIENCY PROGRAM FOR CONSUMER PRODUCTS AND COMMERCIAL AND INDUSTRIAL EQUIPMENT: DEHUMIDIFIERS, October 2023. https://www.regulations.gov/document/EERE-2019-BT-STD-0043-0023. See Dehumidifiers_Calculation_Sheet_05-09-24.xlsx for more detail regardinging the incremental cost data.

[43] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. The new baseline dehumidifier is assumed to cost \$262 based on values reported in: . See “IQ Appliance Calculations.xls” for information.

[44] ENERGY STAR Version 6.0 Dehumidifiers Draft 1 Specification Stakeholder Webinar presentation, March 28, 2024. Purchase price incremental cost between current DOE standard and Draft 1 v.6.0 for units ≤ 8.0 ft^3.

[45] Assume usage is evenly distributed day vs. night, weekend vs. weekday and is used between April through the end of September (4392 possible hours). With 2,200 operating hours, coincidence peak during summer peak is therefore 2200/4392 = 50.1%

or if capacity range unknown assume average.

0.473 = Constant to convert Pints to Liters

24 = Constant to convert Liters/day to Liters/hour

Hours = Run hours per year

= 2,200[46]

IQAdj = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market. [47]

= 1.096 for Portable Dehumidifiers if IQ, 1.0 if non-IQ or Whole Home Dehumidifiers

L/kWh = Liters of water per kWh consumed, as provided in tables above

Annual kWh usage and savings, for each capacity class and product type, are presented in the four tables below:

Portable Dehumidifiers					**Annual kWh**			
Capacity Range	**Capacity Used[48]**	**Federal Standard Criteria**	**ENERGY STAR Criteria**	**ENERGY STAR Most Efficient Criteria**	**Non-IQ Baseline: Federal Standard**	**IQ Baseline**	**ENERGY STAR**	**ENERGY STAR Most Efficient**
(pints/day)	**(pints/day)**	**(≥ L/kWh)**	**(≥ L/kWh)**	**(≥ L/kWh)**				
≤25	20	1.3	1.7	1.85	667	731	510	469
>25 and ≤50	37.5	1.6	2.01	2.2	1016	1114	809	739
>50 and <155	102.5	2.8	3.3	3.4	1587	1740	1347	1307
Average[49]	38.2	1.54	1.95	2.13	778	1178	630	778
Whole Home Dehumidifiers[50]					**Annual kWh**			
Product Case Volume (sqft.)	**Capacity Used[51]**	**Federal Standard Criteria**	**ENERGY STAR Criteria**	**ENERGY STAR Most Efficient Criteria**	**Non-IQ Baseline: Federal Standard**	**IQ Baseline**	**ENERGY STAR**	**ENERGY STAR Most Efficient**
≤ 8.0	55	1.77	2.22	2.35	2127	N/A	1696	1602

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[46] Based on Mattison et al., “Dehumidifiers: A Major Consumer of Residential Electricity”, Cautley et al., “Dehumidification and Subslab Ventilation in Wisconsin Homes” and Yang et al., “Dehumidifier Use in the U.S. Residential Sector”, all indicating average usage around 2,200 hours per year.

[47] It is assumed that a second-hand unit is on average 2/3 of a measure’s EUL years old (8 years). In 2019 a new Federal Standard became effective and “relative to the previous standard, the current standard represents energy savings of about 15-25%”. 20% was used and increased by an estimate of 0.4% * 8 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This secondhand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See “IQ Appliance Calculations.xls” for information.

[48] Capacity Used in calculations for each bin is an average. See next footnote regarding overall average for Portable Dehumidifiers

[49] Weighted Overall average based on ENERGY STAR Products List 2025 for Dehumidifiers, accessed May 2025. See sheet estar-2025-05 in file "ENERGY STAR Dehumidifier TRM Analysis_2025.xlsx"

[50] There are currently no ENERGY STAR whole-home dehumidifiers with a product case volume > 8.0 sqft. Savings for any dehumidifiers in this category will need to be calculated with actual performance values utilizing the savings algorithm above

[51] Capacity Used in calculations for each bin is an average. See next footnote regarding overall average for Portable Dehumidifiers

Portable Dehumidifier		Energy Savings (ΔkWh)			
		Non-IQ		IQ	
Capacity Range (pints/day)	Capacity Used (pints/day)	ENERGY STAR	ENERGY STAR Most Efficient	ENERGY STAR	ENERGY STAR Most Efficient
≤25	20	157	198	221	262
>25 and ≤50	37.5	207	277	305	375
>50 and <155	102.5	241	280	393	432
Average	38.2	226	297	329	400
Whole Home Dehumidifiers		Energy Savings (ΔkWh)			
Product Case Volume (sqft.)	Capacity Used	ENERGY STAR	ENERGY STAR Most Efficient	ENERGY STAR	ENERGY STAR Most Efficient
≤ 8.0	55	431	525	N/A	N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh/Hours * CF$$

Where:

CF = Summer Peak Coincidence Factor for measure

= 0.50[52]

Summer coincident peak demand results for each capacity class are presented below:

Portable Dehumidifier		Energy Savings (ΔkW)			
		Non-IQ		IQ	
Capacity Range (pints/day)	Capacity Used (pints/day)	ENERGY STAR	ENERGY STAR Most Efficient	ENERGY STAR	ENERGY STAR Most Efficient
≤25	20	0.036	0.045	0.05	0.06
>25 and ≤50	37.5	0.047	0.063	0.069	0.085
>50 and <155	102.5	0.055	0.064	0.089	0.098
Average	38.2	0.051	0.067	0.075	0.091
Whole Home Dehumidifiers		Energy Savings (ΔkW)			
Product Case Volume (sqft.)	Capacity Used	ENERGY STAR	ENERGY STAR Most Efficient	ENERGY STAR	ENERGY STAR Most Efficient
≤ 8.0	55	0.098	0.116	N/A	N/A

FOSSIL FUEL SAVINGS

N/A

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[52] Assume usage is evenly distributed day vs. night, weekend vs. weekday and is used between April through the end of September (4392 possible hours). With 2200 operating hours, coincidence peak during summer peak is therefore 2200/4392 = 50.1%

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-ESDH-V13-270101

REVIEW DEADLINE: 1/1/2030

5.1.4 ENERGY STAR Dishwasher

DESCRIPTION

A standard or compact residential dishwasher meeting ENERGY STAR[53] standards is installed in place of a model meeting the federal standard.

This measure was developed to be applicable to the following program types: TOS, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as a standard or compact dishwasher meeting the ENERGY STAR standards presented in the table below.

ENERGY STAR Requirements (Version 7.0, Effective July 19, 2023)

Dishwasher Type	Maximum kWh/year	Maximum gallons/cycle
Standard (≥ 8 place settings + six serving pieces)	240	3.2
Standard with Connected Functionality[54]	252	
Compact (< 8 place settings + six serving pieces)	155	2.0

DEFINITION OF BASELINE EQUIPMENT

The baseline reflects the minimum federal efficiency standards for dishwashers effective May 30, 2013, as presented in the table below.[55]

Dishwasher Type	Maximum kWh/year	Maximum gallons/cycle
Standard	307	5.0
Compact	222	3.5

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of the measure is 11 years.[56]

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[53] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[54] The ENERGY STAR specification “establishes optional connected criteria for dishwashers. ENERGY STAR certified dishwashers with connected functionality offer favorable attributes for demand response programs to consider, since their peak energy consumption is relatively high, driven by water heating. ENERGY STAR certified dishwashers with connected functionality will offer consumers new convenience and energy-saving features, such as alerts for cycle completion and/or recommended maintenance, as well as feedback on the energy use of the product”. See ‘ENERGY STAR Residential Dishwasher Final Version 6.0 Cover Memo.pdf’. Calculated as per Version 6.0 specification; “ENERGY STAR Residential Dishwasher Version 6.0 Final Program Requirements.pdf”. As of July 2021, Version 7.0 specification is still under development. Note that the potential for demand response and additional peak savings from units with Connected Functionality have not been explored. This could be a potential addition in a future version.

[55] A new federal efficiency standard for residential dishwashers is scheduled to go into effect on April 23rd, 2027. The current 2013 standard will remain the baseline for this version of the TRM to allow for a sell-through period. Please see EERE-2019-BT-STD-0039 for details.

[56] Measure lifetime from California DEER. See file California DEER 2014-EUL Table - 2014 Update.xlsx.

DEEMED MEASURE COST

The incremental cost for standard and compact dishwashers is provided in the table below:[57]

Dishwasher Type	Baseline Cost		ENERGY STAR Cost	Incremental Cost	
	Non-IQ	IQ[58]		Non-IQ	IQ
Standard	$310	$213.03	$340	$30	$118.28
Compact	$290.13	$241.78	$308.62	$18.49	$66.85

LOADSHAPE

Loadshape R02 - Residential Dish Washer

COINCIDENCE FACTOR

The coincidence factor is assumed to be 2.6%.[59]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh^{60} = ((kWh_{Base} - kWh_{ESTAR}) * (\%kWh\_op + (\%kWh\_heat * \%Electric\_DHW)))$$

Where:

kWh_{BASE} = Baseline kWh consumption per year

Dishwasher Type	Maximum kWh/year	
	Non-IQ	IQ[61]
Standard	307	310
Compact	222	224

kWh_{ESTAR} = ENERGY STAR kWh annual consumption

Dishwasher Type	Maximum kWh/year
Standard	240
Standard with Connected Functionality	252
Compact	155

---

[57] Costs are based on data from U.S. DOE, Final Rule Life-Cycle Cost (LCC) Spreadsheet. See file Residential Dishwasher Analysis_2021.xlsx for cost calculation details.

[58] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See “IQ Appliance Calculations.xls” for information.

[59] Calculated from Itron eShapes, 8760 hourly data by end use for Missouri, as provided by Ameren.

[60] The Federal Standard and ENERGY STAR annual consumption values include electric consumption for both the operation of the machine and for heating the water that is used by the machine.

[61] It is assumed that a secondhand unit is on average 2/3 of a measure’s EUL years old (7 years). There has been no new Federal Standard in that period, but new unit baseline consumption is increased by an estimate of 0.4% * 7 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This secondhand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See “IQ Appliance Calculations.xls” for information.

%kWh_op = Percentage of dishwasher energy consumption used for unit operation

= 100 - 56%[62]

= 44%

%kWh_heat = Percentage of dishwasher energy consumption used for water heating

= 56%[63]

%Electric_DHW = Percentage of DHW savings assumed to be electric

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[64], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[65]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Dishwasher Type	ΔkWh - Non IQ			ΔkWh - IQ		
	With Electric DHW	With Gas DHW	With Unknown location and building type DHW	With Electric DHW	With Gas DHW	With Unknown location and building type DHW
ENERGY STAR Standard	67.0	29.5	40.4	70.0	30.8	42.2
ENERGY STAR Standard with Connected Functionality	55.0	24.2	33.1	58.0	25.5	34.9
ENERGY STAR Compact	67.0	29.5	40.4	69.0	30.4	41.6

<u>Secondary kWh Savings for Water Supply and Wastewater Treatment</u>

The following savings should be included in the total savings for this measure but should not be included in TRC tests

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[62] ENERGY STAR Qualified Appliance Savings Calculator, last updated October 2016.

[63] Ibid.

[64] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[65] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

to avoid double counting the economic benefit of water savings.

$$\Delta kWh_{water} = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ total}$$

Where

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

=5,010[66]

Using defaults provided:

Standard ΔkWh_{water} = 252/1,000,000 * 5,010

= 1.3 kWh

Compact ΔkWh_{water} = 67/1,000,000 * 5,010

= 0.3 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS[67]

$$\Delta kW = \Delta kWh/Hours * CF$$

Where:

ΔkWh = Annual kWh savings from measure as calculated above. Note do not include the secondary savings in this calculation.

Hours = Annual operating hours[68]

= 353 hours

CF = Summer Peak Coincidence Factor

= 2.6% [69]

Dishwasher Type	ΔkW - Non IQ			ΔkW - IQ		
	With Electric DHW	With Gas DHW	With Unknown location and building type DHW	With Electric DHW	With Gas DHW	With Unknown location and building type DHW
ENERGY STAR Standard	0.0049	0.0022	0.0030	0.0052	0.0023	0.0031
ENERGY STAR Standard with Connected Functionality	0.0041	0.0018	0.0024	0.0043	0.0019	0.0026
ENERGY STAR Compact	0.0049	0.0022	0.0030	0.0051	0.0022	0.0031

FOSSIL FUEL SAVINGS

$$\Delta\ Therm = (kWh_{Base} - kWh_{ESTAR}) * \%kWh\_heat * \%Fossil\_DHW * R\_eff * 0.03412$$

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[66] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information, please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

[67] Note that the potential for demand response and additional peak savings from units with Connected Functionality have not been explored. This could be a potential addition in a future version.

[68] Assuming 2.1 hours per cycle and 168 cycles per year therefore 353 operating hours per year. 168 cycles per year is based on a weighted average of dishwasher usage in Illinois derived from the 2009 RECs data.

[69] End use data from Ameren representing the average DW load during peak hours/peak load.

Where

%kWh_heat = % of dishwasher energy used for water heating

= 56%

%Fossil_DHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[70], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[71]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

R_eff = Recovery efficiency factor

= 1.26[72]

0.03412 = factor to convert from kWh to Therm

Dishwasher Type	ΔTherms - Non IQ			ΔTherms - IQ		
	With Electric DHW	With Gas DHW	With Unknown location and building type DHW	With Electric DHW	With Gas DHW	With Unknown location and building type DHW
ENERGY STAR Standard	0	1.61	1.15	0	1.69	1.20
ENERGY STAR Standard with Connected Functionality	0	1.32	0.94	0	1.40	0.99
ENERGY STAR Compact	0	1.61	1.15	0	1.66	1.18

WATER IMPACT DESCRIPTIONS AND CALCULATION

$$\Delta Water\ (gallons) = Water_{Base} - Water_{EFF}$$

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[70] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[71] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[72] To account for the different efficiency of electric and natural gas hot water heaters (gas water heater: recovery efficiencies ranging from 0.74 to 0.85 (0.78 used), and electric water heater with 0.98 recovery efficiency (see ENERGY STAR Waste Water Heat Recovery Guidelines). Therefore, a factor of 0.98/0.78 (1.26) is applied.

Where:

$Water_{Base}$ = water consumption of conventional unit

Dishwasher Type	$Water_{Base}$ (gallons) [73]
Standard	840
Compact	588

$Water_{EFF}$ = annual water consumption of efficient unit:

Dishwasher Type	$Water_{EFF}$ (gallons) [74]
Standard	538
Compact	336

Dishwasher Type	ΔWater (gallons)
ENERGY STAR Standard	302
ENERGY STAR Compact	252

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-ESDI-V13-270101

REVIEW DEADLINE: 1/1/2028

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[73] Assuming maximum allowed from specifications and 168 cycles per year based on a weighted average of dishwasher usage in Illinois derived from the 2009 RECs data.

[74] Ibid

5.1.5 ENERGY STAR Freezer

DESCRIPTION

A freezer meeting the efficiency specifications of ENERGY STAR[75] is installed in place of a model meeting the federal standard (NAECA). Energy usage specifications are defined in the table below (note, AV is the freezer Adjusted Volume and is calculated as 1.73*Total Volume):

Product Category	Volume (cubic feet)	Assumptions after September 2014	
		Federal Baseline Maximum Energy Usage in kWh/year[76]	ENERGY STAR Maximum Energy Usage in kWh/year[77]
Upright Freezers with Manual Defrost	7.75 or greater	5.57*AV + 193.7	5.01*AV + 174.3
Upright Freezers with Automatic Defrost	7.75 or greater	8.62*AV + 228.3	7.76*AV + 205.5
Chest Freezers and all other Freezers except Compact Freezers	7.75 or greater	7.29*AV + 107.8	6.56*AV + 97.0
Compact Upright Freezers with Manual Defrost	< 7.75 and 36 inches or less in height	8.65*AV + 225.7	7.79*AV + 203.1
Compact Upright Freezers with Automatic Defrost	< 7.75 and 36 inches or less in height	10.17*AV + 351.9	9.15*AV + 316.7
Compact Chest Freezers	<7.75 and 36 inches or less in height	9.25*AV + 136.8	8.33*AV + 123.1

This measure was developed to be applicable to the following program types: TOS, NC.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as a freezer meeting the efficiency specifications of ENERGY STAR, as defined below and calculated above:

Equipment	Volume	Criteria
Full Size Freezer	7.75 cubic feet or greater	At least 10% more energy efficient than the minimum federal government standard (NAECA).
Compact Freezer	Less than 7.75 cubic feet and 36 inches or less in height	At least 20% more energy efficient than the minimum federal government standard (NAECA).

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is assumed to be a model that meets the federal minimum standard for energy efficiency. The standard varies depending on the size and configuration of the freezer (chest freezer or upright freezer, automatic or manual defrost) and is defined in the table above.

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[75] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[76] See Department of Energy Federal Standards, (10 CFR Part 430.32(a)), effective September 15th, 2014.

[77] See Version 5.1 ENERGY STAR specification.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 18.5 years for standard size and 11.4 years for compact freezers.[78]

DEEMED MEASURE COST

The incremental cost for this measure is $23[79] for non-IQ participants and $171 for IQ participants.[80]

LOADSHAPE

Loadshape R04 - Residential Freezer

COINCIDENCE FACTOR

The summer peak coincidence factor for this measure is assumed to be 95%.[81]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS:

$$\Delta kWh = (kWh_{Base} * IQAdj) - kWh_{ESTAR}$$

Where:

kWh_{BASE} = Baseline kWh consumption per year as calculated in algorithm provided in table above.

IQAdj = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market. [82]

= 1.14 if IQ, 1.0 if non-IQ

kWh_{ESTAR} = ENERGY STAR kWh consumption per year as calculated in algorithm provided in table above.

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[78] Based on 2023 DOE Rulemaking Technical Support Document, “Refrigerators, Refrigerator-Freezers, and Freezers Life-Cycle Cost (LCC) Analysis Spreadsheet (Direct Final Rule)” posted December 29, 2023.

[79] Costs are estimated using the data provided in the Department of Energy, “Refrigerator, Refrigerator-Freezer, and Freezer Life-Cycle Cost (LCC) Analysis Spreadsheet” posted November 9, 2021 as part of the ‘Energy Conservation Standards for Consumer Refrigerators, Refrigerator-Freezers, and Freezers’ rulemaking docket. Install cost data was trended to provide estimates at the efficiency levels specified in this measure, and then weighted based on available product on the ENERGY STAR Freezer QPI, accessed 5/6/2026. See “EERE-2017-BT-STD-0003-0109_content_Freezers_2026.xls” for more information.

[80] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See “IQ Appliance Calculations.xls” for information.

[81] Based on eShapes Residential Freezer load data as provided by Ameren.

[82] It is assumed that a second-hand unit is on average 2/3 of a measure’s EUL years old (12 years). The current Federal Standard became effective in 2014 so the previous standard is used to estimate base consumption for a second hand unit, and further increased by an estimate of 0.4% * 12 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This second hand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See “IQ Appliance Calculations.xls” for information.

For example for a 7.75 cubic foot Upright Freezers with Manual Defrost purchased by non-IQ participant after September 2014:

$$\Delta kWh = ((5.57*(7.75*1.73)+193.7))*1) – (5.01*(7.75*1.73)+174.3)$$
$$= 268.4 – 241.5$$
$$= 26.9 \text{ kWh}$$

If volume is unknown, use the following default values:

Product Category	Adjusted Volume Used[83]	kWh_{BASE}		kWh_{ESTAR}	ΔkWh	
		Non-IQ	IQ		Non-IQ	IQ
Upright Freezers with Manual Defrost	15.7	281.1	321	253	28.2	67.6
Upright Freezers with Automatic Defrost	26.3	454.8	519	409.4	45.4	109.1
Chest Freezers and all other Freezers except Compact Freezers	25.5	293.8	335	264.4	29.4	70.6
Compact Upright Freezers with Manual Defrost	6	277.7	317	250	27.8	66.7
Compact Upright Freezers with Automatic Defrost	7.9	432.4	493	389.1	43.3	103.8
Compact Chest Freezers	9.1	221.3	252	199.2	22.1	53.1

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh / Hours * CF$$

Where:

ΔkWh = Gross customer annual kWh savings for the measure

Hours = Full Load hours per year

= 5890[84]

CF = Summer Peak Coincident Factor

= 0.95 [85]

For example, for a 7.75 cubic foot Upright Freezers with Manual Defrost purchased by non-IQ participant:

$$\Delta kW = 26.9/5890 * 0.95$$
$$= 0.0043 \text{ kW}$$

If volume is unknown, use the following default values:

Product Category	ΔkW	
	Non-IQ	IQ
Upright Freezers with Manual Defrost	0.0045	0.0109

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[83] Volume is based on average adjusted volume of units on the ENERGY STAR QPI, accessed 5/6/2026. See “DOE LCC Spreadsheet_Freezer_2026.xls” for more information.

[84] Calculated from eShapes Residential Freezer load data as provided by Ameren by dividing total annual load by the maximum kW in any one hour.

[85] Based on eShapes Residential Freezer load data as provided by Ameren.

Product Category	ΔkW	
	Non-IQ	IQ
Upright Freezers with Automatic Defrost	0.0073	0.0176
Chest Freezers and all other Freezers except Compact Freezers	0.0047	0.0114
Compact Upright Freezers with Manual Defrost	0.0045	0.0108
Compact Upright Freezers with Automatic Defrost	0.0070	0.0167
Compact Chest Freezers	0.0036	0.0086

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-ESFR-V07-270101

REVIEW DEADLINE: 1/1/2029

5.1.6 ENERGY STAR, CEE Tier 2 or CEE Tier 3 Refrigerator

DESCRIPTION

This measure relates to:

a) Time of Sale: the purchase and installation of a new refrigerator meeting either ENERGY STAR[86], CEE TIER 2 or TIER 3 specifications.

b) Early Replacement: the early removal of an existing residential inefficient Refrigerator from service, prior to its natural end of life, and replacement with a new ENERGY STAR, CEE Tier 2 or Tier 3 qualifying unit. Savings are calculated between existing unit and efficient unit consumption during the remaining life of the existing unit, and between new baseline unit and efficient unit consumption for the remainder of the measure life.

Energy usage specifications are defined in the table below (note, Adjusted Volume is calculated as the fresh volume + (1.63 * Freezer Volume):

Product Category	Existing Unit	Assumptions after September 2014	
	Based on Refrigerator Recycling algorithm	Federal Baseline Maximum Energy Usage in kWh/year[87]	ENERGY STAR Maximum Energy Usage in kWh/year[88]
1. Refrigerators and Refrigerator-freezers with manual defrost	Use Algorithm in 5.1.8 Refrigerator and Freezer Recycling measure to estimate existing unit consumption	6.79AV + 193.6	6.11 * AV + 174.2
2. Refrigerator-Freezer--partial automatic defrost		7.99AV + 225.0	7.19 * AV + 202.5
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost		8.07AV + 233.7	7.26 * AV + 210.3
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service		8.51AV + 297.8	7.66 * AV + 268.0
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without through-the-door ice service		8.85AV + 317.0	7.97 * AV + 285.3
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service		9.25AV + 475.4	8.33 * AV + 436.3
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service		8.40AV + 385.4	7.56 * AV + 355.3
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service		8.54AV + 432.8	7.69 * AV + 397.9

This measure was developed to be applicable to the following program types: TOS, NC, EREP.

If applied to other program types, the measure savings should be verified.

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[86] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[87] See Department of Energy Federal Standards (10 CFR Part 430.32(a)), effective September 15th, 2014.

[88] See Version 5.1 ENERGY STAR specification.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as a refrigerator meeting the efficiency specifications of ENERGY STAR, CEE Tier 2 or CEE Tier 3 (defined as requiring >= 10%, >= 15% or >=20% less energy consumption than an equivalent unit meeting federal standard requirements respectively). The ENERGY STAR standard varies according to the size and configuration of the unit, as shown in table above.

DEFINITION OF BASELINE EQUIPMENT

Time of Sale: baseline is a new refrigerator meeting the minimum federal efficiency standard for refrigerator efficiency. The current federal minimum standard varies according to the size and configuration of the unit, as shown in table above. This Federal Standard is effective for units manufactured after September 1, 2014. Note in December 2021, the DOE presented preliminary analysis for the purposes of evaluating energy conservation standards. The review deadline will be set for one further year to review progress in standard updates.

Early Replacement: the baseline is the existing refrigerator for the assumed remaining useful life of the unit and the new baseline as defined above for the remainder of the measure life.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 14.5 years.[89]

Remaining life of existing equipment is assumed to be 4.8 years.[90]

DEEMED MEASURE COST

Time of Sale: The incremental cost for non-IQ participants is assumed to be $17 for an ENERGY STAR unit, $33 for a CEE Tier 2 unit and $51 for a CEE Tier 3 unit.[91]

For IQ participants the incremental cost is assumed to be $207 for an ENERGY STAR unit, $223 for a CEE Tier 2 unit and $241 for a CEE Tier 3 unit. [92]

Early Replacement: The measure cost is the full cost of removing the existing unit and installing a new one. The actual program cost should be used. If unavailable, assume $1,155 for ENERGY STAR unit, $1,171 for CEE Tier 2 unit and $1,189 for CEE Tier 3 units.

The avoided replacement cost (after 4.8 years) of a baseline replacement refrigerator is $1,262[93]. This cost should be discounted to present value using the nominal societal discount rate.

LOADSHAPE

Loadshape R05 - Residential Refrigerator

COINCIDENCE FACTOR

A coincidence factor is not used to calculate peak demand savings for this measure, see below.

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[89] Based on 2023 DOE Rulemaking Technical Support Document, "Refrigerators, Refrigerator-Freezers, and Freezers Life-Cycle Cost (LCC) Analysis Spreadsheet (Direct Final Rule)" posted December 29, 2023.

[90] Standard assumption of one third of effective useful life.

[91] Costs are estimated using the data provided in the Guidehouse and Leidos Technology Forecast Updates Residential and Commercial Building Technologies Reference Case presented to U.S. Energy Information Administration March 3, 2023.

[92] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See "IQ Appliance Calculations.xls" for information.

[93] Estimated by taking the incremental cost from the ENERGY STAR cost and applying 4.8 years of inflation at 2.28%.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS:

Time of Sale: $\Delta kWh = (UEC_{BASE} * IQAdj) – UEC_{EE}$

Early Replacement:

ΔkWh for remaining life of existing unit (1st 4.8 years) $= UEC_{EXIST} – UEC_{EE}$

ΔkWh for remaining measure life (next 9.7 years) $= (UEC_{BASE} * IQAdj) – UEC_{EE}$

Where:

UEC_{EXIST} = Annual Unit Energy Consumption of existing unit as calculated in algorithm from 5.1.8 Refrigerator and Freezer Recycling measure.

UEC_{BASE} = Annual Unit Energy Consumption of baseline unit as calculated in algorithm provided in table above.

IQAdj = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market. [94]

= 1.04 if IQ, 1.0 if non-IQ

UEC_{EE} = Annual Unit Energy Consumption of ENERGY STAR unit as calculated in algorithm provided in table above. For CEE Tier 2, unit consumption is calculated as 15% lower than baseline and for CEE Tier 3 20% lower than baseline.

If volume is unknown, use the following defaults, based on an assumed Adjusted Volume of 22.8:[95]

Product Category	Existing Unit UEC_{EXIST}[96]	Baseline Unit UEC_{BASE}		New Efficient UEC_{EE}		
		Non-IQ	IQ	ENERGY STAR	CEE T2	CEE T3
1. Refrigerators and Refrigerator-freezers with manual defrost	998.1	347.9	362	313.1	295.7	278.3
2. Refrigerator-Freezer--partial automatic defrost	998.1	406.6	423	365.9	345.6	325.3
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost	794.7	417.1	434	375.3	354.6	333.7
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service	1201.5	491.2	511	442.1	417.5	393.0

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[94] It is assumed that a second-hand unit is on average 2/3 of a measure's EUL years old (9.7 years). The current Federal Standard became effective in 2014 so the previous standard is used to estimate base consumption for a second hand unit, and further increased by an estimate of 0.4% * 9.7 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This second hand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See "IQ Appliance Calculations.xls" for information.

[95] Volume is based on the average adjusted volume of applicable units on the ENERGY STAR QPI, accessed 5/6/2026.

[96] Estimates of existing unit consumption are based on using the 5.1.8 Refrigerator and Freezer Recycling algorithm and the inputs described here: Age = 10 years, Pre-1990 = 0, Size = 19 ft3 (average of applicably units on ENERGY STAR QPI, accessed 5/6/2026), Single Door = 0, Side by side = 1 for classifications stating side by side, 0 for classifications stating top/bottom, and 0.5 for classifications that do not distinguish, Primary appliances = 1, unconditioned = 0, Part use factor = 0.

Product Category	Existing Unit UEC$_{EXIST}$[96]	Baseline Unit UEC$_{BASE}$		New Efficient UEC$_{EE}$		
		Non-IQ	IQ	ENERGY STAR	CEE T2	CEE T3
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without through-the-door ice service	794.7	518.2	539	466.5	440.4	414.5
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service	794.7	685.6	713	625.6	582.8	548.5
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service	794.7	576.3	599	527.1	489.9	461.1
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service	1201.5	626.9	652	572.7	532.9	501.5

Product Category	Early Replacement (1st 4.8 years) ΔkWh			Time of Sale and Early Replacement (last 9.7 years) ΔkWh					
				Non-IQ			IQ		
	ENERGY STAR	CEE T2	CEE T3	ENERGY STAR	CEE T2	CEE T3	ENERGY STAR	CEE T2	CEE T3
1. Refrigerators and Refrigerator-freezers with manual defrost	685.0	702.3	719.7	34.9	52.2	69.6	48.8	66.1	83.5
2. Refrigerator-Freezer--partial automatic defrost	632.2	652.5	672.8	40.7	61.0	81.3	56.9	77.3	97.6
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost	419.4	440.1	461.0	41.8	62.6	83.4	58.5	79.3	100.1
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service	759.4	783.9	808.5	49.1	73.7	98.2	68.8	93.3	117.9
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without	328.2	354.3	380.2	51.7	77.7	103.6	72.4	98.4	124.4

Product Category	Early Replacement (1st 4.8 years) ΔkWh			Time of Sale and Early Replacement (last 9.7 years) ΔkWh					
				Non-IQ			IQ		
	ENERGY STAR	CEE T2	CEE T3	ENERGY STAR	CEE T2	CEE T3	ENERGY STAR	CEE T2	CEE T3
through-the-door ice service									
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service	169.0	211.9	246.2	60.0	102.8	137.1	87.4	130.3	164.6
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service	267.6	304.8	333.6	49.2	86.4	115.3	72.2	109.5	138.3
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service	628.8	668.6	699.9	54.2	94.0	125.4	79.3	119.1	150.5

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (ΔkWh/8766) * TAF * LSAF

Where:

TAF = Temperature Adjustment Factor

= 1.25[97]

LSAF = Load Shape Adjustment Factor

= 1.057 [98]

If volume is unknown, use the following defaults:

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[97] Average temperature adjustment factor (to account for temperature conditions during peak period as compared to year as a whole) based on Blasnik, Michael, "Measurement and Verification of Residential Refrigerator Energy Use, Final Report, 2003-2004 Metering Study", July 29, 2004 (p. 47). It assumes 90 °F average outside temperature during peak period, 71°F average temperature in kitchens and 65°F average temperature in basement, and uses assumption that 66% of homes in Illinois have central cooling (CAC saturation: "Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey).

[98] Daily load shape adjustment factor (average load in peak period /average daily load) also based on Blasnik, Michael, "Measurement and Verification of Residential Refrigerator Energy Use, Final Report, 2003-2004 Metering Study", July 29, 2004 (p. 48, using the average Existing Units Summer Profile for hours 13 through 17)

Product Category	Early Replacement (1st 5 years) ΔkW			Time of Sale and Early Replacement (last 10 years) ΔkW					
				Non-IQ			IQ		
	ENERGY STAR	CEE T2	CEE T3	ENERGY STAR	CEE T2	CEE T3	ENERGY STAR	CEE T2	CEE T3
1. Refrigerators and Refrigerator-freezers with manual defrost	0.103	0.106	0.108	0.005	0.008	0.010	0.007	0.010	0.013
2. Refrigerator-Freezer--partial automatic defrost	0.095	0.098	0.101	0.006	0.009	0.012	0.009	0.012	0.015
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost	0.063	0.066	0.069	0.006	0.009	0.013	0.009	0.012	0.015
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service	0.114	0.118	0.122	0.007	0.011	0.015	0.010	0.014	0.018
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without through-the-door ice service	0.049	0.053	0.057	0.008	0.012	0.016	0.011	0.015	0.019
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service	0.025	0.032	0.037	0.009	0.016	0.021	0.013	0.020	0.025
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service	0.040	0.046	0.050	0.007	0.013	0.017	0.011	0.017	0.021
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service	0.095	0.101	0.105	0.008	0.014	0.019	0.012	0.018	0.023

Fossil Fuel Savings

N/A

Water Impact Descriptions and Calculation

N/A

Deemed O&M Cost Adjustment Calculation

N/A

Measure Code: RS-APL-ESRE-V13-270101

Review Deadline: 1/1/2029

5.1.7 Room Air Conditioner

DESCRIPTION

This measure relates to:

a) Time of Sale the purchase and installation of an efficient room air conditioning unit that exceeds a baseline unit. The baseline is based on the Federal Standard effective May 26th, 2026.

Product Type and Class (Btu/hr)		Federal Standard with louvered sides (CEER) [99]	Federal Standard without louvered sides (CEER)
Without Reverse Cycle	< 6,000	13.1	12.8
	6,000 - 7,999	13.7	
	8,000 to 10,999	16.0	14.1
	11,000 to 13,999		13.9
	14,000 to 19,999		13.7
	20,000 to 27,999	13.8	13.8
	>=28,000	13.2	
With Reverse Cycle	<14,000	14.4	13.7
	14,000 to 19,999		12.8
	>=20,000	13.7	
Casement only		13.9	
Casement-Slider		15.3	

Side louvers extend from a room air conditioner model in order to position the unit in a window. A model without louvered sides is placed in a built-in wall sleeve and are commonly referred to as "through-the-wall" or "built-in" models.

Casement-only refers to a room air conditioner designed for mounting in a casement window of a specific size.

Casement-slider refers to a room air conditioner with an encased assembly designed for mounting in a sliding or casement window of a specific size.

Reverse cycle refers to the heating function found in certain room air conditioner models. For reverse cycle units in heat pump applications, please refer to Portable HP assumptions within measure 5.3.24 Supplemental Air Source Heat Pumps (Ductless and Portable).

b) Early Replacement: the early removal of an existing residential inefficient Room AC unit from service, prior to its natural end of life, and replacement with a new efficient qualifying unit. Savings are calculated between existing unit and efficient unit consumption during the remaining life of the existing unit, and between new baseline unit and efficient unit consumption for the remainder of the measure life.

Assumptions for IQ participants: This measure can be used by programs supporting the installation of efficient Room AC in income qualified households. It is assumed that the Room AC's installed in IQ households are being used less as a luxury and more as a necessity and that access to a single AC unit per household will result in run hours more consistent with central AC usage.

This measure was developed to be applicable to the following program types: TOS, NC, EREP.

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[99] Federal Baselines defined by Code of Federal Regulations §430.32(d), effective May 26, 2026. See DOE rulemaking docket (EERE-2014-BT-STD-0059) for more information.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure, the new room air conditioning unit must be an efficient unit that exceeds the federal standards presented above.

DEFINITION OF BASELINE EQUIPMENT

Time of Sale: the baseline assumption is a new room air conditioning unit that meets the Federal Standard (effective May 26th, 2026)[100] efficiency standards as presented above.

Early Replacement: the baseline is the existing Room AC for the assumed remaining useful life of the unit and the new baseline as defined above for the remainder of the measure life.

For Income Qualified units, the baseline assumption is an inefficient unit either existing in the home or being purchased or acquired via the secondary market.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 12 years.[101]

Remaining life of existing equipment is assumed to be 4 years.[102]

For Income Qualified units, because the baseline unit is assumed to be purchased from the secondary market, it is assumed that the remaining life of the baseline unit is 6 years and would need to be replaced with another unit from the secondary market at that point.

DEEMED MEASURE COST

Non-IQ Participants:

Time of Sale: The incremental cost for this measure is assumed to be $40 for an efficient unit.[103]

Early Replacement: The measure cost is the full cost of removing the existing unit and installing a new one. The actual program cost should be used. If unavailable, assume $448 for an efficient unit.[104]

The avoided replacement cost (after 4 years) of a baseline replacement unit is $447.[105] This cost should be discounted to present value using the nominal societal discount rate.

Income Qualified participants:

The actual full cost of the efficient unit should be used. If unavailable assume $300.[106] The cost of the inefficient secondary market unit is assumed to be $50. Therefore, where the new unit replaces an existing unit the measure cost is $300, and where there is no existing unit the measure cost is assumed to be $250.

The avoided replacement cost (after 6 years) of the replacement secondary market unit is $50. This cost should be discounted to present value using the nominal societal discount rate.

LOADSHAPE

Loadshape R08 - Residential Cooling

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[100] See DOE's Appliance and Equipment Standards for Room AC.

[101] Measure Life Report, Residential and Commercial/Industrial Lighting and HVAC Measures, GDS Associates, June 2007.

[102] Standard assumption of one third of effective useful life.

[103] ENERGY STAR cost based on field study conducted by Efficiency Vermont. See 'room-ac-cost-analysis-10.2023.xlsx.'

[104] ENERGY STAR based on IL PHA Efficient Living Program Data for 810 replaced units showing $416 per unit plus $32 average recycling/removal cost. Differential in cost for the CEE Tiers is $221, therefore CEE Tier 2 is $448 + 221 = $669.

[105] Estimate based upon Time of Sale incremental costs and applying inflation rate of 2.28% for 4 years.

[106] To promote improved cost effectiveness, it is assumed that the lower cost ENERGY STAR Room AC units would be used. Units between $200-$400 are available dependent on capacity.

COINCIDENCE FACTOR

For non-IQ participants, the coincidence factor for this measure is assumed to be 0.3.[107]

For Income Qualified units, where use is likely to be more consistent with central cooling, the summer peak coincidence factor is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)
= 68%[108]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)
= 46.6%[109]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Time of Sale: $\Delta kWh = (FLH_{RoomAC} * Btu/H * (1/CEERbase - 1/CEERee))/1000$

Early Replacment:

ΔkWh for remaining life of existing unit (1st 4 years) = $(FLH_{RoomAC} * Btu/H * (1/CEERexist - 1/CEERee))/1000$

ΔkWh for remaining measure life (next 8 years) = $(FLH_{RoomAC} * Btu/H * (1/CEERbase - 1/CEERee))/1000$

Where:

FLH_{RoomAC} = Full Load Hours of room air conditioning unit

= dependent on location:[110]

Climate Zone (City based upon)	Non- IQ Participants	IQ Participants		
	FLH_{RoomAC}	FLH_{RoomAC} (single family)	FLH_{RoomAC} (multifamily)	FLH_{RoomAC} (weatherized multifamily)[111]
1 (Rockford)	235	547	499	320
2 (Chicago)	261	709	629	403
3 (Springfield)	340	779	707	453

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[107] Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

[108] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[109] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[110] Full load hours for room AC is significantly lower than for central AC. The average ratio of FLH for Room AC (provided in RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008) to FLH for Central Cooling for the same location is 31%. This ratio is applied to those IL cities that have FLH for Central Cooling provided in the ENERGY STAR calculator. For other cities this is extrapolated using the FLH assumptions VEIC have developed for Central AC. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[111] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015. The multifamily units within this study had undergone significant shell improvements (air sealing and insulation) and therefore this set of assumptions is only appropriate for units that have recently participated in a weatherization or other shell program. Note that the FLHcool where recalculated based on existing efficiencies consistent with the TRM rather than from the metering study.

Climate Zone (City based upon)	Non- IQ Participants	IQ Participants		
	FLH_{RoomAC}	FLH_{RoomAC} (single family)	FLH_{RoomAC} (multifamily)	FLH_{RoomAC} (weatherized multifamily)[111]
4 (Belleville)	447	1082	982	630
5 (Marion)	396	956	868	557
Weighted Average[112]				
ComEd	256	676	603	386
Ameren	364	875	791	507
Statewide	286	731	655	420

Btu/H = Size of rebated unit

= Actual. If unknown assume 8500 Btu/hr[113]

CEERexist = Combined Energy Efficiency Ratio of existing unit

= Actual (if existing unit has EER rating, convert to CEER by dividing by 1.01[114]). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[115] If unknown value is used, it should not be derated by age.

If unknown assume 8.7 CEER for IQ participants and 10.9 CEER for non-IQ or unknown[116]

CEERbase = Combined Energy Efficiency Ratio of baseline unit

= As provided in tables above for non-IQ participants. For IQ participants assume 10.9 CEER[117]

CEERee = Combined Energy Efficiency Ratio of ENERGY STAR unit

= Actual.

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[112] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[113] Based on maximum capacity average from the RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

[114] This factor is used to appropriately compare with the new CEER rating which includes standby and off power consumption. Version 3.0 of the ENERGY STAR specification provided equivalent EER and CEER ratings and for the most popular size band the EER rating is approximately 1% higher than the CEER. See 'ENERGY STAR Version 3.0 Room Air Conditioners Program Requirements'.

[115] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[116] These units are likely to be the most inefficient existing units and so this assumption is lower than the estimate of the average Room AC. For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) prior to 5/26/2026and for IQ participants this is professional judgement.

[117] The baseline unit for IQ customers is assumed to be purchased from the secondary market and is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) prior to 5/26/2026).

Time of Sale:

For example, for an 8,500 Btu/H capacity unit (17.6 $CEER_{ee}$), with louvered sides, in an unknown non IQ location:

ΔkWh = (286 * 8500 * (1/16.0 – 1/17.6)) / 1000

= 13.8 kWh

For example, for an 8,500 Btu/H capacity unit (17.6 $CEER_{ee}$), with louvered sides, in an unknown IQ location for multifamily:

ΔkWh = (655 * 8500 * (1 /10.9 – 1 / 17.6)) / 1000

= 194.4 kWh

Early Replacement:

For example, a 7.7EER, 9000Btu/h unit is removed from a non-IQ home in Springfield and replaced with an efficient (17.6 $CEER_{ee}$) unit with louvered sides:

ΔkWh for remaining life of existing unit (1st 4 years) = (340 * 9000 * (1/(7.7/1.01) - 1/17.6))/1000

= 227.5 kWh

ΔkWh for remaining measure life (next 8 years) = (340 * 9000 * (1/16.0 - 1/17.6))/1000

= 17.4 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

Time of Sale: ΔkW = Btu/H * ((1/(CEERbase *1.01) - 1/(CEERee * 1.01)))/1000) * CF

Early Replacement: ΔkW = Btu/H * ((1/(CEERexist * 1.01) - 1/(CEERee * 1.01)))/1000) * CF

Where:

CF = Summer Peak Coincidence Factor for measure

For non-income qualified: = 0.3[118]

For income qualified:

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour) = 68%[119]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period) = 46.6%[120]

1.01 = Factor to convert CEER to EER (CEER includes standby and off power consumption)[121]

Other variable as defined above

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[118] Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

[119] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[120] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[121] Since the new CEER rating includes standby and off power consumption, for peak calculations it is more appropriate to apply the EER rating, but it appears as though new units will only be rated with a CEER rating. Version 3.0 of the ENERGY STAR specification provided equivalent EER and CEER ratings and for the most popular size band the EER rating is approximately 1% higher than the CEER. See 'ENERGY STAR Version 3.0 Room Air Conditioners Program Requirements'.

Time of Sale:

For example, for an 8,500 Btu/H capacity unit (17.6 $CEER_{ee}$), with louvered sides, for an unknown non- IQ location:

ΔkW = ((8500 * (1/(16.0 * 1.01) – 1/(17.6*1.01))) / 1000) * 0.3

= 0.0175 kW

For example, for an 8,500 Btu/H capacity unit (17.6 $CEER_{ee}$),, with louvered sides, in an unknown IQ location:

$ΔkW_{SP}$ = ((8500 * (1 /(10.9 * 1.01) – 1 /(17.6 * 1.01))) / 1000) * 0.68

= 0.1999 kW

Early Replacement:

For example, a 7.7 EER, 9000Btu/h unit is removed from a home in Springfield and replaced with an efficient (17.6 $CEER_{ee}$) unit with louvered sides:

ΔkW for remaining life of existing unit (1st 4 years) = ((9000 * (1/7.7 - 1/(17.6 * 1.01)))/1000) * 0.3

= 0.1988 kW

ΔkW for remaining measure life (next 8 years) = ((9000 * (1/(16.0 * 1.01) - 1/(17.6 * 1.01)))/1000) * 0.3

= 0.0152 kW

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-ESRA-V14-270101

REVIEW DEADLINE: 1/1/2028

5.1.8 Refrigerator and Freezer Recycling

DESCRIPTION

This measure describes savings from the retirement and recycling of inefficient but operational refrigerators and freezers. Savings are provided based on a 2013 workpaper provided by Cadmus that used data from a 2012 ComEd metering study and metering data from a Michigan study, to develop a regression equation that uses key inputs describing the retired unit. The savings are equivalent to the Unit Energy Consumption of the retired unit and should be claimed for the assumed remaining useful life of that unit. A part use factor is applied to account for those secondary units that are not in use throughout the entire year. The reader should note that the regression algorithm is designed to provide an accurate portrayal of savings for the population as a whole and includes those parameters that have a significant effect on the consumption. The precision of savings for individual units will vary.

For Net to Gross factor considerations, please refer to section 4.2 Appliance Recycling Protocol of Appendix A: Illinois Statewide Net-to-Gross Methodologies of Volume 4.0 Cross Cutting Measures and Attachments.

This measure was developed to be applicable to the following program types: ERET.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

N/A

DEFINITION OF BASELINE EQUIPMENT

The existing inefficient unit must be operational and have a capacity of between 10 and 30 cubic feet.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The estimated remaining useful life of the recycling units is 6.5 years.[122]

DEEMED MEASURE COST

Measure cost includes the customer's value placed on their lost amenity, any customer transaction costs, and the cost of pickup and recycling of the refrigerator/freezer and should be based on actual costs of running the program. The payment (bounty) a Program Administrator makes to the customer serves as a proxy for the value the customer places on their lost amenity and any customer transaction costs. If unknown assume $170 per unit.[123]

LOADSHAPE

Loadshape R05 - Residential Refrigerator

COINCIDENCE FACTOR

The coincidence factor is assumed 1.081 for Refrigerators and 1.028 for Freezers[124].

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[122] DOE refrigerator and freezer survival curves are used to calculate RUL for each equipment age and develop a RUL schedule. The RUL of each unit in the ARCA database is calculated and the average RUL of the dataset serves as the final measure RUL. Refrigerator recycling data from ComEd (PY7-PY9) and Ameren (PY6-PY8) were used to determined EUL with the DOE survival curves from the 2009 TSD. A weighted average of the retailer ComEd data and the Ameren data results in an average of 6.5 years. See Navigant 'ComEd Effective Useful Life Research Report', May 2018.

[123] The $170 default assumption is based on $120 cost of pickup and recycling per unit and $50 proxy for customer transaction costs and value customer places on their lost amenity. $120 is cost of pickup and recycling based on similar Efficiency Vermont program. $50 is bounty, based on Ameren and ComEd program offerings as of 7/27/15.

[124] Cadmus memo, February 12, 2013; "Appliance Recycling Update"

Algorithm

CALCULATION OF SAVINGS

ENERGY SAVINGS[125]

Refrigerators:

Energy savings for refrigerators are based upon a linear regression model using the following coefficients:[126]

Independent Variable Description	Estimate Coefficient
Intercept	83.324
Age (years)	3.678
Pre-1990 (=1 if manufactured pre-1990)	485.037
Size (cubic feet)	27.149
Dummy: Side-by-Side (= 1 if side-by-side)	406.779
Dummy: Primary Usage Type (in absence of the program) (= 1 if primary unit)	161.857
Interaction: Located in Unconditioned Space x CDD/365.25	15.366
Interaction: Located in Unconditioned Space x HDD/365.25	-11.067

ΔkWh = [83.32 + (Age * 3.68) + (Pre-1990 * 485.04) + (Size * 27.15) + (Side-by-side * 406.78) + (Proportion of Primary Appliances * 161.86) + (CDD/365.25 * unconditioned * 15.37) + (HDD/365.25 *unconditioned *-11.07)] * Part Use Factor

Where:

Age = Age of retired unit

Pre-1990 = Pre-1990 dummy (=1 if manufactured pre-1990, else 0)

Size = Capacity (cubic feet) of retired unit

Side-by-side = Side-by-side dummy (= 1 if side-by-side, else 0)

Primary Usage = Primary Usage Type (in absence of the program) dummy

(= 1 if Primary, else 0)

Interaction: Located in Unconditioned Space x CDD/365.25

(=1 * CDD/365.25 if in unconditioned space)

CDD = Cooling Degree Days

= Dependent on location:[127]

Climate Zone (City based upon)	CDD 65	CDD/365.25
1 (Rockford)	877	2.40

---

[125] Based on the specified regression, a small number of units may have negative energy and demand consumption. These are a function of the unit size and age, and should comprise a very small fraction of the population. While on an individual basis this result is counterintuitive it is important that these negative results remain such that as a population the average savings is appropriate.

[126] Energy savings are based on an average 30-year TMY temperature of 51.1 degrees. Coefficients provided in July 30, 2014 memo from Cadmus: "Appliance Recycling Update no single door July 30, 2014".

[127] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F.

Climate Zone (City based upon)	CDD 65	CDD/365.25
2 (Chicago)	1047	2.87
3 (Springfield)	1183	3.24
4 (Belleville)	1641	4.49
5 (Marion/Murphysboro)	1450	3.97

Interaction: Located in Unconditioned Space x HDD/365.25

(=1 * HDD/365.25 if in unconditioned space)

HDD = Heating Degree Days

= Dependent on location:[128]

Climate Zone (City based upon)	HDD 65	HDD/365.25
1 (Rockford)	6414	17.56
2 (Chicago)	5963	16.33
3 (Springfield)	5368	14.70
4 (Belleville)	4162	11.39
5 (Marion/Murphysboro)	4413	12.08

Part Use Factor = To account for those units that are not running throughout the entire year. The most recent part-use factor participant survey results available at the start of the current program year shall be used.[129] For illustration purposes, this example uses 0.93.[130]

For example, the program averages for AIC's ARP in PY4 produce the following equation:

ΔkWh = [83.32 + (22.81 * 3.68) + (0.45 * 485.04) + (18.82 * 27.15) + (0.17 * 406.78) + (0.34 * 161.86) + (1.29 * 15.37) + (6.49 * -11.07)] * 0.93

= 969 * 0.93

= 900.9 kWh

Freezers:

Energy savings for freezers are based upon a linear regression model using the following coefficients:[131]

Independent Variable Description	Estimate Coefficient
Intercept	132.122
Age (years)	12.130
Pre-1990 (=1 if manufactured pre-1990)	156.181
Size (cubic feet)	31.839
Chest Freezer Configuration (=1 if chest freezer)	-19.709
Interaction: Located in Unconditioned Space x	9.778

---

[128] National Climatic Data Center, calculated from 1981-2010 climate normals with a base temp of 65°F.

[129] For example, the part-use factor that shall be applied to the current program year t (PYt) for savings verification purposes should be determined through the PYt-2 participant surveys conducted in the respective utility's service territory, if available. If an evaluation was not performed in PYt-2 the latest available evaluation should be used.

[130] Most recent refrigerator part-use factor from Ameren Illinois PY5 evaluation.

[131] Energy savings are based on an average 30-year TMY temperature of 51.1 degrees. Coefficients provided in January 31, 2013 memo from Cadmus: "Appliance Recycling Update".

Independent Variable Description	Estimate Coefficient
CDD/365.25	
Interaction: Located in Unconditioned Space x HDD/365.25	-12.755

ΔkWh = [132.12 + (Age * 12.13) + (Pre-1990 * 156.18) + (Size * 31.84) + (Chest Freezer * -19.71) + (CDDs* unconditioned *9.78) + (HDDs*unconditioned *-12.75)] * Part Use Factor

Where:

Age = Age of retired unit

Pre-1990 = Pre-1990 dummy (=1 if manufactured pre-1990, else 0)

Size = Capacity (cubic feet) of retired unit

Chest Freezer = Chest Freezer dummy (= 1 if chest freezer, else 0)

Interaction: Located in Unconditioned Space x CDD/365.25

(=1 * CDD/365.25 if in unconditioned space)

CDD = Cooling Degree Days (see table above)

Interaction: Located in Unconditioned Space x HDD/365.25

(=1 * HDD/365.25 if in unconditioned space)

HDD = Heating Degree Days (see table above)

Part Use Factor = To account for those units that are not running throughout the entire year. The most recent part-use factor participant survey results available at the start of the current program year shall be used.[132] For illustration purposes, the example uses 0.85.[133]

For example, the program averages for AIC's ARP in PY4 produce the following equation:

ΔkWh = [132.12 + (26.92 * 12.13) + (0.6 * 156.18) + (15.9 * 31.84) + (0.48 * -19.71) + (6.61 * 9.78) + (1.3 * -12.75)] * 0.825

= 977 * 0.825

= 905 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = kWh/8766 * CF

Where:

kWh = Savings provided in algorithm above

CF = Coincident factor defined as summer kW/average kW

= 1.081 for Refrigerators

= 1.028 for Freezers[134]

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[132] For example, the part-use factor that shall be applied to the current program year t (PYt) for savings verification purposes should be determined through the PYt-2 participant surveys conducted in the respective utility's service territory, if available. If an evaluation was not performed in PYt-2 the latest available evaluation should be used.

[133] Most recent freezer part-use factor from Ameren Illinois Company PY5 evaluation.

[134] Cadmus memo, February 12, 2013; "Appliance Recycling Update"

For example, the program averages for AIC’s ARP in PY4 produce the following equation:

$$\Delta kW = 806/8766 * 1.081$$

$$= 0.099 \text{ kW}$$

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-RFRC-V09-240101

REVIEW DEADLINE:

Note: No active programs utilizing this measure in IL as of 2023. Reliability update is required if measure if to be taken up again.

5.1.9 Room Air Conditioner Recycling

DESCRIPTION

This measure describes the savings resulting from running a drop off service taking existing residential, inefficient Room Air Conditioner units from service, prior to their natural end of life. This measure assumes that though a percentage of these units will be replaced this is not captured in the savings algorithm since it is unlikely that the incentive made someone retire a unit that they weren't already planning to retire. The savings therefore relate to the unit being taken off the grid as opposed to entering the secondary market. The Net to Gross factor applied to these units should incorporate adjustments that account for those participants who would have removed the unit from the grid anyway.

This measure was developed to be applicable to the following program types: ERET. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

N/A. This measure relates to the retiring of an existing inefficient unit.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is the existing inefficient room air conditioning unit.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed remaining useful life of the existing room air conditioning unit being retired is 4 years.[135]

DEEMED MEASURE COST

The actual implementation cost for recycling the existing unit should be used.

LOADSHAPE

Loadshape R08 - Residential Cooling

COINCIDENCE FACTOR

The non-IQ participants or unknown coincidence factor for this measure is assumed to be 30%.[136]

For Income Qualified units, where use is likely to be more consistent with central cooling, the summer peak coincidence factor is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)
= 68%[137]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)
= 46.6%[138]

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[135] A third of assumed measure life for Room AC.

[136] Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

[137] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[138] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta \text{kWh} = \frac{(FLH_{RoomAC} * Btu/hr\ )}{EERexist * 1000}$$

Where:

FLH_{RoomAC} = Full Load Hours of room air conditioning unit

= dependent on location:[139]

Climate Zone (City based upon)	FLH_RoomAC			
	Non—Income Qualified (or Unknown)	Income Qualified single family	Income Qualified multifamily	Income Qualified weatherized multifamily [140]
1 (Rockford)	235	547	499	320
2 (Chicago)	261	709	629	403
3 (Springfield)	340	779	707	453
4 (Belleville)	447	1082	982	630
5 (Marion)	396	956	868	557
Weighted Average[141]				
ComEd	256	676	603	386
Ameren	364	875	791	507
Statewide	286	731	655	420

Btu/H = Size of retired unit

= Actual. If unknown assume 8500 Btu/hr [142]

CEERexist = Efficiency of existing unit

= Actual, if unknown assume 8.7 CEER for IQ participants and 9.7 CEER for non-IQ or unknown[143]

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[139] Full load hours for room AC is significantly lower than for central AC. The average ratio of FLH for Room AC (provided in RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008) to FLH for Central Cooling for the same location is 31%. This ratio is applied to those IL cities that have FLH for Central Cooling provided in the ENERGY STAR calculator. For other cities this is extrapolated using the FLH assumptions VEIC have developed for Central AC. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[140] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015. The multifamily units within this study had undergone significant shell improvements (air sealing and insulation) and therefore this set of assumptions is only appropriate for units that have recently participated in a weatherization or other shell program. Note that the FLHcool where recalculated based on existing efficiencies consistent with the TRM rather than from the metering study.

[141] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[142] Based on maximum capacity average from the RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

[143] These units are likely to be the most inefficient existing units and so this assumption is lower than the estimate of the average Room AC. For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01) and for IQ participants this is professional judgement.

For example, for an 8500 Btu/h unit in Springfield from a non-IQ participant:

ΔkWh = (340 * 8500) / (9.7 * 1000)

= 298 kWh

For example, for an 8500 Btu/h unit in Springfield from a IQ single family participant:

ΔkWh = (779 * 8500) / (8.7 * 1000)

= 761 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta \text{kW} = \left(\frac{Btu/hr}{EERexist * 1000}\right) * CF$$

Where:

CF = Summer Peak Coincidence Factor for measure

= 0.3[144]

For example, an 8500 Btu/h unit in Springfield from a non-IQ participant:

ΔkW = (8500 / (9.7 * 1000)) * 0.3

= 0.2629 kW

For example, for an 8500 Btu/h unit in Springfield from a IQ single family participant:

ΔkW_{SSP} = (8500 / (8.7 * 1000)) * 0.68

= 0.6644 kW

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-RARC-V05-260101

REVIEW DEADLINE: 1/1/2030

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[144] Consistent with coincidence factors found in:
RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

5.1.10 ENERGY STAR Clothes Dryer

DESCRIPTION

This measure relates to the installation of a residential clothes dryer meeting the ENERGY STAR[145] criteria. ENERGY STAR qualified clothes dryers save energy through a combination of more efficient drying and reduced runtime of the drying cycle. More efficient drying is achieved through heat pump technology, increased insulation, modifying operating conditions such as air flow and/or heat input rate, improving air circulation through better drum design or booster fans, and improving efficiency of motors. Reducing the runtime of dryers through automatic termination by temperature and moisture sensors is believed to have the greatest potential for reducing energy use in clothes dryers[146]. ENERGY STAR provides criteria for both gas and electric clothes dryers.

This measure was developed to be applicable to the following program types: TOS, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Clothes dryer must meet the ENERGY STAR or ENERGY STAR Most Efficient criteria, as required by the program. Units utilizing the Heat Pump designation must meet the same ENERGY STAR criteria and be classified as Heat Pump or Hybrid Heat Pump units.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is a clothes dryer meeting the minimum federal requirements for units manufactured on or after January 1, 2015. Note that the DOE Federal Standards utilize the Appendix D1 testing procedure whereas the ENERGY STAR specifications use the Appendix D2 test. In order to compare relative efficiencies, this measure uses adjusted baseline CEF values that were developed by ENERGY STAR to convert CEF-D1 values in to equivalent CEF-D2 values.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 16 years.[147]

DEEMED MEASURE COST

For non-IQ participants, the incremental cost for an ENERGY STAR clothes dryer is assumed to be $152 and $405 for an ENERGY STAR Most Efficient dryer.[148]

For IQ participants, the incremental cost for an ENERGY STAR clothes dryer is assumed to be $246 and $499 for an ENERGY STAR Most Efficient dryer. [149]

Any additional installation costs resulting from fuel switch/electrification measures (such as upgrading electrical panels, capping existing gas lines or adding new electrical circuits) should be divided across all applicable measures weighted by total MMBtu savings.

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[145] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[146] ENERGY STAR Market & Industry Scoping Report. Residential Clothes Dryers. Table 8. November 2011.

[147] Based on DOE Rulemaking Technical Support Document, LCC Chapter, 2011, as recommended in Navigant 'ComEd Effective Useful Life Research Report', May 2018.

[148] Based on the difference in installed cost for an efficient dryer ($716) and standard dryer ($564) (see "ACEEE Clothes Dryers.pdf").

[149] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See "IQ Appliance Calculations.xls" for information.

LOADSHAPE

Loadshape R17 - Residential Electric Dryer

COINCIDENCE FACTOR

The coincidence factor for this measure is 3.8%.[150]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

Non Fuel Switch Measures

ΔkWh = ((Load/CEFbase * IQAdj) – Load/CEFeff) * Ncycles * %Electric

ΔTherm = ((Load/CEFbase * IQAdj) – Load/CEFeff) * Ncycles * Therm_convert * %Gas

Fuel Switch/Electrification Measures

Fuel switch / electrification measures must produce positive total energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows:

SiteEnergySavings (MMBTUs) = [FuelSwitchSavings] + [NonFuelSwitchSavings]

FuelSwitchSavings = [GasConsumptionReplaced] – [ElectricHeatingConsumptionAdded]

GasConsumptionReplaced = [((Load/CEFbase$_{Gas}$ * IQAdj) * Ncycles * MMBtu_convert * %Gas$_{Gas}$]

ElectricHeatingConsumptionAdded = [Load/CEFeff$_{Elec}$ * Ncycles * MMBtu_convert * %Gas$_{Gas}$]

NonFuelSwitchSavings =[BaselineOperationalElectricReplaced] – [EfficientOperationalElectricAdded]

BaselineOperationalElectricReplaced = [((Load/CEFbase$_{Gas}$ * IQAdj) * Ncycles * MMBtu_convert * %Electric$_{Gas}$]

EfficientOperationalElectricAdded = [Load/CEFeff$_{Elec}$ * Ncycles * MMBtu_convert * %Electric$_{Gas}$]

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10

---

[150] Based on coincidence factor of 3.8% for clothes washers

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Gas utility only	N/A	SiteEnergySavings * 10

Where:

Load = The average total weight (lbs) of clothes per drying cycle. If dryer size is unknown, assume standard.

Dryer Size	Load (lbs)[151]
Standard	8.45
Compact	3

CEFbase = Combined energy factor (CEF) (lbs/kWh) of the baseline unit is based on existing federal standards energy factor and adjusted to CEF-D2 (equivalent to as if tested under Appendix D2) as performed in the ENERGY STAR analysis.[152] If product class unknown, assume electric, standard.

Product Class	CEF (lbs/kWh) under Appendix D2
Vented Electric, Standard (≥ 4.4 ft^3)	3.11
Vented Electric, Compact (120V) (< 4.4 ft^3)	3.01
Vented Electric, Compact (240V) (<4.4 ft^3)	2.73
Ventless Electric, Compact (240V) (<4.4 ft^3)	2.13
Vented Gas	2.84[153]
Electric Heat Pump, Standard (≥ 4.4 ft^3)	3.11
Electric Heat Pump, Compact (120V) (< 4.4 ft^3)	3.01

IQAdj = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market. [154]

= 1.033 if IQ, 1.0 if non-IQ

CEFeff = CEF (lbs/kWh) of the ENERGY STAR unit based on ENERGY STAR or ENERGY STAR Most Efficient requirements.[155]

= Actual. If unknown, use defaults below. If product class unknown, assume electric,

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[151] Based on ENERGY STAR test procedures.

[152] ENERGY STAR Draft 2 Version 1.0 Clothes Dryers Data and Analysis

[153] Federal standards report CEF for gas clothes dryers in terms of lbs/kWh. To determine gas savings, this number is later converted to therms.

[154] It is assumed that a second-hand unit is on average 2/3 of a measure's EUL years old (11 years). The current Federal Standard became effective in 2015 so the previous standard is used to estimate base consumption for a second hand unit, and further increased by an estimate of 0.4% * 11 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This second hand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See "IQ Appliance Calculations.xls" for information.

[155] ENERGY STAR Clothes Dryers Key Product Criteria.

standard.

	ENERGY STAR	ENERGY STAR Most Efficient
Product Class	CEF (lbs/kWh)	CEF (lbs/kWh)
Vented or Ventless Electric, Standard (≥ 4.4 ft^3)	3.93	4.3
Vented or Ventless Electric, Compact (120V) (< 4.4 ft^3)	3.80	4.3
Vented Electric, Compact (240V) (< 4.4 ft^3)	3.45	4.3
Ventless Electric, Compact (240V) (< 4.4 ft^3)	2.68	3.7
Vented Gas	3.48[156]	3.8
Electric Heat Pump, Standard (≥ 4.4 ft^3)	3.93	6.5[157]
Electric Heat Pump, Compact (< 4.4 ft^3)	3.36	6.2[158]

Ncycles = Number of dryer cycles per year. Use actual data if available. If unknown, use 259 cycles per year.[159]

%Electric = The percent of overall savings coming from electricity

= 100% for electric dryers, 16% for gas dryers[160]

Therm_convert = Conversion factor from kWh to Therm

= 0.03412

%Gas = Percent of overall savings coming from gas

= 0% for electric units and 84% for gas units[161]

MMBtu_convert = Conversion factor from kWh to MMBtu

= 0.003412

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[156] Federal standards report CEF for gas clothes dryers in terms of lbs/kWh. To determine gas savings, this number is later converted to therms.

[157] Average CEF of available standard ENERGY STAR Clothes Dryers with Heat Pump technology. EPA ENERGY STAR. May 2022. https://www.energystar.gov/productfinder/product/certified-clothes-dryers/.

[158] Average CEF of available compact ENERGY STAR Clothes Dryers with Heat Pump technology. EPA ENERGY STAR. May 2022. https://www.energystar.gov/productfinder/product/certified-clothes-dryers/.

[159] Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region. Reduced by 6% to maintain prior ratio of dryer to clothes washer loads of 94%.

[160] %Electric accounts for the fact that some of the savings on gas dryers comes from electricity (motors, controls, etc). 16% was determined using a ratio of the electric to total savings from gas dryers given by ENERGY STAR Draft 2 Version 1.0 Clothes Dryers Data and Analysis.

[161] %Gas accounts for the fact that some of the savings on gas dryers comes from electricity (motors, controls, etc). 84% was determined using a ratio of the gas to total savings from gas dryers given by ENERGY STAR Draft 2 Version 1.0 Clothes Dryers Data and Analysis.

Electric examples, for a non- IQ Time of Sale, standard, vented, electric ENERGY STAR clothes dryer:

ΔkWh = (((8.45/3.11 * 1) – 8.45/3.93) * 259 * 100%)

= 147 kWh

For an IQ Time of Sale, standard, vented, electric ENERGY STAR clothes dryer:

ΔkWh = (((8.45/3.11 * 1.033) – 8.45/3.93) * 259 * 100%)

= 170 kWh

Gas example, for a non-IQ Time of Sale, a standard, vented, gas ENERGY STAR clothes dryer:

ΔTherm = ((8.45/2.84 * 1) – 8.45/3.48) * 259 * 0.03412 * 0.84

= 4.06 therms

ΔkWh = (((8.45/2.84 * 1) – 8.45/3.48) * 259 * 0.16)

= 22.7 kWh

Fuel switch example, for a non-IQ Time of Sale, ENERGYSTAR Most Efficient Heat Pump clothes dryer in place of a baseline gas dryer:

SiteEnergySavings (MMBTUs) = [FuelSwitchSavings] + [NonFuelSwitchSavings]

FuelSwitchSavings = [GasConsumptionReplaced] – [ElectricHeatingConsumptionAdded]

GasConsumptionReplaced = [((Load/CEFbase$_{Gas}$ * IQAdj) * Ncycles * MMBtu_convert * %Gas$_{Gas}$]

= ((8.45/2.84 * 1) * 259 * 0.003412 * 0.84)

= 2.21 MMBtu

ElectricHeatingConsumptionAdded = [Load/CEFeff$_{Elec}$ * Ncycles * MMBtu_convert * %Gas$_{Gas}$]

= (8.45/5.7 * 259 * 0.003412 * 0.84)

=1.10 MMBtu

FuelSwitchSavings = 2.21 – 1.10 = 1.11 MMbtu

NonFuelSwitchSavings =[BaselineOperationalElectricReplaced] – [EfficientOperationalElectricAdded]

BaselineOperationalElectricReplaced = [((Load/CEFbase$_{Gas}$ * IQAdj) * Ncycles * MMBtu_convert * %Electric$_{Gas}$]

= ((8.45/2.84 * 1) * 259 * 0.003412 * 0.16)

= 0.42 MMBtu

EfficientOperationalElectricAdded = [Load/CEFeff$_{Elec}$ * Ncycles * MMBtu_convert * %Electric$_{Gas}$]

= (8.45/5.7 * 259 * 0.003412 * 0.16)

= 0.21 MMBtu

NonFuelSwitchSavings = 0.42 – 0.21 = 0.21 MMbtu

SiteEnergySavings (MMBTUs) = 1.11 + 0.21

= 1.32 MMBtu

If supported by an electric utility: ΔkWh = ΔSiteEnergySavings * 1,000,000 / 3,412

= 1.32 * 1,000,000/3412

= 386.9 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

For non-fuel switch measures:

ΔkW = (((Load/CEFbase * IQAdj) – Load/CEFeff) * Ncycles * %Electric)/Hours * CF

For fuel switch measures:

ΔkW = ([(Load/CEFBase$_{Gas}$ * IQAdj) * Ncycles * %Electric$_{Gas}$] – [Load/CEFeff$_{Elec}$ * Ncycles * %Electric$_{Electric}$])/Hours * CF

Where:

Hours = Annual run hours of clothes dryer. Use actual data if available. If unknown, use 259 hours per year.[162]

CF = Summer Peak Coincidence Factor for measure

= 3.8%[163]

For example, for a non-IQ Time of Sale, standard, vented, electric ENERGY STAR clothes dryer:

ΔkW = (((8.45/3.11 * 1) – 8.45/3.93) * 259 * 100%)/259 * 3.8%

= 0.0215 kW

FOSSIL FUEL SAVINGS

Calculation provided together with Electric Energy Savings above.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

Cost Effectiveness Screening and Load Reduction Forecasting when Fuel Switching

This measure can involve fuel switching from fossil fuel to electric.

For the purposes of forecasting load reductions due to fuel switch projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below) adjusted for utility line losses (at-the-busbar savings), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, this will not match the output of the calculation/allocation methodology presented in the "Electric Energy Savings" and "Fossil Fuel Savings" sections above. Therefore in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness

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[162] ENERGY STAR qualified dryers have a maximum test cycle time of 80 minutes. Assume one hour per dryer cycle.

[163] Based on coincidence factor of 3.8% for clothes washers.

of the measure.

ΔTherms = [Gas Dryer Consumption Replaced]

= $[((Load/CEFbase_{Gas} * IQAdj) * Ncycles * Therm\_convert * \%Gas_{Gas}]$

ΔkWh = [Gas Dryer Electric Consumption Replaced] - [Electric Dryer Consumption Added]

= $[(Load/CEFbase_{Gas} * IQAdj) * Ncycles * \%Electric_{Gas}] – [Load/CEFeff_{Elec} * Ncycles * \%Electric_{Electric}]$

MEASURE CODE: RS-APL-ESDR-V09-270101

REVIEW DEADLINE: 1/1/2029

5.1.11 ENERGY STAR Water Coolers

DESCRIPTION

Water coolers are a home appliance that offer consumers the ability to enjoy hot and/or cold water on demand. This measure is the characterization of the purchasing and use of an ENERGY STAR[164] certified water cooler in place of a conventional water cooler.

This measure was developed to be applicable to the following program types: TOS, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The high efficiency equipment is an ENERGY STAR certified water cooler meeting the ENERGY STAR 3.0 efficiency criteria.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is a standard or conventional, non-ENERGY STAR certified water cooler.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The estimated useful life for a water cooler is 10 years.[165]

DEEMED MEASURE COST

The incremental cost for this measure is estimated at $60.[166]

LOADSHAPE

Loadshape C53: Flat

COINCIDENCE FACTOR

The summer peak coincidence factor is assumed to be 1.0.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta\text{kWh} = (kWh_{base} - kWh_{ee}) * Days$$

Where:

kWh_{base} = Daily energy use (kWh/day) for baseline water cooler[167]

Type of Water Cooler	kWhbase
Hot and Cold Water – Storage	0.875
Hot and Cold Water – On Demand	0.811
Cold Water Only	0.826

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[164] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[165] Savings Calculator for ENERGY STAR Certified Water Coolers, last updated 2009.

[166] VEIC analysis using cost data collected from retail vendor. Supporting calculations in “5.1.11_ES Water Coolers_Analysis_April 2023.xlsx”

[167] CEC Product list accessed April 2023. Supporting calculations in “5.1.11_ES Water Coolers_Analysis_April 2023.xlsx”.

kWh_{ee} = Daily energy use (kWh/day) for ENERGY STAR water cooler[168]

Type of Water Cooler	kWhee
Hot and Cold Water – Storage	0.689
Hot and Cold Water – On Demand	0.138
Cold Water Only	0.139

Days = Number of days per year that the water cooler is in use
= 365 days[169]

Energy Savings:

Type of Water Cooler	ΔkWh
Hot and Cold Water – Storage	68.2
Hot and Cold Water – On Demand	245.7
Cold Water Only	250.8

DEMAND SAVINGS

$$\Delta kW = \Delta kWh / Hours * CF$$

Where:

Hours = Number of hours per year water cooler is in use
= 8760 hours[170]

CF = Summer Peak Coincidence Factor for measure

= 1.0

Demand Savings:

Type of Water Cooler	ΔkW
Hot and Cold Water - Storage	0.0078
Hot and Cold Water – On Demand	0.0280
Cold Water Only	0.0286

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-WTCL-V03-260101

REVIEW DEADLINE: 1/1/2029

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[168] Energy Star QPL accessed July 2023. Supporting calculations in “5.1.11_ES Water Coolers_Analysis_April 2023.xlsx”.

[169] Assumed 365 days per year and 24 hours per day as utilized in daily energy consumption from ENERGY STAR Program Requirements Product Specification 3.0 for Water Coolers Test Method.

[170] Assumed 365 days per year and 24 hours per day as utilized in daily energy consumption from ENERGY STAR Program Requirements Product Specification 3.0 for Water Coolers Test Method.

5.1.12 Ozone Laundry

DESCRIPTION

A new ozone laundry system is added-on to new or existing residential clothes washing machine(s) or washing machines located in multifamily building common areas. The system generates ozone (O_3), a naturally occurring molecule, which helps clean fabrics by chemically reacting with soils in cold water. Adding an ozone laundry system(s) eliminate the use of chemicals, detergents, and hot water by residential washing machine(s).

Energy savings will be achieved at the domestic hot water heater as it will no longer supply hot water to the washing machine. Cold water usage by the clothes washer will increase, but overall water usage will stay constant.

This measure was developed to be applicable to the following program types: TOS, RNC, RF. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

A new, single-unit ozone laundry system(s) rated for residential clothes washing machines is added-on to new or existing residential clothes washing machines. The ozone laundry system must be connected to both the hot and cold water inlets of the clothes washing machine so that hot water from the domestic hot water heater is no longer provided to the clothes washer.

The ozone laundry system(s) must transfer ozone into the water through:

- Venturi injection
- Bubble diffusion
- Additional applications may be considered upon program review and approval on a case by case basis

DEFINITION OF BASELINE EQUIPMENT

The base case equipment is a conventional residential washing machine with no ozone generator installed. The washing machine is provided hot water from a domestic hot water heater.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure equipment effective useful life (EUL) is estimated at 8 years based on the typical lifetime of products currently available in the market.[171]

DEEMED MEASURE COST

The deemed measure cost is $300 for a new single-unit ozone laundry system.[172]

LOADSHAPE

Loadshape R01 – Residential Clothes Washer

COINCIDENCE FACTOR

The coincidence factor for this measure is 3.8%.[173]

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[171] Average based on conversations with manufacturers and distributors of the four residential ozone laundry systems tested in the 2018 GTI Residential Ozone Laundry Field Demonstration (O3 Pure, Pure Wash, Eco Washer, Scent Crusher).

[172] 2018 GTI Residential Ozone Laundry Field Demonstration (May 2018).

[173] Calculated from Itron eShapes, 8760 hourly data by end use for Missouri, as provided by Ameren.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = kWhHotWash * (\%HotWash_{base} - \%HotWash_{Ozone})$$

Where:

kWhHotWash = (%ElectricDHW * Capacity * IWF * %HotWater * (T_{OUT} - T_{IN}) * 8.33 * 1.0 * Ncycles) / (RE_electric * 3.412)

%ElectricDHW = Proportion of water heating supplied by electric heating

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[174], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[175]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Capacity = Clothes washer capacity (cubic feet).

= Actual. If unknown, assume 5.0 cubic feet.[176]

IWF = Integrated water factor (gallons/cycle/ft^3).

= Actual. If unknown, use the following values

Efficiency Level	IWF (gallons/cycle/ft3)	
	Top loading > 2.5 Cu ft	Front Loading > 2.5 Cu ft
Federal Standard (up to January 1, 2018)	8.4	4.7
Federal Standard (after January 1, 2018) – Use if unit level is unknown.	6.5	4.7

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[174] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[175] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[176] Average data from GTI Residential Ozone Laundry Field Demonstration (May 2018). As an add on to existing equipment it is assumed this is a larger capacity than the assumption for new Clothes Washers as old machines tended to have larger capacities. See 'Residential Ozone Summary Calcs_2019.xlsx' and 'Multifamily Ozone Summary Calcs_2019.xlsx' for more information. If utilities have specific evaluation results providing a more appropriate assumption for homes in a particular market or geographical area then that should be used.

Efficiency Level	IWF (gallons/cycle/ft3)	
	Top loading > 2.5 Cu ft	Front Loading > 2.5 Cu ft
ENERGY STAR (as of February 2018)	4.3	3.2
CEE Tier 2	3.2	3.2

%HotWater = Percentage of water usage that is supplied by the domestic hot water heater when the hot or warm wash cycles are selected.[177]

Single-Family Home	Multifamily
0.1759	0.2960

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municipal system

= 50.7°F [178]

8.33 = Specific weight of water (lbs/gallon)

1.0 = Heat capacity of water (Btu/lb °F)

Ncycles = Number of Cycles per year

Single-Family Home	Multifamily
276[179]	1,243[180]

RE_electric = Recovery efficiency of electric water heater

= 0.98[181] for Electric Resistance

= 3.51[182] for Electric HPWH

3412 = Btus to kWh conversion (Btu/kWh)

$\%HotWash_{base}$ = Average percentage of loads that use hot or warm water with baseline equipment. [183]

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[177] Averaged data from GTI Residential Ozone Laundry Field Demonstration (May 2018). Hot and warm wash cycles were combined because data from the EIA Residential Energy Consumption Survey (RECS) 2015 East North Central Region show that, of the total hot and warm washes that occur, over 96% are warm washes. See 'Residential Ozone Summary Calcs_2019.xlsx' and 'Multifamily Ozone Summary Calcs_2019.xlsx' for more information.

[178] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[179] Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region.

If utilities have specific evaluation results providing a more appropriate assumption for single-family or Multifamily homes, in a particular market, or geographical area then that should be used.

[180] DOE Technical Support Document Chapter 6, 2010 https://www.regulations.gov/contentStreamer?documentId=EERE-2006-STD-0127-0118&attachmentNumber=8&disposition=attachment&contentType=pdf

[181] Review of AHRI database shows that electric water heaters have a recovery efficiency of 98%.

[182] Review of AHRI database shows that Electric Heat Pump Water Heaters support this recovery efficiency. For the raw data, and calculations, please see AHRI_ RES Water Heaters 2022.xlsx.

[183] GTI Residential Ozone Laundry Field Demonstration (May 2018). See 'Residential Ozone Summary Calcs_2019.xlsx' and 'Multifamily Ozone Summary Calcs_2019.xlsx' for more information.

Single-Family Home	Multifamily
0.7743	0.7438

$\%HotWash_{Ozone}$ = Percentage of loads that use hot or warm water with efficient equipment.

= 0.0

For example, a residential ozone laundry system is installed in a single-family home with an electric domestic hot water heater. The capacity and IWF of the baseline equipment is unknown.

ΔkWh = (1 * 5.0 * 6.5 * 0.1759 * (125 – 50.7) * 8.33 * 1.0 * 276) / (0.98 * 3,412) * (0.7743 – 0)

= 226 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh/Hours * CF

Where:

ΔkWh = Energy Savings as calculated above

Hours = Assumed Run hours of Clothes Washer[184]

Single-Family Home	Multifamily
276	1,243

CF = Summer Peak Coincidence Factor for measure.

= 0.038[185]

For example, a residential ozone laundry system is installed in a single-family home with an electric domestic hot water heater. The capacity and IWF of the baseline equipment is unknown.

ΔkW = 226/276 * 0.038

= 0.0311kW

FOSSIL FUEL SAVINGS

$\Delta Therm$ = ThermHotWash * ($\%HotWash_{base}$ - $\%HotWash_{Ozone}$)

Where:

ThermHotWash = (%FossilDHW * Capacity * IWF * %HotWater * (T_{OUT} - T_{IN}) * 8.33 * 1.0 * Ncycles) / (RE_gas * 100,000)

%FossilDHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[186], use the following table:

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[184] Based on a weighted average of 276 clothes washer cycles per year assuming an average load runs for one hour.

[185] Calculated from Itron eShapes, 8760 hourly data by end use for Missouri, as provided by Ameren.

[186] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People’s Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[187]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

RE_gas = Recovery efficiency of gas water heater

Single-Family Homes	Multifamily
79%[188]	67%[189]

100,000 = Btus to Therms conversion (Btu/Therm).

For example, a residential ozone laundry system is installed in a single-family home with a gas domestic hot water heater. The capacity and IWF of the baseline equipment is unknown.

ΔTherms = (1 * 5.0 * 6.5 * 0.1759 * (125 – 50.7) * 8.33 * 1.0 * 276)/(0.79 * 100,000)*(0.7743 – 0)

= 9.6 Therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

LAUNDRY DETERGENT SAVINGS

Annual savings from not purchasing laundry detergent that are realized by efficient equipment end-user(s) ($/year).

Detergent savings per year = Detergent_cost * Ncycles

Where:

Detergent_cost = Average laundry detergent cost per load ($/load).

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[187] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[188] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 79%.

[189] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

= 0.16[190]

For example, a residential ozone laundry system is installed in a single-family home.

Detergent savings per year = 0.16 * 276

= $44.16

MEASURE CODE: RS-APL-OZNE-V08-260101

REVIEW DEADLINE: 1/1/2030

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[190] Based on cost analysis of products available on www.Jet.com and www.Amazon.com.

5.1.13 Income Qualified: ENERGY STAR and CEE Tier 2 Room Air Conditioner - Retired 12/31/2014

Measure combined with 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

5.1.14 Residential Induction Cooking Appliances

DESCRIPTION

A fully electric range with an electric oven and an induction cooktop or a freestanding induction cooktop installed in place of an electric range with an electric resistance cooktop, natural gas range, or a freestanding electric resistance cooktop.

This measure was developed to be applicable to the following program types: TOS, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as a freestanding cooktop that heats cooking vessels using electrical induction or a range with an electric resistance oven and an electric induction cooktop for residential applications. The integrated annual energy consumption (IAEC) represents both the active and standby operating mode energy consumption across one year of operation.[191]

DEFINITION OF BASELINE EQUIPMENT

The baseline product is a minimally efficient electric resistance or gas cooktop.

Cooktop Type	IAEC (Electric) and AEC (Gas)[192]
Electric Resistance	236.9 kWh/year
Natural Gas	1,900 kBtu/year

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of the measure is 16 years.[193]

DEEMED MEASURE COST

The incremental measure cost for an electric range with an induction cooktop is $1,490 when compared to an electric range with an electric resistance cooktop and $1,494 when compared to a gas range. The incremental measure cost for a freestanding induction cooktop is $764 when compared to a freestanding electric resistance cooktop and $880 when compared to a freestanding natural gas cooktop.[194] Assume $100 additional labor from an electric baseline to install additional power/socket requirements.[195] An additional $530 in parts and labor costs are required when replacing a natural gas range or freestanding cooktop to account for infrastructure costs to install electrical wiring, receptacles, circuit breaker, and to cap the gas line.[196]

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[191] IAEC is calculated for products tested per Methodology in 10 CFR 430, Subpart B, Appendix I1 - Uniform Test Method for Measuring the Energy Consumption of Conventional Cooking Products

[192] The U.S. DOE Notice of Proposed Rulemaking (NOPR) Technical Support Document (TSD): https://www.regulations.gov/document/EERE-2014-BT-STD-0005-0090, provides the baseline IAEC for electric-coil cooktops of 199 kWh/year. The U.S. DOE Direct Final Rule (DFR) TSD: https://www.regulations.gov/document/EERE-2014-BT-STD-0005-12819, provides the baseline IAEC for electric-smooth non-induction cooktops of 250 kWh/year and gas cooktops. The DFR TSD also provides the market distribution of electric-smooth versus electric-coil products, at 74.4% and 25.6% respectively.

[193] The EUL was developed for the U.S. Department of Energy (DOE) Energy Conservation Program, Energy Conservation Standards for Residential Conventional Cooking Products as part of the 2016 supplemental notice of proposed rulemaking (SNOPR).

[194] Measure materials cost references market price data from San Diego Gas & Electric (SDG&E). 2024 “SWAP015 Cost Analysis_2024-10-09.xlsx. for electric cooktops and ranges and data from "SWAP013 Cost Analysis_2024-10-03.xlsx." for natural gas cooktops and ranges. Prices do not include additional costs for induction cookware. Baseline equipment cost references U.S. Department of Energy document EERE-2014-BT-STD-0005-12819. All prices were adjusted according to the Bureau of Labor Statistics Consumer Price Index rate to account for inflation and materials and labor rates for the Chicago region in 2026.

[195] Additional labor cost is an estimate.

[196] Infrastructure costs based on R.S. Means material and labor cost data for the installation of residential ranges and cooktops and the installation of electrical components required when switching from natural gas to electric fuel.

Any additional installation costs resulting from fuel switch/electrification measures (such as upgrading electrical panels, capping existing gas lines or adding new electrical circuits) should be divided across all applicable measures weighted by total MMBtu savings.

LOADSHAPE

Loadshape R20 – Residential Induction Cooktop

COINCIDENCE FACTOR

The coincidence factor is assumed to be 29%.[197]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY AND FOSSIL FUEL SAVINGS

Non Fuel Switch Measures (baseline is electric cooktop or range)

$$\Delta kWh = CooktopIAECbase - CooktopIAECee$$

Fuel switch measure (baseline is natural gas cooktop or range):

Fuel switch / electrification measures must produce positive total energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows:

$$\Delta SiteEnergySavings\ (MMBtu) = [\Delta CookingSavings] + [HVACImpacts]$$

$$\Delta CookingSavings = FuelSwitchSavings + NonFuelSwitchSavings$$

$$FuelSwitchSavings = [GasConsumptionReplaced] - [ElectricConsumptionAdded]$$

$$NonFuelSwitchSavings = [ElectricConsumptionReplaced]$$

$$GasConsumptionReplaced = \frac{AECbaseGas}{10}$$

$$ElectricConsumptionAdded = \frac{IAECee * 3{,}412}{1{,}000{,}000}$$

$$ElectricConsumptionReplaced = \frac{AECbaseElectric * 3{,}412}{1{,}000{,}000}$$

$$HVACImpacts\ [counted\ as\ nonfuel\ switch\ savings] = [CoolingImpact] - [ElecHeatImpact] - [FuelHeatImpact]$$

$$CoolingImpact = \frac{\Delta CookingSavings * \%Cool * HCFCOOL * VentFactor}{COPCOOL}$$

$$ElecHeatImpact = \frac{\Delta CookingSavings * \%ElectricHeat * HCFHEAT * VentFactor}{COPHEAT}$$

---

[197] Calculated from ResStock, 15 minute interval data by end use for Illinois, as provided by NREL.

$$FuelHeatImpact = \frac{\Delta CookingSavings * \%FossilHeat * HCFHEAT * VentFactor}{\eta Heat}$$

If ΔSiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	ΔSiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * ΔSiteEnergySavings * 1,000,000/3,412	%IncentiveGas * ΔSiteEnergySavings * 10
Gas utility only	N/A	ΔSiteEnergySavings * 10

Where:

$CooktopIAEC_{ee}$ = Integrated Annual Energy Consumption of an induction cooktop in kWh/yr

= Actual if IAEC is known, if unknown assume 184.2 kWh/yr[198].

$CooktopIAEC_{baseElec}$ = Integrated Annual Energy Consumption of a baseline electric cooktop in kWh/yr

= If values unknown, assume 236.9 kWh/yr

$IAEC_{ee}$ = Integrated Annual Energy Consumption of induction cooking appliance in kWh/yr

= $CooktopIAEC_{ee} + OvenIAEC_{ee}$

$OvenIAEC_{ee}$ = Annual Energy Consumption of electric oven in kWh/yr

= 0 for standalone cooktop appliances

For ranges, if actual $OvenIAEC_{ee}$ is unknown, assume a value of 330 kWh/yr[199]

$AEC_{baseElec}$ = Annual Electric Energy Consumption of baseline electric cooking appliance in kWh/yr, for standby and ignition energy

= 0 for standalone cooktop appliances

For ranges, if $AEC_{baseElec}$ is unknown, assume a value of 4.1 kWh/yr[200]

$AEC_{baseGas}$ = Annual Energy Consumption of a baseline gas cooking appliance in therms/yr

---

[198] The U.S. Environmental Protection Agency (EPA) provided induction cooktop test data in their 2024 ENERGY STAR specification development process. Ten induction cooktops – seven as standalone cooktops and three as the cooktop portion of a range – were at or more efficient than the adopted ENERGY STAR specification level. The average IAEC of those 10 ENERGY STAR qualifying products was 184.2 kWh/year.

[199] The U.S. DOE Direct Final Rule (DFR) TSD: https://www.regulations.gov/document/EERE-2014-BT-STD-0005-12819, provides the baseline IAEC for all variations of oven energy consumption for both gas and electric units as well as the market share allocated between each variation.

[200] Ibid. Average of test data. Average taken as there is no clear correlation between standby energy consumption and active mode energy consumption among the DOE published test data.

= $CooktopAEC_{baseGas}$ + $OvenAEC_{baseGas}$

$CooktopAEC_{baseGas}$ = Annual Energy Consumption of baseline gas cooktop in therms/yr

If unknown, assume 19 therms[201]

$OvenAEC_{baseGas}$ = Annual Energy Consumption of baseline gas oven in therms/yr

= 0 for standalone cooktop appliances

For ranges, if actual $OvenAEC_{baseGas}$ is unknown, assume a value of 20 therms[202].

%ElectricHeat = Percentage of homes that have electric heating

= 100% if electrically heated home, 0% if gas, or

= If unknown[203], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[204]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

%FossilHeat = Percentage of homes that have fossil fuel heating

= 100% if fossil heated home, 0% if electric, or

= If unknown[205], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%

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[201] DOE 2024 Direct Final Rule assumes a baseline IAEC of 1,900 kBtu/year, equivalent to roughly 19 therms/year for standalone gas cooktop usage.

[202] DOE 2024 Direct Final Rule calculates an integrated annual energy consumption (IEAO) for ovens of 20 therms/year when taking a weighted average of all four electric oven configuration (Standards versus Self-Clearn and Freestanding versus Built-in) baseline scenarios and subtracting the average standby power of all DOE published tested products.

[203] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[204] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[205] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[206]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[207]	98.9%	96.5%	99.8%	98.7%	98.6%

HCF_{COOL} = 21%, Portion of reducted waste heat that is coincident with home cooling load[208]

VentFactor = 50%[209]

COP_{COOL} = COP of central air conditioning

= Assume 2.8 if unknown[210]

HCF_{HEAT} = 34.8%, portion of reduced waste heat that is coincident with home heating load[211]

COP_{HEAT} = COP of electric heating system

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[206] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[207] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[208] Additional cooling savings from HVAC interactive effects of 21% of appliance savings, estimated using average result from BEOPT simulation modeling comparing two different home configurations and two locations. Ratio compares the changes in home HVAC loads to changes in appliance energy consumption.

[209] This factor approximates the effectiveness of kitchen ventilation systems in exhausting waste heat from the home. Reference reviewed include 1. Kile et al. Environmental Health 2014, 13:71 (http://www.ehjournal.net/content/13/1/71) which showed 221 of 445 surveyed used exhaust during cooktop cooking; also 2. Cooking Appliance Use in CA Homes. Victoria L. Klug, Agnes B. Lobscheid, Brett C. Singer Environmental Energy Technologies Division Lawrence Berkeley National Laboratory, Berkeley, California, USA August 2011 which showed 44% of respondents use the range hood during dinner cooking and an additional 37% of respondents open windows during dinner cooking.

[210] To reduce complexity of the measure and since this relates to a small waste heat impact, instead of assuming actual existing unit HVAC efficiency and a mid-life adjustment to account for future replacement efficiency, the code minimum baseline should be applied. Starting from federal baseline of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * SEER^2) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP.

[211] Heating penalty of 34.8% of appliance savings, estimated using average result from BEOPT simulation modeling comparing two different home configurations and two locations. Ratio compares the changes in home HVAC loads to changes in appliance energy consumption.

= actual. If not available use:[212]

System Type	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF/3.412)*0.85
Heat Pump	7.5	1.87
Resistance (Baseboard or Electric Furnace)	N/A	1.00
Unknown electric[213]	N/A	1.30

ηHeat = Efficiency of heating system

= 0.70 [214]

Non-fuel switch example, a residential induction cooktop will replace an electric resistance cooktop. The annual energy consumption of the induction cooktop has not been measured. The electric savings are calculated below:

$\Delta kWh = CooktopIAEC_{base} - CooktopIAEC_{ee}$

$CooktopIAEC_{ee} = 184.2$ kWh/yr

$CooktopAEC_{base} = 236.9$ kWh/yr

$\Delta kWh = 236.9 – 184.2$

$= 52.7$ kWh/yr

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[212] To reduce complexity of the measure and since this relates to a small waste heat impact, instead of assuming actual existing unit HVAC efficiency and a mid-life adjustment to account for future replacement efficiency, the code minimum baseline should be applied. Note efficiency includes duct losses. Defaults provided assume 15% duct loss for heat pumps.

[213] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see "HC6.9 Space Heating in Midwest Region.xls", using average for East North Central Region. Program or evaluation data should be used to improve this assumption if available.

[214] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:

(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

Fuel switch example: a residential induction cooktop will replace a natural gas cooktop in a single family non-IQ home. The annual energy consumption of the induction cooktop has not been measured and the homes heating fuel and presence of central cooling is unknown. The savings for a measure supported by an electric utility are calculated below:

ΔSiteEnergySavings (MMBtu) = [ΔCookingSavings] + [HVACImpacts]

ΔCookingSavings = [GasConsumptionReplaced] – [ElectricConsumptionAdded]

= [CooktopAEC_{base} /10] – [CooktopIAEC_{ee} * 3,412/1,000,000]

= [19/10] – [184.2 * 3412/1000000]

= 1.9 – 0.628

=1.272 MMBtu

CoolingImpact = ΔCookingSavings * %Cool * HCF_{COOL} * VentFactor / COP_{COOL}

= 1.272 * 0.989 * 0.21 * 0.5 / 3.3

= 0.04 MMBtu

ElecHeatImpact = ΔCookingSavings * %ElecHeat * HCF_{HEAT} * VentFactor / COP_{HEAT}

= 1.272 * 0.26 * 0.348 * 0.5 / 1.3

= 0.044 MMBtu

FuelHeatImpact = ΔCookingSavings * %GasHeat *HCF_{HEAT} * VentFactor / ηHeat

= 1.272 * 0.74 * 0.348 * 0.5 / 0.7

= 0.234 MMBtu

HVAC Impacts = [CoolingImpact] – [ElecHeatImpact] – [FuelHeatImpact]

= 0.04 – 0.044 – 0.234

= -0.238 MMBtu

ΔSiteEnergySavings (MMBtu) = 1.272 + (- 0.238)

= 1.034 MMBtu

ΔkWh = ΔSiteEnergySavings * 1,000,000 / 3,412

= 1.034 * 1000000/3412

= 303 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

For Non-Fuel Switching measures:

ΔkW = (CooktopAEC_{base} - CooktopIAEC_{ee})/Hours * WHFd * CF

For Fuel Switching measures:

ΔkW = (($\text{AEC}_{baseElectric}$ - IAEC_{ee} + [CoolingImpact] – [ElecHeatImpact]) * 1,000,000/3,412) /Hours * WHFd * CF

Where:

Hours = Annual operating hours[215]

= 239 hours

WHFd = Waste heat factor for demand to account for cooling savings from efficient appliance.

= 1.11[216]

CF = Summer Peak Coincidence Factor

= 29% [217]

All other variables as presented above

FOSSIL FUEL SAVINGS

Calculation provided together with Electric Energy Savings above.

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

COST EFFECTIVENESS SCREENING AND LOAD REDUCTION FORECASTING WHEN FUEL SWITCHING

This measure can involve fuel switching from fossil fuel to electric.

For the purposes of forecasting load reductions due to fuel switch projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below) adjusted for utility line losses (at-the-busbar savings), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, this will not match the output of the calculation/allocation methodology presented in the "Electric Energy Savings" and "Fossil Fuel Savings" sections above. Therefore in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness of the measure.

ΔTherms = ([Gas Cooking Consumption Replaced] – [FuelHeatImpact]) * 10

= ($AEC_{baseGas}$ – FuelHeatImpact) * 10

ΔkWh = ([Electric Cooking Replaced] - [Electric Cooking Consumption Added] + [CoolingImpact] – [ElecHeatImpact]) * 1,000,000/3,412

= ($AEC_{baseElectric}$ - $IAEC_{ee}$ + [CoolingImpact] – [ElecHeatImpact]) * 1,000,000/3,412

MEASURE CODE: RS-MSC-INDC-V04-260101

REVIEW DEADLINE: 1/1/2029

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[215] Assuming 1 hours per cycle and 239 cycles per year therefore 239 operating hours per year. 239 cycles per year is based on a 2016 CASE study for PG&E modeling Plug Loads.

[216] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

[217] Calculated from ResStock, 15 minute interval data by end use for Illinois, as provided by NREL.

5.1.15 Residential Bolt-On Smart Dryer Sensor

DESCRIPTION

This measure relates to the installation of a bolt-on smart wifi enabled dryer sensor with cloud data storage access on a residential gas-fired or electric dryer. A smart dryer sensor is an add-on device, which turns any residential dryer into a smart dryer. The device consists of

1) a sensor that detects temperature and humidity in the dryer
2) a connected hub with a built-in auto shut-off mechanism

The sensor monitors the temperature and humidity inside the clothes dryer to determine when a load is dry. When the humidity levels in the dryer fall below a pre-set cut-off at steady state, the device determines that a load is dry. The sensor then notifies the connected auto shut-off mechanism, cutting off power to the dryer and turning it off.

Residential clothes dryers have not changed significantly in their operation for many years. They typically offer either a time-dry setting (which uses a set timer) or an auto-dry setting (which uses a built-in moisture sensor to determine when the clothes are dry). Most built-in manufacturer moisture sensors do not work well, and users tend to predominantly use the time-dry setting. This measure does not apply to dryers with coin operated mechanical timers, laundromat facilities or commercial clothes dryers. This measure was developed to be applicable to the following program types: TOS, RF, NC, DI and KITS.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Natural gas-fired or electric resistance dryers with a residential bolt-on smart dryer sensor installed.

DEFINITION OF BASELINE EQUIPMENT

The base case equipment is a conventional gas-fired or electric resistance residential dryer without a bolt-on smart dryer sensor installed. The dryer may have a built-in moisture sensor installed. The gas-fired dryer has a natural gas fuel-fired burner element and an electric powered drum motor.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be same as that of the clothes dryer, which is 16 years.[218]

DEEMED MEASURE COST

The deemed measure cost is $60 for a new residential bolt-on smart dryer sensor when installed on a gas-fired dryer. This applies to a non-intrusive bolt-on sensor installed with a magnetically attachable sensor inside the drum and a wirelessly connected plug with an auto shut-off.[219]

When attached to an electric dryer the deemed measure cost is $150[220].

Actual costs should be used when available or if the smart sensor setup is different from the above.

LOADSHAPE

Loadshape R17 - Residential Electric Dryer

COINCIDENCE FACTOR

N/A

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[218] Based on DOE Rulemaking Technical Support Document, LCC Chapter, 2011, as recommended in Navigant 'ComEd Effective Useful Life Research Report', May 2018.

[219] Based on Nicor Gas ETP field demonstration of Residential IoT Smart Dryer Sensors.

[220] Based on current market cost for TickleStar DryerSaver Model #TS2201.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

For all dryers, please use the following equation for calculating energy savings, related to the motor:

$\Delta kWh_{motor} = N_{cycles} * (Motor_{runtimesavings}) * Motor_{kW}$

Where:

N_{cycles} = Number of dryer cycles per year. Use actual data if available. If unknown:

= 259 cycles per year.[221]

$Motor_{runtimesavings}$ = Runtime savings for dryer drum motor

= 0.39 hrs/load[222]

$Motor_{kW}$ = Rated electric power draw of drum motor. Use actual nameplate data. If unknown,

= 0.25 kW.[223]

For electric resistance dryers, please use the following equation for calculating energy savings, related to the heating element:

$\Delta kWh_{heating} = N_{cycles} * RunTimeSavings * Dryer\ Draw\ Rate / 1{,}000$

Where:

RunTimeSavings = Runtime savings for dryer heating element

= 0.08 hrs/load[224]

Dryer Draw Rate = Draw of electric resistance dryer heaters.

= Use actual nameplate data if available. If unknown, 5,250 Watts.[225]

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$\Delta kW = \Delta kWh / Hours * CF$

Where:

ΔkWh = Electric Energy Savings as calculated above

For gas-fired dryers = ΔkWh_{motor}

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[221] Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region. Reduced by 6% to maintain prior ratio of dryer to clothes washer loads of 94%.

[222] Average data based on Nicor Gas ETP field demonstration of Residential IoT Smart Dryer Sensors. Please see Analysis file.

[223] Average Residential dryer drum motors, which typically range between 200 W and 300 W. Please see ENERGY STAR Scoping Reporting for Residential Clothes Dryers file, Table 2, page 3.

[224] Average data based on Nicor Gas ETP field demonstration of Residential IoT Smart Dryer Sensors. Based on natural-gas fired dryer data, and assuming similar savings will be seen for electric dryer.

[225] Average Residential electric resistance heaters typically draw about 5,000 - 5,500 watts. Please see ENERGY STAR Scoping Reporting for Residential Clothes Dryers file, Table 2, page 3.

For electric dryers $= \Delta kWh_{motor} + \Delta kWh_{heating}$

Hours = Annual run hours of clothes dryer.

= Use actual data, if available. If unknown, use 259 hours per year.[226]

CF = Summer Peak Coincidence Factor for measure

= 3.8%[227]

FOSSIL FUEL SAVINGS

For natural gas-fired dryers, please use the following equation for calculating energy savings:

$$\Delta Therm = N_{cycles} * Therm_{convert} * RunTimeSavings * Dryer\ Firing\ Rate$$

Where:

N_{cycles} = Number of dryer cycles per year.

= Use actual data, if available. If unknown, use 259 cycles per year.[228]

$Therm_{convert}$ = Conversion factor from Btu to Therm

= 0.00001

RunTimeSavings = Runtime savings for gas dryer burner element

= 0.08 hrs/load[229]

Dryer Firing Rate = Firing rate of the natural gas-fired dryer burner.

= Use actual nameplate data, if available. If unknown, use 22,500 Btu/hr.[230]

For example, A single-family home in Chicago is retrofitting a residential bolt-on smart dryer sensor on a 22,500 Btu/hr natural gas-fired dryer with 400 loads annually. The annual savings for the installation would be:

Electric Energy Savings

= 400 x 0.39 x 0.25

= 39 kWh

Natural Gas Savings

= 400 x 0.00001 x 0.08 x 22,500

= 7.2 therms

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[226] ENERGY STAR qualified dryers have a maximum test cycle time of 80 minutes. Assume one hour per dryer cycle from existing TRM measure 5.1.10.

[227] Based on coincidence factor of 3.8% for clothes washers from existing Illinois TRM measure 5.1.10.

[228] Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region. Reduced by 6% to maintain prior ratio of dryer to clothes washer loads of 94%..

[229] Average data based on Nicor Gas ETP field demonstration of Residential IoT Smart Dryer Sensors. See Analysis file for details.

[230] Residential dryer burners typically range between 20,000 Btu/hr – 25,000 Btu/hr. Please see ENERGY STAR Scoping Reporting for Residential Clothes Dryers file, Table 2, page 3.

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-SCDS-V02-250101

REVIEW DEADLINE: 1/1/2030

5.1.16 Electric Lawn and Garden Equipment

DESCRIPTION

This measure identifies the claimed savings associated with residential lawn equipment electrification. This measure was developed to be applicable to the following program types: TOS.

Time of Sale (TOS):

- The use of an all-electric equipment in place of an equipment with a spark-ignition gasoline-powered engine.
- Note that the baseline in this case is an equivalent replacement system to that which exists currently in the home.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient condition is an all-electric lawn or garden equipment sized to be equivalent to the baseline equipment.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is new gasoline-powered lawn or garden equipment.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life varies based on the equipment type (displayed in the table below).

Equipment Type	Measure Life (years)[231]
Riding Lawn Mower	9
Push Lawn Mower	9
Leaf Blower	5
Trimmer	5
Chainsaw	7

DEEMED MEASURE COST

For Time of Sale (TOS) the incremental cost should be used. Actual costs can also be used although care should be taken as costs can vary significantly. Defaults are provided below.

Equipment Type	Incremental Cost[232]
Riding Lawn Mower	$3,890
Push Lawn Mower	$419
Leaf Blower	$206
Trimmer	$272
Chainsaw	$384

LOADSHAPE

Loadshape R08 – Residential Cooling[233]

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[231] CARB (2022). CCI Emission Factor Database, "Fuel-Specific GHG" worksheet, available at cci_emissionfactordatabase_2022-11-30.xlsx (live.com).

[232] Vermont Act 56 Tier III Technical Advisory Group 2021 ANNUAL REPORT

[233] Residential cooling loadshape is used as an estimate of likely usage pattern for electric lawn equipment. This methodology is used in other jurisdictions offering electric lawn care equipment savings.

COINCIDENCE FACTOR

The summer Peak Coincidence Factor is assumed to be 30%.[234]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY AND FOSSIL FUEL SAVINGS

Fuel switch measure (baseline is gas equipment):

Fuel switch / electrification measures must produce positive total energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows:

$$\Delta SiteEnergySavings\ (MMBtu) = [GasConsumptionReplaced] – [ElectricConsumptionAdded]$$

$$= [Fuel_{baseline} * 120{,}238/1{,}000{,}000] – [Fuel_{baseline} * ED_{gasoline} / (ED_{electricity} * EER_{G\rightarrow E}) * 3{,}412/1{,}000{,}000]$$

$$Fuel_{baseline} = (BSFC_{baseline} * hp_{baseline} * LF_{baseline} * Hours) / (Fuel\ Density_{gasoline})$$

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10
Gas utility only	N/A	SiteEnergySavings * 10

Where:

$BSFC_{baseline}$ = Brake Specific Fuel (Gasoline) Consumption Factor (lbs/hp-hr)

= If unknown, use default values in the table below

$hp_{baseline}$ = Horsepower of the lawn equipment

= If unknown, use default values in the table below

$LF_{baseline}$ = The load factor is the average operational level of an engine as a fraction or percentage of the engine manufacturer's maximum rated horsepower. Load factor is difficult to characterize since it is a strong function of the equipment use and operation. Load factors for various equipment types are presented in the table below.

Hours = Annual operating hours of the lawn or garden equipment.

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[234] Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

= Values for various equipment types are presented in the table below.

$\text{Fuel Density}_{\text{gasoline}}$ = Gasoline fuel density (assume 6.15 lbs/gal)[235]

$\text{ED}_{\text{gasoline}}$ = Energy density of gasoline (assume 115.83 MJ/gal)[236]

$\text{ED}_{\text{electricity}}$ = Energy density of electricity = 3.6 MJ/kWh

$EER_{G\rightarrow E}$ = Energy Economy Ratio = 3.4 (for switching from gasoline to electricity)[237]

120,238 = Btu content in one gallon of finished gasoline[238]

1,000,000 = Btu to MMBtu conversion

Equipment Type	$\text{BSFC}_{\text{baseline}}$ (lbs/hp-hr)[239]	$\text{hp}_{\text{baseline}}$[234]	$\text{LF}_{\text{baseline}}$[234]	Hours (hrs/year)[234]	ΔkWh	ΔMMBtu	Site Energy Savings (MMBtu)
Riding Lawn Mower	0.779	21.4	38%	36	-350.9	4.5	3.3
Push Lawn Mower	0.830	3.9	33%	25	-41.1	0.5	0.4
Leaf Blower	0.874	2.0	94%	10	-25.3	0.3	0.2
Trimmer	0.922	1.2	91%	9	-13.9	0.2	0.1
Chainsaw	0.770	1.9	70%	13	-20.5	0.3	0.2

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta\text{kW} = -1 * \text{kW}_{\text{battery draw}} * \text{CF}$$

Where:

$\text{kW}_{\text{battery draw}}$ = The electric draw by the battery during charging. This varies based on the battery and charger specifications. If unknown use values in the table below.

Equipment Type	$\text{kW}_{\text{battery draw}}$
Riding Lawn Mower	0.57[240]
Push Lawn Mower	0.42[241]
Leaf Blower	0.20[236]
Trimmer	0.00[236]
Chainsaw	0.00[236]

CF = Summer Peak Coincidence Factor

= 30%[242]

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[235] CARB (2022). CCI Emission Factor Database, "Fuel-Specific GHG" worksheet, available at cci_emissionfactordatabase_2022-11-30.xlsx (live.com).

[236] Ibid.

[237] Energy Economy Ratio (EER) dimensionless value that represents the efficiency of a fuel as used in a powertrain as compared to a reference fuel used in the same powertrain. Source: CARB (2018), Low Carbon Fuel Standard Regulations: Table 5. EER Values for Fuels Used in Light- and Medium- Duty, and Heavy-Duty Applications. RESO 18-34 LCFS Attachment A Final Reg Order (ca.gov)

[238] Energy conversion calculators - U.S. Energy Information Administration (EIA)

[239] CARB (2022). CCI Emission Factor Database, "Fuel-Specific GHG" worksheet, available at cci_emissionfactordatabase_2022-11-30.xlsx (live.com).

[240] Vermont Act 56 Tier III Technical Advisory Group 2021 ANNUAL REPORT

[241] Massachusetts Residential Baseline Study, Guidehouse, 2020

[242] Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

COST EFFECTIVENESS SCREENING AND LOAD REDUCTION FORECASTING WHEN FUEL SWITCHING

This measure can involve fuel switching from fossil fuel to electric.

For the purposes of forecasting load reductions due to fuel switch projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below) adjusted for utility line losses (at-the-busbar savings), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, this will not match the output of the calculation/allocation methodology presented in the "Electric Energy Savings" and "Fossil Fuel Savings" sections above. Therefore in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness of the measure.

$$\Delta Therms = [Gas\ Consumption\ Replaced]$$

$$= (BSFC_{baseline} * hp_{baseline} * LF_{baseline} * Hours) / (Fuel\ Density_{gasoline}) * 120{,}238/100{,}000$$

$$\Delta kWh = [Electric\ Consumption\ Added]$$

$$= (BSFC_{baseline} * hp_{baseline} * LF_{baseline} * Hours) / (Fuel\ Density_{gasoline}) * ED_{gasoline} / (ED_{electricity} * EER_{G \rightarrow E})$$

MEASURE CODE: RS-APL-ELGE-V01-240101

REVIEW DEADLINE: 1/1/2028

5.1.17 ENERGY STAR All-in-One Clothes Washer-Dryer

DESCRIPTION

This measure relates to the installation of a residential combination all-in-one clothes washer-dryer meeting the ENERGY STAR[243] criteria. ENERGY STAR qualified combination all-in-one clothes washer-dryers save energy through a combination of more efficient drying and reduced runtime of the drying cycle. More efficient washing and drying is achieved through heat pump technology, modifying operating conditions such as air flow and/or heat input rate, improving air circulation through better drum design, and improving efficiency of motors. ENERGY STAR provides criteria for electric clothes washer-dryers with heat pump technology.

This measure was developed to be applicable to the following program types: Time of Sale, New Construction, Retrofit. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

All-in-one clothes washer-dryer must meet the ENERGY STAR or ENERGY STAR Most Efficient criteria, as required by the program. Units utilizing the Heat Pump designation must meet the same ENERGY STAR criteria and be classified as Heat Pump units.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition for a washing cycle is a clothes washer meeting the minimum federal baseline as of January 2018[244].

Efficiency Level	Top Loading ≥1.6 Cu ft	Front Loading ≥1.6 Cu ft
Federal Standard	≥1.57 IMEF, ≤6.5 IWF	≥1.84 IMEF, ≤4.7 IWF

The baseline condition used for a washing cycle for this measure is a weighted average of 1.7 IMEF.[245]

The baseline condition for a drying cycle is a clothes dryer meeting the minimum federal requirements for units manufactured on or after January 1, 2015.

Efficiency Level	Front Loading ≥4.5 Cu ft
Federal Standard for Clothes Dryer	3.11[246] CEF for Vented Electric, 2.84[247] CEF for Vented Gas

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 14 years[248].

DEEMED MEASURE COST

The average cost of the ENERGY STAR combination all-in-one clothes washer-dryer $2,331 with no additional

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[243] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[244] DOE Energy Conservation Standards for Clothes Washers, Appliance and Equipment Standard, 10 CFR Part 430.32(g)

[245] Weighted average IMEF of Federal Standard rating for Front Loading and Top Loading units. Weighting is based upon the relative top v front loading percentage of available non-ENERGY STAR product in the CEC database (products accessed on 04/21/2022).

[246] ENERGY STAR Draft 2 Version 1.0 Clothes Dryers Data and Analysis

[247] Federal standards report CEF for gas clothes dryers in terms of lbs/kWh. To determine gas savings, this number is later converted to therms.

[248] Lifetime of 14 years per Residential Clothes Washers Life-Cycle Cost Analysis Spreadsheet posted by the Energy Efficiency and Renewable Energy Office on Sep 23, 2021.

installation cost for a total measure cost of $2,331.[249]

For a non-IQ participant, the incremental cost is assumed to be $1,328.[250]

For an IQ participant, the incremental cost is assumed to be $1,224.[251]

LOADSHAPE

Loadshape R17 - Residential Electric Dryer

COINCIDENCE FACTOR

The coincidence factor for this measure is 3.8%.[252]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

Non Fuel Switch Measures[253]

$$\Delta kWh_{total}{}^{254} = \Delta kWh_{clothes\ washer} + \Delta kWh_{dryer}$$

$$\Delta kWh_{clothes\ washer} = [Capacity * IQAdj_{CW}/IMEFbase * Ncycles * (\%CWbase + (\%DHWbase * \%Electric\_DHW))] - [Capacity * 1/IMEFeff * Ncycles * (\%CWeff + (\%DHWeff * \%Electric\_DHW))]$$

$$\Delta Therms = [Capacity * IQAdj_{CW}/IMEFbase * Ncycles * (\%DHWbase * \%Fossil\_DHW * R\_eff)] - [Capacity * 1/IMEFeff * Ncycles * (\%DHWeff * \%Fossil\_DHW * R\_eff)] * ThermConvert$$

$$\Delta kWh_{dryer} = ((Load/CEFbase * IQAdj_{D}) – Load/CEFeff) * Ncycles * \%Electric$$

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[249] The cost of buying a new market available all-in-one clothes washer-dryer with HP technology from Home Depot have been averaged for three different manufacturers. These products are ENERGY STAR certified. See “Incremental Cost R&D.xls” for information.

[250] The baseline cost is assumed to be the cost of a standard efficiency clothes washer in addition to the cost of a standard efficiency clothes dryer. A standard clothes washer cost ($763.98) is based on analysis of cost data provided in the Retail Price Data from DOE Analytical Tool (Lifecycle Cost and Payback Period Analysis) for Negotiated Standards, 2017, and weighted by a market share of 49.4% Top-Loading to 50.6% Front-Loading machines. The cost of a standard dryer ($564) is from “ACEEE Clothes Dryers.pdf.”

[251] IQ Incremental costs factor in the assumption that a secondhand unit costs on average 50% of a new baseline unit, and that 1/3 of IQ participants would have purchased a unit on the secondhand market. See “IQ Appliance Calculations.xls” for information.

[252] Calculated from Itron eShapes, 8760 hourly data by end use for Missouri, as provided by Ameren.

[253] Non-Fuel Switch Measures apply in cases where inefficient electric equipment is being replaced with efficient electric equipment. Assume DHW fuel remains consistent between baseline and efficient scenario. Clothes washer unit savings are always non-fuel switch; however thermal savings can exist in applications with gas DHW.

[254] The energy savings algorithm from the clothes dryer and clothes washer has been calculated individually to create the final algorithm for the Energy Star Combination All-in-One Clothes Washer-Dryer. The dryer section from the clothes washer algorithm has been excluded. See “Energy Star Combination All-in-One Clothes Washer-Dryer Calculations.xls” for information.

Fuel Switch/Electrification Measures

Total Site Energy Savings (MMBTUs) = Site Energy Savings (MMBTUs)$_{\text{clothes washer}}$ + Site Energy Savings (MMBTUs)$_{\text{dryer}}$

SiteEnergySavings(MMBTUs)$_{\text{clothes washer}}$ = [FuelSwitchSavings$_{\text{clothes washer}}$] + [NonFuelSwitchSavings$_{\text{clothes washer}}$]

This measure assumes the baseline clothes washer has a hot and cold water feed, and therefore the home's DHW system is used to heat the water used by the clothes washer. If the efficient unit also has a hot and cold water feed (or it is unknown), the savings are not a fuel switch – and the home's DHW fuel is constant between baseline and efficient. If the new unit is cold water feed only, the clothes washer unit is now heating the water. Therefore if the home's DHW is fossil heated – this becomes a fuel switch scenario.

Non-fuel switch scenario (hot/cold feed or unknown):

NonFuelSwitchSavings$_{\text{clothes washer}}$ = [(ElectricConsumption$_{\text{Baseline clothes washer}}$ + GasConsumption$_{\text{Baseline clothes washer}}$) – (ElectricConsumption$_{\text{Efficient clothes washer}}$ + GasConsumption$_{\text{efficient clothes washer}}$)]

ElectricConsumption[255]$_{\text{Baseline clothes washer}}$ = [Capacity * IQAdj$_{\text{CW}}$/IMEFbase * Ncycles * (%CWbase + (%DHWbase * %Electric_DHW)) * MMBtu_convert]

GasConsumption$_{\text{Baseline clothes washer}}$ = [Capacity * IQAdj$_{\text{CW}}$/IMEFbase * Ncycles * (%DHWbase * %Fossil_DHW * R_eff) * MMBtu_convert]

ElectricConsumption$_{\text{efficient clothes washer}}$ = [Capacity * 1/IMEFeff * Ncycles * (%CWeff + (%DHWeff * %Electric_DHW) * MMBtu_convert]

GasConsumption$_{\text{efficient clothes washer}}$ = [Capacity * 1/IMEFeff * Ncycles * (%DHWeff * %Fossil_DHW * R_eff) * MMBtu_convert]

Fuel switch scenario (cold feed only with existing fossil DHW):

FuelSwitchSavings$_{\text{clothes washer}}$ = [(ElectricConsumption$_{\text{Baseline clothes washer}}$ + GasConsumption$_{\text{Baseline clothes washer}}$) - (ElectricConsumption$_{\text{Efficient clothes washer}}$)]

ElectricConsumption$_{\text{Baseline clothes washer}}$ = [Capacity * IQAdj$_{\text{CW}}$/IMEFbase * Ncycles * %CWbase * MMBtu_convert]

GasConsumption$_{\text{Baseline clothes washer}}$ = [Capacity * IQAdj$_{\text{CW}}$/IMEFbase * Ncycles * (%DHWbase * %Fossil_DHW * R_eff) * MMBtu_convert]

ElectricConsumption$_{\text{Efficient clothes washer}}$ = [Capacity * 1/IMEFeff * Ncycles * (%CWeff + (%DHWeff * %Electric_DHW) * MMBtu_convert]

Site Energy Savings (MMBTUs)$_{\text{dryer}}$[254] = [FuelSwitchSavings$_{\text{dryer}}$] + [NonFuelSwitchSavings$_{\text{dryer}}$]

FuelSwitchSavings$_{\text{dryer}}$ = [Load/CEFbase$_{\text{Gas}}$ * IQAdj$_{\text{D}}$ * Ncycles * MMBtu_convert * %Gas$_{\text{Gas}}$] - [Load/CEFeff$_{\text{Elec}}$ * Ncycles * MMBtu_convert * %Gas$_{\text{Gas}}$]

NonFuelSwitchSavings$_{\text{dryer}}$ = [Load/CEFbase$_{\text{Gas}}$ * IQAdj$_{\text{D}}$ * Ncycles* MMBtu_convert * %Electric$_{\text{Gas}}$] - [Load/CEFeff$_{\text{Elec}}$ * Ncycles * MMBtu_convert * %Electric$_{\text{Gas}}$]

If Total Site Energy Savings (MMBTUs) calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table

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[255] Electric consumption that accounts for the fact that some of the consumption on gas DHW Clothes Washer comes from electricity (motors, controls, etc).

below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Gas utility only	N/A	SiteEnergySavings * 10

Where:

Capacity = Unit capacity (cubic feet)

= Actual. If capacity is unknown assume 4.9 cubic feet[256]

IMEFbase = Integrated Modified Energy Factor of baseline clothes washer unit

= 1.71[257]

$IQAdj_{CW}$ =Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market.[258]

= 1.02 if IQ, 1.0 if non-IQ

IMEFeff = Integrated Modified Energy Factor of Efficient Combination All-in-One Washer-Dryer unit

= Actual. If unknown assume average values provided below.

Efficiency Class	IMEFeff[259]
ENERGY STAR	2.76
ENERGY STAR Most Efficient	2.92

Ncycles = Number of cycles per year

= 276[260]

%CW = Percentage of total energy consumption for Clothes Washer operation (different for baseline and efficient unit – see table below)

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[256] Average of ENERGY STAR & ENERGY STAR MOST EFFICIENT Residential Combination All-in-One Washer-Dryer. April 2024. https://www.energystar.gov/productfinder/product/certified-clothes-washers.

[257] Weighted average IMEF of Federal Standard rating for Front Loading and Top Loading units. Weighting is based upon the relative top v front loading percentage of available non-ENERGY STAR product in the CEC database (products accessed on 04/21/2022).

[258] It is assumed that a second-hand unit is on average 2/3 of a measure's EUL years old (9 years). The baseline consumption of a unit meeting the pre 03/2015 Federal Standard was increased by an estimate of 0.4% * 9 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. For 2025 on, the post 03/2015 Federal Standard is utilized. This second hand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See "IQ Appliance Calculations.xls" for information.

[259] The energy measurements are performed at an ISO/IEC accredited lab as specified in the application process for the ENERGY STAR & ENERGY STAR Most Efficient. Approved products on the ENERGY STAR Qualified Products List 2024-04-23 have IMEF, IWF values listed for clothes washer and CEF values for clothes dryer.

[260] Loads per week was estimated by taking the weighted average of the number of loads per week (midpoint used where loads per week is a range and the weights are the share of respondents falling into each number of loads per week response bin). This estimate was scaled to an IL-specific value by applying a ratio developed using the 2009 state specific values for the states in the East North Central portion of the Midwest Region. This value was then scaled to apply to a consistent amount of laundry washed over time.

%DHW = Percentage of total energy consumption used for water heating (different for baseline and efficient unit – see table below)

Product Class	Percentage of Total Energy Consumption of Clothes Washer[261]	
	%CW	%DHW
Baseline	6.7%	15.8%
Efficient	6.6%	13.0%

%Electric_DHW = Percentage of DHW savings assumed to be electric

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[262], use the following table:

Product Class	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComED	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[263]					29%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Load = The average total weight (lbs) of clothes per drying cycle. If unit size is unknown, assume standard.

Unit Size	Load (lbs)[264]
Standard	8.45

CEFbase = Combined energy factor (CEF) (lbs/kWh) of the baseline unit is based on existing federal standards energy factor as performed in the ENERGY STAR analysis[246]. If product class unknown, assume electric, standard.

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[261] The percentage of total energy consumption that is used for the machine, heating the hot water or by the dryer is different depending on the efficiency of the unit. Values are based on a weighted average of top loading and front loading units based on data from the 2017 DOE Life-Cycle Cost and Payback Period Excel-based analytical tool. See "IL TRM_CW Analysis_082024.xlsx" for the calculation.

[262] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[263] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[264] Based on ENERGY STAR test procedures

Product Class	CEFbase (lbs/kWh)
Vented Electric, Standard (≥ 4.4 ft3)	3.11
Vented Gas	2.84[247]

$IQAdj_D$ = Baseline consumption adjustment for IQ program participants to account for a portion of participants who would have utilized the secondary market.[265]

= 1.033 if IQ, 1.0 if non-IQ

CEFeff = CEF (lbs/kWh) of ENERGY STAR or ENERGY STAR Most Efficient requirements Combination All-in-One Washer-Dryer.

= Actual. If unknown assume values provided below.

Efficiency Class	CEFeff (lbs/kWh)[259]
ENERGY STAR	4.97
ENERGY STAR Most Efficient	6.9

%Electric = The percent of overall savings coming from electricity.

= 100% for electric dryers, 16% for gas dryers[266].

%Fossil_DHW = Percentage of DHW savings assumed to be Fossil Fuel

= 100 % for Fossil fuel

= 0 % for Electric

= If unknown[267], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComED	86.0%	78.5%	57.0%	51.6%	67.1%
People’s Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[268]					71%

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[265] It is assumed that a second-hand unit is on average 2/3 of a measure’s EUL years old (11 years). The current Federal Standard became effective in 2015 so the previous standard is used to estimate base consumption for a second hand unit, and further increased by an estimate of 0.4% * 11 years (based on review of the refrigerator/freezer regression algorithm used in the 5.1.8 Refrigerator and Freezer Recycling measure) to account for degradation of performance over time. This second hand consumption was then weighted 1/3: 2/3 current new baseline to estimate a multiplier for IQ participants. See “IQ Appliance Calculations.xls” for information.

[266] %Electric accounts for the fact that some of the savings on gas dryers comes from electricity (motors, controls, etc). 16% was determined using a ratio of the electric to total savings from gas dryers given by ENERGY STAR Draft 2 Version 1.0 Clothes Dryers Data and Analysis.

[267] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[268] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

R_eff = Recovery efficiency factor

=1.26[269]

MMBtu_convert = Conversion factor from kWh to MMBtu.

= 0.003412

%Gas = Percent of overall savings coming from gas.
= 0% for electric dryers and 84% for gas dryers[270].

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[269] To account for the different efficiency of electric and Natural Gas hot water heaters (gas water heater: recovery efficiencies ranging from 0.74 to 0.85 (0.78 used), and electric water heater with 0.98 recovery efficiency (see ENERGY STAR Waste Water Recovery Guidelines). Therefore a factor of 0.98/0.78 (1.26) is applied.

[270] %Gas accounts for the fact that some of the savings on gas dryers comes from electricity (motors, controls, etc). 84% was determined using a ratio of the gas to total savings from gas dryers given by ENERGY STAR Draft 2 Version 1.0 Clothes Dryers Data and Analysis.

For example:

Non Fuel Switch example, for a non- IQ Time of Sale, standard, ventless, ENERGY STAR All-in-One Clothes Washer-Dryer:

$$\Delta kWh_{total} = \Delta kWh_{clothes\ washer} + \Delta kWh_{dryer}$$

$$\Delta kWh_{clothes\ washer} = [Capacity * 1/IMEFbase * Ncycles * (\%CWbase + (\%DHWbase * \%Electric\_DHW))] - [Capacity * 1/IMEFeff * Ncycles * (\%CWeff + (\%DHWeff * \%Electric\_DHW))]$$

$$\Delta kWh_{dryer} = ((Load/CEFbase* IQAdj) – Load/CEFeff) * Ncycles * \%Electric$$

ENERGY STAR

$$\Delta kWh_{clothes\ washer} = (4.9 * 1/1.71 * 276 * (6.7\% + (15.8\% * 100\%))) – (4.9 * 1/2.76 * 276 *(6.6\% + (13\% * 100\%)))$$

$$= 81.9\ kWh$$

$$\Delta kWh_{dryer} = ((8.45/3.11*1) – 8.45/4.97) * 276 *100\%$$

$$= 280.6\ kWh$$

$$\Delta kWh_{Total} = 280.6 + 81.9$$

$$= 363\ kWh$$

ENERGY STAR Most Efficient/CEE Tier 2

$$\Delta kWh_{clothes\ washer} = (4.9 * 1/1.71 * 276 * (6.7\% + (15.8\% * 100\%))) – (4.9 * 1/2.92 * 276 * (6.6\% + (13\% * 100\%)))$$

$$= 87.2\ kWh$$

$$\Delta kWh_{dryer} = ((8.45/3.11*1) – 8.45/6.9) * 276 *100\%$$

$$= 411.9\ kWh$$

$$\Delta kWh_{Total} = 411.9 + 87.2$$

$$= 499\ kWh$$

Fuel switch example, for a Time of Sale, an ENERGY STAR All-in-One Clothes Washer-Dryer in place of a clothes washer with gas DHW and vented gas dryer:

$$Total\ SiteEnergySavings\ (MMBTUs) = SiteEnergySavings\ (MMBTUs)_{clothes\ washer} + SiteEnergySavings\ (MMBTUs)_{dryer}$$

$$SiteEnergySavings\ (MMBTUs)_{clothes\ washer} = [(ElectricConsumption_{Baseline\ clothes\ washer} + GasConsumption_{Baseline\ clothes\ washer}) – EfficientConsumption_{efficient\ clothes\ washer}]$$

$$ElectricConsumption_{clothes\ washer} = [(Capacity * 1/IMEFbase * Ncycles * ((\%CWbase + \%Electric\_DHW) *MMBtu\_convert]$$

= (4.9 * 1/1.71 * 276 * (6.7% + (15.8% * 0%)) * 0.003412)

= 0.18 MMBTU

GasConsumption$_{\text{Baseline clothes washer}}$ = [Capacity * 1/IMEFbase * Ncycles * (%DHWbase * %Fossil_DHW * R_eff) * MMBtu_convert]

= (4.9 * 1/1.71 * 276 * (15.8% * 1 * 1.26))* 0.003412)

= 0.54 MMBTU

EfficientConsumption$_{\text{efficient clothes washer}}$ = [Capacity * 1/IMEFbase * Ncycles * (%CWeff + (%DHWeff * %Electric_DHW) * MMBtu_convert]

= (4.9 * 1/2.8 * 276 * (6.6% + (13% * 100%)) * 0.003412)

= 0.32 MMBTU

SiteEnergySavings (MMBTUs)$_{\text{clothes washer}}$

= (0.18 + 0.54) – 0.32

= 0.40 MMBTU

SiteEnergySavings (MMBTUs)$_{\text{dryer}}$ = [FuelSwitchSavings$_{\text{dryer}}$] + [NonFuelSwitchSavings$_{\text{dryer}}$]

FuelSwitchSavings$_{\text{dryer}}$ = [Load/CEFbase$_{\text{Gas}}$ * IQAdj * Ncycles * MMBtu_convert * %Gas$_{\text{Gas}}$] - [Load/CEFeff$_{\text{Elec}}$ * Ncycles * MMBtu_convert * %Gas$_{\text{Gas}}$]

= (8.45/2.84 * 1 * 276 * 0.003412 * 84%) - (8.45/4.97 * 276 * 0.003412 * 84%)

= 1.01 MMBTU

NonFuelSwitchSavings$_{\text{dryer}}$ = [Load/CEFbase$_{\text{Gas}}$ * IQAdj * Ncycles * MMBtu_convert * %Electric$_{\text{Gas}}$] - [Load/CEFeff$_{\text{Elec}}$ * Ncycles * MMBtu_convert * %Electric$_{\text{Gas}}$]

= (8.45/2.84 * 1 * 276 * 0.003412 * 16%) - (8.45/4.97 * 276 * 0.003412 * 16%)

= 0.19 MMBTU

SiteEnergySavings (MMBTUs)$_{\text{dryer}}$

= 1.01 + 0.19
= 1.2 MMBTU

Total SiteEnergySavings (MMBTUs) = SiteEnergySavings (MMBTUs)$_{\text{dryer}}$ + SiteEnergySavings (MMBTUs)$_{\text{clothes washer}}$

= 0.40 + 1.2
= 1.6 MMBTU

If supported by an electric utility: ΔkWh = ΔTotal SiteEnergySavings(MMBTUs) * 1,000,000 / 3,412

= 1.6 * 1,000,000 / 3,412
= 469 kWh

If supported by a gas utility: ΔTherms = ΔTotal SiteEnergySavings(MMBTUs) * 10

= 1.6 * 10

= 16 Therms

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW_{Total}{}^{271} = ((\Delta kWh_{clothes\ washer} + \Delta kWh_{dryer}) / Hours) * CF$$

Where:

ΔkWh = $\Delta kWh_{clothes\ washer} + \Delta kWh_{dryer}$

$\Delta kWh_{clothes\ washer}$ = Energy Savings for clothes washer. Note: do not include the secondary savings in this calculation

ΔkWh_{dryer} = Energy Savings for dryer.

For non-fuel switch measures, use ΔkWh as calcuated in Electric Energy Savings section above, for fuel-switch measures use the ΔkWh as provided in the Cost Effectiveness Screening and Load Reduction Forecasting when Fuel Switching section below

Hours = Assumed run hours of unit

= 630 hours[272]

CF = Summer Peak Coincidence Factor for measure.

= 0.038[252]

For example, for a Time of Sale, an ENERGY STAR All-in-One Clothes Washer-Dryer

ΔkW = ((81.9 + 280.6) / 630) *0.038

= 0.02 kW

FOSSIL FUEL SAVINGS

Calculation provided together with Electric Energy Savings above.

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

$$\Delta Water\ (gallons) = Capacity * ((IWFbase * IQAdj_{CW}) - IWFeff) * Ncycles$$

Where:

ΔWater (gallons) = Water saved, in gallons

IWFbase = Integrated Water Factor of baseline clothes washer

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[271] The peak energy savings algorithm from the clothes dryer and clothes washer has been calculated individually to create the final algorithm for the Energy Star Combination All-in-One Clothes Washer-Dryer. The dryer section from the clothes washer algorithm has been excluded. See “Energy Star Combination All-in-One Clothes Washer-Dryer Calculations.xls” for information.

[272] Based on an average of reported cycle times for a normal load of models on the ENERGY STAR QPL.

= 5.59[273]

=1.02 if IQ, 1.0 if non-IQ

IWFeff = Water Factor of Efficient Combination All-in-One Washer-Dryer unit

= Actual. If unknown assume average values provided below

Other factors as defined above.

Using the default assumptions provided above, the prescriptive water savings for each efficiency level are presented below:

Effciency Class	IWFeff[259]	ΔWater [274] (gallons per year)
ENERGY STAR	3.1	3,367.5
ENERGY STAR Most Efficient	2.9	3,638.0

Other factors as defined above.

For example, for a non- IQ Time of Sale, standard, ventless, ENERGY STAR All-in-One Clothes Washer-Dryer:

ENERGY STAR

$$\Delta Water = 4.9 * ((5.59 * 1) - 3.10) * 276$$

$$= 3{,}367.5 \text{ Gallons per year}$$

ENERGY STAR Most Efficient/CEE Tier 2

$$\Delta Water = 4.9 * ((5.59 *1) - 2.9) * 276$$

$$= 3{,}638.0 \text{ Gallons per year}$$

Secondary kWh Savings for Clothes Washer Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWhwater = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ total}$$

Where:

ΔWater (gallons) = Water saved, in gallons – as calculated below.

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

= 5010[275]

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[273] Weighted average IWF of Federal Standard rating for Front Loading and Top Loading units. Weighting is based upon the relative top v front loading percentage of available non-ENERGY STAR product in the CEC database (products accessed on 04/21/2022).

[274] Baseline clothes washer capacity is assumed to have 4.9 cu.ft. with 233 wash cycles for clothes washer.

[275] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information, please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

For example, for a non- IQ Time of Sale, standard, ventless, ENERGY STAR All-in-One Clothes Washer-Dryer:

ENERGY STAR

ΔkWhwater = 3367.5/1,000,000 * 5,010

= 16.9 kWh

ENERGY STAR Most Efficient/CEE Tier 2

ΔkWhwater = 3638.0/1,000,000 * 5,010

= 18.2 kWh

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

COST EFFECTIVENESS SCREENING AND LOAD REDUCTION FORECASTING WHEN FUEL SWITCHING

This measure can involve fuel switching from fossil fuel to electric.

For the purposes of forecasting load reductions due to fuel switch projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below) adjusted for utility line losses (at-the-busbar savings), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, this will not match the output of the calculation/allocation methodology presented in the "Electric Energy Savings" and "Fossil Fuel Savings" sections above. Therefore, in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness of the measure.

ΔTherms = [Clothes Washer with Gas DHW Consumption Replaced + Gas Dryer Consumption Replaced] – [All-in-One Clothes Washer-Dryer Consumption Added]

= [(Capacity * $IQAdj_{CW}$/IMEFbase * Ncycles * (%DHWbase * %Fossil_DHW * R_eff)) + ((Load/$CEFbase_{Gas}$ * IQAdj) * Ncycles * Therm_convert * $\%Gas_{Gas}$) + ((Load/$CEFeff_{Elec}$ * $IQAdj_{D}$) * Ncycles * Therm_convert * $\%Gas_{Gas}$))] – [(Capacity * 1/IMEFeff * Ncycles * (%CWeff + (%DHWeff * %Electric_DHW) * Therm_convert) + (Load/CEFeff * Ncycles * $\%Gas_{gas}$* Therm_convert)]

ΔkWh = [Clothes Washer with Gas DHW Electric Consumption Replaced + Gas Dryer Electric Consumption Replaced] - [All-in-One Clothes Washer-Dryer Consumption Added]

= [(Capacity * $IQAdj_{CW}$/IMEFbase * Ncycles * (%CWbase + (%DHWbase * $\%Electric\_DHW_{base}$))) + ((Load/$CEFbase_{Gas}$ * $IQAdj_{D}$) * Ncycles * $\%Electric_{Gas}$)] - [(Capacity * 1/IMEFeff * Ncycles * (%CWeff + (%DHWeff * $\%Electric\_DHW_{efficient}$))) + ((Load/CEFeff * Ncycles * $\%Gas_{gas}$) + (Load/CEFeff * Ncycles * $\%Electric_{gas}$))]

MEASURE CODE: RS-APL-ACWD-V03-260101

REVIEW DEADLINE: 1/1/2030

5.1.18 Residential Refrigerator Seal Replacement

DESCRIPTION

This measure characterizes the savings associated with installing new door gaskets on existing residential refrigerators where the existing gasket has been worn or damaged to the point where it no longer provides an effective seal. Tight fitting gaskets prevent infiltration of warm, moist air into the refrigerator, thereby reducing the cooling load. The reduction of moisture in the case also helps prevent frost on the evaporator coil. Frost buildup on the coil reduces the heat transfer effectiveness, reduces air passage, and increases energy use during the defrost cycle. Therefore, replacing defective door gaskets reduces compressor run time and improves the overall effectiveness of heat removal from the refrigerator.

This measure was developed to be applicable to the following program types: RF. This is an IQ-only measure.
If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is assumed to be a standard replacement gasket with the same profile and similar material composition as the original. The fit must be tight and seal properly upon installation with no visible gaps or tears.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is assumed to be a worn refrigerator gasket with visible damage that allows air to enter the unit with the door closed.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is 3 years[276]

DEEMED MEASURE COST

Measure costs are based on values from a door gasket measure maintained by the RTF (Regional Technical Forum)[277]. Original measure costs were adjusted for inflation from 2006 to 2024[278] and by typical door perimeter for reach-in cases (14.9 feet [279, 280]).

Annual Savings	Cost/foot
Refrigerator Section	$8.46
Freezer Section	$10.47

LOADSHAPE

Loadshape R05 - Residential Refrigerator

COINCIDENCE FACTOR

This measure has deemed kW savings therefore a coincidence factor does not apply.

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[276] California Public Utilities Commission Database for Energy Efficient Resources (DEER) CPUC Support Table (2020) – Effective Useful Life and Remaining Useful Life. https://www.caetrm.com/cpuc/table/effusefullife/

[277] Database for UES measures, Regional Technical Forum. Door Gasket Replacement, Version 1.5. December 2016 https://rtf.nwcouncil.org/measure/door-gasket-replacement/

[278] U.S. Bureau of Labor Statistics - CPI Inflation Calculator https://data.bls.gov/cgi-bin/cpicalc.pl

[279] Typical commercial reach-in cooler doors are 50% 24” wide and 50% 30” Wide, Wisconsin Focus on Energy Technical Reference Manual, Energy-Efficient Case Doors, pages 590-592.

[280] Typical commercial reach-in cooler doors are 62 3/8” high, Hill Phoenix case drawings: www.hillphoenix.com/products/onrm

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = UEC_{Base} * SF$$

Where:

UEC_{BASE} = Annual Unit Energy Consumption of baseline refrigerator, from table below:

Product Category	UEC_{BASE} [281]
	IQ
1. Refrigerators and Refrigerator-freezers with manual defrost	363
2. Refrigerator-Freezer--partial automatic defrost	424
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost	435
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service	512
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without through-the-door ice service	540
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service	715
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service	601
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service	653

SF = Savings Factor, see table below

Door Seal Condition	Savings Factor[282]
Fair (some wear but no visible gaps)	20%
Poor (visible gaps in the seal)	30%

<u>Deemed savings are provided below:</u>

Product Category	ΔkWh Savings	
	Fair	Poor
1. Refrigerators and Refrigerator-freezers with manual defrost	72.6	108.9
2. Refrigerator-Freezer--partial automatic defrost	84.8	127.2
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost	87.0	130.5

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[281] Assumptions as provided in 5.1.6 ENERGY STAR, CEE Tier 2 or CEE Tier 3 Refrigerator.

[282] Based upon review of U.S. Department of Energy's Refrigerator and Freezer Energy Rating Online Search Tool, refrigerators with "fair" seals use 20% more energy and refrigerators with "poor" seals use 30% more energy. Accessed 8/21/2025. www.energy.gov/scep/wap/articles/refrigerator-and-freezer-energy-rating-online-search-tool.

Product Category	ΔkWh Savings	
	Fair	Poor
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service	102.4	153.6
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without through-the-door ice service	108.0	162.0
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service	143.0	214.5
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service	120.2	180.3
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service	130.6	195.9

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta \mathrm{kW} = \frac{\Delta kWh}{8766} * TAF * LSAF$$

Where:

8766 = Hours per year

TAF = Temperature Adjustment Factor

= 1.25[283]

LSAF = Load Shape Adjustment Factor

= 1.057[284]

Deemed savings are provided below:

Product Category	ΔkW Savings	
	Fair	Poor
1. Refrigerators and Refrigerator-freezers with manual defrost	0.0109	0.0164
2. Refrigerator-Freezer--partial automatic defrost	0.0128	0.0192
3. Refrigerator-Freezers--automatic defrost with top-mounted freezer without through-the-door ice service and all-refrigerators--automatic defrost	0.0131	0.0197
4. Refrigerator-Freezers--automatic defrost with side-mounted freezer without through-the-door ice service	0.0154	0.0232

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[283] Average temperature adjustment factor (to account for temperature conditions during peak period as compared to year as a whole) based on Blasnik, Michael, "Measurement and Verification of Residential Refrigerator Energy Use, Final Report, 2003-2004 Metering Study", July 29, 2004 (p. 47). It assumes 90 °F average outside temperature during peak period, 71°F average temperature in kitchens and 65°F average temperature in basement, and uses assumption that 66% of homes in Illinois have central cooling (CAC saturation: "Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey).

[284] Daily load shape adjustment factor (average load in peak period /average daily load) also based on Blasnik, Michael, "Measurement and Verification of Residential Refrigerator Energy Use, Final Report, 2003-2004 Metering Study", July 29, 2004 (p. 48, using the average Existing Units Summer Profile for hours 13 through 17)

Product Category	ΔkW Savings	
	Fair	Poor
5. Refrigerator-Freezers--automatic defrost with bottom-mounted freezer without through-the-door ice service	0.0163	0.0244
5A Refrigerator-freezer—automatic defrost with bottom-mounted freezer with through-the-door ice service	0.0216	0.0323
6. Refrigerator-Freezers--automatic defrost with top-mounted freezer with through-the-door ice service	0.0181	0.0272
7. Refrigerator-Freezers--automatic defrost with side-mounted freezer with through-the-door ice service	0.0197	0.0295

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-APL-RRSR-V01-260101

REVIEW DEADLINE: 1/1/2030

5.2 Consumer Electronics End Use

5.2.1 Advanced Power Strip – Tier 1

DESCRIPTION

This measure relates to Advanced Power Strips – Tier 1 which are multi-plug surge protector power strips with the ability to automatically disconnect specific connected loads depending upon the power draw of a control load, also plugged into the strip. Power is disconnected from the switched (controlled) outlets when the control load power draw is reduced below a certain adjustable threshold, thus turning off the appliances plugged into the switched outlets. By disconnecting, the standby load of the controlled devices, the overall load of a centralized group of equipment (i.e. entertainment centers and home office) can be reduced. Uncontrolled outlets are also provided that are not affected by the control device and so are always providing power to any device plugged into it. This measure characterization provides savings for a 5-plug strip and a 7-plug strip.

This measure was developed to be applicable to the following program types: TOS, NC, DI, KITS. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient case is the use of a 5 or 7-plug advanced power strip.

DEFINITION OF BASELINE EQUIPMENT

For time of sale or new construction applications, the assumed baseline is a standard power strip that does not control connected loads.

For direct install and kits, the baseline is the existing equipment utilized in the home.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of the advanced power strip is 7 years.[285]

DEEMED MEASURE COST

For time of sale or new construction the incremental cost of an advanced Tier 1 power strip over a standard power strip with surge protection is assumed to be $10.[286]

For direct install the actual full equipment and installation cost (including labor) and for kits the actual full equipment cost should be used.

Equipment cost if unknown[287]:

Baseline Cost	Efficient Cost	Incremental Equipment Cost
$20	$30	$10

LOADSHAPE

Loadshape R13 - Residential Standby Losses – Entertainment

Loadshape R14 - Residential Standby Losses - Home Office

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[285] This is a consistent assumption with 5.2.2 Advanced Power Strip – Tier 2.

[286] Price survey performed by Illume Advising LLC for IL TRM workpaper, see "Current Surge Protector Costs and Comparison 7-2016" spreadsheet.

[287] Price survey performed by Illume Advising LLC for IL TRM workpaper, see "Current Surge Protector Costs and Comparison 7-2016" spreadsheet.

COINCIDENCE FACTOR

The summer peak coincidence factor for this measure is assumed to be 80%.[288]

Algorithm

CALCULATION OF SAVINGS ELECTRIC ENERGY SAVINGS

$\Delta kWh = kWh * ISR$

Where:

kWh = Assumed annual kWh savings per unit

= 56.5 kWh for 5-plug units or 103 kWh for 7-plug units[289]

ISR = In Service Rate, dependent on delivery mechanism

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[288] Efficiency Vermont 2016 TRM coincidence factor for advanced power strip measure –in the absence of empirical evaluation data, this was based on assumptions of the typical run pattern for televisions and computers in homes.

[289] NYSERDA Measure Characterization for Advanced Power Strips. Study based on review of:
Smart Strip Electrical Savings and Usability, Power Smart Engineering, October 27, 2008.
Final Field Research Report, Ecos Consulting, October 31, 2006. Prepared for California Energy Commission’s PIER Program.
Developing and Testing Low Power Mode Measurement Methods, Lawrence Berkeley National Laboratory (LBNL), September 2004. Prepared for California Energy Commission’s Public Interest Energy Research (PIER) Program.
2005 Intrusive Residential Standby Survey Report, Energy Efficient Strategies, March 2006.
Smart Strip Portfolio of the Future, Navigant Consulting for San Diego G&E, March 31, 2009.
“Smart strip” in this context refers to the category of Advanced Power Strips, does not specifically signify Smart Strip® from BITS Limited, and was used without permission. Smart Strip® is a registered trademark of BITS Smart Strip, LLC.
An additional more recent study in Massachusetts by NMR Group, Inc., "RLPNC 17-3: Advanced Power Strip Metering Study", March 19, 2019 provides a consistent result to the final savings presented here. On p77 the average savings found was 78 kWh which includes accounting for In Service Rate, Short Term Retention Rate and Realization Rate.

Delivery Mechanism	ISR
Multifamily Energy Efficiency Kit, Leave behind	47%[290]
Single Family Energy Efficiency Kit, Leave behind	55%[291]
Income Qualified Energy Efficiency Kit, Mailed	69%[292]
Community Distributed Kit	91%[293]
Direct Install (installations should be limited to high use locations such as office or entertainment centers)	100%
Time of Sale	71%[294]

Using assumptions above:

# Plugs	Delivery Mechanism	ΔkWh
5- plug	Multifamily Energy Efficiency Kit, Leave behind	26.6
	Single family Energy Efficiency Kit, Leave behind	31.1
	Income Qualified Energy Efficiency Kit, Mailed	39.0
	Community Distributed Kit	51.4
	Direct Install	56.5
	Time of Sale	40.1
7-plug	Multifamily Energy Efficiency Kit, Leave behind	48.4
	Single family Energy Efficiency Kit, Leave behind	56.7
	Income Qualified Energy Efficiency Kit, Mailed	71.1
	Community Distributed Kit	93.8
	Direct Install	103.0
	Time of Sale	73.1
Unknown[295]	Multifamily Energy Efficiency Kit, Leave behind	31.9

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[290] Opinion Dynamics and Navigant. Impact Evaluation for ComEd 2018 site visit efforts for leave-behind measures in public housing multi-family units. The Evaluation Team completed site visits for 72 apartment units across seven of the ten participating properties in which advanced power strips were installed. The Evaluation Team attempted a census using all data provided at the time of site visit planning (Fall 2018). The program distributed a total of 476 advanced power strips, with 471 distributed amongst the seven properties with completed site visits. The Team performed intrasite sampling within each property and verified a total of 37 advanced power strips of the 92 within the sample. Opinion Dynamics conducted primary research with tenants of participating multifamily buildings in 2023 to study their usage behavior after Program Allies left advanced power strips in their units. Opinion Dynamics, "2023 AIC Multifamily Initiatives Tenant Survey Findings Memo," Ameren Illinois, Multifamily Initiatives, April 24, 2024. 54% of survey respondents reported that the Advanced Power Strip was properly installed and in use properly. An average of these two sources results in an overall ISR of 47%.

[291] Research from 2018 ComEd Home Energy Assessment participant survey.

[292] Research from 2021 Ameren Illinois Income Qualified participant survey (customer self-report), available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf

[293] Research from 2018 Ameren Illinois Income Qualified participant survey.

[294] Research from 2019 ComEd Appliance Rebate Program- Online Marketplace participant survey

[295] Calculated as average of 5 and 7 plug savings assumptions.

# Plugs	Delivery Mechanism	ΔkWh
	Single family Energy Efficiency Kit, Leave behind	43.9
	Income Qualified Energy Efficiency Kit, Mailed	55.0
	Community Distributed Kit	72.6
	Direct Install	80.0
	Time of Sale	56.6

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh / Hours * CF

Where:

Hours = Annual number of hours during which the controlled standby loads are turned off by the Tier 1 Advanced power Strip.

= 7,129 [296]

CF = Summer Peak Coincidence Factor for measure

= 0.8 [297]

# Plugs	Delivery Mechanism	ΔkW
5- plug	Multifamily Energy Efficiency Kit, Leave behind	0.0030
	Single family Energy Efficiency Kit, Leave behind	0.0035
	Income Qualified Energy Efficiency Kit, Mailed	0.0044
	Community Distributed Kit	0.0058
	Direct Install	0.0063
	Time of Sale	0.0045
7-plug	Multifamily Energy Efficiency Kit, Leave behind	0.0054
	Single family Energy Efficiency Kit, Leave behind	0.0064
	Income Qualified Energy Efficiency Kit, Mailed	0.0080
	Community Distributed Kit	0.0105
	Direct Install	0.0116
	Time of Sale	0.0082
Unknown[298]	Multifamily Energy Efficiency Kit, Leave behind	0.0042
	Single family Energy Efficiency Kit, Leave behind	0.0049
	Income Qualified Energy Efficiency	0.0062

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[296] Average of hours for controlled TV and computer from; NYSERDA Measure Characterization for Advanced Power Strips

[297] Efficiency Vermont 2016 TRM coincidence factor for advanced power strip measure –in the absence of empirical evaluation data, this was based on assumptions of the typical run pattern for televisions and computers in homes.

[298] Calculated as average of 5 and 7 plug savings assumptions.

# Plugs	Delivery Mechanism	ΔkW
	Kit, Mailed	
	Community Distributed Kit	0.0081
	Direct Install	0.0090
	Time of Sale	0.0064

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-CEL-SSTR-V11-260101

REVIEW DEADLINE: 1/1/2029

5.2.2 Tier 2 Advanced Power Strips (APS) – Residential Audio Visual

DESCRIPTION

This measure relates to the installation of a Tier 2 Advanced Power Strip / surge protector for household audio visual environments (Tier 2 AV APS). Tier 2 AV APS are multi-plug power strips that remove power from audio visual equipment through intelligent control and monitoring strategies.

By utilizing advanced control strategies such as a countdown timer, external sensors (e.g. of infra-red remote usage and/or occupancy sensors, true RMS (Root Mean Square) power sensing; both active power loads and standby power loads of controlled devices are managed by Tier 2 AV APS devices.[299] Monitoring and controlling both active and standby power loads of controlled devices will reduce the overall load of a centralized group of electrical equipment (i.e. the home entertainment center). This more intelligent sensing and control process has been demonstrated to deliver increased energy savings and demand reduction compared with 'Tier 1 Advanced Power Strips'.

This measure was developed to be applicable to the following program types: DI. If applied to other program delivery types, the installation characteristics including the number of AV devices under control and an appropriate in service rate should be verified through evaluation.

Current evaluation is limited to Direct Install applications. Through a Direct Install program it can be assured that the APS is appropriately set up and the customer is knowledgeable about its function and benefit. It is encouraged that additional implementation strategies are evaluated to provide an indication of whether the units are appropriately set up, used with AV equipment and that the customer is knowledgeable about its function and benefit. This will then facilitate a basis for broadening out the deployment methods of the APS technology category beyond Direct Install.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient case is the use of a Tier 2 AV APS in a residential AV (home entertainment) environment that includes control of at least 2 AV devices with one being the television.[300]

The minimum product specifications for Tier 2 AV APS are:

Safety & longevity

- Product and installation instructions shall comply with 2012 International Fire Code and 2000 NFPA 101 Life Safety Code (IL Fire Code).
- Third party tested to all applicable UL Standards.
- Contains a resettable circuit breaker
- Incorporates power switching electromechanical relays rated for 100,000 switching cycles at full 15 amp load (equivalent to more than 10 years of use).

Energy efficiency functionality

- Calculates real power as the time average of the instantaneous power, where instantaneous power is the product of instantaneous voltage and current.
- Delivers a warning when the countdown timer begins before an active power down event and maintains the warning until countdown is concluded or reset by use of the remote or other specified signal
- Uses an automatically adjustable power switching threshold.

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[299] Tier 2 AV APS identify when people are not engaged with their AV equipment and then remove power, for example a TV and its peripheral devices that are unintentionally left on when a person leaves the house or for instance where someone falls asleep while watching television.

[300] Given this requirement, an AV environment consisting of a television and DVD player or a TV and home theater would be eligible for a Tier 2 AV APS installation.

DEFINITION OF BASELINE EQUIPMENT

The assumed baseline equipment is the existing equipment being used in the home (e.g. a standard power strip or wall socket) that does not control loads of connected AV equipment.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The default deemed lifetime value for Tier 2 AV APS is assumed to be 7 years.[301]

DEEMED MEASURE COST

Direct Installation: The actual installed cost (including labor) of the new Tier 2 AV APS equipment should be used.

Baseline equipment cost if unknown is assumed to be $20[302].

LOADSHAPE

Loadshape R13 - Residential Standby Losses – Entertainment

COINCIDENCE FACTOR

The summer peak coincidence factor for this measure is assumed to be 80%.[303]

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[301] There is little evaluation to base a lifetime estimate upon. Based on review of assumptions from other jurisdictions and the relative treatment of In Service Rates and persistence, an estimate of 7 years was agreed by the Technical Advisory Committee, but further evaluation is recommended.

[302] Price survey performed by Illume Advising LLC for IL TRM workpaper, see “Current Surge Protector Costs and Comparison 7-2016” spreadsheet.

[303] In the absence of empirical evaluation data, this was based on assumptions of the typical run pattern for televisions and computers in homes.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = ERP * BaselineEnergy_{AV} * ISR$$

Where:

ERP = Energy Reduction Percentage of qualifying Tier2 AV APS product range as provided below. Savings are based upon independent field trials of two product manufacturers and the savings differences are assumed to relate to the product classifications provided below. Additional evaluation will be reviewed in future cycles to confirm if additional classification categories are appropriate.

Product Type	ERP used
Infrared Only	40%[304]
Infrared and Occupancy Sensor	25%[305]

$BaselineEnergy_{AV}$ = 466 kWh[306]

ISR = In Service Rate.

Product Type	ISR[307]
Infrared Only	73%
Infrared and Occupancy Sensor	83%

Deemed savings for each product type are provided below:

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[304] Representative savings assumption based on the following independent field tests on Embertec's IR-only product. This includes both simulated saving results (based on recording what action the APS would have taken, but where equipment is not actually switched off allowing evaluation of the expected length of savings), and pre/post metering studies.

- AESC (page 30) - Valmiki, MM., Corradini, Antonio PE. 2015. *Tier 2 Advanced Power Strips in Residential and Commercial Applications*. Prepared for San Diego Gas & Electric by Alternative Energy Systems Consulting, Inc. (Simulated 50%, pre/post 32%).
- AESC- Valmiki, MM., Corradini, Antonio PE., Feb 2016. *Energy Savings of Tier 2 Advanced Power Strips in Residential AV Systems.* (Simulated 50%, pre/post 29%)
- CalPlug research (Page 12) - Wang, M. e. 2014. "*Tier 2 Advanced Power Strip Evaluation for Energy Saving Incentive".* California Plug Load Research Center (CalPlug), UC Irvine. (Simulated 51%)
- NMR Group Inc., *RLPNC 17-3: Advanced Power Strip Metering Study*, Revised March 18, 2019, submitted to Massachusetts Program Administrators and EEAC. (Pre/post with regression 50%, Pre/post only 20%).

[305] Representative savings assumption based on the following independent field tests on TrickeStar IR-OS product and reflect both simulated and pre/post meter study results.

- AESC- Valmiki, MM., Corradini, Antonio PE., Feb 2016. *Energy Savings of Tier 2 Advanced Power Strips in Residential AV Systems.* (Simulated 27%, pre/post 25%)
- NMR Group Inc., *RLPNC 17-3: Advanced Power Strip Metering Study*, Revised March 18, 2019, submitted to Massachusetts Program Administrators and EEAC. (Pre/post with regression 37%, Pre/post only 11%)

[306] Average of baseline energy in Regional Technical Form survey of Tier 2 APS pre-post methodology studies, see 'RTF_T2_APS.ppt'.

[307] Weighted average of evaluation results from AESC, Inc, "Energy Savings of Tier 2 Advanced Power Strips in Residential AC Systems", p35. These assumptions include "adjustments in weighting based on the persistence sensitivity to demographics" and NMR Group Inc., RLPNC 17-3: Advanced Power Strip Metering Study, Revised March 18, 2019.

Product Type	ΔkWh
Infrared Only	136.1
Infrared and Occupancy Sensor	96.7

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh / Hours * CF

Where:

ΔkWh = Energy savings as calculated above

Hours = Annual number of hours during which the APS provides savings.

= 4,380 [308]

CF = Summer Peak Coincidence Factor for measure

= 0.8 [309]

Deemed savings for each product type are provided below:

Product Type	ΔkW
Infrared Only	0.0249
Infrared and Occupancy Sensor	0.0177

FOSSIL FUEL SAVINGS

N/A[310]

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-CEL-APS2-V06-240101

REVIEW DEADLINE: 1/1/2029

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[308] This is estimate based on assumption that approximately half of savings are during active hours (supported by AESC study) (assumed to be 5.3 hrs/day, 1936 per year (NYSERDA 2011. “*Advanced Power Strip Research Report*”)) and half during standby hours (8760-1936 = 6824 hours). The weighted average is 4380.

[309] In the absence of empirical evaluation data, this was based on assumptions of the typical run pattern for televisions and computers in homes. This appears to be supported by the Average Weekday AV Demand Profile and Reduction charts in the AESC study (p33-34). These show that the average demand reduction is relatively flat.

[310] Interactive effects of Tier 2 APS on space conditioning loads has not yet been adequately studied.

5.2.3 ENERGY STAR Television

DESCRIPTION

An ENERGY STAR[311] Certified television installed in place of a standard television.

This measure was developed to be applicable to the following program types: [TOS]. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as a television meeting the ENERGY STAR Version 9.0.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is defined as a non ENERGY STAR certified television.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of this measure is 5 years.[312]

DEEMED MEASURE COST

The incremental cost for this measure is $60.[313]

LOADSHAPE

R13: Residential Standby Losses - Entertainment

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 22%.[314]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

ENERGY STAR savings summarized in table below:[315]

Equipment Size Bin	ΔkWh
<=47.5"	93.2
47.5"<x<=52.5"	91.3
52.5"<x<=59.5"	71.6
59.5"<x<=69.5"	75.3
69.5"<x<=80"	31.7

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[311] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[312] 'ENERGY STAR Version 9.0 TVs Data Package.xls'.

[313] Estimate from 'Savings Estimation Technical Reference Manual, 2017'. Highest cost estimate due to majority of TVs now being the larger bin sizes. This estimate is an old reference and would benefit a new study to improve the assumption.

[314] Based upon Hawai'i Energy, Technical Reference Manual, 2018

[315] 'ENERGY STAR Version 9.0 TVs Data Package.xls'.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$\Delta kW = \Delta kWh / Hours * CF$

Where:

Hours = Estimate of hours savings achieved.

= 1759[316]

CF = Coincidence Factor

= 0.22[317]

Equipment Size Bin	ΔkW
<=47.5"	0.01166
47.5"<x<=52.5"	0.01142
52.5"<x<=59.5"	0.00896
59.5"<x<=69.5"	0.00942
69.5"<x<=80"	0.00396

FOSSIL FUEL SAVINGS

n/a

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

n/a

DEEMED O&M COST ADJUSTMENT CALCULATION

n/a

MEASURE CODE: RS-CEL-TVS-V03-260101

REVIEW DEADLINE: 1/1/2028

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[316] Most savings are achieved during “automatic brightness control” during active viewing. Recent study Nielsen “State of Play” found average viewing of 4.82 hours per day = 1759 hours per year.

[317] Based upon Hawai'i Energy, Technical Reference Manual, 2018

5.2.4 Smart Sockets

DESCRIPTION

Smart sockets achieve savings through the reduction of the standby load of the controlled appliance, as well as eliminating the operation of an appliance during unoccupied hours. The standby power consumption of home appliances can be significantly reduced.

Smart Sockets in homes can be used for all types of appliances and significant saving opportunities exist for devices which are rarely unplugged like televisions, lamps, and speakers. The savings are derived from the times when the devices are not in use. Devices plugged in, even when off, consume electricity and smart sockets will reduce this standby load. In addition, smart sockets can be used to schedule equipment, so the load is less during hours which the devices are not in use.

This measure was developed to be applicable to the following program types: DI, KITS

DEFINITION OF EFFICIENT EQUIPMENT

The efficient case is the use of a smart plug with a standby power wattage of 2W or less. Should be UL listed. (Simply Conserve Smart Socket SS-15A1-WiFi has a standby power of less than or equal to 0.7).

DEFINITION OF BASELINE EQUIPMENT

The assumed baseline is an appliance plugged into an outlet or into a standard power strip with surge protection that does not control connected loads. Note many ENERGY STAR appliances require power saving settings which will partially offset the savings potential of this measure. Where possible non-ENERGY STAR equipment should be plugged in to the socket to ensure savings are realized.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of the smart socket is 7 years.

DEEMED MEASURE COST

For direct install, the actual full equipment and installation cost (including labor) and for kits the actual full equipment cost should be used. If unknown for kits, use $19.99/each[318].

LOADSHAPE

Loadshape R13 – Standby Losses – Entertainment Center

COINCIDENCE FACTOR

The summer peak coincidence factor for this measure is assumed to be 80%.[319]

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[318] Based on cost from vendor of typical smart socket on the market, Simply Conserve Smart Socket by AM Conservation Group.; 15 amp smart socket: $19.99/each.

[319] Efficiency Vermont 2016 TRM coincidence factor for advanced power strip measure –in the absence of empirical evaluation data, this was based on assumptions of the typical run pattern for televisions and computers in homes.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \frac{\left((W_{Base} * OnAdj) - W_{Eff}\right) * Hours * \# of\ Receptacles * Receptacle\ Factor}{1{,}000} * ISR$$

Where:

W_{Base}[320] = Standby power or On power consumption of connected appliance.

Use actual if known, or refer to tables below. For multi-receptacle units add up total wattage of appliances connected. If unknown, e.g. via kits, assume 9.4W

Appliances assumed to be in standby mode:

Controlled Equipment[321]	Standby Power (W)
Air Conditioner	4.0
Air Purifier	0.7
Charger - Electronics	0.52
Coffee Maker	0.95
Computer, Desktop	2.7
Computer Laptop	1.6
Dehumidifier	0.45
Fan	0.22
Gaming Console	1.7
Humidifier	1.2
Light – Smart Bulb	0.4
Media Player – DVD/Blu-ray	1.8
Media Player - Streaming	1.9
Printer	2.61
Television	0.95

Appliances assumed to be in on mode:

Controlled Equipment[322]	On Power (W)
Air Conditioner	10.0
Air Purifier	1.51
Dehumidifier	0.45
Humidifier	3.5
Light	10.4

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[320] Average connected wattage found in Guidehouse, 'ComEd Small Business Kits CY2020 Impact Evaluation Report 2021-04-01 Final.pdf'.

[321] Standby Power Summary Table contained in "Standby Power", Lawrence Berkeley National Laboratory, Building Technology and Urban Systems Division, November 2022, https://standby.lbl.gov/standby-power-data-metering , see "List of Standby Products – StandbyTable.xlsx, Standby Median column."

[322] Standby Power Summary Table contained in "Standby Power", Lawrence Berkeley National Laboratory, Building Technology and Urban Systems Division, , see "List of Standby Products – StandbyTable.xlsx, Standby Max column"

Controlled Equipment[322]	On Power (W)
Fan	70.0
Space Heater	450.0
Television	23.8

OnAdj[323] = Adjustment for wattages of appliances that are powered on during unoccupied hours

= 50% for appliances in on mode

=100% for appliances in standby mode and for unknown

W_{Eff} = Standby power consumption of smart socket. If unknown, assume 0.25W.

Hours = Unused hours per year. If unknown, use 5,794.2 Hours/year

Assumptions	Weekly Hours	Annual Hours
Total Hours per week	168	8,769.6
Hours at work	40	2,088
Hours commuting	5	261
Errands/Social/etc.	10	522
Sleep	56	2,923.2
Hours appliances are unused	111	5,794.2

# of Receptacles = Number of plug sockets on each smart socket

= Actual

Receptacle Factor = 1 if number of receptacles = 1

= 0.85 if number of receptacles >1[324]

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[323] "4.8.22 Smart Sockets," in Illinois Statewide Technical Reference Manual – Volume 2: Commercial and Industrial Measures, v.11.0, 2023

[324] In smart sockets with more than one receptacle, if one piece of equipment is powered on all receptacles will be receiving power. Receptacle factor is intended to account for the uncertainty around receptacle use in multiple-receptacle units.

ISR = In Service Rate, dependent on delivery mechanism[325]

Delivery Mechanism	ISR
Direct Install	97.3%
Single Family Energy Efficiency Kit, Leave behind	74%
Income Qualified Energy Efficiency Kit, Mailed	82%
Community Distributed Kit	93%
Multifamily Energy Efficiency Kit, Leave behind	40%
Virtual Single Family	85.6%
Virtual Multi Family	68.6%

For example, for a direct install smart socket with two receptacles controlling a television and gaming console in standby mode.

ΔkWh = ((((1.7 + 0.95) * 1.0) – 0.25) * 5794.2 * 2 * 0.85)/1,000 * 0.973

= 23.0 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \frac{\Delta kWh}{Hours} * CF$$

Where:

CF = Summer Peak Coincidence Factor for measure

= 0.8 [326]

For example, for a direct install smart socket with two receptacles controlling a television and gaming console in standby mode..

ΔkW = (23.0/5794.2) * 0.8

= 0.0032 kW

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

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[325] Using averages of Advanced Power Strip – Tier 1 and Connected LED Lamps from Volume 3 Residential Measures V11.0. See 'Smart Sockets Working ISRs' workbook for additional details.

[326] Efficiency Vermont 2016 TRM coincidence factor for advanced power strip measure –in the absence of empirical evaluation data, this was based on assumptions of the typical run pattern for televisions and computers in homes.

MEASURE CODE: RS-CEL-SSOC-V03-270101

REVIEW DEADLINE: 1/1/2032

5.3 HVAC End Use

5.3.1 Whole Home Air Source Heat Pumps (Centrally Ducted or Ductless)

DESCRIPTION

A heat pump provides heating or cooling by moving heat between indoor and outdoor air. This measure relates to central systems that provide conditioning for the whole home. For supplemental or portable heat pumps, see 5.3.24 Supplemental Air Source Heat Pump (Ductless or Portable). Note: For ductless systems with a capacity <18 kBtu being installed in an unknown scenario, assume these will be supplemental. Eligible systems include:

- a unitary central heat pump (split or packaged) with conditioned air delivered to the home via ductwork
- a ductless minisplit system
- "hybrid" systems that work in conjunction with fuel-fired heating systems. Note that for hybrid systems, a complementary excel tool has been developed enabling greater customization to measure savings.[327]

This measure characterizes:

a) New Construction:
  - The installation of a new residential sized (<= 65,000 Btu/hr) Air Source Heat Pump meeting minimum requirements determined by the program in a new home.
  - Note the baseline in this case should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition.

b) Time of Sale:
  - The installation of a new residential sized (<= 65,000 Btu/hr) Air Source Heat Pump meeting minimum requirements determined by the program. This relates to the replacement of an existing unit at the end of its useful life.
  - Note the baseline in this case is an equivalent replacement system to that which exists currently in the home. Where unknown, the baseline should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition.
  - The allocation of savings is dependent on whether an incentive for the installation has been provided by both a gas and electric utility, just an electric utility or just a gas utility.

c) Early Replacement:

The early removal of functioning components of the electric or gas heating and/or cooling systems from service, prior to its natural end of life, and replacement with a new high efficiency air source heat pump unit.

Note the baseline in this case is the existing equipment being replaced. The allocation of savings is dependent on whether an incentive for the installation has been provided by both a gas and electric utility, just an electric utility or just a gas utility.

Early Replacement determination will be based on meeting the following conditions:

- The existing unit is operational when replaced, or
- The existing unit requires minor repairs (defined as 20% of the cost of a new baseline unit).[328]
- All other conditions will be considered Time of Sale.

The Baseline SEER2 of the existing unit replaced:

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[327] Reference Documents: 3rd Volume - Residential Measures: 5.3 HVAC End Use: 5.3.1 Air Source Heat Pumps: GTI-Nicor Tool.

[328] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement. Note the non-inflated cost should be used as this would be a cost consideration in the program year.

- Is the actual SEER (converted to SEER2) value of the unit replaced.
- If the SEER of the existing unit is unknown use assumptions in variable list below (SEER2_exist and HSPF2_exist).
- If the operational status or repair cost of the existing unit is unknown, use time of sale assumptions or average weighted factors determined via evaluation and the algorithms below.

A weighted average early replacement rate is provided for use in programs when the actual baseline early replacement rates are unknown.

Deemed Early Replacement Rates For ASHP[329]

Equipment Type	Full System Displacement	Partial System Displacement
Cooling	30%	30%
Heating	30%	100%

Note to apply these deemed early replacement rates, an assumption of the percentage of replacements that are full displacement v partial displacement is required. If the program design requires cold climate heat pumps, sizes heating equipment to handle the full heating load of the living unit, 100% full displacement can be used. Otherwise the split of full vs partial displacement should be determined through evaluation, or a deemed ratio of 100% Full Displacement for ducted ASHPs and 50% Full: 50% Partial for Ductless ASHPs can be used[330]. Savings should be calculated following both the full and partial displacement methodology and then this ratio should be used to weight the savings accordingly.

Quality Installation:

Additional savings are attributed to the Quality Installation (QI) of the system. QI programs should follow industry standards such as those described in ENERGY STAR Verified HVAC Installation Program (ESVI), ANSI ACCA QI5 and QI9vp. This must include considerations of system design (including sizing, matching, ventilation calculations) and equipment installation (including static pressure, airflow, refrigerant charge) and may also consider distribution.

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

A new residential sized (<= 65,000 Btu/hr) air source heat pump with specifications to be determined by program.

The following conversion factors are recommended for use if the efficient equipment is not rated under the new testing procedure:[331]

SEER2 = SEER * X

EER2 = EER * X

---

[329] Program tracking data from ComEd and Ameren between 2018 and 2020 was used to develop these assumptions. During this period the air source heat pump programs operated downstream and projects were classified as Time of Sale or Early Replacement. Note that any fuel switch scenario at the time would have been classified as Time of Sale and therefore the rates provided likely represent a low estimate of the true early replacement rates. In the absence of alternative data, the TAC agreed to apply these rates and the deemed full v partial displacement assumptions listed, but these assumptions should be revisited through future evaluation.

[330] All calculations should use the Standard hours. We assume that smaller systems are typically used to (1) provide all of the heating/cooling for zones outside of central living zones or (2) as partial displacement of existing systems in central living zones.

[331] Consortium for Energy Efficiency (CEE), Testing, Testing, M1, 2, 3, Transitioning to New Federal Minimum Standards, CEE Summer Program Meeting, August, 2022.

HSPF2 = HSPF * X

Where:

X	SEER	EER	HSPF
Ducted	0.95	0.95	0.85
Non-Ducted	1.00	1.00	0.90
Packaged	0.95	0.95	0.84

DEFINITION OF BASELINE EQUIPMENT

The baseline designation can be assigned differently for heating and cooling for the same installation, but the designation must remain consistent when applying the TRM calculations (e.g., for energy savings, measure cost, and demand savings). For example, customers may choose to replace an AC at the end of its useful life yet continue using their existing furnace. In this case, the cooling replacement could represent a time of sale baseline while the heating replacement could reflect an early replacement baseline.

New Construction: To calculate savings with an electric baseline, the baseline equipment is assumed to be an Air Source Heat Pump meeting the Federal Standard efficiency level:[332]

- Split system ducted heat pump standard sized units – 14.3 SEER2, 7.5 HSPF2, 9.4 EER2
- Split system ductless heat pump standard sized units – 14.3 SEER2, 7.5 HSPF2, 8.5 EER2
- Space constrained heat pump units – 11.9 SEER2, 7.8 EER2 and 6.3 HSPF2

Note, the space constrained product baseline should only be used when the efficient unit is classified as space constrained (labelled as SCP on AHRI database).

To calculate savings with a furnace/central AC baseline, the baseline equipment is assumed to be an 80% AFUE Furnace and central AC meeting the Federal Standard efficiency level; 13.4 SEER2, 10.6 EER2 for standard sized units, or 11.7SEER, 9.2 EER2 for space constrained product.

Time of Sale: The baseline for this measure is a new replacement unit of the same system type as the existing unit, meeting the baselines provided below[333].

Unit Type	Efficiency Standard
Standard sized Ducted ASHP	14.3 SEER2, 9.4 EER2, 7.5 HSPF2
Standard sized Ductless ASHP	14.3 SEER2, 8.5 EER2, 7.5 HSPF2
Space constrained ASHP	11.9 SEER2, 7.8 EER2, 6.3 HSPF2
Room AC (baseline applicable for mobile homes or IQ homes only)	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient.
Electric Resistance (Baseboard or Electric Furnace)	3.412 HSPF2
Natural Gas or LP Furnace	80% AFUE
Natural Gas or LP Boiler	84% AFUE
Oil Furnace	83% AFUE
Oil Boiler	86% AFUE

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[332] The federal Standard does not currently include an EER2 component for northern states. The value provided is based on scaling CEE Tier 1 ratings for North and Canada (12EER2 for CAC, 10EER2 for ducted HP and 9.0EER2 for ductless HP) proportionally down compared to the Federal baseline SEER2 compared to CEE Tier 1 SEER2 ratings.

[333] Federal Standard as provided in DOE 10 CFR 430.32.

Unit Type	Efficiency Standard
Standard sized Central AC	13.4 SEER2, 10.6 EER2
Space constrained Central AC	11.7 SEER2, 9.2 EER2
Unknown, installing ducted [334]	13.9 SEER2, 9.4 EER2, 5.9HSPF2, 80.1% AFUE
Unknown, installing ductless	13.7 SEER2, 8.5 EER2, 5.3HSPF2, 81.1% AFUE

Early replacement / Retrofit: The baseline for this measure is the efficiency of the *existing* heating and cooling equipment for the assumed remaining useful life of the existing unit and a new baseline heating and cooling system for the remainder of the measure life (as provided in table above).

When unknown, default early replacement efficiency assumptions are 9.2 SEER2, 7.4 EER2, 4.5 HSPF2 and 80% AFUE when installing ducted ASHP and 9.5 SEER2, 7.4 EER2, 4.4 HSPF2 and 63% AFUE when installing ductless[335]. Consistent with TRM Volume 1 Section 2.3.1 for midstream programs or other cases where the existing condition is unknown, it may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on evaluation results.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 20 years for ducted ASHP and 17 years for ductless ASHP.[336]

Remaining life of existing equipment is assumed to be 6.7 years for ducted ASHP, 5.7 years for ductless ASHP, 8.3 years for Central AC, 8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers[337] and the full measure life (20 years for ducted or 17 for ductless) for electric resistance.[338]

DEEMED MEASURE COST

New Construction and Time of Sale: The actual installed cost of the Centrally Ducted Air Source Heat Pump or Ductless Minisplit Heat Pump (including any necessary electrical or distribution upgrades required) should be used minus the assumed installation cost of the baseline equipment from table below for electric baseline equipment, or assume $4,019 for a new baseline 80% AFUE furnace or $8,820 for a new baseline 84% AFUE boiler[339].

Baseline Equipment Type	Capacity Range	Baseline Cost per Ton[340]
Centrally Ducted Air Source	< 2 tons	$4,602

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[334] Unknown time of sale baseline values represent the weighted average baseline values (in SEER2/HSPF2/AFUE) reflecting the assumed shares of installed ASHP replacing given baseline technologies (e.g. ASHP/electric resistance or furnace/boiler) by fuel type. Assumed shares are based on Opinion Dynamics and Guidehouse analysis of 2018-2021 Ameren and ComEd HVAC (downstream) program tracking data, converted to SEER2/EER2/HSPF2 using conversion factors provided. For further details, see '2018-2021 AIC Res HVAC Data ASHP Baseline TRM Update 2023-6-20.xls'.

[335] Unknown early replacement baseline values represent the weighted average existing system efficiency values (converted to SEER2/HSPF2 using conversion factors provided) reflecting the assumed shares of installed ASHP replacing given baseline technologies (e.g. ASHP/electric resistance or furnace/boiler) by fuel type. Assumed shares are based on Opinion Dynamics and Guidehouse analysis of 2018-2021 Ameren and ComEd HVAC (downstream) program tracking data. For further details, see '2018-2021 AIC Res HVAC Data ASHP Baseline TRM Update 2023-6-20.xls'.

[336] Based on recommendations from "Final Evaluation Report for: X2001B: Connecticut Measure Life/EUL Update Study-Residential & Commercial" prepared by Michaels Energy and Evergreen Economics, May 11, 2023.

[337] Assumed to be one third of effective useful life of replaced equipment.

[338] Assume full measure life for replacing electric resistance as we would not expect that resistance heat would fail during the lifetime of the efficient measure.

[339] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

[340] Ibid

Baseline Equipment Type	Capacity Range	Baseline Cost per Ton[340]
Heat Pumps	≥ 2 to < 3 tons	$3,691
	≥ 3 to < 4 tons	$3,093
	≥ 4 tons	$2,992
Ductless Minisplit Heat Pumps	< 1 ton	$8,156
	≥ 1 to < 2 tons	$5,356
	≥ 2 to < 3 tons	$3,704
	≥ 3 tons	$3,670
Central Air Conditioning	< 2 tons	$2,340
	≥ 2 to < 3 tons	$1,900
	≥ 3 tons	$1,500

Default full cost of the efficient Centrally Ducted ASHP or DMSHP is provided in the table below[341]:

Equipment Type	Capacity Range	Efficient Cost
Centrally Ducted Air Source Heat Pumps	< 2 tons	$4,689 / ton + ($600* (HSPF2-7.8))
	≥ 2 to < 3 tons	$3,762 / ton + ($600* (HSPF2-7.8))
	≥ 3 to < 4 tons	$3,152 / ton + ($600* (HSPF2-7.8))
	≥ 4 tons	$3,049 / ton + ($600* (HSPF2-7.8))
Ductless Minisplit Heat Pumps	< 1 ton	$8,312 / ton + ($600* (HSPF2-7.8))
	≥ 1 to < 2 tons	$5,458 / ton + ($600* (HSPF2-7.8))
	≥ 2 to < 3 tons	$3,775 / ton + ($600* (HSPF2-7.8))
	≥ 3 tons	$3,740 / ton + ($600* (HSPF2-7.8))

The incremental cost of the Centrally Ducted ASHP or DSMHP compared to a baseline minimum efficiency Centrally Ducted ASHP or DSMHP is provided in the table below:

Equipment Type	Capacity Range	Incremental Cost
Centrally Ducted Air Source Heat Pumps	< 2 tons	$88 / ton + ($600* (HSPF2-7.8))
	≥ 2 to < 3 tons	$70 / ton + ($600* (HSPF2-7.8))
	≥ 3 to < 4 tons	$59 / ton + ($600* (HSPF2-7.8))
	≥ 4 tons	$57 / ton + ($600* (HSPF2-7.8))
Ductless Minisplit Heat Pumps	< 1 ton	$156 / ton + ($600* (HSPF2-7.8))
	≥ 1 to < 2 tons	$102 / ton + ($600* (HSPF2-7.8))
	≥ 2 to < 3 tons	$71 / ton + ($600* (HSPF2-7.8))
	≥ 3 tons	$70 / ton + ($600* (HSPF2-7.8))

Early Replacement: The actual full installation cost of the Centrally Ducted Air Source Heat Pump or Ductless Minisplit Heat Pump (including any necessary electrical or distribution upgrades required) should be used (defaults provided above). The assumed deferred cost (after the appropriate number of years described above in the 'Deemed Lifetime of Efficient Equipment' section) of replacing existing equipment with a new baseline unit is presented in the table below for electric equipment or assume $4,813 for non-IQ, $4,923 for IQ homes for a new baseline 80% AFUE furnace or $10,563 for a new baseline 84% AFUE boiler[342]. If replacing electric resistance heat, there is no deferred replacement cost. This future cost should be discounted to present value using the nominal societal discount rate.

Equipment Type	Capacity Range	Deferred Baseline Cost per Ton
Centrally Ducted Air	< 2 tons	$5,305

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[341] Ibid

[342] All baseline replacement costs are consistent with their respective measures and include inflation rate of 2.28%.

Equipment Type	Capacity Range	Deferred Baseline Cost per Ton
Source Heat Pumps	≥ 2 to < 3 tons	$4,255
	≥ 3 to < 4 tons	$3,565
	≥ 4 tons	$3,449
Ductless Minisplit Heat Pumps	< 1 ton	$9,216
	≥ 1 to < 2 tons	$6,052
	≥ 2 to < 3 tons	$4,185
	≥ 3 tons	$4,147
Central Air Conditioning	< 2 tons	$2,783
	≥ 2 to < 3 tons	$2,260
	≥ 3 tons	$1,784

Fuel switch scenarios are likely to require additional installation work which may include adding new electrical circuits, capping existing gas lines and upgrading electrical panels. These costs are likely to range significantly and actual values should be used wherever possible. If unknown, assume an additional $2,000 for full displacement fuel switch installations and $300 for partial displacement installations.

The total of any additional electrification costs should be divided across all applicable measures weighted by total MMBtu savings.

Quality Installation: The additional design and installation work associated with quality installation has been estimated to cost an additional $150.[343]

LOADSHAPE

Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's Forward Capacity Market.

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during utility peak hour)

= 72%[344]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[345]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[346]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average

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[343] Based on data provided by MidAmerican in April 2018 summarizing survey results from 11 HVAC suppliers in Iowa.

[344] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[345] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[346] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY AND FOSSIL FUEL SAVINGS

Non fuel switch measures (if heat pump is being installed for cooling only, only calculate the cooling impact below):

$\Delta kWh_{Non\ Fuel\ Switch}$ = ASHPSiteCoolingImpact + ASHPSiteHeatingImpact + ElectricFurnaceFanSavings

Where:

For all other scenarios:

ASHPSiteCoolingImpact = ((CoolingLoad/DuctlessSave * (1/(SEER2_base * (1 – DeratingCool$_{Base}$)))) – (CoolingLoad * 1/(SEER2_ee * (1 – DeratingCool$_{Eff}$))))/1000

For Room AC baseline (applicable for mobile homes or IQ only):

ASHPSiteCoolingImpact = ((CoolingLoad * (1/CEERbase))/1,000) – (CoolingLoad * 1/(SEER2_ee * (1 – DeratingCool$_{Eff}$))))/1000

For all scenarios:

ASHPSiteHeatingImpact = ((HeatLoad_Disp/DuctlessSave * (1/(HSPF2_base * HSPF2_ClimateAdj * (1 – DeratingHeat$_{Base}$)))) – (HeatLoad_Disp * 1/(HSPF2_ee * HSPF2_ClimateAdj * (1 – DeratingHeat$_{Eff}$)))) / 1000

ElectricFurnaceFanSavings[347] = FurnaceFlag * ASHPSiteHeatingImpact * F$_e$

Fuel switch measures:

Fuel switch measures must produce positive total lifecycle energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows:

SiteEnergySavings (MMBTUs) = FuelSwitchSavings + NonFuelSwitchSavings

FuelSwitchSavings = GasHeatReplaced – ASHPSiteHeatConsumed

NonFuelSwitchSavings = GasFurnaceFanSavings + ASHPSiteCoolingImpact

Where:

GasHeatReplaced = (HeatLoad_Disp/DuctlessSave * 1/AFUE$_{base}$) / 1,000,000

GasFurnaceFanSavings = (FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/AFUE$_{base}$ * F$_e$) / 1,000,000

ASHPSiteHeatConsumed = ((HeatLoad_Disp * (1/(HSPF2_ee * HSPF2_ClimateAdj * PD_Adj * (1 – DeratingHeat$_{Eff}$)))) /1000 * 3412)/ 1,000,000

For all other scenarios:

ASHPSiteCoolingImpact = ((CoolingLoad/DuctlessSave * (1/(SEER2_base * (1 – DeratingCool$_{Base}$)))) –

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[347] If replacing an electric furnace only. The HSPF rating of a heat pump accounts for the fan consumption, however the HSPF rating of an electric furnace does not. Therefore, additional fan savings should be claimed.

((CoolingLoad * 1/(SEER2_ee * (1 – $\text{DeratingCool}_{\text{Eff}}$))))/1000 * 3412) / 1,000,000

For Room AC baseline (applicable for mobile homes or IQ only):

ASHPSiteCoolingImpact = ((CoolingLoad * (1/CEERbase))/1,000) – ((CoolingLoad * 1/(SEER2_ee * (1 – $\text{DeratingCool}_{\text{Eff}}$))))/1000 * 3412) / 1,000,000

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10
Gas utility only	N/A	SiteEnergySavings * 10

Note for Early Replacement measures, the efficiency (SEER, EER and HSPF) and furnace fan energy consumption (F_e) terms of the existing unit should be used for the remaining useful life of the existing equipment (6.7 years for ducted ASHP, 5.7 years for ductless ASHP, 8.3 years for Central AC, 8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers, the full measure life (20 years for ducted or 17 for ductless) for electric resistance), and the efficiency and F_e terms for a new baseline unit should be used for the remaining years of the measure. See assumptions below.

Programs where existing system is unknown

In programs where the existing fuel or system type is unknown, savings should be apportioned between the Fuel Switch and Non- Fuel Switch scenarios, as follows:

Savings from Non-Fuel Switch (kWh) = (1 – %FuelSwitch) * $\Delta\text{kWh}_{\text{Non Fuel Switch}}$

Plus

Savings from Fuel Switch (MMBtu converted to appropriate fuel as table above)

= %FuelSwitch * SiteEnergySavings (MMBTUs)

Where:

%FuelSwitch = The percentage of replacements resulting in fuel-switching.

= 1 when fuel switching is known, 0 if non fuel switch

= when unknown, e.g. midstream program, determine via evaluation

CoolingLoad = Annual cooling load for the building

For all other scenarios:

= FLH_cooling * Capacity_ASHPcool

For room AC baseline (applicable for mobile homes or IQ only):

= FLH_cooling * CapacityRAC * #RACUnits

FLH_cooling = Full load hours of air conditioning

= dependent on location:

Climate Zone (City based upon)	FLH_cooling (single family) [348]	FLH_cooling (multifamily) [349]
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[350]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building has meets utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Capacity_ASHPcool = Cooling Output Capacity of Air Source Heat Pump (Btu/hr)

= Actual (1 ton = 12,000Btu/hr)

CapacityRAC = Capacity of assumed Room AC unit

= Actual, if unknown assume 8500 Btu/hr[351]

#RACUnits = Number of Room AC units assumed to have been installed in mobile home or IQ home instead of an ASHP

= Actual, if unknown assume 3DuctlessSave = Factor used to adjust ducted heating or cooling load displaced by ductless or portable HP systems that are not subject to losses from existing ductwork.

= 1-0.15 = 0.85 for ducted system displaced by ductless system

= 1.00 for ducted system displaced by ducted system or ductless system displaced by ductless system

SEER2_base = Seasonal Energy Efficiency Ratio of baseline unit (kBtu/kWh), converted to SEER2 if rating is in SEER. For early replacment measures, the actual SEER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment (6.7 years for ducted ASHP, 5.7 years for ductless ASHP, and 8.3

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[348] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values

[349] Ibid.

[350] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[351] Based on maximum capacity average from the RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

years for Central AC). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[352] or if unknown assume default provided below. If unknown value is used, it should not be derated by age.

Baseline/Existing Cooling System	SEER2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump – Standard sized	9.2 SEER2[353]	14.3 SEER2[354]	
Air Source Heat Pump – Space constrained	9.2 SEER2	11.9 SEER2	
Central AC – Standard sized	9.2 SEER2[355]	13.4 SEER2[356]	
Central AC – Space constrained	9.2 SEER2	11.7 SEER2	
Room AC[357] (baseline applicable for mobile homes and IQ homes only) Non-IQ IQ	 10.9 CEER 8.7 CEER	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient. If unknown assume 10.9 CEER.	
No existing cooling (Non-IQ only)	Make '1/SEER2_exist' = 0[358]	13.4 SEER2[359]	
Unknown, installing ducted[360]	9.2 SEER2	13.9 SEER2	
Unknown, installing ductless	9.5 SEER2	13.7 SEER2	

SEER2_ee = Rated Seasonal Energy Efficiency Ratio of ENERGY STAR[361] unit (kBtu/kWh), converted to SEER2 if rating is in SEER
= Actual or program-defined minimum if unknown.

$DeratingCool_{Eff}$ = Efficent ASHP Cooling derating

= 0% if Quality Installation is performed

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[352] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[353] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018', converted to SEER2.

[354] Minimum Federal Standard as of 1/1/2023

[355] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to SEER2.

[356] Minimum Federal Standard; Federal Register, Vol. 66, No. 14, Monday, January 22, 2001/Rules and Regulations, p. 7170-7200.

[357] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026. For IQ participants this is more likely to be the least efficient units so is consistent with the early replacement baseline from 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[358] If there is no central cooling in place but the incentive encourages installation of a new ASHP with cooling, the added cooling load should be subtracted from any heating benefit.

[359] Assumes that the decision to replace existing systems includes desire to add cooling.

[360] Values represent the weighted average SEER baseline values (converted to SEER2) reflecting the assumed shares of installed ASHP replacing given baseline technologies (e.g. ASHP/electric resistance or furnace/boiler) by fuel type. Assumed shares are based on Opinion Dynamics and Guidehouse analysis of 2018-2021 Ameren and ComEd HVAC (downstream) program tracking data. For further details, see '2018-2021 AIC Res HVAC Data ASHP Baseline TRM Update 2023-06-20.xls'.

[361] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

= $DeratingCool_{Base}$ if Quality Installation is not performed or unknown[362]

$DeratingCool_{Base}$ = Baseline Cooling derating

= If ducted heating or cooling load is being replaced by ductless systems that are not subject to losses from existing ductwork, assume 5% as DuctlessSave term accounts for distribution benefits

= 10%

HeatLoad_Disp = Annual heat load for the building displaced by the ASHP (Btus)

= FLH_ASHPheat * Capacity_ASHPheat * HeatLoadFactor

FLH_ASHPheat = Full load hours of heat pump heating

= Dependent on location and home type:

Climate Zone (City based upon)	FLH_ ASHPheat (single family and multifamily)[363]
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion/Murphysboro)	1270
Weighted Average[364]	
ComEd	1766
Ameren	1547
Statewide	1700

Capacity_ASHPheat = Heating Output Capacity of Air Source Heat Pump at 47° F (Btu/hr)

= Actual (1 ton = 12,000Btu/hr)

HeatLoadFactor = Portion of HeatLoad displaced by ASHP in partial displacement applications. Varies by Switchover Temperature and Climate Region. If Switchover Temperature is unknown, use 32F. For portable heat pumps, unless it can be confirmed that the unit will be used through the heating season, use 47F to reflect likely behavior of unit being removed

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[362] Based on Cadmus assumption provided in preparation of the 2014 Interstate Power and Light TRM based upon proper refrigerant charge, evaporator airflow, and unit sizing. Appears conservative in comparison to ENERGY STAR statements (see 'Sponsoring an ENERGY STAR Verified HVAC Installation (ESVI) Program') and so could be considered for future evaluation.

[363] Full load heating hours for heat pumps are provided for Rockford, Chicago and Springfield in the ENERGY STAR Calculator. Estimates for the other locations were calculated based on the FLH to Heating Degree Day (from NCDC) ratio. VEIC consider ENERGY STAR estimates to be high due to oversizing not being adequately addressed. Using average Illinois billing data (from ICC Commerce Commission) VEIC estimated the average gas heating load and used this to estimate the average home heating output (using 83% average gas heat efficiency). Dividing this by a typical 36,000 Btu/hr ASHP gives an estimate of average ASHP FLH_heat of 1821 hours. We used the ratio of this value to the average of the locations using the ENERGY STAR data (1994 hours) to scale down the ENERGY STAR estimates. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of HDD60, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[364] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

when temperature falls below this temperature.

= 1.0 if full displacement (e.g. cold climate heat pumps) or if switchover temperature is lower than 17F, if Partial Displacement with simultaneous operation.

Climate Zone (City based upon)	HeatLoadFactor (by Switchover Temperature)										
	47F	44F	41F	38F	35F	32F	29F	26F	23F	20F	17F
1 (Rockford)	8%	14%	18%	22%	32%	42%	50%	63%	70%	74%	81%
2 (Chicago)	8%	14%	20%	26%	37%	48%	56%	70%	77%	80%	86%
3 (Springfield)	8%	15%	21%	27%	43%	57%	63%	73%	79%	82%	87%
4 (Belleville)	13%	21%	30%	37%	48%	61%	71%	80%	88%	92%	95%
5 (Marion)	14%	23%	33%	41%	59%	72%	79%	88%	92%	95%	97%
Weighted Average[365]											
ComEd	8%	14%	20%	26%	37%	48%	56%	70%	77%	80%	86%
Ameren	10%	16%	24%	30%	44%	57%	64%	75%	81%	85%	90%
Statewide	8%	15%	21%	27%	39%	50%	58%	71%	78%	81%	87%

HSPF2_base = Heating Seasonal Performance Factor 2 of baseline heating system (kBtu/kWh), converted to HSPF2 if rating is in HSPF. For early replacement measures, use actual HSPF2 rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment (6.7 years for ducted ASHP, 5.7 years for ductless ASHP, and the full measure life (20 years for ducted or 17 for ductless) for electric resistance). If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[366] or if unknown assume default. If unknown value is used, it should not be derated by age.

Baseline/ Existing Heating System	HSPF2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump – standard sized	4.91 HSPF2[367]	7.5 HSPF2[368]	
Air Source Heat Pump – space constrained	4.91 HSPF2	6.3 HSPF2	
Electric Resistance (Baseboard or Electric Furnace)	3.41 HSPF2[369]		
Unknown, installing ducted[370]	4.5 HSPF2	5.9 HSPF2	

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[365] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[366] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[367] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to HSPF2.

[368] Based on Minimum Federal Standard effective 1/1/2023.

[369] Electric resistance has a COP of 1.0 which equals 1/0.293 = 3.41 HSPF.

[370] Values represent the weighted average HSPF (converted to HSPF2) baseline values reflecting the assumed shares of installed ASHP replacing given baseline technologies (e.g. ASHP/electric resistance or furnace/boiler) by fuel type. Assumed shares are based on Opinion Dynamics and Guidehouse analysis of 2018-2021 Ameren and ComEd HVAC (downstream) program tracking data. For further details, see '2018-2021 AIC Res HVAC Data ASHP Baseline TRM Update 2023-06-20.xls'.

Baseline/ Existing Heating System	HSPF2_base		
	Early Replacement (Remaining useful life of existing equipment)	**Early Replacement (Remaining measure life)**	**Time of Sale or New Construction**
Unknown, installing ductless	4.4 HSPF2	5.3 HSPF2	

HSPF2_ee = Heating Seasonal Performance Factor 2 of efficient Air Source Heat Pump, converted to HSPF2 if rating is in HSPF (kBtu/kWh)

= Actual or program-defined minimum if unknown[371]

$DeratingHeat_{Eff}$ = Efficent ASHP Heating derating

= 0% if Quality Installation is performed

= 10% if Quality Installation is not performed[372]

$DeratingHeat_{Base}$ = Baseline Heating derating

= 10%

HSPF2_ClimateAdj= Adjustment factor to account for observed discrepency between seasonal heating performance relative to rated HSPF2 as provided by standard AHRI 210/240 rating conditions.[373]

= 100% if Partial Displacement and switchover temperature greater than 17F, otherwise:

City (county based upon)	HSPF2_ClimateAdj
1 (Rockford)	77%
2 (Chicago)	77%
3 (Springfield)	91%
4 (Belleville)	91%
5 (Marion)	91%
Weighted Average[374]	
ComEd	77%
Ameren	89%
Statewide	80%

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[371] ENERGY STAR minimum.

[372] Based on Cadmus assumption provided in preparation of the 2014 Interstate Power and Light TRM based upon proper refrigerant charge, evaporator airflow, and unit sizing, Assumed consistent for heating and cooling. Appears conservative in comparison to ENERGY STAR statements (see 'Sponsoring an ENERGY STAR Verified HVAC Installation (ESVI) Program') and so could be considered for future evaluation.

[373] Adjustment factors are based on findings from NEEA, July 2020 'EXP07:19 Load-based and Climate-Specific Testing and Rating Procedures for Heat Pumps and Air Conditioners'. See 'NEEA HP data' for calculation. Findings were consistent with other reviewed sources including ASHRAE, 2020 'Right-Sizing Electric Heat Pump and Auxiliary Heating for Residential Heating Systems Based on Actual Performance Associated with Climate Zone' and Cadmus, 2022 'Residential ccASHP Building Electrification Study'. The difference between HSPF and HSPF2 ratings is based on the change in testing procedure that will correct for some of this effect where ducted systems will have an approximately 9% lower HSPF2 rating as compared to HSPF, based on CEE presentation, July 2022, 'Testing Testing, M1, 2, 3: Transitioning to New Federal Minimum Standards'.

[374] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

PD_Adj = Adjustment multiplier to account for increased heat pump efficiency in Partial Displacement applications when there is no electric resistance backup and switchover temperature is higher than 17F. Varies by Switchover Temperature and Climate Region. If Switchover Temperature is unknown, use 32F.

= 1.0 if full displacement (e.g. cold climate heat pumps) or if switchover temperature is lower than 17F, or if Partial Displacement with simultaneous operation.

Climate Zone (City based upon)	PD_Adj (by Switchover Temperature)										
	47F	44F	41F	38F	35F	32F	29F	26F	23F	20F	17F
1 (Rockford)	155%	151%	148%	146%	141%	137%	134%	131%	128%	127%	125%
2 (Chicago)	155%	151%	147%	144%	140%	137%	134%	131%	129%	128%	126%
3 (Springfield)	155%	151%	147%	145%	139%	136%	134%	132%	130%	129%	127%
4 (Belleville)	155%	151%	148%	145%	142%	138%	136%	133%	131%	130%	129%
5 (Marion)	155%	151%	147%	145%	140%	138%	136%	134%	133%	132%	131%
Weighted Average[375]											
ComEd	155%	151%	147%	144%	140%	137%	134%	131%	129%	128%	126%
Ameren	155%	151%	147%	145%	140%	137%	135%	132%	130%	129%	128%
Statewide	155%	151%	147%	144%	140%	137%	134%	131%	129%	128%	126%

$AFUE_{base}$ = Baseline Annual Fuel Utilization Efficiency Rating. For early replacement measures, use actual AFUE rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment (8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[376] or if unknown assume default. If unknown value is used, it should not be derated by age.

Baseline/ Existing Heating System	AFUEbase		
	Early Replacement (Remaining useful life of existing equipment)[377]	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Furnace	64.4%	80%	80%
Boiler	61.6%	84%	84%
Unknown, installing ducted[378]	80%	80.1%	80.1%
Unknown, installing ductless	80%	81.1%	81.1%

FurnaceFlag = 1 if system replaced is a furnace (fossil fueled or electric), 0 if not.

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

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[375] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[376] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[377] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[378] Values represent the weighted average AFUE baseline values reflecting the assumed shares of installed ASHP replacing given baseline technologies (e.g. ASHP/electric resistance or furnace/boiler) by fuel type. Assumed shares are based on Opinion Dynamics and Guidehouse analysis of 2018-2021 Ameren and ComEd HVAC (downstream) program tracking data. For further details, see '2018-2021 AIC Res HVAC Data ASHP Baseline TRM Update 2022-07-11.xls'.

For Early Replacement (1st 6 years) F_e_Exist = 3.14%[379]

For New Construction, Time of Sale and early replacement (remaining 10 years) F_e_New = 1.88%[380]

3412 = Btu per kWh

%IncentiveElectric = % of total incentive paid by electric utility

= Actual

%IncentiveGas = % of total incentive paid by gas utility

= Actual

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[379] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

[380] New furnaces are required to have ECM fan motors installed. Comparing Eae to Ef for furnaces on the AHRI directory as above, indicates that Fe for new furnaces is on average 1.88%.

Non Fuel Switch Illustrative Examples

Time of Sale using ASHP baseline:

For example, a ducted ASHP is installed in a single-family home in Marion with the following nameplate information: 15.2 SEER2, 11 EER2, 9 HSPF2; Cooling capacity: 34,800 Btuh; Heating capacity at 47°F: 33,000 Btuh; Heating capacity at 17°F: 21,200 Btuh with Quality Installation;

$\Delta kWh_{Non\ Fuel\ Switch}$ = ASHPSiteCoolingImpact + ASHPSiteHeatingImpact

ASHPSiteCoolingImpact = (((956 * 34,800)/1 * 1/(14.3 * (1 - 0.1))) – (956 * 34,800 * 1/(15.2 * (1 – 0)))) / 1,000

= 396 kWh

ASHPSiteHeatingImpact = (((1,270 * 33,000 * 1)/1 * (1/(7.5 * 0.91 * (1 – 0.1)) - 1/(9 * 0.91 * (1-0)))) / 1,000)

= 1,706 kWh

$\Delta kWh_{Non\ Fuel\ Switch}$ = 396 + 1706 = 2,102 kWh

Early Replacement:

For example, a 15.2 SEER2, 11 EER2, 9 HSPF2 ducted Air Source Heat Pump with nameplate information as above replaces an existing working ducted Air Source Heat Pump with unknown efficiency ratings in a single family home in Marion:

ΔkWH for remaining life of existing unit (1st 6.7 years):

ASHPSiteCoolingImpact = (((956 * 34,800)/1 * 1/(9.3 * (1 - 0.1))) – (956 * 34,800 * 1/(15.2 * (1 – 0)))) / 1,000

= 1,786 kWh

ASHPSiteHeatingImpact = (((1,270 * 33,000 * 1)/1 * (1/(5.54 * 0.91 * (1 – 0.1)) - 1/(9 * 0.91 * (1-0)))) / 1,000)

= 4,120 kWh

$\Delta kWh_{Non\ Fuel\ Switch}$ = 1,786 + 4,102 = 5,888 kWh

ΔkWH for remaining measure life (next 13.3 years):

= 2,102 kWh (as example above)

Fuel Switch Illustrative Examples

[for illustrative purposes, 50:50 Incentive is used for joint programs]

New construction using gas furnace and central AC baseline:

For example a 3-ton (Cooling capacity of 34,800Btuh and Heating capacity of 33,000 Btuh), 15.2 SEER2, 12.4 EER2, 9 HSPF2 ducted Air Source Heat Pump installed in single-family home in Marion with Quality Installation, in place of a 81,000 Btuh natural gas furnace and 3 ton Central AC unit:

SiteEnergySavings (MMBTUs) = GasHeatReplaced + FurnaceFanSavings – ASHPSiteHeatConsumed + ASHPSiteCoolingImpact

GasHeatReplaced = ((HeatLoad_Disp/DuctlessSave * 1/$AFUE_{base}$) / 1,000,000)

= (((1,270 * 33,000 * 1)/1 * 1/0.8) / 1,000,000)

= 52.4 MMBtu

FurnaceFanSavings = (FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/$AFUE_{base}$ * F_e_New) / 1,000,000

= (1 * (1270 * 33,000 * 1)/1 * 1/0.8 * 0.0188) / 1,000,000

= 1.0 MMBtu

ASHPSiteHeatConsumed = ((HeatLoad_Disp * (1/(HSPF2_ee * HSPF2_ClimateAdj * PDAdj * (1 – $DeratingHeat_{Eff}$)))) /1000 * 3412)/ 1,000,000

= (((1,270 * 33,000 * 1)/1 * (1/(9 * 0.91 * 1 * (1-0)))) / 1,000 * 3412)/ 1,000,000

= 17.5 MMBtu

Fuel Switch Illustrative Example continued

ASHPSiteCoolingImpact = ((CoolingLoad/DuctlessSave * (1/(SEER2_base * (1 – $\text{DeratingCool}_{\text{Base}}$)) - 1/(SEER2_ee * (1 – $\text{DeratingCool}_{\text{Eff}}$))))/1000) * 3412) / 1,000,000

= (((956 * 34,800 * 1)/1 * (1/(13.4 * (1-0.1)) - 1/(15.2 * (1-0)))) / 1,000 * 3,412)/1,000,000

= 1.9 MMBtu

SiteEnergySavings (MMBTUs) = 52.4 + 1.0 – 17.5 + 1.9 = 37.8 MMBtu [Measure is eligible]

Savings would be claimed as follows:

Measure supported by:	Electric Utility claims:	Gas Utility claims:
Electric utility only	37.8 * 1,000,000/3,412 = 11,079 kWh	N/A
Electric and gas utility	0.5 * 37.8 * 1,000,000/3,412 = 5,539 kWh	0.5 * 37.8 * 10 = 189 Therms
Gas utility only	N/A	37.8 * 10 = 378 Therms

Early Replacement fuel switch:

For example a three ton (Cooling capacity of 34,800 Btuh and Heating capacity of 33,000 Btuh), 15.2 SEER2, 11 EER2, 9 HSPF2 ducted Air Source Heat Pump installed in single-family home in Marion with Quality Installation, replaces an existing working natural gas furnace and 3-ton Central AC unit with unknown efficiency ratings:

LifetimeSiteEnergySavings (MMBTUs) = LifetimeGasHeatReplaced + LifetimeFurnaceFanSavings – LifetimeASHPSiteHeatConsumed + LifetimeASHPSiteCoolingImpact

LifetimeGasHeatReplaced = [(HeatLoad_Disp/DuctlessSave * 1/$\text{AFUE}_{\text{exist}}$) / 1,000,000] * 6 years + [(HeatLoad_Disp/DuctlessSave * 1/$\text{AFUE}_{\text{base}}$) / 1,000,000] * 10 years

= ((((1,270 * 33,000 * 1)/1 * 1/0.644) / 1,000,000) * 6) + ((((1,270 * 33,000 * 1)/1 * 1/0.8) / 1,000,000) * 10)

=914.3 MMBtu

LifetimeFurnaceFanSavings = ((FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/$\text{AFUE}_{\text{exist}}$ * F_e_Exist) / 1,000,000) * 6 years + ((FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/$\text{AFUE}_{\text{base}}$ * F_e_New) / 1,000,000) * 10 years

= ((1 * (1,270 * 33,000 * 1)/1 * 1/0.644 * 0.0314) / 1,000,000) * 6 + ((1 * (1,270 * 33,000 * 1)/1 * 1/0.8 * 0.0188)/ 1,000,000) * 10

= 22.1 MMBtu

LifetimeASHPSiteHeatConsumed = ((HeatLoad_Disp/DuctlessSave * (1/(HSPF2_ee * HSPF2_ClimateAdj * PD_Adj * (1 – $\text{DeratingHeat}_{\text{Eff}}$)))) /1,000 * 3,412)/ 1,000,000 * 16 years

= (((1,270 * 33,000 * 1)/1 * (1/(9 * 0.91 * 1.001 * 1 * (1-0)))) / 1,000 * 3412)/1,000,000 * 16

= 279 MMBtu

Fuel Switch Illustrative Example continued

LifetimeASHPSiteCoolingImpact = (((CoolingLoad/DuctlessSave * (1/(SEER2_exist * (1 – DeratingCool$_{Base}$)) - 1/(SEER2_ee * SEER2adj * (1 – DeratingCool$_{Eff}$))))/1000 * 3412)/1,000,000 * 6 years) + (((CoolingLoad/DuctlessSave * (1/(SEER2_base * (1 – DeratingCool$_{Base}$)) - 1/(SEER2_ee * SEER2adj * (1 – DeratingCool$_{Eff}$))))/1000 * 3412)/1,000,000 * 10 years)

= ((((956 * 34,800)/1 * (1/(9.3 * (1-0.1)) - 1/(15.2 * (1-0)))) / 1,000 * 3,412)/1,000,000 * 6) + ((((956 * 34,800)/1 * (1/(13.4 * (1-0.1)) - 1/(15.2 * (1-0)))) / 1,000 * 3412)/1,000,000 * 10)

= 56.0 MMBtu

LifetimeSiteEnergySavings (MMBTUs) = 914.3 + 22.1 – 279 + 56.0 = 713.4 MMBtu [Measure is eligible]

First 6 years:

SiteEnergySavings_FirstYear (MMBTUs) = GasHeatReplaced + FurnaceFanSavings – ASHPSiteHeatConsumed + ASHPSiteCoolingImpact

GasHeatReplaced = [(HeatLoad_Disp/DuctlessSave * 1/AFUE$_{Exist}$) / 1,000,000]

= (((1,270 * 33,000 * 1)/1 * 1/0.644) / 1,000,000)

= 65.1 MMBtu

FurnaceFanSavings = (FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/AFUE$_{Exist}$ * F$_e$_Exist) / 1,000,000

= (1 * (1,270 * 33,000 * 1)/1 * 1/0.644 * 0.0314) / 1,000,000

= 2.0 MMBtu

ASHPSiteHeatConsumed = ((HeatLoad_Disp/DuctlessSave * (1/(HSPF2_ee * HSPF2_ClimateAdj * PD_Adj * (1 – DeratingHeat$_{Eff}$)))) /1,000 * 3,412)/ 1,000,000

= (((1,270 * 33,000 * 1)/1 * (1/(9 * 0.91 * 1 * (1-0)))) / 1,000 * 3412) / 1,000,000

= 17.5 MMBtu

ASHPSiteCoolingImpact = ((CoolingLoad/DuctlessSave * (1/(SEER2_exist * (1 – DeratingCool$_{Base}$)) - 1/(SEER2_ee * (1 – DeratingCool$_{Eff}$))))/1,000 * 3,412) / 1,000,000

= (((956 * 34,800)/1 * (1/(9.3 * (1-0.1)) - 1/(15.2 * (1-0)))) / 1,000 * 3,412)/1,000,000

= 6.1 MMBtu

SiteEnergySavings_FirstYear (MMBTUs) = 65.1 + 2.0 – 17.5 + 6.1 = 55.7 MMBtu

Remaining 10 years:

SiteEnergySavings_PostAdj (MMBTUs) = GasHeatReplaced + FurnaceFanSavings – ASHPSiteHeatConsumed + ASHPSiteCoolingImpact

GasHeatReplaced = (((1,270 * 33,000 * 1)/1 * 1/0.8) / 1,000,000)

= 52.4 MMBtu

FurnaceFanSavings = (1 * (1,270 * 33,000 * 1)/1 * 1/0.8 * 0.0188) / 1,000,000

= 1.0 MMBtu

Fuel Switch Illustrative Example continued

ASHPSiteHeatConsumed = (((1,270 * 33,000 * 1) /1 * (1/(9 * 0.91 * 1 * (1-0)))) / 1,000 * 3,412) / 1,000,000

= 17.5 MMBtu

ASHPSiteCoolingImpact = (((956 * 34,800)/1 * (1/(13.4 * (1-0.1)) - 1/(15.2 * (1-0)))) / 1,000 *3,412)/1,000,000

= 1.9 MMBtu

SiteEnergySavings_ PostAdj (MMBTUs) = 52.4 + 1.0 – 17.5 + 1.9 = 37.8 MMBtu

Savings would be claimed as follows:

Measure supported by:	Electric Utility claims:	Gas Utility claims:
Electric utility only	First 6 years: 55.7* 1,000,000/3412 = 16,235 kWh Remaining 10 years: 37.8 * 1,000,000/3412 = 11,079 kWh	N/A
Electric and gas utility	First 6 years: 0.5 * 55.7 * 1,000,000/3412 = 8,162 kWh Remaining 10 years: 0.5 * 37.8 * 1,000,000/3412 = 5,539 kWh	First 6 years: 0.5 * 55.7 * 10 = 279 Therms Remaining 10 years: 0.5 * 37.8 * 10 = 189 Therms
Gas utility only	N/A	First 6 years: 55.7 * 10 = 557 Therms Remaining 10 years: 37.8 * 10 = 378 Therms

SUMMER COINCIDENT PEAK DEMAND SAVINGS

For all other scenarios:

ΔkW = ((Capacity_cooling/DuctlessSave * (1/(EER2_base * (1 – $\text{DeratingCool}_{\text{Base}}$))) – (Capacity_cooling * 1/(EER2_ee * (1 – $\text{DeratingCool}_{\text{Eff}}$)))) / 1,000 * CF

For Room AC baseline (applicable for mobile homes or IQ only):

ΔkW = ((#RACUnits * CapacityRAC * (1/(CEERbase * 1.01)))/1,000) – (Capacity_cooling * 1/(EER2_ee * (1 – $\text{DeratingCool}_{\text{Eff}}$)))) / 1,000 * CF

Where:

EER2_base = Energy Efficiency Ratio 2 of baseline unit (kBtu/kWh). For early replacment measures, the actual EER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment (6.7 years for ducted ASHP, 5.7 years for ductless ASHP, and 8.3 years for Central AC). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[381] If unknown, assume default provided below. If unknown value is used, it should not be derated by age.

Baseline/Existing Cooling System	EER2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Ducted Air Source Heat Pump – standard sized	7.4 EER2[382]	9.4 EER2[383]	
Ductless Air Source Heat Pump – standard sized	7.4 EER2	8.5 EER2	
Air Source Heat Pump – space constrained	7.4 EER2	7.8 EER2	
Central AC – standard sized	7.4 EER2	10.6 EER2	
Central AC – space constrained	7.4 EER2	9.2 EER2	
Room AC[384] (baseline applicable for mobile homes and IQ homes only) Non-IQ IQ	 10.9 CEER 8.7 CEER	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient. If unknown assume 10.9 CEER.	
No existing cooling	Make '1/EER2_exist' = 0 [385]	10.6 EER2[386]	
Unknown, installing ducted [387]	7.4 EER2	9.4 EER2	
Unknown, installing ductless	7.4 EER2	8.5 EER2	

EER2_ee = Energy Efficiency Ratio of efficient Air Source Heat Pump (kBtu/hr / kW)

= Actual. If unknown, assume 11 EER2.[388]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[389]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during peak period)

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[381] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[382] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to EER2.

[383] Assumed consistent with the EER2 requirements in the Federal Standard for Southwest standards (in the absence of standards for Nothern states).

[384] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026. For IQ participants this is more likely to be the least efficient units so is consistent with the early replacement baseline from 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[385] If there is no central cooling in place but the incentive encourages installation of a new ASHP with cooling, the added cooling load should be subtracted from any heating benefit.

[386] Assumes that the decision to replace existing systems includes desire to add cooling.

[387] Program tracking data does not provide an EER2 value. These are estimated based on the other values in the table.

[388] ENERGY STAR v6.2 minimum specification.

[389] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

= 46.6%[390]

$CF_{SSP, MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[391]

$CF_{PJM, MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

Use Multifamily if: Building meets utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family. For central systems use Volume 2 Commercial and Industrial Measures.

Time of Sale:

For example, a three ton, 15.2 SEER2, 11 EER2, 9 HSPF2 Air Source Heat Pump installed in single-family home in Marion with Quality Installation:

ΔkW_{SSP} = (36,000/1 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.72

= 0.7075 kW

ΔkW_{PJM} = (36,000/1 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.466

= 0.4579 kW

Early Replacement:

For example, a 3-ton, 15.2 SEER2, 11 EER2, 9 HSPF2 ducted Air Source Heat Pump replaces an existing working Air Source Heat Pump with unknown efficiency ratings in single-family home in Marion with Quality Installation:

ΔkW_{SSP} for remaining life of existing unit (1st 6.7 years):

= (36,000/1 * (1/(7.5 * (1-0.1)) - 1/(11 * (1-0)))) / 1,000 * 0.72

= 1.48 kW

ΔkW_{SSP} for remaining measure life (next 13.3 years):

= (36,000/1 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.72

= 0.7075 kW

ΔkW_{PJM} for remaining life of existing unit (1st 6.7 years):

= (36,000/1 * (1/(7.5 * (1-0.1)) - 1/(11 * (1-0)))) / 1,000 * 0.466

= 0.9602 kW

ΔkW_{PJM} for remaining measure life (next 13.3 years):

= (36,000/1 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.466

= 0.4579 kW

FOSSIL FUEL SAVINGS

Calculation provided together with Electric Energy Savings above.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

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[390] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[391] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

COST EFFECTIVENESS SCREENING AND LOAD REDUCTION FORECASTING WHEN FUEL SWITCHING

This measure can involve fuel switching from fossil fuel to electric.

For the purposes of forecasting load reductions due to fuel switch ASHP projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, should therefore reflect the decrease in one fuel and increase in another, as opposed to the single savings value calculated in the "Electric and Fossil Fuel Energy Savings" section above. Therefore in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness of the measure. For Early Replacement measures, the efficiency and Fe terms of the existing unit should be used for the remaining useful life of the existing equipment (6.7 years for ducted ASHP, 5.7 years for ductless ASHP, 8.3 years for Central AC, 8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers or GSHP, 16 years for electric resistance), and the efficiency and Fe terms for a new baseline unit should be used for the remaining years of the measure.

ΔTherms = [Heating Consumption Replaced]

= [(%FuelSwitch * HeatLoad_Disp/DuctlessSave * 1/AFUE$_{base}$) / 100,000]

For all other scenarios:

ΔkWh = [GasFurnaceFanSavings] - [ASHP heating consumption] + [Cooling savings]

= %FuelSwitch * [[FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/AFUE$_{base}$ * F$_e$ * 0.000293] - [(HeatLoad_Disp * (1/(HSPF2_ee * HSPF2_ClimateAdj * PD_Adj * (1 – DeratingHeat$_{Eff}$))))/1,000] + [((CoolingLoad/DuctlessSave * (1/(SEER2_base * (1 – DeratingCool$_{Base}$)))) – ((CoolingLoad * 1/(SEER2_ee * (1 – DeratingCool$_{Eff}$)))))/1,000]

For Room AC baseline (applicable for mobile homes or IQ only):

ΔkWh = [GasFurnaceFanSavings] - [ASHP heating consumption] + [Cooling savings]

= %FuelSwitch * [[FurnaceFlag * HeatLoad_Disp/DuctlessSave * 1/AFUE$_{base}$ * F$_e$ * 0.000293] - [(HeatLoad_Disp * (1/(HSPF2_ee * HSPF2_ClimateAdj * PD_Adj * (1 – DeratingHeat$_{Eff}$))))/1,000] + [((CoolingLoad * (1/(CEERbase))) – ((CoolingLoad * 1/(SEER2_ee * (1 – DeratingCool$_{Eff}$)))))/1,000]

MEASURE CODE: RS-HVC-ASHP-V17-270101

REVIEW DEADLINE: 1/1/2029

5.3.2 Boiler Pipe Insulation

DESCRIPTION

This measure describes adding insulation to un-insulated boiler pipes in un-conditioned basements or crawlspaces.

This measure was developed to be applicable to the following program types: TOS, RNC, RF, DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient case is installing pipe wrap insulation to a length of boiler pipe.

DEFINITION OF BASELINE EQUIPMENT

The baseline is an un-insulated boiler pipe.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 11 years.[392]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 9 years.[393] See section below for detail.

DEEMED MEASURE COST

The actual installation cost should be used if known. If unknown, the measure cost including material and installation is assumed to be $3 per linear foot.[394] For foam pipe insulation assume a measure cost of $0.59/ft for ½” insulation and $0.94/ft for ¾” insulation.[395]

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

$$\Delta Therm = (((1/R_{exist} - 1/R_{new}) * Ci_{nside} * L_{effective} * FLH\_heat * \Delta T) / \eta Boiler)/100,000$$

Where:

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[392] DEER 2014

[393] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

[394] Consistent with DEER 2008 Database Technology and Measure Cost Data.

[395] Review of website cost data for Homedepot.com, Lowes.com, and Menards.com for locations in Peoria, IL. Websites accessed 4/27/26.

R_{exist} = Pipe heat loss coefficient of uninsulated pipe (existing) [(hr-°F-ft^2)/Btu]

= Varies based on pipe size and material. See table below for values.

R_{new} = Pipe heat loss coefficient of insulated pipe (new) [(hr-°F-ft^2)/Btu]

= Actual (R_{exist} + R value of insulation[396])

C_{inside} = Inside circumference of the pipe [ft]

= Actual (0.5” pipe = 0.1427 ft, 0.75” pipe = 0.2055 ft); See table below for values.

$L_{effective}$ = Effective Length of pipe from boiler covered by pipe insulation (ft)[397]

= $L_{Horizontal} + \alpha L_{Vertical}$

= Actual; See table below for α values. If unknown, assume 3ft of vertical and remaining horizontal.

FLH_heat = Full load hours of heating

= Dependent on location:[398]

Climate Zone (City based upon)	FLH_heat
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion)	1270
Weighted Average[399]	
ComEd	1766
Ameren	1543
Statewide	1700

ΔT = Average temperature difference between circulated heated water and unconditioned space air temperature (°F) [400]

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[396] Where possible it should be ensured that the R-value of the insulation is at the appropriate mean rating temperature (125F).

[397] In cases with zero wind, heat loss (and therefore) savings is larger from horiztonal pipe configurations than vertical pipe configurations due, perhaps to the way in which convective losses are handled. An analysis of the 3E PLUS tool by NAIMA (https://insulationinstitute.org/tools-resources/free-3e-plus/) yielded adjustment factors for horizontal to vertical loss and savings values. See DHW_PipeInsulationCalcs_062121.xlsx for details of the analysis and comparisons.

[398] Full load heating hours for heat pumps are provided for Rockford, Chicago and Springfield in the ENERGY STAR Calculator. Estimates for the other locations were calculated based on the FLH to Heating Degree Day (from NCDC) ratio. VEIC consider ENERGY STAR estimates to be high due to oversizing not being adequately addressed. Using average Illinois billing data (from Illinois Commerce Commission) VEIC estimated the average gas heating load and used this to estimate the average home heating output (using 83% average gas heat efficiency). Dividing this by a typical 36,000 Btu/hr ASHP gives an estimate of average ASHP FLH_heat of 1821 hours. We used the ratio of this value to the average of the locations using the ENERGY STAR data (1994 hours) to scale down the ENERGY STARr estimates. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of HDD60, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[399] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[400] Assumes 160°F water temp for a boiler without reset control, 120°F for a boiler with reset control, and 50°F air temperature for pipes in unconditioned basements and the following average heating season outdoor temperatures as the air temperature in crawl spaces: Zone 1 – 33.1, Zone 2 – 34.4, Zone 3 – 37.7, Zone 4 – 40.0, Zone 5 – 39.8, Weighted Average – 35.3 (NCDC 1881-2010 Normals, average of monthly averages Nov – Apr for zones 1-3 and Nov-March for zones 4 and 5).

Pipes in unconditioned basement:

Outdoor reset controls	ΔT (°F)
Boiler without reset control	110
Boiler with reset control	70

Pipes in crawl space:

Climate Zone (City based upon)	ΔT (°F)	
	Boiler without reset control	Boiler with reset control
1 (Rockford)	127	87
2 (Chicago)	126	86
3 (Springfield)	122	82
4 (Belleville)	120	80
5 (Marion)	120	80
Weighted Average[401]	125	85

ηBoiler = Efficiency of boiler

= 0.819 [402]

Parameter assumptions for various pipe sizes and materials:

Type and Size	C_{Inside}[403] (I.D.*π/12) (ft)	Product of Overall Heat Transfer Coefficient and Pipe Area (UA) per foot[404] from bare pipe (BTU/hr·ft·°F)	Pipe Area per linear foot (ft^3)[405]	R_{exist} ((hr·ft·°F)/BTU)	Horizontal to Vertical Adjustment Factor (α)
½” Copper Pipe	0.1427	0.345	0.153	0.444	0.67
¾” Copper Pipe	0.2055	0.417	0.217	0.521	0.72
½” PEX	0.1270	0.438	0.145	0.332	0.73
¾” PEX	0.1783	0.545	0.204	0.374	0.77

For example, insulating 10 feet of 0.75” copper pipe (4ft vertical and 6 ft horizontal) with R-3 insulation in a crawl space of a Marion home with a boiler without reset control:

ΔTherm = (((1/0.521– 1/3.521) * 0.2055 * (6 + 4*0.72) * 110 * 1270) / 0.819) / 100,067

= 5.09 therms

Mid-Life adjustment

In order to account for the likely replacement of existing heating equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the

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[401] Weighted based on number of occupied residential housing units in each zone.

[402] Average efficiency of boiler units found in Ameren PY3-PY4 data.

[403] See: https://energy-models.com/pipe-sizing-charts-tables (last accessed 5/7/21) for copper pipe sizes and https://www.garagesanctum.com/size-chart/pex-tubing-size-chart/ (last accessed 5/7/21) for PEX pipe sizes.

[404] Laboratory measured values from Hoeschele and Weitzel (2012), Figure 1.

[405] Calculated using the average pipe thickness (I.D. + O.D.)*0.5.

following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηHeat	Boiler	84% AFUE

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimate to be 13 years.[406] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-PINS-V09-270101

REVIEW DEADLINE: 1/1/2030

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[406] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

5.3.3 Central Air Conditioning

DESCRIPTION

This measure characterizes:

a) Time of Sale:

   a. The installation of a new residential sized (<= 65,000 Btu/hr) Central Air Conditioning ducted split system meeting specifications determined by the program. This could relate to the replacement of an existing unit at the end of its useful life, or the installation of a new system in a new home.

b) Early Replacement:

   Early Replacement determination will be based on meeting the following conditions:

   - The existing unit is operational when replaced, or
   - The existing unit requires minor repairs (defined as 20% of the cost of a new baseline unit).[407]
   - All other conditions will be considered Time of Sale.

   The Baseline SEER2 of the existing Central Air Conditioning unit replaced:

   - If the SEER of the existing unit is known use the actual SEER (converted to SEER2) value of the unit replaced.
   - If the SEER of the existing unit is unknown, use assumptions in variable list below (SEER2_exist).
   - If the operational status or repair cost of the existing unit is unknown, use time of sale assumptions.

   A weighted average early replacement rate is provided when the actual baseline early replacement rate is unknown.[408]

Deemed Early Replacement Rates for CAC Units in Combined System Replacement (CSR) Projects

Replacement Scenario for the CAC Unit	Deemed Early Replacement Rate
Early Replacement Rate for participants when a CAC unit when the CAC unit is the Primary unit in a CSR project	14%
Early Replacement Rate for participants when a CAC unit when the CAC unit is the Secondary unit in a CSR project	40%

Note: it is not appropriate to claim additional ECM fan savings (from 5.3.5 Furnace Blower Motor) due to installing new CAC units with an ECM, since the SEER2/EER2 ratings already account for this electrical load.

Quality Installation:

Additional savings are attributed to the Quality Installation (QI) of the system. QI programs should follow industry standards such as those described in ENERGY STAR Verified HVAC Installation Program (ESVI), ANSI ACCA QI5 and QI9vp. This must include considerations of system design (including sizing, matching, ventilation calculations) and

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[407] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement. Note the non-inflated cost should be used as this would be a cost consideration in the program year.

[408] Based upon research from “Home Energy Efficiency Rebate Program GPY2 Evaluation Report” which outlines early replacement rates for both primary and secondary central air cooling (CAC) and residential furnaces. The unit (furnace or CAC unit) that initially caused the customer to contact a trade ally is defined as the “primary unit”. The furnace or CAC unit that was also replaced but did not initially prompt the customer to contact a trade ally is defined as the “secondary unit”. This evaluation used different criteria for early replacement due to the availability of data after the fact; cost of any repairs < $550 and age of unit < 20 years. Report presented to Nicor Gas Company February 27, 2014.

equipment installation (including static pressure, airflow, refrigerant charge) and may also consider distribution.

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

In order for this characterization to apply, the efficient equipment is assumed to be a ducted split central air conditioning unit meeting specifications determined by the program. For reference, the minimum Consortium for Energy Efficiency (CEE) efficiency level standards are provided below[409]:

- Split system central air conditioners – 17 SEER2 and 12.0 EER2
- Single package central air conditioners – 16 SEER2 and 11.5 EER2
- Space constrained units – 13.4 SEER2[410]

The measure characterization recommends sourcing the efficiency specifications from the actually installed equipment. If those values are not known, the default equipment efficiency recommendations are conservatively based on Consortium for Energy Efficiency (CEE) specifications.

The following conversion factors are recommended for use if the efficient equipment is not rated under the new testing procedure:[411]

SEER2 = SEER * X

EER2 = EER * X

Where:

X	SEER	EER
Ducted	0.95	0.95
Packaged	0.95	0.95

DEFINITION OF BASELINE EQUIPMENT

The baseline for the Time of Sale measure is based on the current Federal Standard efficiency level[412]:

- Standard sized Split system air conditioners – 13.4 SEER2
- Standard sized Single-package air conditioners – 13.4 SEER2

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[409] Consortium for Energy Efficiency (CEE) Residential HVAC Specifications, effective January 1, 2026, are in terms of an updated metric, depicted as SEER2 and EER2. The updated test method as well as the updated Consortium for Energy Efficiency (CEE) specifications mimic the updated federal appliance standards. An equivalent stringency of these new standards for split system air conditioners are 16 SEER and 13 EER and for single-package air conditioners are 16 SEER and EER 12, as detailed in: Consortium for Energy Efficiency (CEE) Residential HVAC Specifications, Estimated Appendix M1 Equivalents, January 15 2021

[410] The Consortium for Energy Efficiency (CEE) specification does not provide an efficiency level for space constrained products but this is a proposed level for this product type that the marketplace has developed solutions to meet.

[411] Consortium for Energy Efficiency (CEE), Testing, Testing, M1, 2, 3, Transitioning to New Federal Minimum Standards, CEE Summer Program Meeting, June 10, 2022.

[412] The 2023 federal standards (10 CFR 430.32(c)(5)) are in terms of an updated metric, depicted as SEER2 and manufacturers must certify their products meet the standard according to the new test procedure and new metrics. The updated test method as well as the updated energy conservation standards were negotiated under the appliance standards and rulemaking federal advisory committee (ASRAC) in accordance with the Federal Advisory Committee Act (FACA) and the negotiated rulemaking act. An equivalent stringency of these new standards for split system air conditioners are 14 SEER and for single-package air conditioners are 14 SEER, as detailed in: Federal Code of Regulations, Energy Conservation Program: Energy Conservations Standards for residential Central Air Conditioners and Heat Pumps; Confirmation of effective date and compliance date for direct final rule, May 26, 2017, Docket: EERE-2014-BT-STD-0048 (https://www.regulations.gov/document/EERE-2014-BT-STD-0048-0200)

- Space constrained air conditioners – 11.7 SEER2
- Room AC, applicable for mobile homes or IQ homes only – 9.8 CEER

Note, the space constrained product baseline should only be used when the efficient unit is classified as space constrained. It is assumed that 'Quality Installation' did not occur.

For mobile homes, replacing central AC presents a series of challenges, not least due to structural limitations. It is assumed that in the absence of program support, units would not be replaced with a new central AC unit but instead be replaced with multiple room AC units.

The baseline for the early replacement measure is the efficiency of the existing equipment for the assumed remaining useful life of the unit and the new baseline as defined above for the remainder of the measure life.[413] Consistent with TRM Volume 1 Section 2.3.1 for midstream programs or other cases where the existing condition is unknown, it may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on evaluation results

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 25 years.[414]

Remaining life of existing equipment is assumed to be 8.3 years.[415]

DEEMED MEASURE COST

Time of sale (non-mobile homes): The incremental capital cost for this measure is dependent on capacity. Assumed incremental costs are provided below:[416]

Capacity Range	Efficient Cost	Baseline Cost per Ton	Incremental Cost
< 2 tons	\$2,591 / ton + (\$100 * (SEER2 - 15.2))	\$2,340	\$251 / ton + (\$100 * (SEER2 - 15.2))
≥2 tons - < 3 tons	\$2,104 / ton + (\$100 * (SEER2 - 15.2))	\$1,900	\$204 / ton + (\$100 * (SEER2 - 15.2))
≥ 3 tons	\$1,661 / ton + (\$100 * (SEER2 - 15.2))	\$1,500	\$161 / ton + (\$100 * (SEER2 - 15.2))

Time of sale (mobile homes):

For mobile homes, this measure assumes a baseline of three 8,500 BTU/hr room AC units purchased via the secondary market and assumed to cost \$50 each – for a total of \$150. This should be compared to a typical retail cost for an efficient 3-ton unit from table above.

An additional \$150 every 8.3 years should be included to account for the replacement of the secondhand room AC units.

Early replacement: The full install cost for this measure is the actual cost of removing the existing unit and installing the new one. If this is unknown, assume defaults from table above.

Assumed deferred cost (after 8.3 years) of replacing existing equipment with new baseline unit is presented in the table below for non-mobile homes and is assumed to be \$150 for mobile homes. This cost should be discounted to

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[413] Baseline SEER and EER should be updated when new minimum federal standards become effective.

[414] Recommendation from "Final Evaluation Report for: X2001B: Connecticut Measure Life/EUL Update Study-Residential & Commercial" prepared by Michaels Energy and Evergreen Economics, May 11, 2023.

[415] Assumed to be one third of effective useful life.

[416] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

present value using the nominal societal discount rate.

Capacity Range	Deferred Baseline Cost per Ton[417]
< 2 tons	\$2,783
≥ 2 to < 3 tons	\$2,260
≥ 3 tons	\$1,784

Quality Installation: The additional design and installation work associated with quality installation has been estimated to cost an additional \$150.[418]

LOADSHAPE

Loadshape R08 - Residential Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)
= 68%[419]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)
= 46.6%[420]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Time of sale (Central AC):

$$\Delta kWH = (FLHcool * Capacity * (1/(SEER2base * (1 - DeratingCool_{Base})) - 1/(SEER2ee * (1 - DeratingCool_{Eff}))))/1000$$

Time of sale (Room AC applicable for mobile homes or IQ only):

$$\Delta kWH = kWhBaseRAC - kWhEffCAC$$

$$kWhBaseRAC = (\#RACUnits * FLHcool * CapacityRAC * (1/CEERbase))/1,000$$

$$kWhEffCAC = (FLHcool * Capacity * (1/(SEER2ee (1 - DeratingCool_{Eff}))))/1,000$$

Early replacement:[421]

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[417] All baseline replacement costs include inflation rate of 2.28%.

[418] Based on data provided by MidAmerican in April 2018 summarizing survey results from 11 HVAC suppliers in Iowa.

[419] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[420] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[421] The two equations are provided to show how savings are determined during the initial phase of the measure (existing to efficient) and the remaining phase (new baseline to efficient). In practice, the screening tools used may either require a First Year savings (using the first equation) and then a "number of years to adjustment" and "savings adjustment" input which would be the (new base to efficient savings)/(existing to efficient savings).

ΔkWH for remaining life of existing unit (1st 8.3 years):

$$=(FLHcool * Capacity * (1/(SEER2exist * (1 - DeratingCool_{Base})) - 1/(SEER2ee * (1 - DeratingCool_{Eff}))))/1,000$$

ΔkWH for remaining measure life (next 16.7 years) – Central AC:

$$= (FLHcool * Capacity * (1/(SEER2base * (1 - DeratingCool_{Base})) - 1/(SEER2ee * (1 - DeratingCool_{Eff}))))/1,000$$

ΔkWH for remaining measure life (next 16.7 years) – Room AC applicable for mobile-homes or IQ only:

= kWhBaseRAC – kWhEffCAC

kWhBaseRAC = (#RACUnits * FLHcool * CapacityRAC * (1/CEERbase))/1,000

kWhEffCAC = $(FLHcool * Capacity * (1/(SEER2ee * (1 - DeratingCool_{Eff}))))/1,000$

Where:

FLHcool = Full load cooling hours

= dependent on location and building type:[422]

Climate Zone (City based upon)	FLHcool (single family)	FLHcool (multifamily)	FLH_cooling (weatherized multifamily)[423]
1 (Rockford)	547	499	320
2 (Chicago)	709	629	403
3 (Springfield)	779	707	453
4 (Belleville)	1,082	982	630
5 (Marion)	956	868	557
Weighted Average[424]			
ComEd	676	603	386
Ameren	875	791	507
Statewide	731	655	420

Use Multifamily if the Building meets the utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Capacity = Output capacity of new equipment in Btu/hr (note 1 ton = 12,000Btu/hr)

= Use actual when program delivery allows size of AC unit to be known. If unknown, use table:

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[422] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[423] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015. The multifamily units within this study had undergone significant shell improvements (air sealing and insulation) and therefore this set of assumptions is only appropriate for units that have recently participated in a weatherization or other shell program. Note that the FLHcool where recalculated based on existing efficiencies consistent with the TRM rather than from the metering study. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[424] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

Housing Type[425]	Capacity (Btu/hr)
Single Family Non-Low Income	37,200
Single Family Low Income	31,200
Multi-family Non-Low Income	28,800
Multi-family Low income	30,000
Mobile homes[426]	24,000
Unknown	33,600

SEER2base = Seasonal Energy Efficiency Ratio of baseline unit (kBtu/kWh)

= 13.4 SEER2 for standard sized units or 11.7 SEER2 for space constrained units[427]

SEER2exist = Seasonal Energy Efficiency Ratio 2 of existing unit (kBtu/kWh)

= Use actual SEER2 rating where it is possible to measure or reasonably estimate. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[428] or, if unknown, assume 9.2 SEER2.[429] If unknown value is used, it should not be derated by age.

SEER2ee = Rated Seasonal Energy Efficiency Ratio 2 of CEE unit (kBtu/kWh)

= Actual, or 17 SEER2 (17.9 SEER) if unknown.

$DeratingCool_{Eff}$ = Efficent Central Air Conditioner Cooling derating

= 0% if Quality Installation is performed

= 10% if Quality Installation is not performed or unknown[430]

$DeratingCool_{Base}$ = Baseline Central Air Conditioner Cooling derating

= 10%

#RACUnits = Number of Room AC units assumed to have been installed in mobile home or IQ home instead of a replacement CAC unit

= Actual, if unknown assume 3

CapacityRAC = Capacity of assumed Room AC unit

= Actual, if unknown assume 8500 Btu/hr[431]

CEERbase = Efficiency of baseline Room AC unit, assumed to be purchased through the secondary

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[425] All values except Mobile Home data based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential baseline Study Results”, Oct 31 2024.

[426] Mobile home capacity based on ENERGY STAR’s Manufactured Home Cooling Equipment Sizing Guidelines which vary by climate zone and home size. The average size of a mobile home in the East North Central region (1,120 square feet) from the 2015 RECS data is used to calculated appropriate size.

[427] Based on Minimum Federal Standard.

[428] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[429] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants, assumption provided for 2020; See ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’ Converted to SEER2.

[430] Based on Cadmus assumption provided in preparation of the 2014 Interstate Power and Light TRM based upon proper refrigerant charge, evaporator airflow, and unit sizing, Appears conservative in comparison to ENERGY STAR statements (see ‘Sponsoring an ENERGY STAR Verified HVAC Installation (ESVI) Program’).

[431] Based on maximum capacity average from the RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

market

= Actual (if existing unit has EER rating, convert to CEER by dividing by 1.01[432]).

If unknown assume 9.8 [433]

Time of sale non mobile-home/IQ example: a 3 ton unit with SEER2 rating of 17, EER2 rating of 12.5 in unknown location without Quality Install:

ΔkWH = (731 * 36,000 * (1/(13.4 * (1-0.1)) – 1 / (17 * (1-0.1)))) / 1,000

= 462 kWh

Time of sale example: a 3-ton unit with SEER2 rating of 17, EER2 rating of 12.5 in unknown location with Quality Install:

ΔkWH = (731 * 36,000 * (1/(13.4 * (1-0.1)) – 1 / (17 * (1-0)))) / 1,000

= 634 kWh

Time of sale mobile-home or IQ example: a 3-ton unit with SEER2 rating of 17, EER2 rating of 12.5 is installed with Quality Install in a mobile home in Belleville, in place of 3 Room AC units:

ΔkWH = kWhBaseRAC – kWhEffCAC

kWhBaseRAC = (3 * 1,082 * 8,500 * (1/9.8))/1,000

= 2,815 kWh

kWhEffCAC = (1,082 * 36,000 * (1/(17 * (1 – 0))))/1,000

= 2,291 kWh

ΔkWH = 2,815 – 2,291

= 524 kWh

Early replacement example: a 3-ton unit, with SEER2 rating of 17, EER2 rating of 12.5 replaces an existing unit in unknown location with quality installation:

ΔkWH(for first 8.3 years) = (731 * 36,000 * (1/(9.2 * (1-0.1)) - 1/(17 * (1-0))))/1,000

= 1,630 kWh

ΔkWH(for next 16.7 years) = (731 * 36,000 * (1/(13.4 * (1-0.1)) - 1/(17 * (1-0))))/1,000

= 634 kWh

Therefore, savings adjustment of 39% (634/1,630) after 8.3 years.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

Time of sale (Central AC):

ΔkW = (Capacity * (1/(EER2base * (1 – $DeratingCool_{Base}$)) - 1/(EER2ee * (1 – $DeratingCool_{Eff}$))))/1,000 *

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[432] This factor is used to appropriately compare with the new CEER rating which includes standby and off power consumption. Version 3.0 of the ENERGY STAR specification provided equivalent EER and CEER ratings and for the most popular size band the EER rating is approximately 1% higher than the CEER. See 'ENERGY STAR Version 3.0 Room Air Conditioners Program Requirements'.

[433] This is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) prior to 6/1/2014.

CF

Time of sale (Room AC applicable for mobile-homes or IQ only):

ΔkW = (kWBaseRAC – kWEffCAC) * CF

kWBaseRAC = (#RACUnits * CapacityRAC * (1/(CEERbase * 1.01)))/1,000

kWEffCAC = (Capacity * (1/(EER2ee (1 – DeratingCool$_{Eff}$))))/1,000

Early replacement:[434]

ΔkW for remaining life of existing unit (1st 8.3 years):

= (Capacity * (1/(EER2exist * (1 – DeratingCool$_{Base}$)) - 1/(EER2ee* (1 – DeratingCool$_{Eff}$))))/1,000 * CF

ΔkW for remaining measure life (next 16.7 years) – non mobile-homes:

= (Capacity * (1/(EER2base * (1 – DeratingCool$_{Base}$)) - 1/(EER2ee* (1 – DeratingCool$_{Eff}$))))/1,000 * CF

ΔkW for remaining measure life (next 16.7 years) –mobile-homes:

= (kWBaseRAC – kWEffCAC) * CF

kWBaseRAC = (#RACUnits * CapacityRAC * (1/(CEERbase * 1.01))/1,000

kWEffCAC = (Capacity * (1/(EER2ee (1 – DeratingCool$_{Eff}$))))/1,000

Where:

EER2base = EER2 Efficiency of baseline unit

= 10.6 EER2 for standard sized units[435]

= 9.2 EER2 for space constrained units

EER2exist = EER2 Efficiency of existing unit

= Use actual EER2 rating where it is possible to measure or reasonably estimate. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[436] If unknown, assume 7.4 EER2.[437] If unknown value is used, it should not be derated by age.

EER2ee = EER2 Efficiency of CEE unit

= Actual installed or 12 EER2 if unknown

CF$_{SSP}$ = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

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[434] The two equations are provided to show how savings are determined during the initial phase of the measure (existing to efficient) and the remaining phase (new baseline to efficient). In practice, the screening tools used may either require a First Year savings (using the first equation) and then a “number of years to adjustment” and “savings adjustment” input which would be the (new base to efficient savings)/(existing to efficient savings).

[435] The federal Standard does not currently include an EER2 component. The value provided is based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Converted to EER2.

[436] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[437] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Converted to EER2.

= 68%[438]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during peak period)

= 46.6%[439]

Time of sale non mobile-home/IQ example: a 3 ton unit with EER2 rating of 12 with Quality Install:

ΔkW_{SSP} = (36,000 * (1/(10.6 * (1-0.1)) – 1/(12 * (1-0)))) / 1,000 * 0.68

= 0.5260 kW

ΔkW_{PJM} = (36,000 * (1/(10.6 * (1-0.1)) – 1/(12 * (1-0)))) / 1,000 * 0.466

= 0.3605 kW

Time of sale mobile-home or IQ example: a 3 ton unit with EER2 rating of 12 is installed with Quality Install in a mobile home, in place of 4 Room AC units:

ΔkW = (kWBaseRAC – kWEffCAC) * CF

kWBaseRAC = (4 * 8,500 * (1/(9.8*1.01)))/1,000

= 3.435 kW

kWEffCAC = (36,000 * (1/(12 * (1 – 0))))/1,000

= 3.0000kW

ΔkW_{SSP} = (3.435 – 3.0000) * 0.68

= 0.2958 kW

ΔkW_{PJM} = (3.435 – 3.0000) * 0.466

= 0.2027 kW

Early replacement example: a 3 ton unit with EER2 rating of 12 replaces an existing unit with Quality Install:

ΔkW_{SSP} (for first 8.3 years)= (36,000 * (1/(7.4 * (1-0.1)) – 1/(12 * (1-0)))) / 1,000 * 0.68

= 1.636 kW

ΔkW_{SSP} (for next 16.7 years) = (36,000 * (1/(10.1 * (1-0.1)) – 1/(12 * (1-0)))) / 1,000 * 0.68

= 0.653 kW

ΔkW_{PJM} (for first 8.3 years) = (36,000 * (1/(7.4 * (1-0.1)) – 1/(12 * (1-0)))) / 1,000 * 0.466

= 1.121 kW

ΔkW_{PJM} (for next 16.7 years)= (36,000 * (1/(10.1 * (1-0.1)) – 1/(12 * (1-0)))) / 1,000 * 0.466

= 0.448 kW

FOSSIL FUEL SAVINGS

N/A

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[438] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[439] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-CAC1-V15-270101

REVIEW DEADLINE: 1/1/2030

5.3.4 Duct Insulation and Sealing

DESCRIPTION

This measure describes evaluating the savings associated with adding duct insulation or performing duct sealing using mastic sealant, metal tape, or injection of UL certified and low VOC for sealant to the distribution system of homes with either central air conditioning or a ducted heating system.

Three methodologies for estimating the savings associate with sealing the ducts are provided, one of which can also be used to estimate duct insulation savings. The first preferred method requires the use of a blower door, the second method requires a pressurized duct test, and the third requires careful inspection of the duct work.

1. **Modified Blower Door Subtraction** – this technique is described in detail on the Energy Conservatory website. See 'The Energy Conservatory_Blower-Door-Subtraction-Method.pdf'.
2. **Pressurized Duct Test** – this technique includes direct measurement of air leaks in the duct system.
3. **Evaluation of Distribution Efficiency** – this methodology can be used to estimate duct insulation or duct sealing savings, and requires the evaluation of three duct characteristics below, and use of the Building Performance Institutes 'Distribution Efficiency Look-Up Table'[440].
    a. Percentage of duct work found within the conditioned space
    b. Duct leakage evaluation
    c. Duct insulation evaluation

For mobile home applications, the third method that evaluates both distribution efficiency and insulation is recommended in place of the blower door test and default assumptions for typical improvements are provided.

This measure was developed to be applicable to the following program types: RF. If applied to other program types, the measure savings should be verified.

For duct insulation and sealing of central systems in multifamily buildings, use Volume 2 Commercial and Industrial Measures.

DEFINITION OF EFFICIENT EQUIPMENT

For duct sealing, the efficient condition is sealed duct work throughout the unconditioned or semi-conditioned space in the home. A non-conditioned space is defined as a space outside of the thermal envelope of the building that is not intentionally heated for occupancy (crawl space, roof attic, etc.). A semi-conditioned space is defined as a space within the thermal envelop that is not intentionally heated for occupancy (unfinished basement).[441]

For duct insulation, the efficient condition is ductwork insulated with a minimum of R-4 insulation in an unconditioned or semi-conditioned space in the home.

DEFINITION OF BASELINE EQUIPMENT

For duct sealing, the existing baseline condition is leaky duct work within the unconditioned or semi-conditioned space in the home. For mobile home projects that do not also claim 5.6.1 Air Sealing savings, the default baseline condition is leaky duct work. For mobile home projects that also claim 5.6.1 Air Sealing savings, the baseline condition is tight duct work in order to minimize double counting of duct savings within the blower door driven Air Sealing measure.

For duct insulation, the baseline condition is un-insulated ductwork that passes through an unconditioned or semi-conditioned space in the home. For mobile home projects with a missing belly wrap or very poor belly condition, the default baseline condition is uninsulated ductwork. For mobile home projects with fair to poor belly condition, the

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[440] Building Performance Institute, Distribution Efficiency Look-up Tables. https://www.bpi.org/sites/default/files/Guidance%20on%20Estimating%20Distribution%20Efficiency.pdf

[441] Definition matches Regain factor discussed in Home Energy Services Impact Evaluation, prepared for the Massachusetts Residential Retrofit and Low Income Program Area Evaluation, Cadmus Group, Inc., August 2012

default baseline condition is R-2 insulated ductwork.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of this measure is 20 years.[442]

Note: a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years.[443] See section below for detail.

DEEMED MEASURE COST

The actual duct sealing or insulating measure cost should be used.

LOADSHAPE

Loadshape R08 - Residential Cooling

Loadshape R09 - Residential Electric Space Heat

Loadshape R10 - Residential Electric Heating and Cooling (Shell Measures)

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[444]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[445]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

For Methodology 1: Modified Blower Door Subtraction, follow steps (a) through (c)

For Methodology 2: Pressurized Duct Test, follow step (c)

a) Determine Duct Leakage rate before and after performing duct sealing:
Duct Leakage ($CFM50_{DL}$) = ($CFM50_{Whole\ House}$ – $CFM50_{Envelope\ Only}$) * SCF

Where:

$CFM50_{Whole\ House}$ = Standard Blower Door test result finding Cubic Feet per Minute at 50 Pascal pressure differential

$CFM50_{Envelope\ Only}$ = Blower Door test result finding Cubic Feet per Minute at 50 Pascal pressure

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[442] Measure Life Report, Residential and Commercial/Industrial Lighting and HVAC Measures, GDS Associates, June 2007.

[443] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

[444] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[445] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

differential with all supply and return registers sealed.

SCF = Subtraction Correction Factor to account for underestimation of duct leakage due to connections between the duct system and the home. Determined by measuring pressure in duct system with registers sealed and using look up table provided by Energy Conservatory.

b) Calculate duct leakage reduction, convert to $CFM25_{DL}$ and factor in Supply and Return Loss Factors

Duct Leakage Reduction ($\Delta CFM25_{DL}$) = (Pre $CFM50_{DL}$ – Post $CFM50_{DL}$) * 0.64 * (SLF + RLF)

Where:

0.64 = Converts CFM50 to CFM25[446]

SLF = Supply Loss Factor

= % leaks sealed located in Supply ducts * 1 [447]

Default = 0.5[448]

RLF = Return Loss Factor

= % leaks sealed located in Return ducts * 0.5[449]

Default = 0.25[450]

c) Calculate Electric Energy Savings:

ΔkWh = $\Delta kWh_{cooling}$ + $\Delta kWh_{heatingElectric}$ + ΔkWh_{Fan}

$\Delta kWh_{cooling}$ = (($\Delta CFM25_{DL}$/ ((OutputCapacityCool/12,000) * 400)) * FLHcool * OutputCapacityCool * %Cool) / 1,000 / ηCool

$\Delta kWh_{heatingElectric}$ = (($\Delta CFM25_{DL}$ /((OutputCapacityHeat/12,000) * 400)) * $FLHheat_{Elec}$ * OutputCapacityHeat * TRFheat *%ElectricHeat) / ηHeat / 3412

ΔkWh_{Fan} If fossil fueled furnace: = (ΔTherms * %FurnaceFossil * F_e * 29.3)

If electric furnace: = ΔkWh_heating * %FurnaceElectric * F_e

Where:

$\Delta CFM25_{DL}$ = Duct leakage reduction in CFM25

= For Methodology 1: Modified Blower Door Subtraction,calculated above

---

[446] 25 Pascals is the standard assumption for typical pressures experienced in the duct system under normal operating conditions. To convert CFM50 to CFM25 you multiply by 0.64 (inverse of the "Can't Reach Fifty" factor for CFM25; see Energy Conservatory Blower Door Manual).

[447] Assumes that for each percent of supply air loss there is one percent annual energy penalty. This assumes supply side leaks are direct losses to the outside and are not recaptured back to the house. This could be adjusted downward to reflect regain of usable energy to the house from duct leaks. For example, during the winter some of the energy lost from supply leaks in a crawlspace will probably be regained back to the house (sometimes 1/2 or more may be regained). More information provided in "Appendix E Estimating HVAC System Loss From Duct Airtightness Measurements" from Energy Conservatory 'Minneapolis Duct Blaster Operation Manual'.

[448] Assumes 50% of leaks are in supply ducts.

[449] Assumes that for each percent of return air loss there is a half percent annual energy penalty. Note that this assumes that return leaks contribute less to energy losses than do supply leaks. This value could be adjusted upward if there was reason to suspect that the return leaks contribute significantly more energy loss than "average" (e.g. pulling return air from a super heated attic), or can be adjusted downward to represent significantly less energy loss (e.g. pulling return air from a moderate temperature crawl space) . More information provided in "Appendix E Estimating HVAC System Loss From Duct Airtightness Measurements" from Energy Conservatory 'Minneapolis Duct Blaster Operation Manual'.

[450] Assumes 50% of leaks are in return ducts.

= For Methodology 2: Pressurized Duct Test, use actual

OutputCapacityCool = Output capacity of Air Cooling system (Btu/hr)

= Actual

12,000 = Converts Btu/H capacity to tons

400 = Converts capacity in tons to CFM (400CFM / ton)[451]

FLHcool = Full load cooling hours

= Dependent on location as below:[452]

Climate Zone (City based upon)	FLHcool Single Family	FLHcool Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1,082	982
5 (Marion)	956	868
Weighted Average[453]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

%Cool = Percent of homes that have cooling

Cooling (Central)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[454]	98.9%	96.5%	99.8%	98.7%	98.6%

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2) of Air Conditioning equipment (kBtu/kWh) * $DistEff_{base}$

$DistEff_{base}$ = Distribution Efficiency of base condition

= Actual where it is possible to measure or reasonably estimate. If unknown assume 0.85[455]

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[451] This conversion is an industry rule of thumb; e.g. see 'Why 400 CFM per ton.pdf'.

[452] Based on Full Load Hours from ENERGY STAR with adjustments made in a Navigant Evaluation, other cities were scaled using those results and CDD. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[453] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[454] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[455] Based on Building Performance Institute Inc., "Duct Efficiency Tables".

= Actual. If unknown assume the following:[456]

Age of Equipment	SEER2 Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
After 2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Unknown (for use in program evaluation only)[457]		
Single Family Non-IQ		10.5
Single Family IQ		10.5
Multi Family Non-IQ		10.6
Multi Family IQ		10.5
Unknown		10.5

ΔTherms = Therm savings as calculated in Fossil Fuel Savings

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[458]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[459]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[460]

29.3 = kWh per therm

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[456] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[457] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[458] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[459] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[460] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

For example, duct sealing in unconditioned space a single family house in Springfield with a 36,000 Btu/H, SEER 11 central air conditioning with 85% estimated distribution efficiency, an 80% AFUE, 105,000 Btu/H natural gas furnace and the following blower door test results:

Before: $CFM50_{Whole\ House}$ = 4800 CFM50

$CFM50_{Envelope\ Only}$ = 4500 CFM50

House to duct pressure of 45 Pascals. = 1.29 SCF (Energy Conservatory look up table)

After: $CFM50_{Whole\ House}$ = 4600 CFM50

$CFM50_{Envelope\ Only}$ = 4500 CFM50

House to duct pressure of 43 Pascals = 1.39 SCF (Energy Conservatory look up table)

Duct Leakage:

$CFM50_{DL\ before}$ = (4800 – 4500) * 1.29

= 387 CFM

$CFM50_{DL\ after}$ = (4600 – 4500) * 1.39

= 139 CFM

Duct Leakage reduction at CFM25:

$\Delta CFM25_{DL}$ = (387 – 139) * 0.64 * (0.5 + 0.25)

= 119 CFM25

Energy Savings:

$\Delta kWh_{cooling}$ = [((119 / ((36,000/12,000) * 400)) * 779 * 36,000) / 1000 / (11 * 0.85)] + (179 * 0.0314 * 29.3)

= 297 + 165

= 462 kWh

Heating savings for homes with electric heat:

$\Delta kWh_{heatingElectric}$ = (($\Delta CFM25_{DL}$ /((OutputCapacityHeat/12,000) * 400)) * $FLHheat_{Elec}$ * OutputCapacityHeat * TRFheat *%ElectricHeat) / ηHeat / 3412

Where:

OutputCapacityHeat = Heating output capacity (Btu/hr) of electric heat

=Actual

$FLHheat_{Elec}$ = Full load heating hours for electric heat

= Dependent on location as below:[461]

Climate Zone (City based upon)	FLH_heat
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion/Murphysboro)	1270

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[461] Heating EFLH based on ENERGY STAR EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL.

Climate Zone (City based upon)	FLH_heat
Weighted Average[462]	
ComEd	1766
Ameren	1547
Statewide	1700

TRFheat = Thermal Regain Factor for heating by supply duct location

= 1.0 for Attic or other unconditioned space above living area[463]

= 0.72 for Crawlspace or Basement with house floor insulation

= 0.40 for Crawlspace or Basement without house floor insulation

= 0.92 for Under belly of Manufactured Home

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Electric Furnace) or Heat Pump

= 0 % for Natural Gas

= If unknown[464], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[465]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

ηHeat = Efficiency in COP of Heating equipment * $DistEff_{base}$

$DistEff_{base}$ = Distribution Efficiency of base condition

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[462] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[463] See Walker, 1998, "Technical Background for Default Values used for Forced Air Systems in Proposed ASHRAE Standard 152P," LBNL-40588, https://www.osti.gov/servlets/purl/821316. The value for Crawlspaces or Basements with house floor insulation is an average of all crawlspace and basement regain factors with house floor insulation and air infiltration of 1 or less ACHs (Tables 9 and 10). The value for Manufactured Homes is based on the crawlspace with air infiltration of 10 ACHs (Table 9) which is representative of the conditions faced by most manufactured homes.

[464] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[465] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

= Actual where it is possible to measure or reasonably estimate. If unknown assume 0.85[466]

= Actual. If not available use:[467]

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Electric Furnace)	N/A	N/A	1.00
Unknown (for use in program evaluation only)[468]	N/A	N/A	1.32

3412 = Converts Btu to kWh

For example, duct sealing in an attic in a 36,000 Btu/H 2.5 COP heat pump heated single family house in Springfield with the blower door results described above:

$\Delta kWh_{heating}$ = ((119 / ((36,000/12,000) * 400)) * 1,708 * 36,000 * 1 * 1) / 2.5 / 3,412

= 715 kWh

Methodology 3: Evaluation of Distribution Efficiency

Determine Distribution Efficiency by evaluating duct system before and after duct sealing or duct insulating using Building Performance Institute “Distribution Efficiency Look-Up Table”.

$\Delta kWh = ((((DE_{after} - DE_{before}) / DE_{after}) * FLHcool * CapacityCool * \%Cool)/1,000 / \eta Cool) + (\Delta Therms * F_e * 29.3)$

Where:

DE_{after} = Distribution Efficiency after duct sealing, see table below[469]

For mobile home projects:

= 0.94 for cooling (“R-4+, Tight” for “Vented Crawl”)

DE_{before} = Distribution Efficiency before duct sealing, see table below[470]

---

[466] Based on Building Performance Institute Inc., “Duct Efficiency Tables”.

[467] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

[468] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is assumed consistent with the baseline for 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[469] Building Performance Institute, Distribution Efficiency Look-up Tables, Climate Zones 4-5. https://www.bpi.org/sites/default/files/Guidance%20on%20Estimating%20Distribution%20Efficiency.pdf

[470] Ibid

Insulation	Sealing	Cooling		
		Attic	Basement	Vented Crawl
R-0	Leaky	61%	81%	76%
	Average	64%	87%	83%
	Tight	73%	94%	91%
R-2	Leaky	65%	83%	78%
	Average	74%	88%	85%
	Tight	84%	95%	93%
R-4	Leaky	67%	83%	79%
	Average	77%	89%	86%
	Tight	87%	95%	94%
R-8	Leaky	69%	83%	79%
	Average	79%	89%	87%
	Tight	90%	95%	94%

For mobile home projects claiming duct insulation and sealing savings without 5.6.1 Air Sealing:
= 0.76 for very poor belly condition, cooling (“R-0, Leaky” for “Vented Crawl”)
= 0.78 for fair to poor belly condition, cooling (“R-2, Leaky” for “Vented Crawl”)

For mobile home projects claiming duct insulation and sealing savings and 5.6.1 Air Sealing:
= 0.91 for very poor belly condition, cooling (“R-0, Tight” for “Vented Crawl”)
= 0.93 for fair to poor belly condition, cooling (“R-2, Tight” for “Vented Crawl”)

FLHcool = Full load cooling hours

= Dependent on location as below:[471]

Climate Zone (City based upon)	FLHcool Single Family	FLHcool Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1,082	982
5 (Marion)	956	868
Weighted Average[472]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility’s definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

CapacityCool = Capacity of Air Cooling system (Btu/hr)

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[471] Based on Full Load Hours from ENERGY STAR with adjustments made in a Navigant Evaluation, other cities were scaled using those results and CDD. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[472] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

= Actual

%Cool = Percent of homes that have cooling

Cooling (Central)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[473]	98.9%	96.5%	99.8%	98.7%	98.6%

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2) of Air Conditioning equipment (kBtu/kWh) * $DistEff_{base}$

$DistEff_{base}$ = Distribution Efficiency of base condition

= Actual where it is possible to measure or reasonably estimate. If unknown assume 0.85[474]

= Actual. If unknown assume:[475]

Age of Equipment	SEER2 Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
After 2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Unknown (for use in program evaluation only)[476]		
Single Family Non-IQ		10.5
Single Family IQ		10.5
Multi Family Non-IQ		10.6
Multi Family IQ		10.5

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[473] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[474] Based on Building Performance Institute Inc., "Duct Efficiency Tables".

[475] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[476] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

For example, duct sealing in an attic space in a single family house in Springfield, with 36,000 Btu/H SEER 11 central air conditioning and estimated 85% distribution efficiency, an 80% AFUE, 105,000 Btu/H natural gas furnace and the following duct evaluation results:

DE_{before} = 0.85

DE_{after} = 0.92

Energy Savings:

$\Delta kWh_{cooling}$ = ((((0.92 – 0.85)/0.92) * 779 * 36,000 * 1) / 1000 / (11 * 0.85)) + (179 * 0.0314 * 29.3)

= 228 + 165

= 393 kWh

Heating savings for homes with electric heat:

$\Delta kWh_{heatingElectric}$ = $((DE_{after} – DE_{before})/ DE_{after})) * FLHheat_{Elec} * OutputCapacityHeat * TRFheat * \%ElectricHeat) / \eta Heat / 3412$

Where:

DE_{after} = Distribution Efficiency after duct sealing, see table below[477]

For mobile home projects:

= 0.92 for heating (“R-4+, Tight” for “Vented Crawl”)

DE_{before} = Distribution Efficiency before duct sealing, see table below[478]

Insulation	Sealing	Heating		
		Attic	Basement	Vented Crawl
R-0	Leaky	69%	93%	74%
	Average	73%	94%	78%
	Tight	77%	95%	82%
R-2	Leaky	76%	94%	80%
	Average	82%	96%	85%
	Tight	87%	97%	90%
R-4	Leaky	79%	95%	82%
	Average	84%	96%	87%
	Tight	90%	98%	92%
R-8	Leaky	80%	95%	84%
	Average	86%	97%	89%
	Tight	92%	98%	94%

For mobile home projects claiming duct insulation and sealing savings without 5.6.1 Air Sealing:

= 0.74 for very poor belly condition, heating (“R-0, Leaky” for “Vented Crawl”)

= 0.80 for fair to poor belly condition, heating (“R-2, Leaky” for “Vented Crawl”)

For mobile home projects claiming duct insulation and sealing savings and 5.6.1 Air Sealing:

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[477] Building Performance Institute, Distribution Efficiency Look-up Tables, Climate Zones 4-5. https://www.bpi.org/sites/default/files/Guidance%20on%20Estimating%20Distribution%20Efficiency.pdf

[478] Ibid

= 0.82 for very poor belly condition, heating (“R-0, Tight” for “Vented Crawl”)
= 0.90 for fair to poor belly condition, heating (“R-2, Tight” for “Vented Crawl”)

OutputCapacityHeat = Heating output capacity (Btu/hr) of the electric heat

= Actual

FLHheat = Full load heating hours for electric heat

= Dependent on location as below:[479]

Climate Zone (City based upon)	FLH_heat
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion)	1270
Weighted Average[480]	
ComEd	1766
Ameren	1547
Statewide	1700

TRFheat = Thermal Regain Factor for heating by supply duct location

= 1.0 for Attic or other unconditioned space above living area[481]

= 0.72 for Crawlspace or Basement with house floor insulation

0.40 for Crawlspace or Basement without house floor insulation

0.92 for Under belly of Manufactured Home

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Electric Furnace) or Heat Pump

= 0 % for Natural Gas

= If unknown[482], use the following table:

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[479] Heating EFLH based on ENERGY Star EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL.

[480] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[481] See Walker, 1998, “Technical Background for Default Values used for Forced Air Systems in Proposed ASHRAE Standard 152P,” LBNL-40588, https://www.osti.gov/servlets/purl/821316. The value for Crawlspaces or Basements with house floor insulation is an average of all crawlspace and basement regain factors with house floor insulation and air infiltration of 1 or less ACHs (Tables 9 and 10). The value for Manufactured Homes is based on the crawlspace with air infiltration of 10 ACHs (Table 9) which is representative of the conditions faced by most manufactured homes.

[482] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[483]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

ηHeat = Coefficient of Performance of electric heating system[484] * $DistEff_{base}$

$DistEff_{base}$ = Distribution Efficiency of base condition

= Actual where it is possible to measure or reasonably estimate. If unknown assume 0.85 for heat pump, 1.0 for resistance heating[485]

= Actual. If not available use:[486]

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Electric Furnace)	N/A	N/A	1.00
Unknown (for use in program evaluation only)[487]	N/A	N/A	1.32

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[483] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[484] Note that the HSPF2 of a heat pump is equal to the COP * 3.412.

[485] Based on Building Performance Institute Inc., “Duct Efficiency Tables”.

[486] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

[487] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is assumed consistent with the baseline for 2006-2014. Program or evaluation data should be used to improve this assumption if available.

For example, duct sealing in an attic space in a 36,000 Btu/H, 2.5 COP heat pump heated with estimated 85% distribution efficiency single family house in Springfield with the following duct evaluation results:

DE_{after} = 0.92

DE_{before} = 0.85

Energy Savings:

$\Delta kWh_{heating}$ = ((0.92 – 0.85)/0.92) * 1,708 * 36,000 * 1 * 1) / (2.5 * 0.85)) / 3,412

= 645 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$\Delta kW = \Delta kWh_{cooling} / FLHcool * CF$

Where:

FLHcool = Full load cooling hours:

= Dependent on location as below:[488]

Climate Zone (City based upon)	FLHcool Single Family	FLHcool Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1,082	982
5 (Marion)	956	868
Weighted Average[489]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility’s definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

= 68%[490]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during peak period)

= 46.6%[491]

FOSSIL FUEL SAVINGS

<u>For homes with Fossil Fuel Heating:</u>

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[488] Based on Full Load Hours from ENERGY Star with adjustments made in a Navigant Evaluation, other cities were scaled using those results and CDD. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[489] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[490] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[491] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Methodology 1: Modified Blower Door Subtraction

Methodology 2: Pressurized Duct Test

ΔTherm = $(((\Delta CFM25_{DL} / (InputCapacityHeat * 0.0123)) * FLHheat_{Fossil} * InputCapacityHeat * TRFheat * \%FossilHeat * (\eta Equipment / \eta System)) / 100,000$

Where:

$\Delta CFM25_{DL}$ = Duct leakage reduction in CFM25

InputCapacityHeat = Heating input capacity (Btu/hr)

=Actual

0.0123 = Conversion of Capacity to CFM (0.0123CFM / Btu/hr)[492]

$FLHheat_{Fossil}$ = Full load heating hours for fossil heating

=Dependent on location as below:

Climate Zone (City based upon)	$FLHheat_{Fossil}$ [493]
1 (Rockford)	1022
2 (Chicago)	976
3 (Springfield)	836
4 (Belleville)	645
5 (Marion)	656
Weighted Average[494]	
ComEd	978
Ameren	800
Statewide	928

TRFheat = Thermal Regain Factor for heating by supply duct location

= 1.0 for Attic or other unconditioned space above living area[495]

= 0.72 for Crawlspace or Basement with house floor insulation

= 0.40 for Crawlspace or Basement without house floor insulation

= 0.92 for Under belly of Manufactured Home

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[492] Based on Natural Draft Furnaces requiring 100 CFM per 10,000 Btu, Induced Draft Furnaces requiring 130CFM per 10,000Btu and Condensing Furnaces requiring 150 CFM per 10,000 Btu (rule of thumb from ‘Practical Standards to Measure HVAC System Performance’). Data provided by GAMA during the federal rule-making process for furnace efficiency standards, suggested that in 2000, 24% of furnaces purchased in Illinois were condensing units. Therefore, a weighted average required airflow rate is calculated assuming a 50:50 split of natural v induced draft non-condensing furnaces, as 123 per 10,000Btu or 0.0123/Btu.

[493] Full load hours for Chicago, are based on findings in ‘Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60F.

[494] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[495] See Walker, 1998, “Technical Background for Default Values used for Forced Air Systems in Proposed ASHRAE Standard 152P,” LBNL-40588, https://www.osti.gov/servlets/purl/821316. The value for Crawlspaces or Basements with house floor insulation is an average of all crawlspace and basement regain factors with house floor insulation and air infiltration of 1 or less ACHs (Tables 9 and 10). The value for Manufactured Homes is based on the crawlspace with air infiltration of 10 ACHs (Table 9) which is representative of the conditions faced by most manufactured homes.

%FossilHeat = Percent of homes that have gas space heating

= 100 % for Natural Gas

= 0 % for Electric Resistance (Electric Furnace) or Heat Pump

= If unknown[496], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[497]					75.4%

Note: If a measure is supported by a gas and electric utility, utilize the assumptions above for the gas utility

100,000 = Converts Btu to therms

ηEquipment = Heating Equipment Efficiency

= Actual.[498] If not available, use 83%.[499]

ηSystem = Pre duct sealing Heating System Efficiency (Equipment Efficiency * Pre Distribution Efficiency)[500]

= Actual. If not available, use 70%[501]

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[496] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[497] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[498] The Equipment Efficiency can be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test.

If there are more than one heating systems, the weighted (by consumption) average efficiency should be used.

If the heating system or distribution is being upgraded within a package of measures together with the insulation upgrade, the new average heating system efficiency should be used.

[499] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey). In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:

(0.24*0.92) + (0.76*0.8) = 0.829

[500] The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see ‘DistributionEfficiencyTable-Blue Sheet’) or by performing duct blaster testing.

[501] Estimated as follows: 0.829 * (1-0.15) = 0.70

For example, duct sealing in an attic space in a house in Springfield with an 80% AFUE, 105,000 Btu/H (input capacity) natural gas furnace and the following blower door test results:

Before: $CFM50_{Whole\ House}$ = 4800 CFM50

$CFM50_{Envelope\ Only}$ = 4500CFM50

House to duct pressure of 45 Pascals = 1.29 SCF (Energy Conservatory look up table)

After: $CFM50_{Whole\ House}$ = 4600 CFM50

$CFM50_{Envelope\ Only}$ = 4500CFM50

House to duct pressure of 43 Pascals = 1.39 SCF (Energy Conservatory look up table)

Duct Leakage:

$CFM50_{DL\ before}$ = (4800 – 4500) * 1.29

= 387 CFM

$CFM50_{DL\ after}$ = (4600 – 4500) * 1.39

= 119 CFM

Duct Leakage reduction at CFM25:

$\Delta CFM25_{DL}$ = (387 – 139) * 0.64 * (0.5 + 0.25)

= 119 CFM25

Energy Savings:

Pre Distribution Efficiency = 1 – (387/4800) = 92%

ηSystem = 80% * 92% = 74%

ΔTherm = ((119/ (105,000 * 0.0123)) * 836 * 105,000 * 1 *(0.8/0.74)) / 100,000

= 87.4 therms

Methodology 3: Evaluation of Distribution Efficiency

$$\Delta Therm = ((DE_{after} - DE_{before})/ DE_{after})) * FLHheat_{Fossil} * InputCapacityHeat * TRFheat * \%FossilHeat * (\eta Equipment / \eta System)) / 100{,}000$$

Where:

DE_{after} = Distribution Efficiency after duct sealing, refer to table in electric heating savings section

DE_{before} = Distribution Efficiency before duct sealing, refer to table in electric heating savings section

Other factors as defined above.

For example, duct sealing in an attic space in a house in Springfield an 80% AFUE, 105,000 Btu/H (input capacity) natural gas furnace and the following duct evaluation results:

DE_{after} = 0.92

DE_{before} = 0.85

Energy Savings:

ηSystem = 80% * 85% = 68%

ΔTherm = (((0.92 – 0.85)/0.92) * 836 * 105,000 * 1 * 1 * (0.8/0.68)) / 100,067

= 78.5 therm

Mid-Life Adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied.

For electric HVAC, to calculate the adjustment, re-calculate the savings using the algorithms in the ‘Electric Energy Savings’ section using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC	13.4 SEER2
	Heat Pump	14.3 SEER2
ηHeat	Heat Pump (7.5/3.412)	2.20 COP

For gas fueled systems, because the algorithm uses input capacity (which already accounts for the equipment efficiency), the *change* in equipment efficiency needs to be accounted for. Therefore, re-calculate the savings using the following algorithm:

Methodology 1: Modified Blower Door Subtraction

Methodology 2: Pressurized Duct Test

ΔTherms = (($\Delta CFM25_{DL}$ / (InputCapacityHeat * 0.0123)) * $FLHheat_{Fossil}$ * InputCapacityHeat * TRFheat * %FossilHeat * (ηEquipment / ($ηEquipment_{New}$ * DE_{after})) / 100,000

Where:

$ηEquipment_{New}$ = 80% AFUE

DE_{after} = Distribution efficiency after duct sealing

= 1 – ($CFM50_{DL\ After}$ / $CFM50_{Whole\ House\ After}$)

Methodology 3: Evaluation of Distribution Efficiency

ΔTherms = ((DE_{after} – DE_{before})/ DE_{after})) * $FLHheat_{Fossil}$ * InputCapacityHeat * TRFheat * %FossilHeat * (ηEquipment / ($ηEquipment_{New}$ * DE_{after})) / 100,000

Where:

$ηEquipment_{New}$ = 80% AFUE

DE_{after} = Distribution efficiency after duct sealing

= As evaluated using the Building Performance Institutes ‘Distribution Efficiency Look-Up Table’

The re-calculated reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimated to be 10 years.[502] Note: if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

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[502] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-DINS-V16-270101

REVIEW DEADLINE: 1/1/2031

5.3.5 Furnace Blower Motor

DESCRIPTION

This measure describes savings from a brushless permanent magnet (BPM) motor (known and referred in this measure as an electronically commutated motor (ECM)) compared to a lower efficiency motor. Time of Sale and New Construction replacement scenarios no longer apply to this measure, as federal standards make ECM blower fan motors a requirement for residential furnaces.[503] Savings however are available from retrofitting an ECM motor into an existing furnace, or replacing an operational inefficient furnace with a new furnace with an ECM prior to the end of its life.

This measure characterizes the electric savings associated with the fan and the interactive negative therm savings due to a reduction in waste heat of the fan when operating in heating mode.

Savings decrease sharply with static pressure so duct improvements, and clean, low pressure drop filters can maximize savings. Savings occur when the blower is used for heating, cooling as well as when it is used for continuous ventilation, but only if the non-ECM motor would have been used for continuous ventilation too. If the resident runs the ECM blower continuously because it is a more efficient motor and would not run a non-ECM motor that way, savings are near zero and possibly negative. This characterization uses a 2016 Ameren Illinois study of ECM blower motors in Illinois, which accounted for the effects of this behavioral impact through surveyed results of impacted homeowners.

Retrofitting an existing blower motor with a new ECM reduces the potential impact of the high efficiency motor over a new system designed for an ECM blower motor because existing systems were not designed to capitalize and take advantage of the ECM's multi-staging features. Energy and demand savings are limited to the efficiency gains from the motor itself.

Note: as part of a Time of Sale measure, it is not appropriate to claim additional ECM fan savings due to installing a new furnace or CAC unit as ECM motors are now baseline for new furnaces and the SEER2/EER2 ratings of a CAC unit already account for this electrical load.

In an early replacement furnace situation, ECM fan heating savings can be claimed for the RUL of the existing furnace, and cooling savings can be claimed for the RUL of the CAC if an existing cooling unit is not replaced.

If a new CAC unit is installed in a home where the existing furnace is not replaced, heating ECM savings should only be claimed if it can be demonstrated that the new CAC motor will be used for the heating load.

This measure was developed to be applicable to the following program types: RF, EREP

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

A brushless permanent magnet (ECM) blower motor, also known by the trademark ECM, BLDC, and other names.

DEFINITION OF BASELINE EQUIPMENT

A non-ECM blower motor.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 6 years, which is the remaining life of existing furnaces.[504]

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[503] As part of the code of federal regulations, energy conservation standards for covered residential furnace fans become effective on July 3, 2019 (10 CFR 430.32(y)). The expectation is the baseline will essentially become an ECM motor.

[504] While ECM blower motors have an effective useful life of 15 year (consistent with assumed life of a BPM/ECM motor, Appendix 8-E of the DOE Technical support documents for federal residential appliance standards) as this is a retrofit measure on an existing furnace blower motor, the remaining useful life of that equipment is used. For more detail, please see 5.3.7 Gas High Efficiency Furnace

DEEMED MEASURE COST

The capital cost for this measure as a retrofit should be actual if known; if unknown, assume $350.[505] In cases of furnace early replacements, it is assumed the incremental cost of the ECM is $0.

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

ECMs installed in high efficiency CACs and ASHPs do not generate peak demand cooling savings if demand savings are claimed for these systems. However, some savings are realized for fans operating in circulation mode, even during peak demand cooling periods. Circulation mode operation during peak cooling periods would only occur when a system is not operating in cooling mode, with the percent time in circulation mode calculated using the summer system peak and PJM peak coincidence factors. A metering study found 23% of fans operated continuously during the summer peak periods;[506] therefore, ECMs do generate some demand savings during peak periods (when the system is not cooling). ECMs installed with CACs or ASHPs not receiving a rebate improve the cooling efficiency and therefore generate additional peak demand savings (when the system is cooling). Demand savings vary with system size and can be calculated using factors listed in the demand savings calculation table in the next section which incorporate coincidence with peak in their calculation.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = Capacity\_cooling * kWhSavingsPerTon$$

Where:

Capacity_cooling = Capacity of cooling system in tons

= Actual (1 ton = 12,000Btu/hr)

kWhSavingsPerTon = Blower fan kWh savings per ton of cooling[507]

The per-ton energy savings values vary by system installation scenario and location as provided below. Assumptions are also provided for installation with no or unknown cooling system.

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[505] The cost of a typical replacement motor is estimated at $180 based on quotes from online suppliers, plus $17 for the bracket. Typical labor costs are estimated at between $140 and $190 based on program experience provided by Staples in April 2022. A total retrofit measure cost is therefore estimated at $350.

[506] See Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018'.

[507] Tons of cooling was determined to be the most straightforward multiplier to apply to systems in which the BPM is installed. The basis of the values and for more information see Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018'.

Region	Existing ASHP	Existing CAC	Furnace, No Cooling System*	Furnace, Cooling System unknown* [508]
Rockford	247	229	210	223
Chicago	245	230	208	222
Springfield	249	231	203	221
Belleville	247	235	196	222
Marion	242	231	196	219
Average	247	230	206	222
*Multiply kWh saved value by 2 tons for furnaces <70 kBTU, by 3 tons for furnaces 70 kBTU – 90 kBTU and by 4 tons for furnaces 90+ kBTU.				

For example, an BPM installed in an existing 3-ton, 16 SEER CAC in a home in Marion:

ΔkWh = 3 * 231

= 693 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = Capacity\_cooling * kWSavingsPerTon$$

Where:

kWSavingsPerTon = Blower fan kW savings per ton of cooling[509]

The per-ton energy savings values vary by system installation scenario and location as provided below. Assumptions are also provided for installation with no or unknown cooling system.

Demand Savings Type	Existing ASHP	Existing CAC	Furnace, No Cooling System*	Furnace, Cooling System unknown* [510]
SSP	0.085	0.085	0.013	0.065
PJM	0.064	0.064	0.009	0.048
*Multiply kWh saved value by 2 tons for furnaces <70 kBTU, by 3 tons for furnaces 70 kBTU – 90 kBTU and by 4 tons for furnaces 90+ kBTU.				

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[508] Unknown cooling system values are based on a weight of 66% existing CAC and 34% no cooling factors. Based on 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

[509] Tons of cooling was determined to be the most straightforward multiplier to apply to systems in which the BPM is installed. The basis of the values and for more information see Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018'.

[510] Unknown cooling system values are based on a weight of 66% existing CAC and 34% no cooling factors. Based on 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

For example, a BPM installed in an existing 3-ton, 16 SEER CAC receiving a rebate in a home in Marion:

$\Delta kW_{ssp} = 3 * 0.0085$

$= 0.0255$ kW

$\Delta kW_{pjm} = 3 * 0.064$

$= 0.192$ kW

FOSSIL FUEL SAVINGS

$$\Delta therms^{511} = - HeatingkWhSavings * Capacity\_cooling * 0.03412 / AFUE$$

Where:

HeatingkWhSavings = Heating kWh savings per ton of cooling[512]

Use the location-specific values in the following table to determine heating savings based on the size of the cooling system. If cooling size is unknown, assume 2 tons for furnaces <70 kBTU, 3 tons for furnaces 70 kBTU – 90 kBTU, and 4 tons for furnaces 90+ kBTU. If heating size is unknown or if the system does not include cooling, assume a 3-ton system.

Region	Heating Savings (kWh per ton of cooling)
Rockford	61
Chicago	59
Springfield	50
Belleville	39
Marion	39
Average	56

0.03412 = Converts kWh to therms

AFUE = Efficiency of the Furnace

= Actual. If unknown, assume 64.4 AFUE% for the existing furnace.[513]

For example, an ECM installed in an existing 3-ton CAC and 95% AFUE furnace in a home in Marion:

Δtherms = (-39 kWh * 3 tons * 0.03412) / 0.95

Δtherms = - 4.2 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

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[511] The blower fan is in the heating duct so all, or very nearly all, of its waste heat is delivered to the conditioned space. Negative value since this measure will increase the heating load due to reduced waste heat.

[512] Tons of cooling was determined to be the most straightforward multiplier to apply to systems in which the BPM is installed. The basis of the values and for more information see Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018'.

[513] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

MEASURE CODE: RS-HVC-FBMT-V10-270101

REVIEW DEADLINE: 1/1/2028

5.3.6 Gas High Efficiency Boiler

DESCRIPTION

High efficiency boilers achieve most gas savings through the utilization of a sealed combustion chamber and multiple heat exchangers that remove a significant portion of the waste heat from flue gasses. Because multiple heat exchangers are used to remove waste heat from the escaping flue gasses, some of the flue gasses condense and must be drained.

This measure characterizes:

a) Time of Sale:

   a. The installation of a new high efficiency, gas-fired hot water boiler in a residential location meeting efficiency specifications determined by the program. This could relate to the replacement of an existing unit at the end of its useful life, or the installation of a new system in a new home.

b) Early Replacement:

   Early Replacement determination will be based on meeting the following conditions:

   - The existing unit is operational when replaced, or
   - The existing unit requires minor repairs (defined as 20% of the cost of a new baseline unit).[514]
   - All other conditions will be considered Time of Sale.

   The Baseline AFUE of the existing unit replaced:

   - If the AFUE of the existing unit is known the Baseline AFUE is the actual AFUE value of the unit replaced.
   - If the AFUE of the existing unit is unknown, use assumptions in variable list below ($AFUE_{Exist}$).
   - If the operational status or repair cost of the existing unit is unknown, use time of sale assumptions.

   A weighted average early replacement rate is provided for use in programs when the actual baseline early replacement rates are unknown.[515]

Deemed Early Replacement Rates for Boilers

	Deemed Early Replacement Rate
Early Replacement Rate for Boiler participants	7%

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed Boiler must meet the requirements determined by the program. For reference the ENERGY STAR[516] specification is an AFUE rated at or greater than 90% and input capacity less than

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[514] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement. Note the non-inflated cost should be used as this would be a cost consideration in the program year.

[515] Based upon research from “Home Energy Efficiency Rebate Program GPY2 Evaluation Report” which outlines early replacement rates for both primary and secondary central air cooling (CAC) and residential furnaces. This is used as a reasonable proxy for boiler installations since boiler specific data is not available. Report presented to Nicor Gas Company February 27, 2014.

[516] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

300,000 Btu/hr.[517]

DEFINITION OF BASELINE EQUIPMENT

Time of sale: The baseline equipment for this measure is a new, gas-fired, standard-efficiency water boiler. The baseline AFUE is assumed to be 84% and is based on minimum federal appliance standards for boilers manufactured on or after January 15, 2021.[518]

Early replacement: The baseline for this measure is the efficiency of the existing equipment for the assumed remaining useful life of the unit and the new baseline as defined above for the remainder of the measure life. Consistent with TRM Volume 1 Section 2.3.1 for midstream programs or other cases where the existing condition is unknown, it may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on evaluation results as provided above.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 25 years.[519]

Early replacement: Remaining life of existing equipment is assumed to be 8 years.[520]

DEEMED MEASURE COST

Time of sale: The incremental install cost for this measure is dependent on efficiency:[521]

Efficiency Level	Installation Cost	Incremental Install Cost
Baseline	$8,820	n/a
AFUE < 95%	$10,141	$1,321
AFUE ≥ 95%	$10,710	$1,891

Early Replacement: The full installation cost is provided in the table above. The assumed deferred cost (after 8 years) of replacing existing equipment with a new baseline unit is assumed to be $10,563.[522] This cost should be discounted to present value using the nominal discount rate.

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

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[517] ENERGY STAR Program Requirements, Product Specifications for Boilers, version 3.0, effective October 1, 2014 (≥ 90% AFUE for gas-fired and ≥ 87% AFUE for oil-fired)

[518] Code of Federal Regulations, effective January 15, 2021 (10 CFR 432(e)(3)).

[519] Appendix 8-F of the Department of Energy Commercial Technical Support Document, Table 8.3.3, federal residential appliance standards.

[520] Assumed to be one third of effective useful life

[521] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

[522] $8,820 inflated for 8 years using assumed inflation rate of 2.28%.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

Time of Sale:

$$\Delta Therms\ = \frac{(EFLH\ *\ CAPInput\ *\ (\frac{AFUEEff}{AFUEBase}\ - 1))}{100{,}000}$$

Early replacement:[523]

ΔTherms for remaining life of existing unit (1st 8 years):

$$= \frac{(EFLH\ *\ CAPInput\ *\ (\frac{AFUEEff}{AFUEExist} - 1))}{100{,}000}$$

ΔTherms for remaining measure life (next 17 years):

$$= \frac{(EFLH\ *\ CAPInput\ *\ (\frac{AFUEEff}{AFUEBase}\ - 1))}{100{,}000}$$

Where:

CAP_{Input} = Gas Boiler input capacity (Btuh)

= Actual

EFLH = Equivalent Full Load Hours for gas heating

Climate Zone (City based upon)	EFLH[524]
1 (Rockford)	1022
2 (Chicago)	976
3 (Springfield)	836
4 (Belleville)	645
5 (Marion)	656
Weighted Average[525]	
ComEd	978
Ameren	800

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[523] The two equations are provided to show how savings are determined during the initial phase of the measure (existing to efficient) and the remaining phase (new baseline to efficient). In practice, the screening tools used may either require a First Year savings (using the first equation) and then a “number of years to adjustment” and “savings adjustment” input which would be the (new base to efficient savings)/(existing to efficient savings).

[524] Full load hours for Chicago, are based on findings in ‘Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60F.

[525] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

Climate Zone (City based upon)	EFLH[524]
Statewide	928

$AFUE_{Exist}$ = Existing Boiler Annual Fuel Utilization Efficiency Rating

= Use actual AFUE rating where it is possible to measure or reasonably estimate. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[526] or if unknown, assume 61.6 AFUE%.[527] If unknown value is used, it should not be derated by age.

$AFUE_{Base}$ = Baseline Boiler Annual Fuel Utilization Efficiency Rating

= 84% if implemented in 2022 and beyond

$AFUE_{Eff}$ = Efficent Boiler Annual Fuel Utilization Efficiency Rating

= Actual. If unknown, use defaults dependent on tier as listed below:[528]

Measure Type	AFUE(eff)
ENERGY STAR®	90%
AFUE 90%	92.5%
AFUE 95%	95%

Time of Sale:

For example, a 100,000 Btu/h, 90% AFUE ENERGY STAR boiler purchased and installed near Springfield in 2022:

ΔTherms = (836 * 100,000 * (0.90/0.84 – 1)) / 100,000

= 59.7 Therms

Early Replacement:

For example, an existing function boiler with unknown efficiency is replaced with a 100,000 Btu/h, 90% AFUE ENERGY STAR boiler purchased and installed in Springfield in 2022:

ΔTherms for remaining life of existing unit (1st 8 years):

= (836 * 100,000 * (0.90/0.616 – 1)) / 100,000

= 385.4 Therms

ΔTherms for remaining measure life (next 17 years):

= (836 * 100,000 * (0.90/0.84 – 1)) / 100,000

= 59.7 Therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

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[526] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[527] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[528] Default values per tier selected based upon the average AFUE value for the tier range except for the top tier where the minimum is used due to proximity to the maximum possible.

MEASURE CODE: RS-HVC-GHEB-V14-270101

REVIEW DEADLINE: 1/1/2029

5.3.7 Gas High Efficiency Furnace

DESCRIPTION

High efficiency furnace features may include improved heat exchangers and modulating multi-stage burners.

This measure characterizes:

a) Time of sale:
   a. The installation of a new high efficiency, gas-fired condensing furnace in a residential location meeting efficiency specifications determined by the program. This could relate to the replacement of an existing unit at the end of its useful life, or the installation of a new system in a new home.

b) Early Replacement:

Early Replacement determination will be based on meeting the following conditions:

- The existing unit is operational when replaced, or
- The existing unit requires minor repairs (defined as 20% of the cost of a new baseline unit).[529]
- All other conditions will be considered Time of Sale.

The Baseline AFUE of the existing unit replaced:

- If the AFUE of the existing unit is known, the Baseline AFUE is the actual AFUE value of the unit replaced.
- If the AFUE of the existing unit is unknown, use assumptions in variable list below (AFUE(exist)).
- If the operational status or repair cost of the existing unit is unknown, use time of sale assumptions.

A weighted average early replacement rate is provided for use in programs when the actual baseline early replacement rate is unknown.[530]

Deemed Early Replacement Rates For Furnaces

Replacement Scenario for the Furnace	Deemed Early Replacement Rate
Early Replacement Rate for Furnace-only participants	7%
Early Replacement Rate for a furnace participant when the furnace is the Primary unit in a Combined System Replacement (CSR) project	14%
Early Replacement Rate for a furnace participant when the furnace is the Secondary unit in a CSR project	46%

Verified Quality Installation

This approach uses in-field measurement and interpretation of static pressures, identification and plotting of airflow, airflow measurement, temperature measurement and diagnostics, pressure measurements and duct design, and BTU measurement to ensure that newly installed equipment is operating according to manufacturers' published

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[529] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement. Note the non-inflated cost should be used as this would be a cost consideration in the program year.

[530] Based upon research from "Home Energy Efficiency Rebate Program GPY2 Evaluation Report" which outlines early replacement rates for both primary and secondary central air cooling (CAC) and residential furnaces. The unit (furnace or CAC unit) that initially caused the customer to contact a trade ally is defined as the "primary unit". The furnace or CAC unit that was also replaced but did not initially prompt the customer to contact a trade ally is defined as the "secondary unit". This evaluation used different criteria for early replacement due to the availability of data after the fact; cost of any repairs < $550 and age of unit < 20 years. Report presented to Nicor Gas Company February 27, 2014.

potential performance. Installed equipment operating efficiency is largely dependent on the efficiency rating of the equipment, the skill of the installation contractor, the degree to which the equipment has aged or drifted from initial settings, and the system level constraints. When one or more of these key dependencies are operating sub-optimally, the overall efficiency of the equipment is degraded. A Verified Quality Install identifies sub-optimal performance and prescribes a solution during furnace installation.

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be a residential sized (input energy less than 225,000 Btu/hr) natural gas fired furnace with an Annual Fuel Utilization Efficiency (AFUE) rating exceeding the program requirements. For reference the ENERGY STAR[531] specification is an AFUE rated at or greater than 97% with an ECM motor and input capacity less than 225,000 Btu/hr.[532]

DEFINITION OF BASELINE EQUIPMENT

Time of Sale: The current Federal Standard for gas furnaces is an AFUE rating of 80%. The baseline will be adjusted when the Federal Standard is updated.

Early replacement: The baseline for this measure is the efficiency of the existing equipment for the assumed remaining useful life of the unit and a new baseline 80% AFUE unit for the remainder of the measure life. Consistent with TRM Volume 1 Section 2.3.1 for midstream programs or other cases where the existing condition is unknown, it may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on evaluation results.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 22.5 years for non-IQ homes and 26 years for IQ homes.[533]

For early replacement: Remaining life of existing equipment is assumed to be 8 years for non-IQ and 9 years for IQ homes.[534]

DEEMED MEASURE COST

Time of sale: The incremental installed cost (retail equipment cost plus installation cost) for this measure depends on efficiency as listed below:[535]

AFUE	Installed Cost	Incremental Installed Cost
Baseline	$4,019	n/a
≤ 95%	$4,327	$307
> 95% - < 97%	$4,524	$505
≥ 97%	$4,699	$679

Early Replacement: Actual install costs should be used if available. The deemed full installed cost is provided in the

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[531] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[532] ENERGY STAR Program Requirements, Product Specifications for Furnaces, version 5.0, effective July 31,2026.

[533] The non-IQ assumption is based on the latest Residential Furnace Department of Energy NOPR (10 CFR Part 430). The IQ assumption is based on over 10 years of program data from Ameren replacing furnaces in over 9000 IQ homes, collecting nameplate manufacture or install date.

[534] Assumed to be one third of effective useful life

[535] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

table above. The assumed deferred cost (after 8 years for non-IQ or 9 years for IQ) of replacing existing equipment with a new 80% baseline unit is assumed to be $4,813 for non-IQ, $4,923 for IQ homes.[536] This cost should be discounted to present value using the nominal discount rate. For furnaces installed in mobile homes, add an extra $750 to both the full install cost and the deferred baseline cost to account for increased equipment and labor costs associated with this install.[537]

Verified Quality Installation: The additional design and installation work associated with verified quality installation has been estimated to take 1-2 hours (Tim Hanes, ESI). At $40/hr, VQI adds $60 to the installed cost.

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Electrical energy savings from the more fan-efficient (typically using brushless permanent magnet (BPM) blower motor) should also be claimed, please refer to “Furnace Blower Motor” characterization for details.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

If the blower motor is also used for cooling, coincident peak demand savings should also be claimed, please refer to “Furnace Blower Motor” characterization for savings details.

FOSSIL FUEL SAVINGS

Time of Sale:

$$\Delta Therms = \frac{\frac{EFLH * CAPInput}{\left(1 - Derating_{eff}\right)} * \left(\frac{AFUE(eff) * (1 - Derating(eff))}{AFUE(base) * (1 - Derating(base))} - 1\right)}{100{,}000}$$

Early replacement:[538]

ΔTherms for remaining life of existing unit (1st 6 years):

$$= \frac{\frac{EFLH * CAPInput}{(1 - Derating_{eff})} * \left(\frac{AFUE(eff) * (1 - Derating(eff))}{AFUE(exist) * (1 - Derating(base))} - 1\right)}{100{,}000}$$

ΔTherms for remaining measure life (next 14 years):

$$= \frac{\frac{EFLH * CAPInput}{(1 - Derating_{eff})} * \left(\frac{AFUE(eff) * (1 - Derating(eff))}{AFUE(base) * (1 - Derating(base))} - 1\right)}{100{,}000}$$

Where:

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[536] $4019 inflated for 8 or 9 years using assumed inflation rate of 2.28%.

[537] Based on cost review and data provided by Future Energy Enterprises, 5/2022.

[538] The two equations are provided to show how savings are determined during the initial phase of the measure (existing to efficient) and the remaining phase (new baseline to efficient). In practice, the screening tools used may either require a First Year savings (using the first equation) and then a “number of years to adjustment” and “savings adjustment” input which would be the (new base to efficient savings)/(existing to efficient savings).

CAPInput = Gas Furnace input capacity (Btuh)

= Actual. If unknown, use the table below:

Housing Type	Input capacity[539]
Single Family Non-Low Income	80,400
Single Family Low Income	67,200
Multi-family Non-Low Income	61,200
Multi-family Low Income	49,200

EFLH = Equivalent Full Load Hours for gas heating

Climate Zone (City based upon)	EFLH[540]
1 (Rockford)	1022
2 (Chicago)	976
3 (Springfield)	836
4 (Belleville)	645
5 (Marion)	656
Weighted Average[541]	
ComEd	978
Ameren	800
Statewide	928

AFUE(exist) = Existing Furnace Annual Fuel Utilization Efficiency Rating

= Use actual AFUE rating where it is possible to measure or reasonably estimate. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[542] or if unknown, assume 64.4 AFUE%.**[543]** If unknown value is used, it should not be derated by age.

AFUE(base) = Baseline Furnace Annual Fuel Utilization Efficiency Rating

= 80%[544]

AFUE(eff) = Efficent Furnace Annual Fuel Utilization Efficiency Rating

= Actual. If unknown, , use the table below:

Eligibility Tier	AFUE (eff)[545]
AFUE ≥ 95 (all furnaces, no tiers)	96.0%
AFUE ≥ 95 and < 97 tier	95.9%

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[539] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential baseline Study Results", Oct 31 2024.

[540] Full load hours for Chicago, are based on findings in 'Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60F.

[541] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[542] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[543] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[544] Code of Federal Regulations, effective November, 2015 (10 CFR 432(e)).

[545] Average AFUE based on analysis of Nicor Gas 2019 Home Energy Efficiency Rebate Program participant tracking data, prepared by Guidehouse, Inc., based on 12,549 furnaces rebated at the 95 AFUE Tier, and 1,103 furnaces rebated at the 97 AFUE Tier.

Eligibility Tier	AFUE (eff)[545]
AFUE ≥ 97 tier	97.5%

Derating(base) =Baseline furnace AFUE derating

= 6.4%[546]

Derating(eff) =Efficent furnace AFUE derating

=0% if verified quality installation is performed

=6.4% if verified quality installation is not performed or unknown[547]

Time of Sale:

For example, a 97% AFUE, 80,000 Btuh furnace purchased and installed with verified quality installation for an existing home near Rockford:

ΔTherms = ((1022 * 80,000)/(1-0) * (((0.97 * (1-0)) / (0.8 * (1-0.064))) – 1)) / 100000

= 242 therms

For example, a 97% AFUE, 80,000 Btuh furnace purchased and installed without verified quality installation for an existing home near Rockford:

ΔTherms = ((1022 * 80,000)/(1-0.064) * (((0.97 * (1-0.064)) / (0.8 * (1-0.064))) – 1)) / 100000

=186 therms

Early Replacement:

For example, an existing functioning furnace with unknown efficiency is replaced with an 97% AFUE, 80,000 Btuh furnace using quality installation in Rockford:

ΔTherms for remaining life of existing unit (1st 6 years):

= ((1022 * 80,000)/(1-0) * (((0.97 * (1-0)) / (0.644 * (1-0.064))) – 1)) / 100000

= 498 therms

ΔTherms for remaining measure life (next 14 years):

= ((1022 * 80,000)/(1-0) * (((0.97 * (1-0)) / (0.8 * (1-0.064))) – 1)) / 100000

= 242 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-GHEF-V16-270101

REVIEW DEADLINE: 1/1/2029

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[546] Brand, L., Yee, S., and Baker, J. “Improving Gas Furnace Performance: A Field and Laboratory Study at End of Life.” Building Technologies Office. National Renewable Energy Laboratory. 2015 accessed September 6th, 2016.

[547] Ibid

5.3.8 Ground Source Heat Pump

DESCRIPTION

This measure characterizes the installation of a Ground Source Heat Pump under the following scenarios:

a) New Construction:
   i. The installation of a new residential sized Ground Source Heat Pump system meeting minimum efficiency standards determined by the program in a new home.
   ii. Note the baseline in this case should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition.

b) Time of Sale:
   i. The planned installation of a new residential sized Ground Source Heat Pump system meeting minimum efficiency standards determined by the program to replace an existing system(s) that does not meet the criteria for early replacement described in section c below.
   ii. Note the baseline in this case is an equivalent replacement system to that which exists currently in the home. Where unknown, the baseline should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition. The calculation of savings is dependent on whether an incentive for the installation has been provided by both a gas and electric utility, just an electric utility or just a gas utility.
   iii. Additional DHW savings are calculated based upon the fuel and efficiency of the existing unit.

c) Early Replacement/Retrofit:
   i. The early removal of functioning components of the electric or gas space heating and/or cooling systems from service, prior to the natural end of life, and replacement with a new high efficiency Ground Source Heat Pump system.
   ii. Note the baseline in this case is the existing equipment being replaced. The calculation of savings is dependent on whether an incentive for the installation has been provided by both a gas and electric utility, just an electric utility or just a gas utility.
   iii. Additional DHW savings are calculated based upon the fuel and efficiency of the existing unit.
   iv. Early Replacement determination will be based on meeting the following conditions:
      - The existing unit is operational when replaced, or
      - The existing unit requires minor repairs (defined as 20% of the cost of a new baseline replacement unit).:[548]
      - All other conditions will be considered Time of Sale.
   v. The Baseline efficiency of the existing unit replaced:
      - Is the actual efficiency value of the unit replaced if known.
      - If the efficiency of the existing unit is unknown, use assumptions in variable list below (SEER2, HSPF2 or AFUE exist).
      - If the operational status or repair cost of the existing unit is unknown use time of sale assumptions.

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

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[548] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement.

For ground source heat pump central systems in multifamily buildings, use Volume 2 Commercial and Industrial Measures.

DEFINITION OF EFFICIENT EQUIPMENT

In order for this characterization to apply, the efficient equipment must be a Ground Source Heat Pump unit meeting the minimum efficiency level standards determined by the program effective at the time of installation. For reference, the current ENERGY STAR[549] specifications are detailed below:

ENERGY STAR Requirements (Effective January 1, 2012)

Product Type	Cooling EER	Heating COP
Water-to-air		
Closed Loop	17.1	3.6
Open Loop	21.1	4.1
Water-to-Water		
Closed Loop	16.1	3.1
Open Loop	20.1	3.5
DGX		
DGX-to-Air	16	3.6
DGX-to-Water	15	3.1

The following conversion factors are recommended for use if the efficient equipment is not rated under the new testing procedure:[550]

SEER2 = SEER * X

EER2 = EER2 * X

HSPF2 = HSPF2 * X

Where:

X	SEER	EER	HSPF
Ducted	0.95	0.95	0.85

DEFINITION OF BASELINE EQUIPMENT

For these products, baseline equipment includes Air Conditioning, Space Heating and Water Heating.

New Construction:

To calculate savings with an electric baseline, the baseline equipment is assumed to be an Air Source Heat Pump meeting the Federal Standard efficiency level and a Federal Standard electric hot water heater. The Federal Standard efficiency levels for an Air Source Heat Pump are as follows[551]:

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[549] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[550] Consortium for Energy Efficiency (CEE), Testing, Testing, M1, 2, 3, Transitioning to New Federal Minimum Standards, CEE Summer Program Meeting, June 10, 2022.

[551] The 2023 federal standards (10 CFR 430.32(c)(5)) are in terms of an updated metric, depicted as SEER2 and HSPF2 and manufacturers must certify their products meet the standard according to the new test procedure and new metrics. The updated test method as well as the updated energy conservation standards were negotiated under the appliance standards and rulemaking federal advisory committee (ASRAC) in accordance with the Federal Advisory Committee Act (FACA) and the negotiated rulemaking act. An equivalent stringency of these new standards for split system heat pumps are 15 SEER and 8.8

- Split system heat pump – 14.3 SEER2, 9.4 EER2 and 7.5 HSPF2
- Single-package heat pump – 13.4 SEER2, 8.5 EER2 and 6.7 HSPF2

To calculate savings with a furnace/central AC baseline, the baseline equipment is assumed to be an 80% AFUE Furnace and central AC meeting the Federal Standard efficiency level; 13.4 SEER2, 10.6 EER2[552]. If a gas water heater, the Federal Standard baseline is calculated as follows; 0.6483 – (0.0017 * storage capacity in gallons) for tanks<=55 gallons and 0.7897 − (0.0004 × storage capacity in gallons) for greater than 55 gallon storage water heaters.[553] For a 40-gallon storage water heater this would be 0.58 EF.

Time of Sale: The baseline for this measure is a new replacement unit of the same system type as the existing unit, meeting the baselines provided below.

Unit Type	Efficiency Standard
ASHP	14.3 SEER2 9.4 EER2, 7.5 HSPF2
Natural Gas or LP Furnace	80% AFUE
Natural Gas or LP Boiler	84% AFUE
Oil Furnace	83% AFUE
Oil Boiler	86% AFUE
Central AC	13.4 SEER2, 10.6 EER2
Room AC (baseline applicable for IQ homes only)	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient.

Early replacement / Retrofit: The baseline for this measure is the efficiency of the *existing* heating, cooling and hot water equipment for the assumed remaining useful life of the existing unit and a new baseline heating and cooling system for the remainder of the measure life (as provided in table above).

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 25 years.[554]

For early replacement, the remaining life of existing equipment is assumed to be 6.7 years for ducted ASHP, 5.7 years for ductless ASHP, 8.3 years for Central AC, 8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers and GSHP[555] and 25 years for electric resistance.[556]

DEEMED MEASURE COST

New Construction and Time of Sale: The actual installed cost of the Ground Source Heat Pump (including any necessary electrical or distribution upgrades required) should be used (default of $6,333 per ton),[557] minus the assumed installation cost of the baseline equipment from table below for electric equipment, or assume $4,019 for

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HSPF and for single-package heat pumps are 14 SEER and 8 HSPF, as detailed in: Federal Code of Regulations, Energy Conservation Program: Energy Conservations Standards for residential Central Air Conditioners and Heat Pumps; Confirmation of effective date and compliance date for direct final rule, May 26, 2017, Docket: EERE-2014-BT-STD-0048 (https://www.regulations.gov/document/EERE-2014-BT-STD-0048-0200)

[552] The Federal Standard does not include an EER requirement. The value provided is based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018'.

[553] Minimum Federal standard as of 4/16/2015.

[554] System life of indoor components as per DOE estimate (see 'Geothermal Heat Pumps Department of Energy'). The ground loop has a much longer life, but the compressor and other mechanical components are the same as an ASHP.

[555] Assumed to be one third of effective useful life of replaced equipment.

[556] Assume full measure life (16 years) for replacing electric resistance as we would not expect that resistance heat would fail during the lifetime of the efficient measure.

[557] Based on data from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023.

a new baseline 80% AFUE furnace or $8,820 for a new baseline 84% AFUE boiler.[558]

Baseline Equipment Type	Capacity Range	Baseline Cost per Ton[559]
Centrally Ducted Air Source Heat Pumps	< 2 tons	$4,602
	≥ 2 to < 3 tons	$3,691
	≥ 3 to < 4 tons	$3,093
	≥ 4 tons	$2,992
Ductless Minisplit Heat Pumps	< 1 ton	$8,156
	≥ 1 to < 2 tons	$5,356
	≥ 2 to < 3 tons	$3,704
	≥ 3 tons	$3,670
Central Air Conditioning	< 2 tons	$2,340
	≥ 2 to < 3 tons	$1,900
	≥ 3 tons	$1,500

Early Replacement: The actual full installation cost of the Ground Source Heat Pump should be used (including any necessary electrical or distribution upgrades required). If the install cost is unknown a default is provided above, however because these assumptions do not include any additional costs that may be required for fuel switch scenarios, these defaults should not be used and actual costs should always be used for fuel switch measures.

The assumed deferred cost (after the appropriate number of years described above in the 'Deemed Lifetime of Efficient Equipment' section) of replacing existing equipment with a new baseline unit is presented in the table below for electric equipment, or assume $4,813 for non-IQ, $4,923 for IQ homes for a new baseline 80% AFUE furnace or $10,563 for a new baseline 84% AFUE boiler.[560] This future cost should be discounted to present value using the nominal societal discount rate.

Equipment Type	Capacity Range	Deferred Baseline Cost per Ton
Centrally Ducted Air Source Heat Pumps	< 2 tons	$5,268
	≥ 2 to < 3 tons	$4,226
	≥ 3 to < 4 tons	$3,541
	≥ 4 tons	$3,425
Ductless Minisplit Heat Pumps	< 1 ton	$9,337
	≥ 1 to < 2 tons	$6,132
	≥ 2 to < 3 tons	$4,240
	≥ 3 tons	$4,202
Central Air Conditioning	< 2 tons	$2,679
	≥ 2 to < 3 tons	$2,175
	≥ 3 tons	$1,717

Fuel switch scenarios are likely to require additional installation work which may include adding new electrical circuits, capping existing gas lines and upgrading electrical panels. These costs are likely to range significantly and actual values should be used wherever possible. The total of any additional electrification costs should be divided across all applicable measures weighted by total MMBtu savings.

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[558] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

[559] Ibid

[560] All baseline replacement costs are consistent with their respective measures and include inflation rate of 2.28%.

LOADSHAPE

Loadshape R10 - Residential Electric Heating and Cooling	(if replacing gas heat and central AC)[561]
Loadshape R09 - Residential Electric Space Heat	(if replacing electric heat with no cooling)
Loadshape R10 - Residential Electric Heating and Cooling	(if replacing ASHP)

Note for purpose of cost effectiveness screening a fuel switch scenario, the heating kWh increase and cooling kWh decrease should be calculated separately such that the appropriate loadshape (i.e., Loadshape R09 - Residential Electric Space Heat and Loadshape R08 – Residential Cooling respectively) can be applied.

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Heat Pumps (during utility peak hour)

= 72%[562]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Heat Pumps (average during PJM peak period)

= 46.6%[563]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS AND FOSSIL FUEL SAVINGS

Non-fuel switch measures:

ΔkWh = GSHPSiteCoolingImpact + GSHPSiteHeatingImpact + ElectricFurnaceFanSavings + GSHPSiteDHWImpact

For all other scenarios:

GSHPSiteCoolingImpact = [FLHcool * Capacity_cooling * (1/$SEER2_{base}$ – 1/$EER2_{PL}$)/1000]

For Room AC baseline (applicable for IQ only):

GSHPSiteCoolingImpact = [(FLHcool * CapacityRAC * #RACUnits (1/$CEER_{base}$)/1000) – (FLHcool * Capacity_GSHPcool * (1/$EER2_{PL}$)/1000)]

For all scenarios:

GSHPSiteHeatingImpact = [HeatLoad* (1/$HSPF2_{base}$ – 1/(COP_{PL} * 3.412))/1000] +

ElectricFurnaceFanSavings[564] = FurnaceFlag * [Heating savings] * F_e

GSHPSiteDHWImpact = [ElecDHW * %DHWDisplaced * ((1/EF_{ELEC} * GPD * Household

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[561] The baseline for calculating electric savings is an Air Source Heat Pump.

[562] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[563] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[564] If replacing an electric furnace only. The HSPF rating of a heat pump accounts for the fan consumption, however the HSPF rating of an electric furnace does not. Therefore, additional fan savings should be claimed.

* 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412)]

Fuel switch measures:

Fuel switch measures must produce positive total lifecycle energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows (note for early replacement measures the lifetime savings should be calculated by calculating savings for the remaining useful life of the existing equipment and for the remaining measure life):

SiteEnergySavings (MMBTUs) = FuelSwitchSavings + NonFuelSwitchSavings

FuelSwitchSavings = GasHeatReplaced – GSHPSiteHeatConsumed

NonFuelSwitchSavings = GasFurnaceFanSavings + GSHPSiteCoolingImpact + GSHPSiteWaterImpact

GasHeatReplaced = [(HeatLoad * 1/$AFUE_{base}$) / 1,000,000]

GasFurnaceFanSavings = (FurnaceFlag * HeatLoad * 1/$AFUE_{base}$ * F_e) / 1,000,000

GSHPSiteHeatConsumed = [HeatLoad * (1/(COP_{PL} * 3.412))/1000] * 3412) / 1,000,000

For all other scenarios:

GSHPSiteCoolingImpact = [FLHcool * Capacity_GSHPcool * (1/$SEER2_{base}$ – 1/$EER2_{PL}$)/1000] * 3412) / 1,000,000

For Room AC baseline (applicable for IQ only):

GSHPSiteCoolingImpact = [(FLHcool * CapacityRAC * #RACUnits * (1/$CEER_{base}$)/1000) – (FLHcool * Capacity_GSHPcool * (1/$EER2_{PL}$)/1000)] * 3412) / 1,000,000

$GSHPSiteWaterImpact_{Gas}$ = (%DHWDisplaced * (1/EF_{Gas} * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0)) / 1,000,000)

$GSHPSiteWaterImpact_{Electric}$ = (%DHWDisplaced * (1/EF_{Elec} * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0)) / 1,000,000

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10
Gas utility only	N/A	SiteEnergySavings * 10

Note for Early Replacement measures, the efficiency and Fe terms of the existing unit should be used for the remaining useful life of the existing equipment (6 years for ASHP and Central AC, 8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers or GSHP, 25 years for electric resistance), and the efficiency and Fe terms for a new baseline unit should be used for the remaining years of the measure. See assumptions below.

Where:

FLHcool = Full load cooling hours

Dependent on location as below:[565]

Climate Zone (City based upon)	FLHcool Single Family	FLHcool Multifamily	FLH_cooling (weatherized multifamily) [566]
1 (Rockford)	547	499	320
2 (Chicago)	709	629	403
3 (Springfield)	779	707	453
4 (Belleville)	1082	982	630
5 (Marion)	956	868	557
Weighted Average[567]			
ComEd	676	603	386
Ameren	875	791	507
Statewide	731	655	420

Use Multifamily if: Building meets utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Capacity_GSHPcool = Cooling Output Capacity of Ground Source Heat Pump (Btu/hr)

= Actual (1 ton = 12,000Btu/hr)

CapacityRAC = Capacity of assumed Room AC unit

= Actual, if unknown assume 8500 Btu/hr[568]

#RACUnits = Number of Room AC units assumed to have been installed in mobile home or IQ home instead of a GSHP

= Actual, if unknown assume 3

$SEER2_{base}$ = SEER2 Efficiency of baseline unit. For early replacment measures, the actual SEER/SEER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment (6.7 years for ducted ASHP, 5.7 years for ductless ASHP,8.3 years for Central AC, or 8 years for GSHP). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[569] or if unknown assume default provided below. If unknown value is used, it

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[565] Based on Full Load Hours from ENERGY STAR with adjustments made in a Navigant Evaluation, other cities were scaled using those results and CDD. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[566] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015. The multifamily units within this study had undergone significant shell improvements (air sealing and insulation) and therefore this set of assumptions is only appropriate for units that have recently participated in a weatherization or other shell program. Note that the FLHcool where recalculated based on existing efficiencies consistent with the TRM rather than from the metering study.

[567] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[568] Based on maximum capacity average from the RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

[569] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

should not be derated by age.

Baseline/Existing Cooling System	SEER2base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump	9.2 SEER2[570]	14.3 SEER2[571]	
Ground Source Heat Pump	13.4 SEER2[572]	14.3 SEER2	
Central AC	9.2 SEER2[573]	13.4 SEER2[574]	
Room AC[575] (baseline applicable for IQ homes only)	8.7 CEER	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient. If unknown assume 10.9 CEER.	
No existing cooling	13.4 SEER2[576]	13.4 SEER2	

$EER2_{PL}$ = Part Load EER2 Efficiency of efficient GSHP unit[577]

= Actual installed

HeatLoad = Calculated heat load for the building

= FLH_GSHPheat * Capacity_GSHPheat

FLH_GSHPheat = Full load hours of heat pump heating

Dependent on location as below:[578]

Climate Zone (City based upon)	FLH_heat
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion)	1270
Weighted Average[579]	

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[570] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018', converted to SEER2.

[571] Minimum Federal Standard as of 1/1/2023

[572] Estimate of existing GSHP efficiency is based converting 12 EER (estimate based upon Navigant, 2018 "EIA – Technology Forecast Updates – Residential and Commercial Building Technologies – Reference Case") to SEER. Converted to SEER2.

[573] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to SEER2.

[574] Minimum Federal Standard; Federal Register, Vol. 66, No. 14, Monday, January 22, 2001/Rules and Regulations, p. 7170-7200.

[575] For IQ participants this is more likely to be the least efficient units so is consistent with the early replacement baseline from 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[576] Assumes that the decision to replace existing systems includes desire to add cooling.

[577] As per conversations with David Buss territory manager for Connor Co, the SEER and COP ratings of an ASHP equate most appropriately with the part load EER and COP of a GSHP.

[578] Heating EFLH based on ENERGY STAR EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of HDD60, NCDC/NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[579] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide

Climate Zone (City based upon)	FLH_heat
ComEd	1766
Ameren	1547
Statewide	1700

Capacity_GSHPheat = Heating Output Capacity of Ground Source Heat Pump (Btu/hr)

= Actual (1 ton = 12,000Btu/hr)

$HSPF2_{base}$ =Heating Seasonal Performance Factor 2 of baseline heating system (kBtu/kWh), converted to HSPF2 if rating is in HSPF. For early replacement measures, use actual HSPF/HSPF2 rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment (6.7 years for ducted ASHP 5.7 years for ductless ASHP, 8 years for GSHP or 25 years for electric resistance). If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[580] or if unknown assume default. If unknown value is used, it should not be derated by age.

Baseline/ Existing Heating System	HSPF2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump	4.91 HSPF2[581]	7.5 HSPF2[582]	
Ground Source Heat Pump	7.5 HSPF2[583]	7.5 HSPF2	
Electric Resistance (Baseboard or Electric Furnace)	3.41 HSPF2[584]		

COP_{PL} = Part Load Coefficient of Performance of efficient unit[585]

= Actual Installed

3.412 = Constant to convert the COP of the unit to the Heating Season Performance Factor (HSPF2)

ElecDHW = 1 if existing DHW is electrically heated

= 0 if existing DHW is not electrically heated

%DHWDisplaced = Percentage of total DHW load that the GSHP will provide

= Actual if known

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average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[580] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[581] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to HSPF2.

[582] Based on Minimum Federal Standard effective 1/1/2023.

[583] Estimate of existing GSHP efficiency is assumed equivalent to a new baseline ASHP. It is recommended that this value be evaluated and adjusted for a future version.

[584] Electric resistance has a COP of 1.0 which equals 1/0.293 = 3.41 HSPF.

[585] As per conversations with David Buss territory manager for Connor Co, the SEER and COP ratings of an ASHP equate most appropriately with the part load EER and COP of a GSHP.

= If unknown and if desuperheater installed, assume 44%[586]

= 0% if no desuperheater installed

EF_{ELEC} = Energy Factor (efficiency) of electric water heater

= Actual. If unknown or for new construction, assume federal standard:[587]

For <=55 gallons: 0.96 – (0.0003 * rated volume in gallons)

For >55 gallons: 2.057 – (0.00113 * rated volume in gallons)

GPD = Gallons Per Day of hot water use per person

= 45.5 gallons hot water per day per household/2.59 people per household[588]

= 17.6

Household = Average number of people per household

Household Unit Type	Household[589]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[590]
Custom	Actual Occupancy or Number of Bedrooms[591]		

Use Multifamily if: Building meets utility's definition for multifamily

365.25 = Days per year

γWater = Specific weight of water

= 8.33 pounds per gallon

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municiplal system

= 50.7°F [592]

1.0 = Heat Capacity of water (1 Btu/lb*°F)

3412 = Conversion from Btu to kWh

$AFUE_{base}$ = Baseline Annual Fuel Utilization Efficiency Rating. For early replacement measures, use actual AFUE rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment (8 years for non-IQ or 9 years for IQ for

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[586] Assumes that the desuperheater can provide two thirds of hot water needs for eight months of the year (2/3 * 2/3 = 44%). Based on input from Doug Dougherty, Geothermal Exchange Organization.

[587] Minimum Federal Standard as of 4/1/2015;.

[588] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[589] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[590] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[591] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[592] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

furnace, 8 years for boilers). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[593] or if unknown assume default. If unknown value is used, it should not be derated by age.

Baseline/ Existing Heating System	AFUEbase		
	Early Replacement (Remaining useful life of existing equipment)[594]	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Furnace	64.4%	80%	80%
Boiler	61.6%	84%	84%

FurnaceFlag = 1 if system replaced is a gas furnace, 0 if not.

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

For Early Replacement (1st 6 years) F_e_Exist = 3.14%[595]

For New Construction, Time of Sale and early replacement (remaining 10 years) F_e_New = 1.88%[596]

$EF_{GAS\ EXIST}$ = Energy Factor (efficiency) of existing gas water heater

= Actual. If unknown, assume federal standard:[597]

For <=55 gallons: 0.6483 – (0.0017 * storage capacity in gallons)

For > 55 gallons 0.7897 – (0.0004 * storage capacity in gallons)

= If tank size unknown, assume 40 gallons and EF_Baseline of 0.58

3412 = Btu per kWh

%IncentiveElectric = % of total incentive paid by electric utility

= Actual

%IncentiveGas = % of total incentive paid by gas utility

= Actual

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[593] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[594] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[595] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

[596] New furnaces are required to have ECM fan motors installed. Comparing Eae to Ef for furnaces on the AHRI directory as above, indicates that Fe for new furnaces is on average 1.88%.

[597] Minimum Federal Standard as of 4/1/2015.

Non Fuel Switch Illustrative Examples

New Construction using ASHP baseline:

For example, a 3-ton unit with Part Load EER2 rating of 19 and Part Load COP of 4.4 with desuperheater is installed with a 50 gallon electric water heater in single family non- IQ house in Springfield:

ΔkWh = [779 * 36,000 * (1/13.4 – 1/19) / 1000] + [1708* 36,000 * (1/7.5 – 1/(4.4*3.412)) / 1000] + [1 * 0.44 * ((1/0.945 * 17.6 * 2.62 *365.25 * 8.33 * (125-50.7) * 1)/3412)]

= 617 + 4103 + 1422

= 6142 kWh

Early Replacement

For example, a 3-ton unit with Part Load EER2 rating of 19 and Part Load COP of 4.4 with desuperheater is installed in single family non-IQ house in Springfield with a 50 gallon electric water heater replacing an existing working Air Source Heat Pump with unknown efficiency ratings:

ΔkWH for remaining life of existing unit (1st 8 years):

= [779 * 36,000 * (1/9.3 - 1/19) / 1000] + [1708 * 36,000 * (1/6.8 - 1/(4.4 * 3.412)) / 1000] + [0.44 * 1 * ((1/0.945 * 17.6 * 2.62 *365.25 * 8.33 * (125-50.7) * 1)/3412)]

= 1540 + 4947 + 1422

= 7,909 kWh

ΔkWH for remaining measure life (next 17 years):

= (779 * 36,000 * (1/13.4 – 1/19) / 1000] + [1708 * 36,000 * (1/7.5 – 1/ (4.4 * 3.412)) / 1000] + [0.44 * 1 * ((1/0.945 * 17.6 * 2.62 *365.25 * 8.33 * (125-50.7) * 1)/3412)]

= 617 + 4103 + 1422

= 6142 kWh

Fuel Switch Illustrative Example

[for illustrative purposes 50:50 Incentive is used for joint programs]

New construction using gas furnace and central AC baseline:

For example, a 3-ton unit with Part Load EER2 rating of 19 and Part Load COP of 4.4 in single family non-IQ house in Springfield with a 40 gallon gas water heater is installed in place of a natural gas furnace and 3 ton Central AC unit:

SiteEnergySavings (MMBTUs) = GasHeatReplaced + FurnaceFanSavings – GSHPSiteHeatConsumed + GSHPSiteCoolingImpact + GSHPSiteWaterImpact

GasHeatReplaced = (HeatLoad * 1/$AFUE_{base}$) / 1,000,000

= (1708 * 36,000 * 1/0.8) / 1,000,000 = 76.9 MMBtu

FurnaceFanSavings = (FurnaceFlag * HeatLoad * 1/$AFUE_{base}$ * F_e_New) / 1,000,000

= (1 * 1708 * 36,000 * 1/0.8 * 0.0188) / 1,000,000

= 1.4 MMBtu

GSHPSiteHeatConsumed = (HeatLoad * 1/COP_{PL})/ 1,000,000

= (1708 * 36,000 * 1/4.4) /1,000,000 = 14.0 MMBtu

Continued on next page

Fuel Switch Illustrative Example continued

GSHPSiteCoolingImpact = (FLHcool * Capacity_GSHPcool * (1/SEER2$_{base}$ – 1/EER2$_{PL}$)/1000 * 3412)/ 1,000,000

= (779 * 36,000 * (1/13.4 – 1/19) / 1000 * 3412) /1,000,000 = 2.10 MMBtu

GSHPSiteWaterImpact$_{Gas}$ = ((%DHWDisplaced * ((1/EF$_{Gas}$ * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0) / 1,000,000)

= (0.44 * (1/ 0.58 * 17.6 * 2.62 *365.25 * 8.33 * (125-50.7) * 1)) / 1,000,000 = 7.9 MMBtu

SiteEnergySavings (MMBTUs) = 76.9 + 1.4 – 14.0 + 2.10 + 7.9 = 74.3 MMBtu (Measure is eligible)

Savings would be claimed as follows:

Measure supported by:	Electric Utility claims:	Gas Utility claims:
Electric utility only	74.3 * 1,000,000/3412 = 21,776 kWh	N/A
Electric and gas utility	0.5 * 74.3 * 1,000,000/3412 = 10,888 kWh	0.5 * 74.3 * 10 = 372 Therms
Gas utility only	N/A	74.3 * 10 = 743 Therms

SUMMER COINCIDENT PEAK DEMAND SAVINGS

For all other scenarios:

$$\Delta kW = (Capacity\_cooling * (1/EER2_{base} - 1/EER2_{FL}))/1000 * CF$$

For Room AC baseline (applicable for IQ only):

$$\Delta kW = (CapacityRAC * \#RACUnits * \left(\frac{1}{CEER_{base}}\right)) - (Capacity_{GSHPcool} * (1/EER2_{FL}))/1000 * CF$$

Where:

ER2$_{base}$ = Energy Efficiency Ratio 2 of baseline unit (kBtu/kWh). For early replacment measures, the actual EER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment (6 years for ASHP and Central AC). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[598] If unknown, assume default provided below. If unknown value is used, it should not be derated by age.

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[598] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

<table>
<tr><th rowspan="2">Baseline/Existing Cooling System</th><th colspan="3">EER2_base</th></tr>
<tr><th>Early Replacement (Remaining useful life of existing equipment)</th><th>Early Replacement (Remaining measure life)</th><th>Time of Sale or New Construction</th></tr>
<tr><td>Air Source Heat Pump</td><td>7.4 EER2[599]</td><td colspan="2">9.4 EER2[600]</td></tr>
<tr><td>Ground Source Heat Pump</td><td>11.2 EER2</td><td colspan="2">11.2 EER2</td></tr>
<tr><td>Central AC</td><td>7.4 EER2</td><td colspan="2">10.6 EER2</td></tr>
<tr><td>Room AC[601] (baseline applicable for IQ homes only)
IQ</td><td>8.7 CEER</td><td colspan="2">Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient. If unknown assume 10.9 CEER.</td></tr>
<tr><td>No existing cooling</td><td>10.6 EER2[602]</td><td colspan="2">10.6 EER2</td></tr>
</table>

$EER2_{FL}$ = Full Load EER2 Efficiency of ENERGY STAR GSHP unit [603]

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

= 72%[604]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during peak period)

= 46.6%[605]

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[599] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to EER2.

[600] Assumed consistent with the EER2 requirements in the Federal Standard for Southwest standards (in the absence of standards for Northen states).

[601] For IQ participants this is more likely to be the least efficient units so is consistent with the early replacement baseline from 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[602] Assumes that the decision to replace existing systems includes desire to add cooling.

[603] As per conversations with David Buss territory manager for Connor Co, the EER rating of an ASHP equate most appropriately with the full load EER of a GSHP.

[604] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[605] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

New Construction or Time of Sale:

For example, a 3-ton unit with Full Load EER2 unit rating of 19:

ΔkW_{SSP} = (36,000 * (1/9.4 – 1/19))/1000 * 0.72

= 0.9 kW

ΔkW_{PJM} = (36,000 * (1/9.4 – 1/19))/1000 * 0.466

= 0.71 kW

Early Replacement:

For example, a 3-ton Full Load 19 EER2 unit replaces an existing working Air Source Heat Pump with unknown efficiency ratings in Marion:

ΔkW_{SSP} for remaining life of existing unit (1st 8 years):

= (36,000 * (1/7.4 – 1/19))/1000 * 0.72

= 2.14 kW

ΔkW_{SSP} for remaining measure life (next 17 years):

= (36,000 * (1/9.4 – 1/19))/1000 * 0.72

= 1.39 kW

ΔkW_{PJM} for remaining life of existing unit (1st 8 years):

= (36,000 * (1/7.4 – 1/19))/1000 * 0.466

= 1.38 kW

ΔkW_{PJM} for remaining measure life (next 17 years):

= (36,000 * (1/9.4 – 1/19))/1000 * 0.466

= 0.902 kW

FOSSIL FUEL SAVINGS

Calculation provided together with Electric Energy Savings above

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

COST EFFECTIVENESS SCREENING AND LOAD REDUCTION FORECASTING WHEN FUEL SWITCHING

This measure can involve fuel switching from gas to electric.

For the purposes of forecasting load reductions due to fuel switch GSHP projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, should therefore reflect the decrease in one fuel and increase in another, as opposed to the single savings value calculated in the "Electric and Fossil Fuel Energy Savings" section above.Therefore in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness of the measure. For Early Replacement measures, the efficiency terms of the existing unit should be used for the remaining useful life of the existing equipment (6 years for ASHP and Central AC, 10 years for furnace, 8 years for boilers or GSHP, 15 years for electric resistance), and the efficiency terms for a new baseline unit should be used for the remaining years of the measure.

ΔTherms = [Heating Consumption Replaced] + [DHW Savings if gas]

= [(HeatLoad * 1/$AFUE_{base}$) / 100,000] + [(1 – ElecDHW) * %DHWDisplaced * (1/ $EF_{GAS\ EXIST}$ * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 100,000)]

ΔkWh = [FurnaceFanSavings] - [GSHP heating consumption] + [Cooling savings] + [DHW savings if electric]

= [FurnaceFlag * HeatLoad * 1/$AFUE_{base}$ * F_e * 0.000293] - [(HeatLoad * (1/COP_{PL} * 3.412))/1000] + [(FLHcool * Capacity_GSHPcool * (1/$SEER2_{base}$ - 1/$EER2_{PL}$))/1000] + [ElecDHW * %DHWDisplaced * ((1/EF_{ELEC} * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412)]

Illustrative Example of Cost Effectiveness Inputs for Fuel Switching

For example, a 3-ton unit with Part Load EER2 rating of 19 and Part Load COP of 4.4 in single family non-IQ house in Springfield with a 40-gallon gas water heater replaces an existing working natural gas furnace and 3-ton Central AC unit with unknown efficiency ratings. [Note the calculation provides the annual savings for the first 6 years of the measure life, an additional calculation (not shown) would be required to calculate the annual savings for the remaining life (years 7-25)]:

ΔTherms = [(HeatLoad * 1/$AFUE_{exist}$) / 100,000] + [(1 – ElecDHW) * %DHWDisplaced * (1/ $EF_{GAS\ EXIST}$ * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 100,067)]

= [1708 * 36,000 * 1/0.644) / 100,000] + [((1 – 0) * 0.44 * (1/ 0.58 * 17.6 * 2.62 *365.25 * 8.33 * (125-54) * 1) / 100,067)]

= 955 + 76

= 1031 therms

ΔkWh = [FurnaceFlag * HeatLoad * 1/$AFUE_{base}$ * F_e_Exist * 0.000293] - [(HeatLoad * (1/COP_{PL} * 3.412))/1000] + [(FLHcool * Capacity_GSHPcool * (1/SEERexist - 1/EER_{PL}))/1000] + [ElecDHW * %DHWDisplaced * (((1/EF_{ELEC}) * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412)]

= [1 * 1708 * 3600 * 1/0.644 * 0.0314 * 0.000293] - [(1708 * 36,000 * (1/(4.4 * 3.412)))/ 1000] + [(779 * 36,000 * (1/9.2 - 1/19))/ 1000)] + [0 * 0.44 * (((1/0.904) * 17.6 * 2.62 *365.25 * 8.33 * (125-50.7) * 1)/3412)]

= 88 - 4096 + 1572 + 0

MEASURE CODE: RS-HVC-GSHP-V17-270101

REVIEW DEADLINE: 1/1/2029

5.3.9 High Efficiency Bathroom Exhaust or Radon Mitigation Fan

DESCRIPTION

This market opportunity measure is split into the purchase of a new bathroom fan for typical usage, meet the need for continuous mechanical ventilation due to reduced air-infiltration from a tighter building shell, and for Radon mitigation. In retrofit projects, existing fans may be too loud, or insufficient in other ways, to be operated as required. This measure assumes fan capacities between 10 and 200 CFM rated at a sound level of less than 2.0 sones at 0.1 inches of water column static pressure, or 50 CFM if used for continuous ventilation, or 120 CFM for Radon mitigation. All eligible installations shall be sized to provide the mechanical ventilation rate indicated by ASHRAE 62.2 or for Radon mitigation.

This measure was developed to be applicable to the following program types: TOS, NC, RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

New efficient ENERGY STAR[606] or ENERGY STAR Most Efficient exhaust-only ventilation fan, quiet (< 2.0 sones) operating in accordance with recommended ventilation rate indicated by ASHRAE 62.2 – 2016 or for Radon mitigation. ENERGY STAR specifications (effective October 1, 2015) and 2025 Most Efficient specifications are provided below:

Efficiency Level	Fan Capacity	Minimum Efficacy Level (CFM/Watts)	Maximum Allowable Sound Level (sones)
ENERGY STAR	10 – 89 CFM	2.8	2.0
	90 – 200 CFM	3.5	
ENERGY STAR Most Efficient	All	1.9*D + 2.9	
ENERGY STAR Most Efficient (In-Line)	All	6.5	
ENERGY STAR Most Efficient (In-Line tested with filter)	All	4.7	

* D = effective diameter (inches) based on Duct Size listed on the QPL

DEFINITION OF BASELINE EQUIPMENT

New standard efficiency exhaust-only ventilation fan.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 19 years.[607]

DEEMED MEASURE COST

Incremental cost per installed fan is $48 for ENERGY STAR qualified fans.[608]

LOADSHAPE

Loadshape R11 - Residential Ventilation

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[606] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[607] Conservative estimate based upon GDS Associates Measure Life Report “Residential and C&I Lighting and HVAC measures” 25 years for whole-house fans, and 19 for thermostatically-controlled attic fans.

[608] VEIC analysis using cost data collected from wholesale and retail vendors.

COINCIDENCE FACTOR

The summer Peak Coincidence Factor is assumed to be 100% because the fan runs continuously.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = (CFM * (1/\eta_{,BASELINE} - 1/\eta_{EFFICIENT})/1000) * Hours$$

Where:

CFM = Nominal Capacity of the exhaust fan

= Actual or use defaults provided below

= Assume 50CFM for continuous ventilation[609]

$\eta_{BASELINE}$ = Average efficacy for baseline fan (CFM/watts)

= See table below

$\eta_{EFFCIENT}$ = Average efficacy for efficient fan (CFM/watts)

= Actual or use defaults provided below

Hours = assumed annual run hours,

= 1089 for standard usage[610]

= 8766 for continuous ventilation.

Defaults provided below:[611]

					ENERGY STAR		ENERGY STAR Most Efficient	
Application	Min CFM	Max CFM	Average CFM	Base CFM/Watts	CFM/Watts	ΔkWh Savings	CFM/Watts	ΔkWh Savings
Standard usage	10	89	71.0	1.7	4.7	28.9	11.9	38.9
	90	200	115.9	2.7	5.4	23.1	14.2	37.8
	Unknown		94.2	2.2	5.1	26.9	13.3	39.4
Continuous usage	N/A		50	1.7	5.0	164.6	11.3	213.8
Continuous usage (Radon)	N/A		120	2.5	5.0	203.2	n/a	n/a

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = (CFM * (1/\eta_{BASELINE} - 1/_{EFFICIENT})/1000) * CF$$

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[609] 50CFM is the closest available fan size to ASHRAE 62.2 Section 4.1 Whole House Ventilation rates based upon typical square footage and bedrooms.

[610] Assumed to be consistent with Residential Indoor Lighting hours of use.

[611] Based on review of Bathroom Exhaust Fan product available on CEC Appliance Database, accessed 4/6/2023. See 'CEC-res-vent-fans-4.6.23.xlsx' for more information.

Where:

CF = Summer Peak Coincidence Factor

= 0.135 for standard usage

= 1.0 for continuous operation

Other variables as defined above

Application	Min CFM	Max CFM	Average CFM	ENERGY STAR ΔkW Savings	ENERGY STAR Most Efficient ΔkW Savings
Standard usage	10	89	70.6	0.0036	0.0048
	90	200	116.1	0.0029	0.0047
	Unknown		92.4	0.0033	0.0049
Continuous usage	N/A		50	0.0188	0.0244

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-BAFA-V06-270101

REVIEW DEADLINE: 1/1/2030

5.3.10 HVAC Tune Up (Central Air Conditioning or Air Source Heat Pump)

DESCRIPTION

This measure involves the measurement of refrigerant charge levels and airflow over the central air conditioning or heat pump unit coil, correction of any problems found and post-treatment re-measurement. Measurements must be performed with standard industry tools and the results tracked by the efficiency program.

Savings from this measure are developed using a reputable Wisconsin study. It is recommended that future evaluation be conducted in Illinois to generate a more locally appropriate characterization.

This measure was developed to be applicable to the following program types: RF. If applied to other program types, the measure savings should be verified.

For tune-up of central systems in multifamily buildings, use Volume 2 Commercial and Industrial Measures.

DEFINITION OF EFFICIENT EQUIPMENT

N/A

DEFINITION OF BASELINE EQUIPMENT

This measure assumes that the existing unit being maintained is either a residential central air conditioning unit or an air source heat pump that has not been serviced for at least 3 years.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 3 years.[612]

DEEMED MEASURE COST

If the implementation mechanism involves delivering and paying for the tune up service, the actual cost should be used. If however the customer is provided a rebate and the program relies on private contractors performing the work, the measure cost should be assumed to be $250.[613]

LOADSHAPE

Loadshape R08 - Residential Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[614]

CF_{SSP} = Summer System Peak Coincidence Factor for Heat Pumps (during system peak hour)

= 72%[615]

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[612] Based on DEER 2014 EUL Table for "Clean Condenser Coils – Residential" and "Refrigerant Charge – Residential".

[613] Based on personal communication with HVAC efficiency program consultant Buck Taylor or Roltay Inc., 6/21/10, who estimated the cost of tune up at $125 to $225, depending on the market and the implementation details. The average value of $175 has been increased by inflation to give an estimate of $250 in 2026.

[614] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[615] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[616]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$\Delta kWh_{Central\ AC}$ = (FLHcool * Capacity_cooling* (1/$SEER2_{CAC}$))/1,000 * MFe

$\Delta kWh_{Air\ Source\ Heat\ Pump}$ = ((FLHcool * Capacity_cooling * (1/$SEER2_{ASHP}$))/1,000 * MFe) + (FLHheat * Capacity_heating * (1/$HSPF2_{ASHP}$))/1,000 * MFe)

Where:

FLHcool = Full load cooling hours

Dependent on location as below:[617]

Climate Zone (City based upon)	FLHcool Single Family	FLHcool Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1,082	982
5 (Marion)	956	868
Weighted Average[618] ComEd Ameren Statewide	676 875 731	603 791 655

Use Multifamily if: Building meets utility’s definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Capacity_cooling = Cooling cpacity of equipment in Btu/hr (note 1 ton = 12,000 Btu/hr)

= Actual

$SEER2_{CAC}$ = SEER2 Efficiency of existing central air conditioning unit receiving maintenence * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency if only equipment efficiency is available). If unknown assume 9.5 SEER2 [619] * 0.85 = 8.1 SEER2

MFe = Maintenance energy savings factor

---

[616] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[617] Based on Full Load Hours from ENERGY STAR with adjustments made in a Navigant Evaluation, other cities were scaled using those results and CDD. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[618] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[619] Use actual SEER2 rating where it is possible to measure or reasonably estimate. Unknown default of 9.5 SEER2 is a VEIC estimate of existing unit efficiency, based on minimum federal standard between the years of 1992 and 2006, converted to SEER2.

= 0.05[620]

$SEER2_{ASHP}$ = SEER2 Efficiency of existing air source heat pump unit receiving maintenence* Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for ducted system if only equipment efficiency is available). If unknown assume 9.5 SEER2 [621] * 0.85 = 8.1 SEER2

FLHheat = Full load heating hours

Dependent on location:[622]

Climate Zone (City based upon)	FLHheat
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion)	1270
Weighted Average[623]	
ComEd	1766
Ameren	1547
Statewide	1700

Capacity_heating = Heating cpacity of equipment in Btu/hr (note 1 ton = 12,000 Btu/hr)

= Actual

$HSPF2_{ASHP}$ = Heating Season Performance Factor of existing air source heat pump unit receiving maintenence * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency if only equipment efficiency is available). If unknown assume 5.8 HSPF2 [624] * 0.85 = 4.9 HSPF2

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[620] Energy Center of Wisconsin, May 2008; “Central Air Conditioning in Wisconsin, A Compilation of Recent Field Research.”

[621] Use actual SEER2 rating where it is possible to measure or reasonably estimate. Unknown default of 9.5 SEER2 is a VEIC estimate of existing unit efficiency, based on minimum federal standard between the years of 1992 and 2006, converted to SEER2.

[622] Full load heating hours for heat pumps are provided for Rockford, Chicago and Springfield in the ENERGY STARCalculator. Estimates for the other locations were calculated based on the FLH to Heating Degree Day (from NCDC) ratio. VEIC consider ENERGY STAREstimates to be high due to oversizing not being adequately addressed. Using average Illinois billing data (from Illinois Commerce Commission) VEIC estimated the average gas heating load and used this to estimate the average home heating output (using 83% average gas heat efficiency). Dividing this by a typical 36,000 Btu/hr ASHP gives an estimate of average ASHP FLH_heat of 1821 hours. We used the ratio of this value to the average of the locations using the ENERGY STAR data (1994 hours) to scale down the ENERGY STAR estimates. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[623] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[624] Use actual HSPF2 rating where it is possible to measure or reasonably estimate. Unknown default of 5.8 HSPF2 is a VEIC estimate based on minimum Federal Standard between 1992 and 2006, converted to HSPF2.

For example, maintenance of a 3-ton, SEER2 10 air conditioning unit in a single family house in Springfield:

ΔkWh_{CAC} = (779 * 36,000 * (1/10))/1,000 * 0.05

= 140 kWh

For example, maintenance of a 3-ton, SEER2 10, HSPF2 6.8 air source heat pump unit in a single family house in Springfield:

ΔkWh_{ASHP} = ((779 * 36,000 * (1/10))/1,000 * 0.05) + (1,708 * 36,000 * (1/6.8))/1,000 * 0.05)

= 592 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = Capacity_cooling * (1/EER2)/1,000 * MFd * CF

Where:

EER2 = EER2 Efficiency of existing unit receiving maintenance in Btu/H/Watts

= Calculate using Actual SEER2

= $- 0.02*SEER2^2 + 1.12*SEER2$ [625]

MFd = Maintenance demand savings factor

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

= 68%[626]

CF_{SSP} = Summer System Peak Coincidence Factor for Heat Pumps (during system peak hour)

= 72%[627]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C and Heat Pumps (average during peak period)

= 46.6%[628]

For example, maintenance of 3-ton, SEER2 10 (equals EER2 9.2) CAC unit:

ΔkW_{SSP} = 36,000 * 1/(9.2)/1,000 * 0.02 * 0.68

= 0.0532 kW

ΔkW_{PJM} = 36,000 * 1/(9.2)/1,000 * 0.02 * 0.466

= 0.0365 kW

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

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[625] Based on Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder. Note this is appropriate for single speed units only.

[626] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[627] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[628] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

DEEMED O&M COST ADJUSTMENT CALCULATION

Conservatively not included.

MEASURE CODE: RS-HVC-TUNE-V10-260101

REVIEW DEADLINE: 1/1/2030

5.3.11 Programmable Thermostats

DESCRIPTION

This measure characterizes the household energy savings from the installation of a new or reprogramming of an existing Programmable Thermostat for reduced heating energy consumption through temperature set-back during unoccupied or reduced demand times. Because a literature review was not conclusive in providing a defensible source of prescriptive cooling savings from programmable thermostats, cooling savings from programmable thermostats are assumed to be zero for this version of the measure. It is not appropriate to assume a similar pattern of savings from setting a thermostat down during the heating season and up during the cooling season. Since energy savings are applicable at the household level, savings should only be claimed for one thermostat of any type (i.e., one programmable thermostat or one advanced thermostat), installation of multiple thermostats per home does not accrue additional savings.

This measure was developed to be applicable to the following program types: TOS, NC, RF, DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The criteria for this measure are established by replacement of a manual-only temperature control, with one that has the capability to adjust temperature setpoints according to a schedule without manual intervention. This category of equipment is broad and rapidly advancing in regards to the capability, and usability of the controls and their sophistication in setpoint adjustment and information display, but for the purposes of this characterization, eligibility is perhaps most simply defined by what it is not: a manual only temperature control.

For the thermostat reprogramming measure, the auditor consults with the homeowner to determine an appropriate set back schedule, reprograms the thermostat and educates the homeowner on its appropriate use.

DEFINITION OF BASELINE EQUIPMENT

For new thermostats the baseline is a non-programmable thermostat requiring manual intervention to change temperature setpoint.

For the purpose of thermostat reprogramming, an existing programmable thermostat that an auditor determines is being used in override mode or otherwise effectively being operated like a manual thermostat.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life of a programmable thermostat is assumed to be 16 years, however concerns over persistence over a population result in the application of a mid-life adjustment to reduce annual savings during the measure lifetime.[629] For reprogramming, the measure life of 2 years is assumed.

DEEMED MEASURE COST

Actual material and labor costs should be used if the implementation method allows. If unknown (e.g., through a retail program) the capital cost for the new installation measure is assumed to be $30.[630] The cost for reprogramming is assumed to be $10 to account for the auditor’s time to reprogram and educate the homeowner.

LOADSHAPE

Loadshape R09 - Residential Electric Space Heat

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[629] ASHRAE Applications (2003), Section 36, Table 3 provides an estimate of 16 years for the equipment life, however the TAC agreed to reduce by 50% to account for persistence issues. This is applied via a midlife adjustment (see later section) rather than a reduction in the measure life to 8 years.

[630] Market prices vary significantly in this category, generally increasing with thermostat capability and sophistication. The basic functions required by this measure's eligibility criteria are available on units readily available in the market for the listed price.

COINCIDENCE FACTOR

N/A due to no savings attributable to cooling during the summer peak period.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh[631] = ΔkWh_heatingElectric + ΔkWh_heatingFurnace

Where:

ΔkWh_heatingElectric = %ElectricHeat * Elec_Heating_Consumption * Heating_Reduction * HF * Eff_ISR

%ElectricHeat = Percentage of heating savings assumed to be electric

Heating fuel	%ElectricHeat
Electric	100%
Natural Gas	0%
Unknown	3%[632]

Elec_Heating_ Consumption = Estimate of annual household heating consumption for electrically heated homes.[633] If location and heating type is unknown, assume 15,683 kWh.[634]

Climate Zone (City based upon)	Electric Resistance (Baseboard or Electric Furnace) Elec_Heating_ Consumption (kWh)	Electric Heat Pump Elec_Heating_ Consumption (kWh)
1 (Rockford)	21,748	12,793
2 (Chicago)	20,777	12,222
3 (Springfield)	17,794	10,467
4 (Belleville)	13,726	8,074
5 (Marion)	13,970	8,218
Average	19,749	11,617

Heating_Reduction = Assumed percentage reduction in total household heating energy consumption due to programmable thermostat

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[631] Note the second part of the algorithm relates to furnace fan savings if the heating system is Natural Gas.

[632] Value used is based on known PY8 percent of electric heat provided by Navigant as part of the ongoing evaluation work source: "Slide 21: May 22, 2018, Second Addendum IL TRM Advanced Thermostat Cooling Savings Evaluation"

[633] Values in table are based on converting an average household heating load (834 therms) for Chicago based on 'Table E-1, Energy Efficiency/Demand Response Nicor Gas Plan Year 1: Research Report: Furnace Metering Study, Draft, Navigant, August 1 2013 to an electric heat load (divide by 0.03412) to electric resistance and ASHP heat load (resistance load reduced by 15% to account for distribution losses that occur in furnace heating but not in electric resistance while ASHP heat is assumed to suffer from similar distribution losses) and then to electric consumption assuming efficiencies of 100% for resistance and 200% for HP (see 'Household Heating Load Summary Calculations_08222018.xls'). Finally these values were adjusted to a statewide average using relative HDD assumptions to adjust for the evaluation results focus on northern region. Values for individual cities are then calculated by comparing average HDD to the individual city's HDD.

[634] Assumption that 1/2 of electrically heated homes have electric resistance and 1/2 have Heat Pump, based on 2010 Residential Energy Consumption Survey for Illinois.

= 6.2%[635]

HF = Household factor, to adjust heating consumption for non-single-family households.

Household Type	HF
Single-Family	100%
Mobile home	83%[636]
Multifamily	65%[637]
Unknown	96.5%[638]
Actual	Custom[639]

Use Multifamily if: Building meets utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Eff_ISR = Effective In-Service Rate, the percentage of thermostats installed and programmed effectively

Program Delivery	Eff_ISR
Direct Install	100%
Other, or unknown	56%[640]

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: $= \Delta Therms * \%FurnaceFossil * F_e * 29.3$

If electric furnace: $= \Delta kWh\_heatingElectric * \%FurnaceElectric * F_e$

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[641]

---

[635] The savings from programmable thermostats are highly susceptible to many factors best addressed, so far for this category, by a study that controlled for the most significant issues with a very large sample size. To the extent that the treatment group is representative of the program participants for IL, this value is suitable. Higher and lower values would be justified based upon clear dissimilarities due to program and product attributes. Future evaluation work should assess program specific impacts associated with penetration rates, baseline levels, persistence, and other factors which this value represents.

[636] Since mobile homes are similar to Multifamily homes with respect to conditioned floor area but to single-family homes with respect to exposure (i.e., all four wall orientations are adjacent to the outside), this factor is estimated as an average of the single family and multifamily household factors.

[637] Multifamily household heating consumption relative to single-family households is affected by overall household square footage and exposure to the exterior. This 65% factor is applied to MF homes based on professional judgment that average household size, and heat loads of MF households are smaller than single-family homes

[638] When Household type is unknown, a value of 96.5% may be used as a weighted average of 90% SF and 10% MF (96.5% = 100%*90% + 65%*10%) based on a Navigant evaluation of PY8 participants in ComEd's advanced thermostat program.

[639] Program-specific household factors may be utilized on the basis of sufficiently validated program evaluations.

[640] "Programmable Thermostats. Report to KeySpan Energy Delivery on Energy Savings and Cost Effectiveness," GDS Associates, Marietta, GA. 2002GDS

[641] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[642]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[643]

29.3 = kWh per therm

For example, a programmable thermostat direct-installed in an electric resistance heated, single-family home in Springfield:

ΔkWH = 1 * 17,794 * 0.062 * 100% * 100% + (0 * 0 * 0.0314 * 29.3)

= 1,103 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A due to no savings from cooling during the summer peak period.

NATURAL GAS ENERGY SAVINGS

ΔTherms = %FossilHeat * Gas_Heating_Consumption * Heating_Reduction * HF * Eff_ISR

Where:

%FossilHeat = Percentage of heating savings assumed to be Natural Gas

Heating fuel	%FossilHeat
Electric	0%
Natural Gas	100%
Unknown	97%[644]

Gas_Heating_Consumption

= Estimate of annual household heating consumption for gas heated single-family homes. If location is unknown, assume the average below:[645]

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[642] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[643] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

[644] Value used is based on known PY8 percent of electric heat provided by Navigant as part of the ongoing evaluation work source: “Slide 21: May 22, 2018, Second Addendum IL TRM Advanced Thermostat Cooling Savings Evaluation”

[645] Values are based on adjusting the average household heating load (834 therms) for Chicago based on ‘Table E-1, Energy Efficiency / Demand Response Nicor Gas Plan Year 1, Research Report: Furnace Metering Study’, divided by standard assumption of existing unit efficiency of 83% (estimate based on 24% of furnaces purchased in Illinois were condensing in 2000 (based on data from GAMA, provided to Department of Energy), assuming typical efficiencies: (0.24*0.92) + (0.76*0.8) = 0.83) to give 1005 therms. This Chicago value was then adjusted to a statewide average using relative HDD assumptions to adjust for

Climate Zone (City based upon)	Gas_Heating_ Consumption (therms)
1 (Rockford)	1,052
2 (Chicago)	1,005
3 (Springfield)	861
4 (Belleville)	664
5 (Marion)	676
Average	955

For example, a programmable thermostat directly-installed in a gas heated single-family home in Chicago:

ΔTherms = 1.0 * 1005 * 0.062 * 100% * 100%

= 62.3 therms

Mid-Life Baseline Adjustment

Due to concerns that across a population the savings for programmable thermostats are likely to decline through the technical lifetime of the thermostat,[646] a mid-life adjustment should be applied. The mid-life adjustment should be applied in year 6 (i.e., after five years of full savings) and is calculated as 28%. This results in a consistent lifetime savings as applying a 50% reduction to the technical lifetime. This adjustment should be applied to both electric and therm heating savings.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-PROG-V11-270101

REVIEW DEADLINE: 1/1/2029

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the evaluation results focus on northern region. Values for individual cities are then calculated by comparing average HDD to the individual city's HDD.

[646] This concern is based on consideration of the findings from a number of evaluations, including Sachs et al, *"Field Evaluation of Programmable Thermostats",* US DOW Building Technologies Program, December 2012, p35; "low proportion of households that ended up using thermostat-enabled energy saving settings", and Meier et al., *"Usability of residential thermostats: Preliminary investigations",* Lawrence Berkeley National Laboratory, March 2011, p1; "The majority of occupants operated thermostats manually, rather than relying on their programmable features and almost 90% of respondents reported that they rarely or never adjusted the thermostat to set a weekend or weekday program. Photographs of thermostats were collected in one on-line survey, which revealed that about 20% of the thermostats displayed the wrong time and that about 50% of the respondents set their programmable thermostats on "long term hold" (or its equivalent)."

5.3.12 Ductless Heat Pumps – Removed in v12

Measure now combined with 5.3.1 Air Source Heat Pump (Centrally Ducted and Ductless)

5.3.13 Residential Furnace Tune-Up

DESCRIPTION

This measure is for a natural gas Residential furnace that provides space heating. The tune-up will improve furnace performance by inspecting, cleaning and adjusting the furnace and appurtenances for correct and efficient operation. Additional savings maybe realized through a complete system tune-up.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure an approved technician must complete the tune-up requirements listed below:[647]

- Measure combustion efficiency using an electronic flue gas analyzer
- Check and clean blower assembly and components per manufacturer’s recommendations
- Where applicable Lubricate motor and inspect and replace fan belt if required
- Inspect for gas leaks
- Clean burner per manufacturer’s recommendations and adjust as needed
- Check ignition system and safety systems and clean and adjust as needed
- Check and clean heat exchanger per manufacturer’s recommendations
- Inspect exhaust/flue for proper attachment and operation
- Inspect control box, wiring and controls for proper connections and performance
- Check air filter and clean or replace per manufacturer’s
- Inspect duct work connected to furnace for leaks or blockages
- Measure temperature rise and adjust flow as needed
- Check for correct line and load volts/amps
- Check thermostat operation is per manufacturer’s recommendations(if adjustments made, refer to ‘Residential Programmable Thermostat’ measure for savings estimate)
- Perform Carbon Monoxide test and adjust heating system until results are within standard industry acceptable limits

DEFINITION OF BASELINE EQUIPMENT

The baseline is furnace assumed not to have had a tune-up in the past 3 years.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life for the clean and check tune up is 3 years.[648]

DEEMED MEASURE COST

The incremental cost for this measure should be the actual cost of tune up.

DEEMED O&M COST ADJUSTMENTS

There are no expected O&M savings associated with this measure.

LOADSHAPE

Loadshape R09 - Residential Electric Space Heat

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[647] American Standard Maintenance for Indoor Units (see ‘HVAC Maintenance American Standard’)

[648] Assumed consistent with other tune-up measures.

COINCIDENCE FACTOR

N/A

Algorithms

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \Delta Therms * Fe * 29.3$$

Where:

ΔTherms = as calculated below

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[649]

29.3 = kWh per therm

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

$$\Delta \text{Therms} = \frac{\text{CAPInputPre} * \text{EFLH} * (\frac{1}{Effbefore} - \frac{1}{(Effbefore + Ei)})}{100{,}000}$$

Where:

$\text{CAPInput}_{\text{Pre}}$ = Gas Furnace input capacity pre tune-up (Btuh)

= Measured input capacity from HVAC SAVE

EFLH = Equivalent Full Load Hours for heating

Climate Zone (City based upon)	EFLH[650]
1 (Rockford)	1022
2 (Chicago)	976
3 (Springfield)	836
4 (Belleville)	645
5 (Marion)	656
Weighted Average[651]	
ComEd	978
Ameren	800
Statewide	928

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[649] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

[650] Full load hours for Chicago, are based on findings in 'Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60F.

[651] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

Effbefore = Efficiency of the furnace before the tune-up

= Actual

Note: Contractors should select a mid-level firing rate that appropriately represents the average building operating condition over the course of the heating season and take readings at a consistent firing rate for pre and post tune-up.

EI = Efficiency Improvement of the furnace tune-up measure

= Actual

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-FTUN-V08-240101

REVIEW DEADLINE: 1/1/2029

5.3.14 Boiler Reset Controls

DESCRIPTION

This measure relates to improving system efficiency by adding controls to residential heating boilers to vary the boiler entering water temperature relative to heating load as a function of the outdoor air temperature to save energy. The water can be set at a lower temperature during fall and spring, and at a higher temperature during the coldest parts of the winter. A boiler reset control has two temperature sensors: ne outside the house, and one in the boiler water. As the outdoor temperature goes up and down, the reset control adjusts the water temperature setting to the lowest setting that is meeting the house heating demand. There are also limits in the controls to keep a boiler from operating outside of its recommended operating range.[652]

This measure was developed to be applicable to the following program types: RF.

DEFINITION OF EFFICIENT EQUIPMENT

Natural gas single-family residential customer adding boiler reset controls, capable of resetting the boiler entering water temperature in an inverse relationship with outdoor air temperature. The system must be set so that the minimum temperature is not more than 10 degrees above manufacturer's recommended minimum return temperature. This boiler reset measure is limited to existing condensing boilers serving a single-family residence. Boiler reset controls for non-condensing boilers in single family residences should be implemented as a custom measure, and the cost-effectiveness should be confirmed.

DEFINITION OF BASELINE EQUIPMENT

Existing condensing boiler in a single-family residential setting without boiler reset controls.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The life of this measure is 16 years, which is assumed to be the remaining life of the existing boiler.[653]

DEEMED MEASURE COST

The cost of this measure is $612.[654]

LOADSHAPE

NA

COINCIDENCE FACTOR

N/A

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[652] Energy Solutions Center, a consortium of natural gas utilities, equipment manufacturers and vendors, See 'Boiler Reset Control – NaturalGasEfficiency.org'.

[653] This is intentionally longer than the assumptions found in the early replacement residential HVAC measures as the application of boiler reset controls will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

[654] Nexant. Questar DSM Market Characterization Report. August 9, 2006.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

NA

FOSSIL FUEL SAVINGS

$$\Delta\text{Therms} = \text{Gas\_Boiler\_Load} * (1/\text{AFUE}) * \text{Savings Factor}$$

Where:

Gas_Boiler_Load[655]

= Estimate of annual household load for gas boiler. If location is unknown, assume the average below.[656]

= or Actual if informed by site-specific load calculations, ACCA Manual J, or equivalent.[657]

Climate Zone (City based upon)	Gas_Boiler Load (therms)
1 (Rockford)	873
2 (Chicago)	834
3 (Springfield)	714
4 (Belleville)	551
5 (Marion)	561
Average	793

AFUE = Existing Condensing Boiler Annual Fuel Utilization Efficiency Rating

= Actual. If unknown, default to 90%.[658]

SF = Savings Factor, 5%[659]

---

[655] Boiler consumption values are informed by an evaluation which did not identify any fraction of heating load due to domestic hot water (DHW) provided by the boiler. Thus these values are an average of both homes with boilers only providing heat, and homes with boilers that also provide DHW. Heating load is used to describe the household heating need, which is equal to (gas heating consumption * AFUE)

[656] Values are based on household heating consumption values and inferred average AFUE results from Table 3-4, Program Sample Analysis, *Nicor R29 Res Rebate Evaluation Report 092611_REV FINAL to Nicor*). Adjusting to a statewide average using relative HDD values to adjust for the evaluation results focus on northern region. Values for individual cities are then calculated by comparing average HDD to the individual city's HDD.

[657] The Air Conditioning Contractors of America Manual J, Residential Load Calculation 8th Edition produces equipment sizing loads for Single Family, Multi-single, and Condominiums using input characteristics of the home. A best practice for equipment selection and installation of Heating and Air Conditioning, load calculations should be completed by contractors during the selection process and may be readily available for program data purposes.

[658] Condensing boilers typically have an AFUE greater than 90%. This is also a consistent assumption with the '5.3.6 High Efficiency Boiler' measure.

[659] Energy Solutions Center, a consortium of natural gas utilities, equipment manufacturers and vendors. See 'Boiler Reset Control – NaturalGasEfficiency.org'. This savings value is also supported by Cadmus impact evaluation for the Electric and Gas Program Administrators of Massachusetts: Cadmus, Home Energy Services Impact Evaluation, August 2012.

For example, boiler reset controls on a 92.5% AFUE boiler at a household in Rockford, IL

ΔTherms = 873 * (1/0.925) * 0.05

= 47.2 Therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-BREC-V05-270101

REVIEW DEADLINE: 1/1/2030

5.3.15 ENERGY STAR Ceiling Fan

DESCRIPTION

A ceiling fan/light unit meeting the efficiency specifications of ENERGY STAR[660] version 4.0 is installed in place of a model meeting the federal standard. ENERGY STAR qualified ceiling fan/light combination units are over 60% more efficient than conventional fan/light units and use improved motors and blade designs.

Due to the savings from this measure being derived from more efficient ventilation and more efficient lighting, and the loadshape and measure life for each component being very different, the savings are split into the component parts and should be claimed together. Lighting savings should be estimated utilizing the 5.5.9 LED Fixtures measure.

This measure was developed to be applicable to the following program types: TOS, NC, RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as an ENERGY STAR certified ceiling fan with integral LED bulbs.[661] Concurrently, ENERGY STAR criteria require ceiling fans with light kits to provide the consumer with LEDs. In the cases where light kits require screw-base sockets, the efficient lamps have to be included in the packaging of the ceiling fan.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is assumed to be a standard fan with efficient incandescent or halogen light bulbs. Production of 100W, standard efficacy incandescent lamps ended in 2012 followed by restrictions on 75W in 2013 and 60W and 40W in 2014, due to the Energy Independence and Security Act of 2007 (EISA). Finally, a provision in the EISA regulations requires that by January 1, 2020, all lamps meet efficiency criteria of at least 45 lumens per watt, in essence making the baseline equivalent to a current day CFL. Therefore the measure life (number of years that savings should be claimed) for the lighting portion of the savings should be reduced once the assumed lifetime of the bulb exceeds 2020. Due to expected delay in clearing retail inventory and to account for the operating life of a halogen incandescent potentially spanning over 2020, this shift is assumed not to occur until 2021.

Effective January 21, 2020, all ceiling fan light kits manufactured after this date must be packaged with lamps to fill all screw-base sockets, further limiting the potential for inefficient light bulbs to be utilized. Additionally, ceiling fan light kits with pin-based sockets for fluorescent lamps must use electronic ballasts. Integrated ceiling fan light kits must adhere to the same lighting efficiency requirements.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The fan savings measure life is assumed to be 10 years.[662]

The lighting savings measure life is assumed to be 1 year for lighting savings for units installed in 2020 (see 5.5.9 LED Fixtures measure).[663]

DEEMED MEASURE COST

Incremental cost of a ceiling fan with light kit is $46.

Incremental cost of only a ceiling fan is $30.71. [664]

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[660] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[661] ENERGY STAR version 4.0, Product Specification for Residential Ceiling Fans and Ceiling Fan Light Kits, effective June 15, 2018.

[662] Lifetime estimate is sourced from the ENERGY STAR Ceiling Fan Savings Calculator.

[663] Since the replacement baseline bulb from 2020 on will be equivalent to a CFL, no additional savings should be claimed from that point. Due to expected delay in clearing stock from retail outlets and to account for the operating life of a halogen incandescent potentially spanning over 2020, this shift is assumed not to occur until 2021.

[664] The incremental cost of $46 is sourced from the ENERGY STAR Ceiling Fan Savings Calculator, which is based on a ceiling fan

LOADSHAPE

R06 - Residential Indoor Lighting

R11 - Residential Ventilation

COINCIDENCE FACTOR

The summer peak coincidence factor for the ventilation savings is assumed to be 30%.[665]

For lighting savings, see 5.5.9 LED Fixtures measure.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$\Delta kWh = \Delta kWh_{fan} + \Delta kWh_{Light}$

$\Delta kWh_{fan} = [Days * FanHours * ((\%Low_{base} * WattsLow_{base}) + (\%Med_{base} * WattsMed_{base}) + (\%High_{base} * WattsHigh_{base}))/1000] - [Days * FanHours * ((\%Low_{ES} * WattsLow_{ES}) + (\%Med_{ES} * WattsMed_{ES}) + (\%High_{ES} * WattsHigh_{ES}))/1000]$

ΔkWh_{light} = see 5.5.9 LED Fixtures measure.

Where:[666]

Days = Days used per year

= Actual. If unknown use 365.25 days/year

FanHours = Daily Fan “On Hours”

= Actual. If unknown use 3 hours

$\%Low_{base}$ = Percent of time spent at Low speed of baseline

= 40%

$WattsLow_{base}$ = Fan wattage at Low speed of baseline

= Actual. If unknown use 15 watts

$\%Med_{base}$ = Percent of time spent at Medium speed of baseline

= 40%

$WattsMed_{base}$ = Fan wattage at Medium speed of baseline

= Actual. If unknown use 34 watts

$\%High_{base}$ = Percent of time spent at High speed of baseline

---

and a light kit. In order to determine the incremental cost of only a ceiling fan, the incremental cost of the lights were factored in and removed accordingly. Through review of the ENERGY STAR Qualified Products List, accessed on October 11, 2018, the average ceiling fan LED light kit had 1.2 lamps, with an average wattage of 11.8W. The comparable baseline wattage, baseline cost, and efficient lamp cost is based on a scaled equivalence from the 5.5.9 LED Fixtures measure.

[665] Assuming that the CF same as a Room AC. Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

[666] All fan operating conditions and baseline default assumptions are based upon assumptions provided in the ENERGY STAR Ceiling Fan Savings Calculator. The efficient wattages at the low and high speed settings are sourced from the average of available products on the ENERGY STAR Qualified Products List (QPL), as pulled on 5/9/2025. The efficient wattage at the medium speed is interpolated based on the varying speed wattages from the ENERGY STAR version 4.0 specifications. For more information on the QPL data set, please see “Illinois Residential Ceiling Fan Analysis_2025.xlsx”.

= 20%

$WattsHigh_{base}$ = Fan wattage at High speed of baseline

= Actual. If unknown use 67 watts

%LowES = Percent of time spent at Low speed of ENERGY STAR

= 40%

$WattsLow_{ES}$ = Fan wattage at Low speed of ENERGY STAR

= Actual. If unknown use 5 watts

$\%Med_{ES}$ = Percent of time spent at Medium speed of ENERGY STAR

= 40%

$WattsMed_{ES}$ = Fan wattage at Medium speed of ENERGY STAR

= Actual. If unknown use 16 watts

$\%High_{ES}$ = Percent of time spent at High speed of ENERGY STAR

= 20%

$WattsHigh_{ES}$ = Fan wattage at High speed of ENERGY STAR

= Actual. If unknown use 36 watts

For ease of reference, the fan assumptions are provided below in table form:

	Low Speed	Medium Speed	High Speed
Percent of Time at Given Speed	40%	40%	20%
Conventional Unit Wattage	15	34	67
ENERGY STAR Unit Wattage	5	16	36
ΔW	10	18	31

If the lighting WattsBase and WattsEE is unknown, assume the following:[667]

WattsBase = 1.2 x 46.5 = 55.8 W

WattsEE = 1.2 x 17.3 = 20.1 W

For example, an ENERGY STAR ceiling fan with one, 22.4W LED lamp as part of its light kit were purchased and installed to replace an existing ceiling fan that was no longer operational, the savings are:

ΔkWh_{fan} = [365.25*3*((0.4*15)+(0.4*34)+(0.2*67))/1000] – [365.25*3*((0.4*5)+(0.4*16)+(0.2*36))/1000]

= 36.2 – 17.1 = 19.1 kWh

ΔkWh_{light} =((88.5 – 22.4)/1000) *759 * 1.06

= 53.2 kWh

ΔkWh = 19.1+53.2

= 72.3 kWh

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[667] Through review of the ENERGY STAR Qualified Products List, accessed on May 5, 2022, the average ceiling fan LED light kit had 1.2 lamps, with an average wattage of 17.3 W. The comparable baseline is based on a scaled equivalent wattage from the 5.5.9 LED Fixtures measure.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$\Delta kW = \Delta kW_{Fan} + \Delta kW_{light}$

$\Delta kW_{Fan} = ((WattsHigh_{base} - WattsHigh_{ES})/1000) * CF_{fan}$

ΔkW_{Light} = see 5.5.9 LED Fixtures measure.

Where:

CF_{fan} = Summer Peak coincidence factor for ventilation savings

= 30%[668]

CF_{light} = Summer Peak coincidence factor for lighting savings

= 11.9%[669]

For example, an ENERGY STAR ceiling fan with one 22.4W LED lamp as part of its light kit were purchased and installed to replace an existing ceiling fan that was no longer operational, the savings are:

$\Delta kW_{fan} = ((67-36)/1000) * 0.3$

$= 0.0093$ kW

$\Delta kW_{light} = ((88.5 - 22.4)/1000) * 1.11 * 0.071$

$= 0.0052$ kW

$\Delta kW = 0.0093 + 0.0052$

$= 0.015$ kW

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

See 5.5.9 LED Fixtures measure for bulb replacement costs.

MEASURE CODE: RS-HVC-CFAN-V05-260101

REVIEW DEADLINE: 1/1/2030

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[668] Assumes the CF is the same as a Room AC. Consistent with coincidence factors found in: RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008.

[669] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs. Average of values for standard and specialty bulbs.

5.3.16 Advanced Thermostats

DESCRIPTION

This measure characterizes the household energy savings from the installation of a new thermostat(s) for reduced heating and cooling consumption through a configurable schedule of temperature setpoints (like a programmable thermostat) *and* automatic variations to that schedule to better match HVAC system runtimes to meet occupant comfort needs. These schedules may be defaults, established through user interaction, and be changed manually at the device or remotely through a web or mobile app. Automatic variations to that schedule could be driven by local sensors and software algorithms, and/or through connectivity to an internet software service. Data triggers to automatic schedule changes might include, for example: occupancy/activity detection, arrival & departure of conditioned spaces, optimization based on historical or population-specific trends, weather data and forecasts.[670] This class of products and services are relatively new, diverse, and rapidly changing. Generally, the savings expected for this measure aren't yet established at the level of individual features, but rather at the system level and how it performs overall. Like programmable thermostats, it is not suitable to assume that heating and cooling savings follow a similar pattern of usage and savings opportunity, and so here too this measure treats these savings independently. Note that this is an active area of ongoing work to better map features to savings value, and establish standards of performance measurement based on field data so that a standard of efficiency can be developed.[671] Since energy savings are applicable at the household level, savings should only be claimed for one thermostat of any type (i.e., one programmable thermostat or one advanced thermostat), and installation of multiple thermostats per home does not accrue additional savings.

Note that though these devices and service could potentially be used as part of a demand response program, the costs, delivery, impacts, and other aspects of DR-specific program delivery are not included in this characterization at this time, though they could be added in the future.

This measure was developed to be applicable to the following program types: TOS, NC, RF, DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The criteria for this measure are established by replacement of a manual-only or programmable thermostat, with one that has the default enabled capability—or the capability to automatically—establish a schedule of temperature setpoints according to driving device inputs above and beyond basic time and temperature data of conventional programmable thermostats. As summarized in the description, this category of products and services is broad and rapidly advancing in regard to their capability, usability, and sophistication, but at a minimum must be capable of two-way communication[672] and exceed the typical performance of manual and conventional programmable thermostats through the automatic or default capabilities described above.

DEFINITION OF BASELINE EQUIPMENT

The baseline is either the actual type (manual or programmable) if it is known,[673] or an assumed mix of these two types based upon information available from evaluations or surveys that represent the population of program

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[670] For example, the capabilities of products and added services that use ultrasound, infrared, or geofencing sensor systems, automatically develop individual models of home's thermal properties through user interaction, and optimize system operation based on equipment type and performance traits based on weather forecasts demonstrate the type of automatic schedule change functionality that apply to this measure characterization.

[671] The ENERGY STAR program released version 1.0 of its Connected Thermostats Specification in 2017. Details and active discussion can be found on ENERGY STAR website; 'Connected Thermostats Specifications v1.0'.

[672] This measure recognizes that field data may be available, through this 2-way communication capability, to better inform characterization of efficiency criteria and savings calculations. It is recommended that program implementations incorporate this data into their planning and operation activities to improve understanding of the measure to manage risks and enhance savings results.

[673] If the actual thermostat is programmable and it is found to be used in override mode or otherwise effectively being operated like a manual thermostat, then the baseline may be considered to be a manual thermostat.

participants. This mix may vary by program, but as a default, 51% programmed programmable and 49% manual or non-programmed programmable thermostats may be assumed.[674]

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life for advanced thermostats is assumed to be 11 years.[675]

DEEMED MEASURE COST

For DI and other programs for which installation services are provided, the actual material, labor, and other costs should be used. For retail, Bring Your Own Thermostat (BYOT) programs,[676] or other program types, actual costs are still preferable,[677] but if unknown, then the average incremental cost for the new installation measure is assumed to be $79.[678]

LOADSHAPE

ΔkWh → Loadshape R10 - Residential Electric Heating and Cooling
$\Delta kWh_{heating}$ → Loadshape R09 - Residential Electric Space Heat
$\Delta kWh_{cooling}$ → Loadshape R08 - Residential Cooling

COINCIDENCE FACTOR

In the absence of conclusive results from empirical studies on peak savings, the TAC agreed to a temporary assumption of 50% of the cooling coincidence factor, acknowledging that while the savings from the advanced Thermostat will track with the cooling load, the impact during peak periods may be lower. This is an assumption that could use future evaluation to improve these estimates.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)
= 34%[679]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)
= 23.3%[680]

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[674] Based on Opinion Dynamics Corporation, "ComEd Residential Saturation/End Use, Market Penetration & Behavioral Study", Appendix 3: Detailed Mail Survey Results, p34, April 2013.

[675] Based on 2017 Residential Smart Thermostat Workpaper, prepared by SCE and Nest for SCE (Work Paper SCE17HC054, Revision #0). Estimate ability of smart systems to continue providing savings after disconnection and conduct statistical survival analysis which yields 9.2-13.8 year range.

[676] In contrast to program designs that utilize program affiliated contractors or other trade ally partners that support customer participation through thermostat distribution, installation and other services , BYOT programs enroll customers *after* the time of purchase through online rebate and program integration sign-ups.

[677] Including any one-time software integration or annual software maintenance, and or individual device energy feature fees.

[678] Market prices vary considerably in this category, generally increasing with thermostat capability and sophistication. The core suite of functions required by this measure's eligibility criteria are available on units readily available in the market roughly in the range of $100 and $150, excluding the availability of time or market-limited wholesale or volume pricing. Analysis of the 2021 Pricing data from AIC's Retail Products Program finds an average retail cost of $129 for Advanced Thermostats. The assumed cost for the baseline equipment (blend of manual and programmable thermostats) is $50 which leads to an incremental cost of $79 for the measure. See AIC_RetailProducts_2021Costdata_AdvThermostats_051322.xlsx for analysis of the AIC program data. Note that any add-on energy service costs, which may include one-time setup and/or annual per device costs are not included in this assumption.

[679] Assumes 50% of the cooling coincidence factor (based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory).

[680] Assumes 50% of the cooling coincidence factor (based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.)

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh[681] = ΔkWh_heatingElectric + ΔkWh_heatingFurnace + $\Delta kWh_{cooling}$

ΔkWh_heatingElectric = %ElectricHeat * Elec_Heating_Consumption * Heating_Reduction * HF * Eff_ISR_Heat

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e

ΔkWh_{cool} = %AC * ((FLH * Capacity * 1/ηCool)/1000) * Cooling_Reduction * Eff_ISR_Cool

Where:

%ElectricHeat = Percentage of heating savings assumed to be electric

Heating fuel	%ElectricHeat
Electric	100%
Natural Gas	0%
Unknown	3%[682]

Elec_Heating_Consumption

= Estimate of annual household heating consumption for electrically heated homes.[683] If location and heating type is unknown, assume 15,683 kWh.[684]

Climate Zone (City based upon)	Electric Resistance (Baseboard or Electric Furnace) Elec_Heating_ Consumption (kWh)	Electric Heat Pump Elec_Heating_ Consumption (kWh)
1 (Rockford)	21,748	12,793
2 (Chicago)	20,777	12,222
3 (Springfield)	17,794	10,467
4 (Belleville)	13,726	8,074
5 (Marion)	13,970	8,218
Average	19,749	11,617

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[681] Electrical savings are a function of both heating and cooling energy usage reductions. For heating this is a function of the percent of electric heat (heat pumps) and fan savings in the case of a natural gas furnace.

[682] Value used is based on known PY8 percent of electric heat provided by Navigant as part of the ongoing evaluation work source: "Slide 21: May 22, 2018, Second Addendum IL TRM Advanced Thermostat Cooling Savings Evaluation"

[683] Values in table are based on converting an average household heating load (834 therms) for Chicago based on 'Table E-1, Energy Efficiency/Demand Response Nicor Gas Plan Year 1: Research Report: Furnace Metering Study, Draft, Navigant, August 1 2013 to an electric heat load (divide by 0.03412) to electric resistance and ASHP heat load (resistance load reduced by 15% to account for distribution losses that occur in furnace heating but not in electric resistance while ASHP heat is assumed to suffer from similar distribution losses) and then to electric consumption assuming efficiencies of 100% for resistance and 200% for HP (see 'Household Heating Load Summary Calculations_08222018.xls'). Finally these values were adjusted to a statewide average using relative HDD assumptions to adjust for the evaluation results focus on northern region. Values for individual cities are then calculated by comparing average HDD to the individual city's HDD.

[684] Assumption that 1/2 of electrically heated homes have electric resistance and 1/2 have Heat Pump, based on 2010 Residential Energy Consumption Survey for Illinois.

Heating_Reduction = Assumed percentage reduction in total household heating energy consumption due to advanced thermostat including accounting for Thermostat Optimization services[685]

Existing Thermostat Type	Heating_Reduction[686]				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Manual	10.20%				
Programmable	7.10%				
Unknown (Blended)[687]	8.0%	8.5%	8.7%	8.9%	8.4%

HF = Household factor, to adjust heating consumption for non-single-family households.

Household Type	HF
Single-Family	100%
Mobile home	83%[688]
Multifamily	65%[689]
Actual	Custom[690]
Unknown	96.5%[691]

Use Multifamily if: Building meets utility’s definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Eff_ISR_Heat = Effective In-Service Rate for heating, the percentage of thermostats installed and configured effectively for 2-way communication. Note that retrospective adjustments should be made during evaluation verification activities through the use of a realization rate if the program design does not ensure that each advanced thermostat is actually installed and/or if the evaluation determines that the advanced thermostat is not actually installed in the Program Administrator’s service territory.

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[685] This estimate is based on a consumption data analysis with matching to non-participants and is therefore net with respect to participant spillover and between net and gross with respect to free ridership. Like all consumption data analyses, it is gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Consistent with Section 7.2 of the Illinois EE Policy Manual, applicable net-to-gross adjustments to these factors will be determined as part of the annual SAG net-to-gross process.

[686] These values represent adjusted baseline savings values (8.8% for manual, and 5.6% for programmable thermostats) as presented in Navigant’s PowerPoint on Impact Analysis from Preliminary Gas savings findings (slide 28 of ‘IL SAG Smart Thermostat Preliminary Gas Impact Findings 2015-12-08 to IL SAG.ppt’), and incorporate any inherent in service rate impact. These values are adjusted upwards in v9 to account for inclusion of Thermostat Optimization savings in an estimated 40% of future participants (based on reported share of Nest and ecobee participants and 2020 rates of Thermostat Optimization and including an assumed 90% ISR consistent with the Guidehouse cooling savings study). The basis for the Thermostat Optimization savings is Navigant “ComEd CY2018 Seasonal Savings Heating Season Impact Evaluation Report”, March 2019.

[687] The weighting of manual to programmable thermostats by market sector is based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential baseline Study Results”, Oct 31 2024. See "Res Baseline Study Workbook.xls" for more detail.

[688] Since mobile homes are similar to Multifamily homes with respect to conditioned floor area but to single-family homes with respect to exposure (i.e., all four wall orientations are adjacent to the outside), this factor is estimated as an average of the single family and multifamily household factors.

[689] Multifamily household heating consumption relative to single-family households is affected by overall household square footage and exposure to the exterior. This 65% reduction factor is applied to MF homes, based on professional judgment that average household size, and heat loads of MF households are smaller than single-family homes

[690] Program-specific household factors may be utilized on the basis of sufficiently validated program evaluations.

[691] When Household type is unknown, a value of 96.5% may be used as a weighted average of 90% SF and 10% MF (96.5% = 100%*90% + 65%*10%) based on a Navigant evaluation of PY8 participants in ComEd’s advanced thermostat program.

Program Delivery	Eff_ISR_Heat
Direct Install	100%
Self-install with Thermostat provided free of charge	54%[692]
Other programs where not evaluated	100%[693]

ΔTherms = Therm savings if Natural Gas heating system

= See calculation in Fossil Fuel section below

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[694]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[695]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[696]

29.3 = kWh per therm

%AC = Fraction of customers with thermostat-controlled air-conditioning

Thermostat control of air conditioning?	%AC[697]
Yes	100%
No	0%

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[692] The 2022 and 2023 Opinion Dynamics evaluations showed that many single family participants who signed up to receive a self-install advanced thermostat did not install it. The value represents an average of the two evaluation years.

[693] As a function of the method for determining savings impact of these devices, in-service rate effects are already incorporated into the savings value for heating_reduction above.

[694] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[695] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[696] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBTU/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STARversion 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

[697] 99% of ComEd PY8 program participants (AC targeted programs) have Central AC per communication with Navigant’s ongoing 2017/2018 cooling savings evaluation. Non-targeted programs are still expected to have participation with %AC above general population rates. 82.5% is an average of the 99% program participation rate, and the 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey ;

Thermostat control of air conditioning?	%AC[697]
Unknown (AC-targeted program)	99%
Unknown (general program)	82.5%

FLH = Estimate of annual household full load cooling hours for air conditioning equipment based on location and home type. If climate zone is unknown, assume the weighted average for the relevant home type. If both climate zone and home type are unknown, assume 723 hours.[698]

Climate zone (city based upon)	FLH (single family) [699]	FLH (general multifamily) [700]	FLH_cooling (weatherized multifamily) [701]
1 (Rockford)	547	499	320
2 (Chicago)	709	629	403
3 (Springfield)	779	707	453
4 (Belleville)	1082	982	630
5 (Marion/Murphysboro)	956	868	557
Weighted Average[702]			
ComEd	676	603	386
Ameren	875	791	507
Statewide	731	655	420

Use Multifamily if: Building meets utility's definition for multifamily and system serves single unit. For residential sized systems serving 2 or more units, assume single family hours. For central systems use Volume 2 Commercial and Industrial Measures.

Capacity = Size of AC unit. (Note: One refrigeration ton is equal to 12,000 Btu/hr)

= Use actual when program delivery allows size of AC unit to be known. If unknown assume 33,600 Btu/hr for single family homes, 28,000 Btu/hr for multifamily or 24,000 Btu/hr for mobile homes.[703] If building type is unknown, assume 33,040 Btu/hr.[704]

ηCool = the cooling equipment's Seasonal Energy Efficiency Ratio rating (kBtu/kWh) *

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[698] When both climate zone and home type are unknown, a value of 723 hours may be used as a weighted average of 90% SF and 10% MF (723 = 731*90% + 655*10%) based on a Navigant evaluation of PY8 participants in ComEd's advanced thermostat program.

[699] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[700] Ibid.

[701] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[702] Weighted based on number of occupied residential housing units in each zone. Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[703] Single family cooling capacity based on Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), October 19, 2010, ComEd, Navigant Consulting. Multifamily capacity based on weighted average of PY9 Ameren and ComEd MF cooling capacities. Mobile home capacity based on ENERGY STAR's Manufactured Home Cooling Equipment Sizing Guidelines which vary by climate zone and home size. The average size of a mobile home in the East North Central region (1,120 square feet) from the 2015 RECS data is used to calculated appropriate size.

[704] Unknown is based on statewide weighted average of 90% single family and 10% multifamily, based on a Navigant evaluation of PY8 participants in ComEd's advanced thermostat program.

Distribution Efficiency

= Use actual SEER2 rating where it is possible to measure or reasonably estimate (assuming 85% distribution efficiency if only equipment efficiency is available). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[705]. If unknown, use the following assumption (do not derate further by age):

Cooling System	SEER2[706]	ηCool (SEER2 * 0.85)
Air Source Heat Pump	11.4	9.7
Central AC		

1/1000 = kBtu per Btu

Cooling_Reduction = Assumed average percentage reduction in total household cooling energy consumption due to installation of advanced thermostat including accounting for Thermostat Optimization:[707]

= 8.4% [708]

Eff_ISR_Cool = Effective In-Service Rate for cooling, the percentage of thermostats installed and configured effectively for 2-way communication. Note that retrospective adjustments should be made during evaluation verification activities through the use of a realization rate if the program design does not ensure that each advanced thermostat is actually installed and/or if the evaluation determines that the advanced thermostat is not actually installed in the Program Administrator's service territory.

Program Delivery	Eff_ISR_Cool
Direct Install	100%

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[705] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[706] Estimate based upon Navigant, 2018 "EIA – Technology Forecast Updates – Residential and Commercial Building Technologies – Reference Case", converted to SEER2.

[707] Note that "Cooling_Reduction" percentage is the savings expected from reduced cooling use, and is not the same as % cooling savings that are based on total kWh saved (including fan and heating kWh savings) as a percent of total kWh used for cooling.

[708] The Cooling_Reduction assumption is based on a TAC agreement to weight the consumption data analysis result (econometric) and the adjusted ENERGY STAR method for estimating runtime savings for advanced thermostats with stakeholder assumptions about baseline behavior (ENERGY STAR), provided by Guidehouse in 2020. The econometric result (7.8%) is weighted at 90%, and the ENERGY STAR result (10-14% range taken as reasonable by stakeholders, however 14% is used to account for increased Thermostat Optimization) weighted at 10%.

This econometric value is based upon the non-weather normalized savings percentage, adjusted for selection bias, %AC and ISR, with additional adjustment to account for the anticipated growth in Thermostat Optimization savings, from 12% of participants in the study to 45% of future participants (based on reported share of Nest and ecobee participants and 2020 rates of Thermostat Optimization). The basis for the Thermostat Optimization savings is Navigant's "ComEd CY2018 Seasonal Savings Cooling Season Impact Evaluation Report", March 2019. The estimate of cooling reduction factor includes an adjustment for apparent selection bias, per stakeholder request as part of a 2020 study by Guidehouse involving a consumption analysis of ComEd advanced thermostat rebate recipients. Guidehouse acknowledges that this adjustment is a coarse method of addressing potential bias, but believes that this adjustment may not be accurate or applicable for future studies of this type.

The adjusted ENERGY STAR analysis is gross with respect to all components of net-to-gross (free ridership, and participant and non-participant spillover). The econometric analysis uses matching to future participants and is therefore gross with respect to free ridership. Like all consumption data analyses, it is net with respect to participant spillover and gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Consistent with Section 7.2 of the Illinois EE Policy Manual, applicable net-to-gross adjustments to these factors will be determined as part of the annual SAG net-to-gross process.

Program Delivery	Eff_ISR_Cool
Self-install with Thermostat provided free of charge	54%[709]
Other programs where not evaluated	90%[710]

For example, an advanced thermostat replacing a programmable thermostat direct-installed in an electric heat pump heated, single-family home in Springfield with advanced thermostat-controlled air conditioning of a system of unknown size and seasonal efficiency rating:

ΔkWH = $\Delta kWh_{heating} + \Delta kWh_{cooling}$

= 1 * 10,464 * 7.1% * 100% * 100% + (0 * 0.0314 * 29.3) + 100% * ((779 * 33,600 * (1/9.7))/1000) * 8.4% * 100%

= 743kWh + 227 kWh

= 970 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = %AC * (Cooling_DemandReduction * Btu/hr * (1/EER2)/1000) * EFF_ISR_Cool * CF

Where:

Cooling_DemandReduction = Assumed average percentage reduction in total household cooling demand due to installation of advanced thermostat including accounting for Thermostat Optimization services

= 16.4%[711]

EER2 = Energy Efficiency Ratio of existing cooling system (kBtu/hr / kW)

= Use actual EER2 rating where it is possible to measure or reasonably estimate. If EER2 unknown but SEER2 available convert using the equation:

EER2 = (-0.02 * SEER2_exist^2) + (1.12 * SEER2_exist) [712]

If SEER2 or EER2 rating unavailable, use:

Cooling System	EER2[713]
Air Source Heat Pump	10.0

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[709] The 2022 and 2023 Opinion Dynamics evaluations showed that many single family participants who signed up to receive a self-install advanced thermostat did not install it. The value represents an average of the two evaluation years.

[710] The 2020 Guidehouse evaluation indicated that 6.75% of participants installed the advanced thermostat out of state. An additional reduction is applied to account for purchases that are never installed. Based on the available data this is estimated as an additional 3.75%.

[711] The current Cooling_DemandReduction assumption is based on results presented on August 4th, 2020 from a Guidehouse econometric analysis and further refinements discussed throughout August.

The final value is based upon the non-weather normalized savings percentage, adjusted for selection bias, %AC and ISR, provided by the Guidehouse econometric results, and includes an additional adjustment to account for the anticipated growth in Thermostat Optimization savings, The estimate of cooling reduction factor includes an adjustment for apparent selection bias, per stakeholder request as part of a 2020 study by Guidehouse involving a consumption analysis of ComEd advanced thermostat rebate recipients. Guidehouse acknowledges that this adjustment is a coarse method of addressing potential bias, but believes that this adjustment may not be accurate or applicable for future studies of this type.

[712] From Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder.

[713] Based on converting SEER2 assumption to EER2.

Cooling System	EER2[713]
Central AC	

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)
= 34%[714]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)
= 23.3%[715]

For example, an advanced thermostat replacing a programmable thermostat directly installed in an electric resistance heated, single-family home in Springfield with advanced thermostat-controlled air conditioning of a system of unknown size and seasonal efficiency rating:

ΔkW_{SSP} = 100% * (16.4% * 33,600 * (1/10.0)/1000) * 100% * 34%
= 0.1874 kW

ΔkW_{PJM} = 100% * (16.4% * 33,600 * (1/10.0)/1000) * 100% * 23.3%
= 0.1284 kW

FOSSIL FUEL SAVINGS

ΔTherms = %FossilHeat * Gas_Heating_Consumption * Heating_Reduction * HF * Eff_ISR_Heat

Where:

%FossilHeat = Percentage of heating savings assumed to be Natural Gas

Heating fuel	%FossilHeat
Electric	0%
Natural Gas	100%
Unknown	97%[716]

Gas_Heating_Consumption

= Estimate of annual household heating consumption for gas heated single-family homes. If location is unknown, assume the average below.[717]

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[714] Assumes 50% of the cooling coincidence factor (based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.)

[715] Assumes 50% of the cooling coincidence factor (based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.)

[716] Value used is based on known PY8 percent of electric heat provided by Navigant as part of the ongoing evaluation work source: “Slide 21: May 22, 2018, Second Addendum IL TRM Advanced Thermostat Cooling Savings Evaluation”

[717] Values are based on adjusting the average household heating consumption (849 therms) for Chicago based on ‘Table 3-4, Program Sample Analysis, Nicor R29 Res Rebate Evaluation Report 092611_REV FINAL to Nicor’, calculating inferred heating load by dividing by average efficiency of new in program units in the study (94.4%) and then applying standard assumption of existing unit efficiency of 83% (estimate based on 24% of furnaces purchased in Illinois were condensing in 2000 (based on data from GAMA, provided to Department of Energy), assuming typical efficiencies: (0.24*0.92) + (0.76*0.8) = 0.83). This Chicago value was then adjusted to a statewide average using relative HDD assumptions to adjust for the evaluation results focus on northern region. Values for individual cities are then calculated by comparing average HDD to the individual city’s HDD.

Climate Zone (City based upon)	Gas_Heating_ Consumption (therms)
1 (Rockford)	1,052
2 (Chicago)	1,005
3 (Springfield)	861
4 (Belleville)	664
5 (Marion)	676
Average	955

Other variables as provided above.

For example, an advanced thermostat replacing a programmable thermostat directly-installed in a gas heated single-family home in Chicago:

ΔTherms = 1.0 * 1005 * 7.1% * 100% * 100%

= 71.4 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-ADTH-V12-270101

REVIEW DEADLINE: 1/1/2028

5.3.17 Gas High Efficiency Combination Boiler

DESCRIPTION

Space heating boilers are pressure vessels that transfer heat to water for use in space heating. Boilers either heat water using a heat exchanger that works like an instantaneous water heater or by adding/connecting a separate tank with an internal heat exchanger to the boiler. A combination boiler contains a separate heat exchanger that heats water for domestic hot water use. Qualifying combination boilers must be whole-house units used for both space heating and domestic water heating with one appliance and energy source. Only participants who have a natural gas account with a participating natural gas utility are eligible for this rebate.

This measure characterizes:

a) Time of Sale:

   a. The installation of a new high efficiency, gas-fired hot water condensing combination boiler in a residential location meeting efficiency specifications determined by the program. This could relate to the replacement of an existing unit at the end of its useful life, or the installation of a new system in a new home.

b) Early Replacement:

   Early Replacement determination will be based on meeting the following conditions:

   - The existing unit is operational when replaced, or
   - The existing unit requires minor repairs (defined as 20% of the cost of a new baseline unit).[718]
   - All other conditions will be considered Time of Sale.

   The Baseline AFUE of the existing unit replaced:

   - If the AFUE of the existing unit is known the Baseline AFUE is the actual AFUE value of the unit replaced.
   - If the AFUE of the existing unit is unknown, use assumptions in variable list below ($AFUE_{Exist}$).
   - If the operational status or repair cost of the existing unit is unknown, use time of sale assumptions.

   A weighted average early replacement rate is provided for use in programs when the actual baseline early replacement rates are unknown.[719]

Deemed Early Replacement Rates for Boilers

	Deemed Early Replacement Rate
Early Replacement Rate for Boiler participants	7%

This measure was developed to be applicable to the following program types: TOS or ER. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient condition is a condensing combination boiler unit with boiler AFUE of 90% or greater. The combination

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[718] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement. Note the non-inflated cost should be used as this would be a cost consideration in the program year.

[719] Based upon research from “Home Energy Efficiency Rebate Program GPY2 Evaluation Report” which outlines early replacement rates for both primary and secondary central air cooling (CAC) and residential furnaces. This is used as a reasonable proxy for boiler installations since boiler specific data is not available. Report presented to Nicor Gas Company February 27, 2014.

boiler must have a sealed combustion unit and be capable of modulating the firing rate and must be accompanied by a programmed outdoor reset control.[720] Measures that do not qualify for this incentive include boilers with a storage tank and redundant or backup boilers.

DEFINITION OF BASELINE EQUIPMENT

Time of sale: The baseline condition is a boiler with the federal minimum of 84% AFUE and a residential, natural gas-fueled storage water heater meeting minimum Federal efficiency standards as described below:

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[721]
Residential Gas Storage Water Heaters ≤75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.3456 – (0.0020 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5982 – (0.0019 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6483 – (0.0017 * Rated Storage Volume in Gallons)
		High	UEF = 0.6920 – (0.0013 * Rated Storage Volume in Gallons)
	>55 gallon and ≤100 gallon tanks	Very small	UEF = 0.6470 – (0.0006 * Rated Storage Volume in Gallons)
		Low	UEF = 0.7689 – (0.0005 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.7897 – (0.0004 * Rated Storage Volume in Gallons)
		High	UEF = 0.8072 – (0.0003 * Rated Storage Volume in Gallons)

Draw patterns are based on first hour rating (gallons) for storage tanks as shown below:[722]

Storage Water Heater Draw Pattern	
Draw Pattern	**First Hour Rating (gallons)**
Very Small	≥ 0 and < 18
Low	≥ 18 and < 51
Medium	≥ 51 and < 75
High	≥ 75

If using a deemed approach, for storage water heaters with a storage capacity equal to or less than 55 gallons, the Federal energy factor requirement is calculated as 0.6483 – (0.0017 * storage capacity in gallons) assuming a Medium draw and 50 gallon tank (resulting in 0.5633 EF).

Early replacement: The baseline for this measure is the efficiency of the existing equipment for the assumed remaining useful life of the unit and the new baseline as defined above for the remainder of the measure life.

Note, since the baseline is likely to be two separate units (a boiler and a storage water heater) it is possible that one element could be time of sale and the other early replacement (e.g. a boiler fails and is replaced with a new combination boiler which results in a working water heater also being replaced). In this scenario use the appropriate savings for each component.

Consistent with TRM Volume 1 Section 2.3.1 for midstream programs or other cases where the existing condition is unknown, it may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on evaluation results as provided above.

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[720] In a 2015 study, the Cadmus Group team conducted an analysis of optimal outdoor reset curves and discovered that “a boiler in Massachusetts with well-programmed outdoor reset controls could see an operating efficiency improvement of up to 3 to 4 percentage points from the average efficiency of 88.4% observed”.

[721] DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431. Minimum Federal standard as of 4/16/2015, confirmed no changes as of 6/20/2021; https://www.ecfr.gov/cgi-bin/text-idx?SID=80dfa785ea350ebeee184bb0ae03e7f0&mc=true&node=se10.3.430_132&rgn=div8

[722] Definitions provided in 10 CFR 430, Subpart B, Appendix E, Section 5.4.1

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 21.5 years.[723]

Early replacement: Remaining life of existing equipment is assumed to be 7 years.[724]

DEEMED MEASURE COST

The incremental measure cost is assumed to be $1,498 for a 90-94% AFUE unit and $2,145 for a unit greater than or equal to 95% AFUE.[725]

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

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[723] US Department of Energy, Technical Support Document: Energy Efficiency Program for Consumer Products and Commercial and Industrial Equipment: Residential Furnaces." February 10, 2015. Table 8.2.1, p. 8-23. The document's definition of furnaces includes hot water boilers with firing rates of less than 300,000 Btu/h.

[724] Assumed to be one third of effective useful life

[725] Northeast Energy Efficiency Partnerships. Incremental Cost Study Report. September 23, 2011. Incremental measure cost of $2,791.00 for a combination boiler and $2,461.00 for a high efficiency boiler sized at 110 Mbh. The percentage increase is applied to the current boiler incremental cost assumptions.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

Note, since the baseline is likely to be two separate units (a boiler and a storage water heater) it is possible that one element could be time of sale and the other early replacement (e.g. a boiler fails and is replaced with a new combination boiler which results in a working water heater also being replaced). In this scenario use the appropriate savings for each component.

Time of Sale:

$$\Delta Therms = \Delta ThermsBoiler + \Delta ThermsWH$$

$$\Delta ThermsBoiler = \frac{EFLH * CAP_{Input} * (\frac{AFUE_{Eff}}{AFUE_{Base}} - 1)}{100{,}000}$$

$$\Delta ThermsWH = \frac{\left(\frac{1}{UEF_{Base}} - \frac{1}{UEF_{Eff}}\right) * (GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0)}{100{,}000}$$

Early Replacement: [726]

$$\Delta Therms\ for\ remaining\ life\ of\ existing\ unit\ (1st\ 7\ years) = \Delta ThermsBoiler_{RUL} + \Delta ThermsWH_{RUL}$$

$$\Delta ThermsBoiler_{RUL} = \frac{EFLH * CAP_{Input} * (\frac{AFUE_{Eff}}{AFUE_{Exist}} - 1)}{100{,}000}$$

$$\Delta ThermsWH_{RUL} = \frac{\left(\frac{1}{UEF_{Exist}} - \frac{1}{UEF_{Eff}}\right) * (GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0)}{100{,}000}$$

$$\Delta Therms\ for\ remaining\ measure\ life\ (next\ 14.5\ years) = As\ provided\ in\ Time\ of\ Sale\ above$$

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[726] The two equations are provided to show how savings are determined during the initial phase of the measure (existing to efficient) and the remaining phase (new baseline to efficient). In practice, the screening tools used may either require a First Year savings (using the first equation) and then a “number of years to adjustment” and “savings adjustment” input which would be the (new base to efficient savings)/(existing to efficient savings).

Where:

CAP_{Input} = Gas Furnace input capacity (Btuh)

= Actual

EFLH = Equivalent Full Load Hours for gas heating

Climate Zone (City based upon)	EFLH[727]
1 (Rockford)	1022
2 (Chicago)	976
3 (Springfield)	836
4 (Belleville)	645
5 (Marion)	656
Weighted Average[728]	
ComEd	978
Ameren	800
Statewide	928

$AFUE_{Exist}$ = Existing Boiler Annual Fuel Utilization Efficiency Rating

= Use actual AFUE rating where it is possible to measure or reasonably estimate. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[729] or if unknown, assume 61.6 AFUE%.[730] If unknown value is used, it should not be derated by age.

$AFUE_{Base}$ = Baseline boiler annual fuel utilization efficiency rating

= 84%

$AFUE_{Eff}$ = Efficent boiler annual fuel utilization efficiency rating

= Actual. If unknown, use defaults dependent on tier as listed below:[731]

Measure Type	$AFUE_{Eff}$
AFUE ≥ 90%	92.5%
AFUE ≥ 95%	95%

UEF_{Base} = Uniform Energy Factor rating of standard storage water heater according to federal standards provided in table in baseline section. For a deemed approach:

= For gas storage water heaters ≤55 gallons: 0.6483 – (0.0017 * storage capacity in gallons)

= For gas storage water heaters >55 gallons: 0.8072 − (0.0003 × storage capacity in

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[727] Full load hours for Chicago, are based on findings in ‘Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60F.

[728] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[729] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[730] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[731] Default values per tier selected based upon the average AFUE value for the tier range except for the top tier where the minimum is used due to proximity to the maximum possible.

gallons)

= If tank size is unknown, assume 0.563 for a gas storage water heater with a 50-gallon storage capacity

UEF_{Eff} =Uniform Energy Factor rating for efficient combination boiler. This is assumed consistent with a condensing instantaneous gas-fired water heater.

= 0.954 [732]

UEF_{Exist} = Uniform Energy Factor rating for existing equipment

= Use actual UEF rating where it is possible to measure or reasonably estimate.

= if unknown assume 0.52 [733]

GPD = Gallons per day of hot water use per person

= 45.5 gallons hot water per day per household/2.59 people per household [734]

= 17.6

Household = Average number of people per household

Household Unit Type	Household[735]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[736]
Custom	Actual Occupancy or Number of Bedrooms[737]		

Use Multifamily if: Building meets utility's definition for multifamily

365.25 = Days per year, on average

γ_{Water} = Specific weight of water

= 8.33 pounds per gallon

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municipal system

= 50.7°F [738]

1.0 = Heat capacity of water (1 Btu/lb*°F)

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[732] Average Uniform Energy Factor from CAC appliance database accessed 4/22/2022 for instantaneous gas-fired water heaters. The water heater portion of a gas high efficiency combination boiler is essentially a tankless water heater.

[733] Based on DCEO Efficient Living Program Data for a sample size of 157 gas water heaters.

[734] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[735] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[736] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[737] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[738] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

For example, a Rockford single-family IQ home installing an 80,000 Btuh condensing combination boiler unit with boiler AFUE of 95%:

$\Delta Therms_{Boiler}$ = (1,022 * 80,000 * (0.95/0.84 - 1))/100,000

$\Delta Therms_{WH}$ = (1/0.5863 – 1/0.954) * (17.6 * 2.76 * 365.25 * 8.33 * (125-50.7) *1.0)/100,000

ΔTherms = 107.1 + 72.2

= 179.3 Therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-COMB-V07-270101

REVIEW DEADLINE: 1/1/2030

5.3.18 Furnace Filter Alarm – Provisional Measure

Measure has been removed in v9.0 due to evaluation results showing filter alarms being ineffectual at indicating a dirty filter.

5.3.19 Thermostatic Radiator Valves – Provisional Measure

DESCRIPTION

Thermostatic Radiator Valves (TRVs) are installed on hydronic or steam radiators to provide temperature control within a room or space. The TRV is a self-regulating valve requiring no auxiliary power, allowing the user to set the temperature to their preferred set point. On hydronic and two-pipe steam systems, as the room temperature rises the valve head expands, blocking the flow of hot water or steam into the radiator. On a one-pipe steam system the TRVs are installed on the air vent and limit the amount of air escaping the radiator, which in turn limits the amount of steam filling the radiator.

The current measure is limited to retrofit application in Multifamily buildings. TRVs are particularly effective in large multifamily buildings where some rooms tend to be overheated resulting in tenants leaving windows open even in winter.

From limited evaluation results, savings appear to be dependent on being part of a whole system commissioning and balancing project.

This measure was developed to be applicable to the following program types: RF. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the TRV is installed on an existing hydronic or steam heated radiator in a multifamily building.

DEFINITION OF BASELINE EQUIPMENT

The baseline is an existing hydronic or steam heated radiator without a TRV installed.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life of a TRV is estimated as 15 years.[739]

DEEMED MEASURE COST

The actual cost per TRV should be used. If unknown assume a measure cost of $200 for steam systems and $250 for hot water per TRV.[740] If the heating system is required to be drained, the full cost should be used and split between all TRVs installed.

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

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[739] Estimate based on assumption used in Department of Energy, Dentz et al, “Thermostatic Radiator Valve Evaluation”, January 2015.

[740] Department of Energy, Dentz et al, “Thermostatic Radiator Valve Evaluation”, January 2015, Table 2, Page 7.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

$$\Delta Therms = Gas\_Heating\_Load/(\mu Boiler * \#Radiators) * \%TRVSavings$$

Where:

ΔTherms = Therm savings per TRV installed

Gas_Heating_Load = Estimated Gas heating Load per multi family unit.[741]

Climate Zone (City based upon)	Gas_Heating_ Load per Multi family unit (therms)
1 (Rockford)	567
2 (Chicago)	542
3 (Springfield)	464
4 (Belleville)	358
5 (Marion)	365
Average	515

µBoiler = AFUE Efficiency of the boiler system

= Actual. If unknown assume 75%

#Radiators = Number of radiators in the multifamily unit.

= Actual. If unknown estimated as five.

%TRVSavings = Estimate of heating consumption savings from installing a TRV[742]

= 15% when part of a system balancing project to address overheated spaces

= 5% if installed without system balancing

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[741] This assumption is based on the Single Family Gas Heating Consumption for boiler values provided in 5.3.14 Boiler Reset Controls (based on Table 3-4, Program Sample Analysis, *Nicor R29 Res Rebate Evaluation Report 092611_REV FINAL to Nicor)* multiplied by a 65% adjustment factor, which is used to account for the expected lower multifamily heating consumption relative to single-family households due to overall household square footage and exposure to the exterior.

[742] Based on literature review of a limited number of studies available including:
Department of Energy, Dentz et al, "Thermostatic Radiator Valve Evaluation", January 2015.
NYSERDA "Thermostatic Radiator Valve Demonstration Project", 1995.
Lublin University of Technology Cholewa et al "Actual energy savings from the use of thermostatic radiator valves in residential buildings – Long term field evaluation", July 2017.

For example, a TRV is installed on three of five radiators in a multifamily unit with a central 75% AFUE hydronic boiler, as part of a system balancing project in Chicago.

ΔTherms per TRV = Gas_Heating_Load/(μBoiler * #Radiators) * %TRVSavings

= 542 / (0.75 * 5) * 0.15

= 21.7 Therms

Total of 19.6 * 3 = 65.1 Therms for the multi family unit

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-TRVS-V01-210101

REVIEW DEADLINE: 1/1/2023

5.3.20 Residential Energy Recovery Ventilator (ERV)

DESCRIPTION

Unconditioned outdoor air is typically warmer or cooler than desired by the occupants and is often also more humid than desired. A Residential ERV system provides necessary outdoor air ventilation while preheating or precooling the outdoor air, and, in some Residential ERV systems, pre-dehumidifying the outdoor air as well. This saves energy required for heating, cooling, and dehumidifying the residence.

An ERV generally comprises two fans (Exhaust and Outdoor Intake) that pass the two streams of air through a heat exchanger, which may be a fixed plate heat exchanger or a rotary heat recovery wheel. Sensible heat from the warmer air stream is transferred to the cooler air stream, thereby reducing the amount of heating energy or cooling energy needed to condition the outdoor air to desired indoor air temperature and humidity levels. The heat exchanger surfaces, in some ERV models, may be coated with a hydroscopic material that absorbs/releases or transfers latent moisture from one air stream to the other. This increases the overall energy transfer efficiency during humid summer months by partially dehumidifying moist outdoor air using the relatively drier indoor exhaust air. In the winter, this same effect serves to humidify the outdoor air, making the space more comfortable, but not saving significant energy.

The current measure serves all residential single family and Group R2, R3 and R4 dwellings of 3 stories or less, both existing and new, where ERV is not required to comply with energy code.

This measure was developed to be applicable to electric cooling systems and electric or natural gas heating systems in the following program types: RF, NC, TOS. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The Residential ERV, proposed for installation, must be listed in the Home Ventilation Institute's HVI-Certified Ratings Listing by its Brand and Model Number, and the HVI-Certified Ratings Listing must include the Model's Maximum CFM, ASRE (Adjusted Sensible Recovery Efficiency) and ATRE (Adjusted Total Recovery Efficiency) ratings values.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is a residential HVAC system with no energy recovery ventilator installed.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life of an ERV is estimated as 15 Years.[743]

DEEMED MEASURE COST

The actual cost of the ERV should be used. If unknown assume an incremental measure cost of $25.00 per Maximum CFM HVI-Certified Rating of proposed Brand and Model Number.[744]

LOADSHAPE

R11 - Residential Ventilation

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate

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[743] State of Minnesota Technical Reference Manual, version 3, pp. 350+. https://mn.gov/commerce/industries/energy/utilities/cip/technical-reference-manual/

[744] This installed cost amount is estimated by Leidos based on 2Q2021 list prices from SupplyHouse.com for a variety of ERVs of nominally 95-117 CFM capacity plus an estimated $2,000 per ERV for electrical and mechanical installation services, divided by the Maximum listed CFM specified in the Home Ventilating Institute's Certified Products Directory for the specific ERVs offered by SupplyHouse.com. Unit installed prices ranged from $24.27 to $28.93 per CFM based on the above.

peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's Forward Capacity Market.

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for ERV (during utility peak hour)

= 95%[745]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for ERV (average during PJM peak period)

= 95%[746]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

ERV Electric Heating Savings

If residence uses Electric heating,

ΔkWh_heating = 1.08 * HVI_Max_CFM * HDD60 * 24 * HVI_Rated_ASRE / ηHeat / 3412 * Daily_Hrs_Ventilation / 24 * %ElectricHeat

Where:

1.08 = Specific heat of air x density of inlet air @ 70F x 60 min/hr in BTU/hr-F-CFM

HVI_Max_CFM = HVI-Certified Maximum CFM of the Brand/Model of ERV proposed to be used[747]

If ERV Brand and Model are unknown, use the appropriate values in following Table of ERV Default Values[748]:

ERV Default Values:

	ERV Default Heating and Cooling CFM	ERV Default ASRE	ERV Default ATRE	ERV Default Watts
Single-family	114	70%	56%	94
Multi-family	64	65%	53%	49
Unknown Residence[749]	99	68%	55%	80
Custom	*Actual*	*Actual*	*Actual*	*Actual*

HDD60 = Heating Degree Days, base 60F, for the Climate Zone of Customer's site, from the following Table [750]

Table 1: Climate Variables

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[745] Based on 24 hr /day, 7 day/w operation.

[746] Ibid.

[747] Please see file 'HVIProd_ER.xlsx' for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings.

[748] Table of ERV Default Values is based on all available ERV Certified Data from file 'HVIProd_ER.xlsx' published by Home Ventilating Institute (https://www.hvi.org/hvi-certified-products-directory/section-iii-hrv-erv-directory-listing/). This table lists certified values of 387 models of ERVs. The default values above assume that Single-family residences will install ERVs with Heating CFM > 75 and Multi-family residences will install ERVs with Heating CFM <= 75 cfm. The respective default values represent arithmetic averages of the respective HVI ERV values separated into these two ERV CFM ranges.

[749] Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions, and States, 2009. 69% Multi-Family and 31% Single Family.

[750] National Climatic Data Center, Cooling Degree Days are based on a base temp of 65°F and Heating Degree Days are based on a base temp of 60F. There is a county mapping table Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

Climate Zone (City based upon)	Climate Heating Factor (CHF)	Heating based on Sensible: HDD60	Cooling based on Sensible: CDD65	Heating Design Day DBT	Cooling Design Day DBT	Cooling Design Day OA Enthalpy	Heating Design Day OA Enthalpy	Cooling Design Day RA Enthalpy	Heating Design Day RA Enthalpy	ΔEnthalpy [751] (Btu-hr/lb)	Daily fan use[752]
1 (Rockford)	58%	5,230	877	0.3	88.0	41.0	0.07	28.36	25.34	6,375	17.8
2 (Chicago)	55%	4,798	1,047	4.4	88.5	40.8	1.06	28.36	25.34	7,243	18.9
3 (Springfield)	48%	4,266	1,183	7.3	90.7	42.8	1.75	28.36	25.34	11,311	18.9
4 (Belleville)	49%	3,188	1,641	12.7	92.7	43.3	3.05	28.36	25.34	11,885	18.4
5 (Marion)	46%	3,390	1,450	12.1	92.7	44.5	2.90	28.36	25.34	11,885	18.4

24 = Number of Hours in a Day [753]

HVI_Rated_ASRE = HVI-Certified Adjusted Sensible Recovery Efficiency of the Brand/Model of ERV proposed to be used[754]

= If ERV Brand and Model are unknown, use default values in previous table of ERV Default Values.

ηHeat = Efficiency of heating system

= Actual (where new or where it is possible to measure or reasonably estimate, assuming heat pump 85% distribution efficiency if only equipment efficiency is available). If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[755] or if not available refer to default table below[756]. If unknown value is used, it should not be derated by age.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate)= (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown (for use in program evaluation only)[757]	N/A	N/A	1.28

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[751] Base: 28.4 BTU/lb Return Air

[752] Based on defrost oversizing factor.

[753] Used to convert Annual HDD (F-Days) to total deltaT-hours (F-Hr) per year. Also used to convert daily ERV run hours to % runtime.

[754] Please see file 'HVIProd_ER.xlsx' for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings.

[755] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[756] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps.

[757] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see "HC6.9 Space Heating in Midwest Region.xls", using average for East North

3412 = Converts Btu to kWh

Daily_Hrs_Ventilation = Average annual daily ERV run time during which heat/cooling is being recovered, based on the assumption that ERV is selected to provide adequate ventilation rate when operated continuously on the coldest day of the year, when the defrost cycle interrupts heat recovery for a period of time depending on outdoor air temperature. ERV is assumed to be oversized so that on this coldest day, the ERV will provide the total ventilation air quantity during the minutes that is is not in defrost. As an example, if a coldest day results in 20% defrost time, the ERV is assumed to be selected at 1/0.8 or 125% oversizing. On the coldest day, the fan would operate 100% of the time. When not in defrost, it is assumed the homeowner would reduced fan operation to 80% runtime to avoid overventilating the residence. This assumed behavior results in an average annual runtime per day ranging from 17.8 to 18.9 hours/day.

The following defrost schedule is typical of ERV manufacturers and was used to calcuate average daily run hours:

OA DBT	Defrost	On	Total	% Runtime
27 F	3.0 Min.	25.0 Min.	28.0 Min.	89.3%
-4 F	4.5 Min.	17.0 Min.	21.5 Min.	79.1%
-31 F	7.0 Min.	15.0 Min.	22.0 Min.	68.2%

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Natural Gas

= If unknown[758], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[759]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[758] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[759] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

For example, assuming HVI Max CFM = 117 cfm; HDD60 = 5,552 (Rockford, IL); Electric Resistance Heat (COP=1.0); HVI Rated ASRE = 75%; Heating COP = 1.0; Daily_Hrs_Ventilation = 17.8; %ElectricHeat = 100%

ΔkWh_heating = ((1.08 * 117 * 5,552 * 24) * 75% / 1.0 / 3,412) * 17.8 / 24 * 100%

= 2,742 kWh of heating energy saved

ERV Electric Cooling Savings

If residence uses Electric cooling, the cooling savings is calculated by the following equation:

ΔkWh_cooling = 4.5 * HVI_Max_CFM * ΔEnthalpy * HVI_Rated_ATRE / 1000 / ηCool * Daily_Hrs_Ventilation / 24 * %Cool

Where:

4.5 = Density of inlet air at 70F x 60 min/hr in lb-min/ft3 -hr

HVI_Max_CFM = HVI-Certified Maximum CFM of the Brand/Model of ERV proposed to be used[760]

= If ERV Brand and Model are unknown, use default values in previous "Table of ERV Default Values".

ΔEnthalpy = Difference between Outdoor Air and Return Air Enthalpies (Btu/lb air) for each weather bin of the Climate Zone of Customer's site[761] times the number of hours of occurrence per year of each weather bin

= Values contained in Table 1, above, for 5 representative climate zones

= $\sum$ [($H\_OA\_Cool_{bin}$ - $H\_RA\_Cool_{bin}$) * Annual $Hours_{bin}$] summed over all temperature bins where $H\_OA\_Cool_{bin} > H\_RA\_Cool_{bin}$.

Where:

H_OA_Cool = Weather Bin Outdoor Air Enthalpy

H_RA_Cool = Cooling Mode Return Air Enthalpy = 28.36 Btu/lb, a deemed value.

1000 = Conversion of btu to kbtu.

ηCool = Efficiency (SEER2) of Air Conditioning equipment (kBtu/kWh) * Distribution Efficiency

= Actual (where new or where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[762] or if unknown assume the following.[763]

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[760] Please see HVI Table at the end of this document. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings".

[761] This is based the Climate Zone based on the Customer's Site Address, informed by the Minnesota Technical Reference Manual v.3, page 350, commercial ERV measure assumptions modified for Illinois climate conditions using ASHRAE Design Data Tables. The table recreates enthalpy assumptions originating in the Minnesota TRM v3 for commercial ERV measure, page 350, tables 1 and 2, modified for Illinois climate conditions

[762] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[763] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[764]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[765]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

HVI_Rated_ATRE = HVI-Certified Adjusted Total Heat Recovery Efficiency of the Brand/Model of ERV proposed to be used[766].

Daily_Hrs_Ventilation = As previously defined

24 = Hours in a day

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[767]	98.9%	96.5%	99.8%	98.7%	98.6%

For example, assuming HVI Max CFM = 117 cfm; ΔEnthalpy = 6,375 BTU-hr/lb (Rockford, IL); Air Conditioner, vintage older than 2006 (ηCool = 9.5); HVI Rated ATRE = 48%; Daily_Hrs_Ventilation = 17.8; %Cool = 100%

ΔkWh_cooling = 4.5 * 117 * 6,375 / 1,000 / 9.5 * 48% * 17.8 / 24 * 100%

= 126 kWh

ERV Fan Energy Savings

For all heating or heating/cooling ERV applications, the ERV fan savings represents the change in energy usage of the ERV fan annual energy use versus the base case standard (non-ERV) exhaust fan energy use.

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[764] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[765] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024.

[766] Please see file ‘HVIProd_ER.xlsx’ for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings.

[767] Based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024.

The base case non-ERV exhaust fan energy use is deemed to be equal to the average ERV daily exhaust volume of air exhausted, times the deemed fan efficiency of a continuously-operated bathroom exhaust fan, as defined in Section 5.3.9 of IL-TRM_Effective_010122_v10.0_Vol_3_Res_08062021_DRAFT.docx: 1.7 CFM/Watt. The daily average total exhaust volume of the existing bathroom exhaust fan(s) is deemed to be equal to the proposed ERV daily average total exhaust volume, after taking into account the defrost cycle periods wherein ERV fan energy is consumed but no ventilation occurs.

Therefore:

Exist_Exh_Fan_Use = HVI_Rated_CFM * Daily_Hrs_Ventilation / 24 / 1.7 CFM/Watt / 1000 * Daily_Hrs_Fan_Use * 365.25

Where:

HVI_Rated_CFM = HVI-Certified Heating CFM at Maximum Air Flow of the Brand/Model of ERV proposed to be used[768]

= If ERV Brand and Model are unknown, use default values in previous "Table of ERV Default Values".

Daily_Hrs_Ventilation = As previously defined.

1.7 CFM/Watt = Deemed base case bathroom exhaust fan efficiency

24 = Hours in a Day

Daily_Hrs_Fan_Use = Deemed 24 hr/day because of continuous ERV fan use whether ERV is in defrost cycle or in ventilation cycle

365.25 = Days in a Year

1000 = Conversion of watts to kW

8766 = Annual Hours of Bathroom Fan Use

ERV_Fan_Use = HVI_Rated_W / 1000 * Daily_Hrs_Fan_Use * 365

Where:

HVI_Rated_W = HVI-Certified Wattage at Maximum Air Flow of the Brand/Model of ERV proposed to be used[769]

= If ERV Brand and Model are unknown, use default Watts/CFM in previous "Table of ERV Default Values" x ERV CFM (also from "Table of ERV Default Values").

1000 = Conversion of watts to kW

Daily_Hrs_Fan_Use = Deemed to be 24 hr/day because of continuous ERV fan use whether ERV is in defrost cycle or in ventilation cycle.

Savings (positive or negative) therefore are calculated by the following equation:

Exist_Exh_Fan_Use - ERV_Fan_Use

Where both terms in the equation are as previously defined.

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[768] Please see file 'HVIProd_ER.xlsx' for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings.

[769] Please see file 'HVIProd_ER.xlsx' for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings".

For Example, assuming HVI_Rated_CFM = 117 CFM; HVI Rated Watts = 106 W; Daily_Hrs_Ventilation = 17.8; Daily_Hrs_Fan_Use = 24; Base Case Bathroom Exhaust Fan Efficiency = 1.7 CFM/Watt.

Exist_Exh_Fan_Use = 117 * 17.8 / 24 / 1.7 / 1000 * 24 * 365.25 = 447 kWh/Year

ERV_Fan_Use = 106 / 1,000* 24 * 365.25 = 929 kWh

ERV Fan Energy Savings = 447 kWh - 929 kWh = - (482) kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$\Delta kW = \Delta kWh_{Annual} / HOU * CF * Daily\_Hrs\_Ventilation / 24$

Where:

ΔkWh_{Annual} = ΔkWh_heating + ΔkWh_cooling

HOU = Annual Hours of Use of ERV, including defrost hours where fan recirculates indoor air through outdoor air heat exchanger.

= Actual. Use 8,766 hours/year if actual is not available.[770]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for ERV (during utility peak hour)

= 95%[771]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for ERV (average during PJM peak period)

= 95%[772]

Daily_Hrs_Ventilation = As defined previously.

24 = Hours in a day

For example, assuming Annual kWh Saved = 1,989 kWh/year; HOU = 8,766 Hr/Yr; CF = 0.95; Daily_hr_use = 17.8

ΔkW = 1,989 / 8,766 * 0.95 * 17.8 / 24

= 0.16 kW

FOSSIL FUEL SAVINGS

$\Delta Therms_{Annual}$ = 1.08 * HVI_Max_CFM * HDD60 * 24 * HVI_Rated_ASRE / ηHeat / 100,000 * Daily_Hrs_Ventilation / 24 * %FossilHeat

Where:

1.08 = Conversion of CFM air * delta T to BTU/hr

HVI_Max_CFM = HVI-Certified Maximum CFM of the Brand/Model of ERV proposed to be used[773]

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[770] Deemed continual operation of ERV throughout year.

[771] Based on 24 hr /day, 7 day/w operation.

[772] Ibid.

[773] Please see file 'HVIProd_ER.xlsx' for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings.

HDD60 = Heating Degree Days base 60F, for the Climate Zone of Customer's site

= Value obtained from Table 1, above.

24 = Converts Days to Hours[774]

HVI_Rated_ASRE = HVI-Certified Adjusted Sensible Recovery Efficiency of the Brand/Model of ERV proposed to be used[775]

= If ERV Brand and Model are unknown, use default values in previous table of ERV Default Values.

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where new or where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency if only equipment efficiency is available).[776] If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[777] or if Equipment Efficiency is not available, use Section 5.3 to select the appropriate equipment efficiency for the project. If unknown value is used, it should not be derated by age.

100,000 = Converts Btu/hr to Therms

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for fossil fuel

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[778], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[779]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

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[774] Used to convert Annual HDD (F-Days) to total deltaT-hours (F-Hr) per year.

[775] Please see file 'HVIProd_ER.xlsx' for all related values. This is a lookup based on Customer inputs of ERV Brand and Model Number, which must match one of the HVI-Certified listings.

[776] Ideally, the System Efficiency should be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test. The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see 'BPI Distribution Efficiency Table') or by performing duct blaster testing.

[777] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[778] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[779] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

Other factors as defined above.

For example, assuming: HVI_Max_CFM =117; HDD60 = 5,552; HVI_Rated_ASRE = 75%; ηHeat = 0.80 (Non-condensing Gas Heat); Daily_Hrs_Ventilation = 17.8, then

$\Delta Therms_{Annual}$ = 1.08 * 117 * 5,552 * 24 * 75% / 0.80 / 100,000 * 17.8 / 24

= 117 Therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-ERVS-V06-270101

REVIEW DEADLINE: 1/1/2029

5.3.21 Air Handler Filter Cleaning/Replacement

DESCRIPTION

A dirty air handler filter increases electricity consumption for circulating fans and decreases system heating and cooling efficiencies. This measure characterizes a direct install style program whereby an existing dirty filter is either cleaned or replaced. This measure applies to central forced-air furnaces, central AC and heat pump systems. Where homes do not have central cooling, only the annual heating savings will apply.

This measure was developed to be applicable to the following program types: DI. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient condition is a cleaned or replaced air handler filter.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is an air handler filter with dirt build up and result in a blower fan motor working harder and the heating/cooling system efficiency degrading.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 3 years[780].

DEEMED MEASURE COST

The actual measure cost to clean or replace the filter should be used. If costs are unavailable assume $30 for a filter clean (assuming ½ hour at $60 an hour) or $50 for a new filter ($20 for the filter plus ½ hour at $60 an hour).

LOADSHAPE

Loadshape R10 - Residential Electric Heating and Cooling

Loadshape R09 - Residential Electric Space Heat

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's Forward Capacity Market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)
= 68%[781]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)
= 46.6%[782]

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[780] Consistent with furnace tune-up measure.

[781] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[782] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh $= kW_{motor} * ((\%ElectricHeat * EFLH_{heat}) + (\%Cool * EFLHcool)) * \%FanSave$

Where:

kW_{motor} = Average air handler fan motor full load electric demand

= 0.377 kW[783]

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Fossil fuel heating

= If unknown[784], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[785]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

$EFLH_{heat}$ = Equivalent Full Load Hours for heating. Depends on location. See table below:

Climate Zone (City based upon)	EFLH for Furnaces[786]	EFLH for Central Heat Pumps[787]
1 (Rockford)	1022	1924

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[783] Typical blower motor capacity for gas furnace is ¼ to ¾ HP. Midpoint is ½ HP. ½ HP × 0.746 (kW/hp)=0.377kW.

[784] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[785] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[786] Full load hours for Chicago, are based on findings in ‘Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60F.

[787] Full load heating hours for heat pumps are provided for Rockford, Chicago and Springfield in the ENERGY STAR Calculator. Estimates for the other locations were calculated based on the FLH to Heating Degree Day (from NCDC) ratio. VEIC consider ENERGY STAR estimates to be high due to oversizing not being adequately addressed. Using average Illinois billing data (from ICC Commerce Commission) VEIC estimated the average gas heating load and used this to estimate the average home heating output (using 83% average gas heat efficiency). Dividing this by a typical 36,000 Btu/hr ASHP gives an estimate of average ASHP

Climate Zone (City based upon)	EFLH for Furnaces[786]	EFLH for Central Heat Pumps[787]
2 (Chicago)	976	1726
3 (Springfield)	836	1708
4 (Belleville)	645	1195
5 (Marion)	656	1270
Weighted Average[788]		
ComEd	978	1766
Ameren	800	1547
Statewide	928	1700

%Cool = Fraction of customers with thermostat-controlled air-conditioning

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[789]	98.9%	96.5%	99.8%	98.7%	98.6%

$EFLH_{cool}$ = Equivalent Full Load Hours for cooling. If no cooling, assume 0.

= dependent on location and building type:[790]

Climate Zone (City based upon)	FLHcool (single family)	FLHcool (multifamily)	FLH_cooling (weatherized multifamily)[791]
1 (Rockford)	547	499	320
2 (Chicago)	709	629	403
3 (Springfield)	779	707	453
4 (Belleville)	1,082	982	630
5 (Marion)	956	868	557

FLH_heat of 1821 hours. We used the ratio of this value to the average of the locations using the ENERGY STAR data (1994 hours) to scale down the ENERGY STAR estimates. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of HDD60, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[788] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[789] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[790] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[791] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015. The multifamily units within this study had undergone significant shell improvements (air sealing and insulation) and therefore this set of assumptions is only appropriate for units that have recently participated in a weatherization or other shell program. Note that the FLHcool where recalculated based on existing efficiencies consistent with the TRM rather than from the metering study. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

Climate Zone (City based upon)	FLHcool (single family)	FLHcool (multifamily)	FLH_cooling (weatherized multifamily) [791]
Weighted Average[792]			
ComEd	676	603	386
Ameren	875	791	507
Statewide	731	655	420

%FanSave = Assumed percent fan savings

= 10%[793]

For example, replacing an air handler filter in a home with a gas furnace and central cooling in Chicago:

ΔkWh = 0.377 * (976 + (1 * 709)) * 0.1

= 63.5 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta \text{kW} = kW_{motor} * \%AC * \%FanSave * CF$$

Where:

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

= 68%[794]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during peak period)

= 46.6%[795]

For example, replacing an air handler filter in a home with a gas furnace and central cooling in Chicago:

ΔkW_{SSP} = 0.377 * 1 * 0.1 * 0.68

= 0.0256 kW

FOSSIL FUEL SAVINGS

$$\Delta \text{Therms} = \%FossilHeat * Gas\_Heating\_Consumption * EI$$

Where:

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heating

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[792] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[793] Based on Energy.gov website; “Maintaining Your Air Conditioner”. Accessed 7/16/2014, which states that replacing a dirty air filter with a clean one can lower total air conditioner energy consumption by 5-15%. Since most savings will be to the fan motor, assuming 10%.

[794] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[795] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[796], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[797]					75.4%

Gas_Heating_Consumption

= Estimate of annual household heating consumption for gas heated single-family homes. If location is unknown, assume the average below[798].

Climate Zone (City based upon)	Gas_Heating_ Consumption (therms)
1 (Rockford)	1,052
2 (Chicago)	1,005
3 (Springfield)	861
4 (Belleville)	664
5 (Marion)	676
Average	955

EI = Estimated savings from efficiency Improvement

= 1%[799]

For example, replacing an air handler filter in a home with a gas furnace and central cooling in Chicago:

ΔTherms = 1.0 * 976 * 0.01

= 9.76 therms

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[796] All values except for People's Gas and Northshore Gas are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential baseline Study Results", Oct 31 2024. People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[797] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[798] Values are based on adjusting the average household heating load (834 therms) for Chicago based on 'Table E-1, Energy Efficiency / Demand Response Nicor Gas Plan Year 1, Research Report: Furnace Metering Study', divided by standard assumption of existing unit efficiency of 83% (estimate based on 24% of furnaces purchased in Illinois were condensing in 2000 (based on data from GAMA, provided to Department of Energy), assuming typical efficiencies: (0.24*0.92) + (0.76*0.8) = 0.83) to give 1005 therms. This Chicago value was then adjusted to a statewide average using relative HDD assumptions to adjust for the evaluation results focus on northern region. Values for individual cities are then calculated by comparing average HDD to the individual city's HDD.

[799] Based on Michael Blasnik estimate of 1% gas savings for 25% air flow change; final slide of presentation: https://buildingscience.com/sites/default/files/01_Lies_Damned_Lies_and_Modeling_rev.pdf

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-AHFR-V02-260101

REVIEW DEADLINE: 1/1/2029

5.3.22 High Efficiency Kitchen Exhaust Fans

DESCRIPTION

This measure will serve to capture the savings from the installation of a new kitchen exhaust fan, also known as a Range Hood, for typical usage. Existing kitchen exhaust fans may be too noisy, inefficient, or in need of replacement if beyond repair. This measure assumes fan capacities between 10 and 200 CFM rated at a sound level of maximum 2.0 sones at 0.1 inches of water column static pressure. All eligible installations shall be sized to provide the mechanical ventilation rate indicated by ASHRAE 62.2.

This measure was developed to be applicable to the following program types: TOS, NC, RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

New efficient ENERGY STAR[800] exhaust-only ventilation fan, quiet (≤ 2.0 sones) operating in accordance with recommended ventilation rate indicated by ASHRAE 62.2 – 2016. ENERGY STAR specifications (effective October 1, 2015) are provided below:

Efficiency Level	Fan Capacity	Minimum Efficacy Level (CFM/Watts)	Maximum Allowable Sound Level (sones)
ENERGY STAR	≤ 75 W	2.8	2.0

DEFINITION OF BASELINE EQUIPMENT

New standard efficiency exhaust-only ventilation fan.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 19 years.[801]

DEEMED MEASURE COST

Incremental cost per installed fan is $107.[802]

LOADSHAPE

Loadshape R11 - Residential Ventilation

COINCIDENCE FACTOR

N/A

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[800] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[801] Conservative estimate based upon GDS Associates Measure Life Report “Residential and C&I Lighting and HVAC measures” 25 years for whole-house fans, and 19 for thermostatically-controlled attic fans.

[802] Analysis using cost data collected from online resources. See ‘Kitchen Exhaust Fans Supplementary Data’ workbook for more information.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = (CFM * (1/\eta_{,BASELINE} - 1/\eta_{EFFICIENT})/1000) * Hours$$

Where:

CFM = Nominal Capacity of the exhaust fan

= Actual or use defaults provided below

$\eta_{BASELINE}$ = Average efficacy for baseline fan (CFM/watts)

= Actual or use defaults provided below

$\eta_{EFFCIENT}$ = Average efficacy for efficient fan (CFM/watts)

= Actual or use defaults provided below

Hours = assumed annual run hours of stove

= 120[803]

Defaults provided below:[804]

Average CFM	Base CFM/Watts	ENERGY STAR CFM/Watts	ΔkWh
145.5	2.4[805]	4.5	3.4

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-KEXF-V02-260101

REVIEW DEADLINE: 1/1/2029

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[803] Assumes that 50% of cooking events utilize the kitchen exhaust fan. Number of cooking events is consistent with the 5.1.14 Residential Induction Cooktop measure which assumes 1 hours per cycle and 239 cycles per year therefore 239 operating hours per year. 239 cycles per year is based on a 2016 CASE study for PG&E modeling Plug Loads.

[804] Average CFM and EnergyStar CFM/Watts calculated using EnergyStar's list of qualified products, accessed 5/2023.

[805] Based on review of Range Hood products available on CEC Appliance Database, accessed 5/12/2023. See 'Kitchen Exhaust Fans Supplementary Data' spreadsheet, "All Fans less than 75W" tab for more details.

5.3.23 Residential Gas Heat Pump

DESCRIPTION

Heat pumps generally involve the use of a refrigerant and operate based on a refrigeration cycle to produce heating effect as energy output[806]. An electric compressor for energy output drives traditional electric heat pump operation. Gas-powered heat pumps (GHP) are a subset of heat pumps whose operation is driven by a gaseous fuel, instead of an electrically driven compressor for energy output. This measure addresses the installation of factory-made gas heat pumps that use natural gas as the primary fuel. GHPs can be separated into two categories: work-activated technologies, where a delivered fuel drives a prime mover (e.g., internal combustion engine) which supplies work to a refrigerant compressor, and heat-activated, where the primary energy input to the heat pump cycle is thermal energy, often from fuel combustion, driving a sorption-type or other thermally-driven heat pump cycle. This measure protocol applies specifically to heat-activated sorption-type gas GHPs. The measure applies to single and multifamily (in-unit) residential applications for space heating and combination ("Combi") type applications with combined space heating and domestic hot water (DHW) heating operation. For centrally heated multifamily applications, refer to measure "4.4.55 Commercial Gas Heat Pump". This measure characterizes the installation of a residential gas-powered heat pump for the following scenarios: NC, TS, and EREP.

The measure will focus on the following cases:

> **New Construction:** The installation of a GHP system certified to ANSI Z21.40.1 or ANSI Z21.40.2, respectively, that meets the criteria laid out in ANSI Z21.40.4 performance testing and rating of gas-fired, air Conditioning, and heat Pump Appliances and meets the Coefficient of Performance (COP) requirements outlined in this measure in place of standard baseline equipment during the construction of a new building or a major renovation. This will focus on energy savings by adding GHP equipment during the construction of the new residence.
>
> **Time of Sale:** The installation of the GHP system meeting the Coefficient of Performance (COP) requirements outlined in this measure, replacing an existing baseline system at the end of its useful life, or installing a new GHP system in a new home. This will focus on energy savings by adding a GHP to replace existing space heating equipment at the end of its life.
>
> **Early Replacement:** The early removal of existing functioning baseline system prior to the end of its effective useful life, for installation of a GHP system meeting the COP requirements outlined in this measure. This will focus on energy savings through addition of GHP equipment at an existing residence where the existing space heating equipment has not reached the end of their useful life.

DEFINITION OF EFFICIENT EQUIPMENT

For all measure cases the efficient equipment is a residential GHP with an input rating of less than 225,000 Btu/hr for both space heating application, and combi applications (space heat and domestic water heating). Since gas heat pumps do not have a U.S. DOE federal standard test procedure, coefficient of performance should be based on ANSI Z21.40.4 test conditions at 7°F DB/ 5.5°F WB outdoor air and 95°F return water temperature.

DEFINITION OF BASELINE EQUIPMENT

Baseline equipment for all measure cases, defined for both space heating and combi applications are as follows:

New Construction: To calculate savings with a central furnace baseline, the baseline equipment is a natural gas-fired furnace with minimum Annual Fuel Utilization Efficiency (AFUE) as required by federal standards[807], 80% AFUE for a non-weatherized furnace. To calculate savings with an electric baseline, the baseline equipment is assumed to be an

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[806] While most heat pump equipment can also be used for cooling applications, this measure is applicable to gas-fired heat pumps for space heating, domestic water heating and combination (space heating and domestic water heating combined) applications.

[807] Federal minimum AFUE requirement for residential furnaces. eCFR :: 10 CFR Part 430 Subpart C -- Energy and Water Conservation Standards

Air Source Heat Pump meeting the Federal Standard Efficiency level[808] , 14.3 SEER2, and 7.5 HSPF2. Note the baseline in this case should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition. For space heating, if the baseline is unknown, then it is assumed to be a gas furnace compliant with the federal minimum standards. For combi application, if the baseline is unknown, then it is assumed to be a gas furnace and a gas storage water heater compliant with the federal minimum standards.

Time of Sale: The baseline for this measure is a new replacement unit of the same system type as the existing unit, meeting the baselines provided below[809].

Unit Type	Efficiency Standard
Standard sized Ducted ASHP	14.3 SEER2, 9.4 EER2, 7.5 HSPF2
Standard sized Ductless ASHP	14.3 SEER2, 8.5 EER2, 7.5 HSPF2
Space constrained ASHP	11.9 SEER2, 7.8 EER2, 6.3 HSPF2
Room AC (baseline for portable HP only)	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient.
Electric Resistance (default for portable HP)	3.412 HSPF2
Natural Gas or LP Furnace	80% AFUE
Natural Gas or LP Boiler	84% AFUE
Oil Furnace	83% AFUE
Oil Boiler	86% AFUE
Standard sized Central AC	13.4 SEER2, 10.6 EER2
Space constrained Central AC	11.7 SEER2, 9.2 EER2

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[808] Federal minimum requirement for residential furnaces. eCFR :: 10 CFR Part 430 Subpart C -- Energy and Water Conservation Standards

[809] Federal Standard as provided in DOE 10 CFR 430.32.

The baseline condition for water heating is a new water heater meeting federal minimum efficiency standards, dependent on the storage volume (in gallons) of the water heater. Note the baseline in this case should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition. If the baseline is unknown, then it is assumed to be a gas storage water heater type compliant with the federal minimum standards.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[810]
Residential Electric Storage Water Heaters ≤ 75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.8808 – (0.0008 * Rated Storage Volume in Gallons)
		Low	UEF = 0.9254 – (0.0003 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.9307 – (0.0002 * Rated Storage Volume in Gallons)
		High	UEF = 0.9349 – (0.0001 * Rated Storage Volume in Gallons)
	>55 gallon and ≤120 gallon tanks [811]	Very small	UEF = 1.9236 – (0.0011 * Rated Storage Volume in Gallons)
		Low	UEF = 2.0440 – (0.0011 * Rated Storage Volume in Gallons)
		Medium	UEF = 2.1171 – (0.0011 * Rated Storage Volume in Gallons)
		High	UEF = 2.2418 – (0.0011 * Rated Storage Volume in Gallons)
Residential Electric Instantaneous Water Heaters	≤12kW and ≤2 gal	All other	UEF = 0.91
		High	UEF = 0.92
Residential Gas Storage Water Heaters ≤75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.3456 – (0.0020 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5982 – (0.0019 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6483 – (0.0017 * Rated Storage Volume in Gallons)
		High	UEF = 0.6920 – (0.0013 * Rated Storage Volume in Gallons)
	>55 gallon and ≤100 gallon tanks	Very small	UEF = 0.6470 – (0.0006 * Rated Storage Volume in Gallons)
		Low	UEF = 0.7689 – (0.0005 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.7897 – (0.0004 * Rated Storage Volume in Gallons)
		High	UEF = 0.8072 – (0.0003 * Rated Storage Volume in Gallons)
Residential Gas Fired Instantaneous Water Heaters	< 2 gal and >50,000 Btu/h	Very small	UEF = 0.80
		All other	UEF = 0.81
Residential Oil Storage Water Heater	≤50 gallon tanks	Very small	UEF = 0.2509 − (0.0012 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5330 − (0.0016 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6087 − (0.0016 * Rated Storage Volume in Gallons)
		High	UEF = 0.6815 − (0.0014 * Rated Storage Volume in Gallons)

Draw patterns are based on first hour rating (gallons) for storage tanks and maximum flow (GPM) for instantaneous as shown below:[812]

Storage Water Heater Draw Pattern	
Draw Pattern	**First Hour Rating (gallons)**
Very Small	≥ 0 and < 18
Low	≥ 18 and < 51
Medium	≥ 51 and < 75
High	≥ 75

Instantaneous Water Heater Draw Pattern	
Draw Pattern	**Max GPM**
Very Small	≥ 0 and < 1.7

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[810] All Residential sized Federal Standards are from DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431.

[811] It is assumed that tanks <75,000Btu/h and >55 gallons will not be eligible measures due to the high baseline.

[812] Definitions provided in 10 CFR 430, Subpart B, Appendix E, Section 5.4.1.

Instantaneous Water Heater Draw Pattern	
Draw Pattern	**Max GPM**
Low	≥ 1.7 and < 2.8
Medium	≥ 2.8 and < 4
High	≥ 4

Early Replacement: The baseline for this measure is the efficiency of the existing heating equipment for the assumed remaining useful life of the existing unit and a new baseline heating system for the remainder of the measure's life. The baseline for an EREP measure is the efficiency of the existing space heating and water heating equipment (if installed in a combi application) for the remainder of its useful life, and the new federal minimum standard for the remainder of the new, efficient equipment's life as specified in the TOS section.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected life is assumed to be 15 years[813].

The remaining life of existing equipment is assumed to be 6.7 years for ducted ASHP, 5.7 years for ductless ASHP, 8 years for non-IQ or 9 years for IQ for furnace, 8 years for boilers,[814] and 15 years for electric resistance[815]. For example, for a natural gas-fired furnace post the effective useful life of the existing equipment, the second baseline efficiency will be set as required by applicable federal standards[816]. Remaining life of existing gas storage and instantaneous water heaters is assumed to be 4.8 and 6.7 years, respectively.[817]

DEEMED MEASURE COST

New Construction and Time of Sale: For space heating, the actual installed cost of the gas heat pump should be used minus the assumed installation cost of the baseline equipment from table below for electric equipment, or assume $4,019 for a new baseline 80% AFUE furnace or $8,820 for a new baseline 84% AFUE boiler.[818]

Baseline Equipment Type	Capacity Range	Baseline Cost per Ton[819]
Centrally Ducted Air Source Heat Pumps	< 2 tons	$4,602
	≥ 2 to < 3 tons	$3,691
	≥ 3 to < 4 tons	$3,093
	≥ 4 tons	$2,992
Ductless Minisplit Heat Pumps	< 1 ton	$8,156
	≥ 1 to < 2 tons	$5,356
	≥ 2 to < 3 tons	$3,704
	≥ 3 tons	$3,670
Central Air Conditioning	< 2 tons	$2,340
	≥ 2 to < 3 tons	$1,900
	≥ 3 tons	$1,500

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[813] U.S. Energy Information Administration | Assumptions to the Annual Energy Outlook 2021. https://www.eia.gov/outlooks/aeo/assumptions/pdf/residential.pdf

[814] Assumed to be one third of effective useful life of replaced equipment.

[815] Assume full measure life for replacing electric resistance as we would not expect that resistance heat would fail during the lifetime of the efficient measure.

[816] Federal minimum AFUE requirement for residential furnaces. eCFR :: 10 CFR Part 430 Subpart C -- Energy and Water Conservation Standards

[817] Assumed to be one third of effective useful life.

[818] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

[819] Ibid

For combi installations, the full installation cost of a baseline water heater should be added to the above installation cost for space heating with baseline equipment. Defaults are provided below.[820] Actual efficient costs can also be used although care should be taken as installation costs can vary significantly due to complexities of a particular site.

Water Heater Type	Baseline Installed Cost	Deferred Baseline Replacement Cost[821]
Electric Resistance	$1,078	$1,162
Gas-Fired	$1,397	$1,507

Early Replacement: The actual full installation cost of the gas heat pump should be used. If the installation cost of the efficient gas-fired heat pump is unknown, assume the following:

GHP Installation Types	Installed Cost ($/unit) [822]
Space Heating Equipment & Labor	$27,000
Combi Equipment & Labor	$33,754

The assumed deferred cost (after the appropriate number of years described above in the 'Deemed Lifetime of Efficient Equipment' section) of replacing existing equipment with a new baseline unit is presented in the table below for electric equipment, or assume $4,813 for non-IQ, $4,923 for IQ homes for a new baseline 80% AFUE furnace or $10,563 for a new baseline 84% AFUE boiler.[823] This future cost should be discounted to present value using the nominal societal discount rate.

Equipment Type	Capacity Range	Deferred Baseline Cost per Ton
Centrally Ducted Air Source Heat Pumps	< 2 tons	$5,268
	≥ 2 to < 3 tons	$4,226
	≥ 3 to < 4 tons	$3,541
	≥ 4 tons	$3,425
Ductless Minisplit Heat Pumps	< 1 ton	$9,337
	≥ 1 to < 2 tons	$6,132
	≥ 2 to < 3 tons	$4,240
	≥ 3 tons	$4,202
Central Air Conditioning	< 2 tons	$2,679
	≥ 2 to < 3 tons	$2,175
	≥ 3 tons	$1,717

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[820] RS MEANS 2025 data for Chicago, IL. Costs shown are average of minimum and maximum values for "Residential Appliances, electric/ gas, glass lined, 30gal". See reference document "RS MEANS – water heater costs.xlsx"

[821] The baseline full cost is inflated applying an inflation rate of 1.91% for 4 years. See reference document "RS MEANS – water heater costs.xlsx"

[822] Based on ongoing field demonstrations done by GTI Energy. These costs are based on actual equipment and installation costs from multiple field demonstrations in the 2024-25 heating season. The following costs and equipment make up the gas heat pump system: Gas Heat pump ($9,055), Air Handler Unit ($4,415), Indirect Storage Tank for Combi systems ($2,360).

[823] All baseline replacement costs are consistent with their respective measures and include inflation rate of 2.28%.

LOADSHAPE

R03 – Residential Electric DHW

R09 – Residential Electric Space Heat

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF ENERGY SAVINGS

Energy savings algorithms for residential GHPs were developed for calculating space heating, and space heating with water heating (combi) applications.

ELECTRIC ENERGY SAVINGS AND FOSSIL FUEL SAVINGS

Non-fuel switch measures:

Space Heating Only Savings:

$$\Delta Therms = \Delta Therms_{SPACE\ HEAT}$$

$$\Delta Therms_{SPACE\ HEAT} = (EFLH_{gasheat} * Capacity * (1/Efficiency_{Base} - 1/Efficiency_{EE})) / 100,000$$

Where:

$EFLH_{gasheat}$ = Equivalent Full Load Hours for gas heating

Climate Zone (City based upon)	EFLH[824]
1 (Rockford)	1,022
2 (Chicago)	976
3 (Springfield)	836
4 (Belleville)	645
5 (Marion)	656
Weighted Average[825]	
ComEd	978
Ameren	800
Statewide	928

Capacity = Nominal Heating Output Capacity Size (Btu/hr) for efficient unit

= Actual

$Efficiency_{Base}$ = Baseline Efficiency Rating

= For NC and TOS, use the efficiencies from Table 1[826]

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[824] Full load hours for Chicago, are based on findings in 'Energy Efficiency / Demand Response Nicor Gas Plan Year 1 (6/1/2011-5/31/2012) Research Report: Furnace Metering Study (August 1, 2013), prepared by Navigant Consulting, Inc. Values for other cities are then calculated by comparing relative HDD at base 60°F.

[825] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[826] Federal Standard as provided in DOE 10 CFR 430.32

= For EREP, use Actual Annual Fuel Utilization Efficiency Rating if known, for the remainder of equipments useful life

= Use actual AFUE rating where it is possible to measure or reasonably estimate. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[827] or if unknown, assume 64.4 AFUE%**[828]** for furnaces and 61.6 AFUE%[829] for boilers. If unknown value is used, it should not be derated by age.

Efficiency_{EE} = Rated Gas Heat Pump space heating efficiency, expressed as a fuel-input only COP_{Gas} for nominal capacity rating condition

100,000 = Converts Btu to Therms

Space Heating and Domestic Hot Water (Combi) Savings:

$\Delta\text{Therms} = \Delta\text{Therms}_{SPACE\ HEAT} + \Delta\text{Therms}_{DHW}$

Please refer to the section above for the algorithm to calculate $\Delta\text{therms}_{SPACE\ HEAT}$

Please refer to the section below for the algorithm to calculate $\Delta\text{therms}_{DHW}$

$$\Delta Therms_{DHW} = \frac{(T_{out} - T_{in}) \ * \ GPD * Household * 365.25 * \gamma Water * 1.0 * \left(\frac{1}{TE_{base}} - \frac{1}{COP_{Eff}}\right)}{100{,}000}$$

Where:

T_{OUT} = Tank temperature
= If unknown, assume default value of 125°F

T_{IN} = Incoming water temperature from well or municipal system
= If unknown, assume default value of 50.7°F[830]

γWater = Specific weight capacity of water (lb/gal)

= 8.33 lbs/gal

1.0 = Specific heat of water (Btu/lb·°F)

100,000 = Converts Btu to Therms

$TE_{gasbase}$ = Rated efficiency of baseline water heater (expressed as Uniform Energy Factor (UEF) or Thermal Efficiency. For NC and TOS, refer to the table in DEFINITION OF BASELINE EQUIPMENT section)

= For EREP, use Actual UEF or Thermal Efficiency if known, for the remainder of equipments useful life

COP_{Eff} = Rated efficiency of the GHP as certified expressed as Coefficient of Performance

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[827] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[828] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[829] Ibid

[830] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

365.25 = Days per year

GPD = Gallons Per Day of hot water use per person
= 45.5 gallons hot water per day per household/2.59 people per household [831]
= 17.6 gallons

Household = Average number of people per household

Household Unit Type	Household[832]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[833]
Custom	Actual Occupancy or Number of Bedrooms[834]		

Note the same draw pattern (very small, low, medium, and high draw) should be used for both baseline and efficient units.

Example:

A single family home in Chicago is replacing the existing space heating and water heating baseline equipment with an 80,000 Btu/hr output gas heat pump system rated for a COP of 1.3. The baseline equipment being replaced is gas furnace and a gas-fired storage hot water heater. Measure type is TOS.

Baseline equipment efficiency: Gas furnace – 80% AFUE; Gas-fired storage hot water heater – 0.78 TE for a high draw pattern and 80 gallon tank.

$$\Delta therms = \Delta therms_{SPACE\ HEAT} + \Delta therms_{DHW}$$

$$\Delta therms_{SPACE\ HEAT} = (EFLH_{gasheat} * Capacity * ((1/Efficiency_{Base} – 1/Efficiency_{EE})) / 100,000$$

$$= (976 * 80,000 * ((1/0.80 – 1/1.3)) / 100,000$$

$$= 375 \text{ therms}$$

$$\Delta therms_{DHW} = (T_{out} – T_{in}) * GPD * Household * 365.25 * ɤWater * 1.0 * (1/TE_{base} – 1/COP_{Eff}))/100,000$$

$$= ((125 – 50.7) * 17.6 * 2.67 * 365.25 * 8.33 * 1.0 * (1/0.78 – 1/1.3))/100,000$$

$$= 54 \text{ therms}$$

Total Therm Savings = 375 + 54
= 429 therms

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[831] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[832] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[833] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[834] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

__Fuel switch measures:__

Fuel switch measures must produce positive total lifecycle energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows: (note for early replacement measures that the lifetime savings should be calculated by calculating savings for the remaining useful life of the existing equipment and for the remaining measure life):

SiteEnergySavings (MMBTUs) = $(\text{ElectricHeatReplaced} - \text{GHPEnergyConsumed}_{\text{Heat}}) + (\text{ElectricWaterHeatReplaced} – \text{GHPEnergyConsumed}_{\text{DHW}})$

If SiteEnergySavings calculated above is positive, the measure is eligible.

Electric Space Heating Replaced with GHP (Space Heating Application)

$\text{ElectricHeatReplaced [MMBTU}_{\text{source}}] = (\text{Capacity}_{\text{heat}} * \text{EFLH}_{\text{electricheat}} * (1/\text{COP}_{\text{base}})) / 1{,}000$

$\text{GHPEnergyConsumed}_{\text{Heat}} \text{ [MMBTU}_{\text{source}}] = ((\text{Capacity}_{\text{heat}} * \text{EFLH}_{\text{gasheat}} * (1/\text{COP}_{\text{GHP}})) / 1{,}000)$

Where:

$\text{Capacity}_{\text{heat}}$ = Nominal heating output capacity of the efficient equipment in kBtu per hour (1 ton of heating capacity equals 12 kBtu/hr).

COP_{base} = Coefficient of performance of the baseline equipment, or thermal efficiency if applicable, at nominal condition

$\text{EFLH}_{\text{electricheat}}$ = Heating Equivalent Full Load Hours for electric heating[835]

Climate Zone (City based upon)	FLH_heat
1 (Rockford)	1,924
2 (Chicago)	1,726
3 (Springfield)	1,708
4 (Belleville)	1,195
5 (Marion/Murphysboro)	1,270
Weighted Average[836]	
ComEd	1,766
Ameren	1,547
Statewide	1,700

$\text{EFLH}_{\text{gasheat}}$ = Heating Equivalent Full Load Hours for gas heating

= See previous section

COP_{GHP} = Coefficient of performance of the GHP equipment
= Actual installed

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[835] Heating EFLH based on ENERGY STAR EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL.

[836] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

Electric Water Heating Replaced with GHP (Combi Application)

$\text{ElectricWaterHeatReplaced [MMBTU}_{site}] = ((T_{out}\text{-}T_{in}) * GPD * Household * 365.25 * \gamma\text{Water} * 1.0 * (1/TE_{elecbase})) /1{,}000{,}000$

$\text{GHPEnergyConsumed}_{DHW} \text{ [MMBTU}_{site}] = (T_{out}\text{-}T_{in}) * GPD * Household * 365.25 * \gamma\text{Water} * 1.0 * (1/COP_{GHP}) / 1{,}000{,}000)$

**See previous sections for most descriptions

$TE_{elecbase}$ = Rated efficiency of baseline water heater expressed as Uniform Energy Factor (UEF) or Thermal Efficiency (TE) or Coefficient of Performance (COP)

COP_{GHP} = Coefficient of performance of the GHP equipment
= Actual installed

Total Therm Savings = SiteEnergySavings * 10

Example:

A single family home in Chicago is replacing the existing space heating and water heating baseline equipment with an 80,000 Btu/hr output gas heat pump system rated for a COP of 1.3. The baseline equipment being replaced is an electric baseboard and an electric resistance storage hot water heater. Measure type is EREP.

Baseline equipment efficiency: electric baseboard – 1.0 COP; Electric Resistance storage hot water heater – 0.95 TE for a 50 gallon gallon tank.

$$\Delta\text{therms} = \Delta\text{therms}_{SPACE\ HEAT} + \Delta\text{therms}_{DHW}$$

$\Delta\text{therms}_{SPACE\ HEAT} = (EFLH_{gasheat} * Capacity_{heat} * (1/Efficiency_{Base} – 1/Efficiency_{EE})) / 100{,}000$

$= (976 * 80{,}000 * (1/1.0 – 1/1.30)))) / 100{,}000$

$= 180$ therms

$\Delta\text{therms}_{DHW} = (T_{out} – T_{in}) * GPD * Household * 365.25 * \gamma\text{Water} * 1.0 * (1/TE_{base} – 1/COP_{Eff}))/100{,}000$

$= ((125 – 50.7) * 17.6 * 2.67 * 365.25 * 8.33 * 1.0 * (1/0.95 – 1/1.3))/100{,}000$

$= 30$ therms

Total Therm Savings = 180 + 30
= 210

= 264 therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-RGPHP-V02-270101

REVIEW DEADLINE: 1/1/2029

5.3.24 Supplemental Air Source Heat Pump (Ductless, Portable)

DESCRIPTION

A heat pump provides heating or cooling by moving heat between indoor and outdoor air. This measure relates to a new system providing supplemental space conditioning in a previously underconditioned or new area of the home; or to the replacement of an existing inefficient supplemental system with a new efficient supplemental system. If system configuration is unknown, any ductless units <18 kBtu may be considered supplemental. Any ductless units with greater capacity may be considered under this characterization if they are known to be installed in a supplemental scenario. For central systems providing whole home conditioning, use '5.3.1 Whole Home Air Source Heat Pumps (Central or Ductless)'. Eligible systems include:

- a ductless minisplit system, and
- a portable heat pump (mounted within a wall, within a window, or floor-mounted with intake and/or exhaust duct(s) directed through a window).

This measure characterizes:

a) New Construction:
  - The installation of a new residential sized (<= 65,000 Btu/hr) Air Source Heat Pump meeting minimum requirements determined by the program in a new home.
  - Note the baseline in this case should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition.
  - Note that portable heat pumps are not eligible under new construction.

b) Time of Sale:
  - The installation of a new residential sized (<= 65,000 Btu/hr) Air Source Heat Pump meeting minimum requirements determined by the program. This relates to the replacement of an existing unit at the end of its useful life.
  - Note the baseline in this case is an equivalent replacement system to that which exists currently in the home, or a new equivalent inefficient system that would otherwise be installed in the space. Where unknown, the baseline should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition.

c) Early Replacement:

  The early removal of functioning components of the electric heating and/or cooling systems from service, prior to its natural end of life, and replacement with a new high efficiency air source heat pump unit.

  Note the baseline in this case is the existing equipment being replaced.

  Early Replacement determination will be based on meeting the following conditions:
  - The existing unit is operational when replaced, or
  - The existing unit requires minor repairs (defined as 20% of the cost of a new baseline replacement unit).[837]
  - All other conditions will be considered Time of Sale.

  The Baseline SEER2 of the existing unit replaced:
  - Is the actual SEER (converted to SEER2) value of the unit replaced.
  - If the SEER of the existing unit is unknown use assumptions in variable list below (SEER2_exist and HSPF2_exist).

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[837] The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement. Note the non-inflated cost should be used as this would be a cost consideration in the program year.

- If the operational status or repair cost of the existing unit is unknown, use time of sale assumptions or average weighted factors determined via evaluation and the algorithms below.

A weighted average early replacement rate is provided for use in programs when the actual baseline early replacement rates are unknown.

Deemed Early Replacement Rates For ASHP[838]

Equipment Type	Full System Displacement
Cooling	30%
Heating	30%

Quality Installation:

Additional savings are attributed to the Quality Installation (QI) of the system. QI programs should follow industry standards such as those described in ENERGY STAR Verified HVAC Installation Program (ESVI), ANSI ACCA QI5 and QI9vp. This must include considerations of system design (including sizing, matching, ventilation calculations) and equipment installation (including static pressure, airflow, refrigerant charge) and may also consider distribution. QI does not apply for portable heat pumps.

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

A new residential sized (<= 65,000 Btu/hr) air source heat pump with specifications to be determined by program.

The following conversion factors are recommended for use if the efficient equipment is not rated under the new testing procedure:[839]

SEER2 = SEER * X

EER2 = EER * X

HSPF2 = HSPF * X

Where:

X	SEER	EER	HSPF
Ducted	0.95	0.95	0.85
Non-Ducted	1.00	1.00	0.90
Packaged/Portable	0.95	0.95	0.84

DEFINITION OF BASELINE EQUIPMENT

The baseline designation can be assigned differently for heating and cooling for the same installation, but the designation must remain consistent when applying the TRM calculations (e.g., for energy savings, measure cost, and demand savings). For example, customers may choose to replace an AC at the end of its useful life yet continue using their existing furnace. In this case, the cooling replacement could represent a time of sale baseline while the heating

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[838] Program tracking data from ComEd and Ameren between 2018 and 2020 was used to develop these assumptions. During this period the air source heat pump programs operated downstream and projects were classified as Time of Sale or Early Replacement. Note that any fuel switch scenario at the time would have been classified as Time of Sale and therefore the rates provided likely represent a low estimate of the true early replacement rates. In the absence of alternative data, the TAC agreed to apply these rates but these assumptions should be revisited through future evaluation.

[839] Consortium for Energy Efficiency (CEE), Testing, Testing, M1, 2, 3, Transitioning to New Federal Minimum Standards, CEE Summer Program Meeting, August, 2022.

replacement could reflect an early replacement baseline.

New Construction: To calculate savings with an electric baseline, the baseline equipment is assumed to be an Air Source Heat Pump meeting the Federal Standard efficiency level:[840]

- Split system ductless heat pump standard sized units – 14.3 SEER2, 7.5 HSPF2, 8.5 EER2

Time of Sale: The baseline for this measure is a new replacement unit of the same system type as the existing unit, meeting the baselines provided below[841].

Unit Type	Efficiency Standard
Standard sized Ductless ASHP	14.3 SEER2, 8.5 EER2, 7.5 HSPF2
Room AC (Default for portable HP)	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient.
Electric Resistance (Baseboard) (Default for portable HP)	3.412 HSPF2
Unknown	13.7 SEER2, 8.5 EER2, 5.3HSPF2

Early replacement / Retrofit: The baseline for this measure is the efficiency of the *existing* heating and cooling equipment for the assumed remaining useful life of the existing unit and a new baseline heating and cooling system for the remainder of the measure life (as provided in table above).

When unknown, default early replacement efficiency assumptions are 9.5 SEER2, 7.4 EER2, and 4.4 HSPF2[842]. Consistent with TRM Volume 1 Section 2.3.1 for midstream programs or other cases where the existing condition is unknown, it may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on evaluation results.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 17 years for ductless ASHP[843] and 12 years for portable HP[844].

Remaining life of existing equipment is assumed to be 5.7 years for ductless ASHP[845] and the full measure life (17 years for ductless or 12 for portable) for electric resistance.[846]

DEEMED MEASURE COST

New Construction and Time of Sale: The actual installed cost of the Ductless Minisplit Heat Pump (including any necessary electrical or distribution upgrades required) should be used minus the assumed installation cost of the

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[840] The federal Standard does not currently include an EER2 component for northern states. The value provided is based on scaling CEE Tier 1 ratings for North and Canada (12EER2 for CAC, 10EER2 for ducted HP and 9.0EER2 for ductless HP) proportionally down compared to the Federal baseline SEER2 compared to CEE Tier 1 SEER2 ratings.

[841] Federal Standard as provided in DOE 10 CFR 430.32.

[842] Unknown early replacement baseline values represent the weighted average existing system efficiency values (converted to SEER2/HSPF2 using conversion factors provided) reflecting the assumed shares of installed ASHP replacing given baseline technologies (e.g. ASHP/electric resistance or furnace/boiler) by fuel type. Assumed shares are based on Opinion Dynamics and Guidehouse analysis of 2018-2021 Ameren and ComEd HVAC (downstream) program tracking data. For further details, see '2018-2021 AIC Res HVAC Data ASHP Baseline TRM Update 2023-6-20.xls'.

[843] Based on recommendations from "Final Evaluation Report for: X2001B: Connecticut Measure Life/EUL Update Study-Residential & Commercial" prepared by Michaels Energy and Evergreen Economics, May 11, 2023.

[844] Assumed the same as 5.1.7 Window Air Conditioners: Measure Life Report, Residential and Commercial/Industrial Lighting and HVAC Measures, GDS Associates, June 2007.

[845] Assumed to be one third of effective useful life of replaced equipment.

[846] Assume full measure life (16 years) for replacing electric resistance as we would not expect that resistance heat would fail during the lifetime of the efficient measure.

baseline equipment from table below[847].

Baseline Equipment Type	Capacity Range	Baseline Cost per Ton[848]
Ductless Minisplit Heat Pumps	< 1 ton	$8,156
	≥ 1 to < 2 tons	$5,356
	≥ 2 to < 3 tons	$3,704
	≥ 3 tons	$3,670

Default full cost of the efficient DMSHP is provided in the table below[849]:

Equipment Type	Capacity Range	Efficient Cost
Ductless Minisplit Heat Pumps	< 1 ton	$8,312 / ton + ($600* (HSPF2-7.8))
	≥ 1 to < 2 tons	$5,458 / ton + ($600* (HSPF2-7.8))
	≥ 2 to < 3 tons	$3,775 / ton + ($600* (HSPF2-7.8))
	≥ 3 tons	$3,740 / ton + ($600* (HSPF2-7.8))

The incremental cost of the DSMHP compared to a baseline minimum efficiency DSMHP is provided in the table below:

Equipment Type	Capacity Range	Incremental Cost
Ductless Minisplit Heat Pumps	< 1 ton	$156 / ton + ($600* (HSPF2-7.8))
	≥ 1 to < 2 tons	$102 / ton + ($600* (HSPF2-7.8))
	≥ 2 to < 3 tons	$71 / ton + ($600* (HSPF2-7.8))
	≥ 3 tons	$70 / ton + ($600* (HSPF2-7.8))

Early Replacement: Where a DMSHP is a supplemental HVAC system, the full installation cost of the DMSHP (including any necessary electrical or distribution upgrades required) should be used without a deferred replacement cost.

Portable Heat Pumps:

The actual installed cost of the portable heat pump (including any necessary electrical or distribution upgrades required) should be used, minus the assumed installation cost of the baseline cooling and heating system. If portable heat pump cost is unknown assume $645 per unit.[850] The cost of a baseline replacement room AC unit is $408.[851]

Quality Installation: The additional design and installation work associated with quality installation has been estimated to cost an additional $150.[852]

LOADSHAPE

Loadshape R10 - Residential Electric Heating and Cooling

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[847] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

[848] Ibid

[849] Ibid

[850] Average retail cost of ENERGY STAR certified portable heat pumps, as of 6/2024 and collected by Ameren. See 'PHP Cost and Efficiencies 20240605.xls'.

[851] Based upon costs provided in 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[852] Based on data provided by MidAmerican in April 2018 summarizing survey results from 11 HVAC suppliers in Iowa.

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's Forward Capacity Market.

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during utility peak hour)

= 72%[853]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[854]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[855]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh = ASHPSiteCoolingImpact + ASHPSiteHeatingImpact

Where:

For all other scenarios:

ASHPSiteCoolingImpact = ((CoolingLoad * (1/(SEER2_base * (1 – $DeratingCool_{Base}$)))) – (CoolingLoad * 1/(SEER2_ee * (1 – $DeratingCool_{Eff}$))))/1000

For Room AC baseline (default for portable HP)

ASHPSiteCoolingImpact = ((CoolingLoad * (1/CEERbase))/1,000) – (CoolingLoad * 1/(SEER2_ee * (1 – $DeratingCool_{Eff}$))))/1000

For all scenarios:

ASHPSiteHeatingImpact = ((HeatLoad_Disp * (1/(HSPF2_base * HSPF2_ClimateAdj * (1 – $DeratingHeat_{Base}$)))) – (HeatLoad_Disp * 1/(HSPF2_ee * HSPF2_ClimateAdj * (1 – $DeratingHeat_{Eff}$)))) / 1000

Where:

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[853] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[854] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[855] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

CoolingLoad = Annual cooling load for the building

For All other scenarios:

= FLH_cooling * Capacity_ASHPcool

For Room AC baseline (default for portable HP):

= FLH_cooling * CapacityRAC * #RACUnits

FLH_cooling = Full load hours of air conditioning

= dependent on location:

Climate Zone (City based upon)	**FLH_cooling** [856] (Ductless Minisplit HP in IQ and non-IQ homes or Portable HP in IQ homes)	**FLH_cooling** (Portable HP in non-IQ homes)
1 (Rockford)	331	235
2 (Chicago)	429	261
3 (Springfield)	472	340
4 (Belleville)	655	447
5 (Marion)	579	396
Weighted Average[857]		
ComEd	409	256
Ameren	530	364
Statewide	443	286

Capacity_ASHPcool = Cooling Output Capacity of Air Source Heat Pump (Btu/hr)

= Actual (1 ton = 12,000Btu/hr)

CapacityRAC = Capacity of assumed Room AC unit

= Actual, if unknown assume 8500 Btu/hr[858]

#RACUnits = Number of Room AC units assumed to have been installed in mobile home or IQ home instead of an ASHP

= Actual, if unknown assume 1

SEER2_base = Seasonal Energy Efficiency Ratio of baseline unit (kBtu/kWh), converted to SEER2 if rating is in SEER. For early replacment measures, the actual SEER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment (5.7 years for ductless ASHP). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[859] or if unknown assume default provided below. If unknown value is used, it should not be derated by age.

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[856] Full load hours for a ductless minisplit HP providing supplemental cooling to a limited space previously unserved or underserved by existing equipment, is based on the ratio of the EFLH for conventional cooling systems to the EFLH of DMSHPs provided in the "Ductless Mini Split Heat Pump Impact Evaluation" 2016, The Cadmus Group, pg. 6 (61%).

[857] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[858] Based on maximum capacity average from the RLW Report: Final Report Coincidence Factor Study Residential Room Air Conditioners, June 23, 2008

[859] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

Baseline/Existing Cooling System	SEER2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump – Standard sized	9.2 SEER2[860]	14.3 SEER2[861]	
Room AC[862] (default for portable HP) Non-IQ IQ	10.9 CEER 8.7 CEER	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient. If unknown assume 10.9 CEER.	
No existing cooling	Make '1/SEER2_exist' = 0[863]	13.4 SEER2[864]	
Unknown	9.5 SEER2	13.7 SEER2	

SEER2_ee = Rated Seasonal Energy Efficiency Ratio of ENERGY STAR[865] unit (kBtu/kWh), converted to SEER2 if rating is in SEER (or CEER for portable heat pumps)
= Actual or program-defined minimum if unknown.

$DeratingCool_{Eff}$ = Efficent ASHP Cooling derating

= 0% if Quality Installation is performed

= $DeratingCool_{Base}$ if Quality Installation is not performed or unknown[866]

$DeratingCool_{Base}$ = Baseline Cooling derating

= 10%

HeatLoad_Disp = Annual heat load for the building displaced by the ASHP (Btus)

= FLH_ASHPheat * Capacity_ASHPheat

FLH_ASHPheat = Full load hours of heat pump heating

Climate Zone (City based upon)	FLH_ ASHPheat [867]
1 (Rockford)	716

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[860] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018', converted to SEER2.

[861] Minimum Federal Standard as of 1/1/2023

[862] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026. For IQ participants this is more likely to be the least efficient units so is consistent with the early replacement baseline from 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[863] If there is no central cooling in place but the incentive encourages installation of a new ASHP with cooling, the added cooling load should be subtracted from any heating benefit.

[864] Assumes that the decision to replace existing systems includes desire to add cooling.

[865] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[866] Based on Cadmus assumption provided in preparation of the 2014 Interstate Power and Light TRM based upon proper refrigerant charge, evaporator airflow, and unit sizing. Appears conservative in comparison to ENERGY STAR statements (see 'Sponsoring an ENERGY STAR Verified HVAC Installation (ESVI) Program') and so could be considered for future evaluation.

[867] Full load hours for a ductless minisplit HP providing supplemental heating to a limited space previously unserved or underserved by existing equipment, is based on the ratio of the EFLH for conventional heating systems to the EFLH of DMSHPs provided in the "Ductless Mini Split Heat Pump Impact Evaluation" 2016, The Cadmus Group, pg. 6 (37%).

Climate Zone (City based upon)	FLH_ ASHPheat [867]
2 (Chicago)	642
3 (Springfield)	636
4 (Belleville)	445
5 (Marion/Murphysboro)	473
Weighted Average[868] ComEd Ameren Statewide	 657 576 633

Capacity_ASHPheat = Heating Output Capacity of Air Source Heat Pump at 47° F (Btu/hr)

= Actual (1 ton = 12,000Btu/hr)

HSPF2_base = Heating Seasonal Performance Factor 2 of baseline heating system (kBtu/kWh), converted to HSPF2 if rating is in HSPF. For early replacement measures, use actual HSPF2 rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment (5.7 years for ductless ASHP, and the full measure life (17 years for ductless or 12 for portable) for electric resistance). If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[869] or if unknown assume default. If unknown value is used, it should not be derated by age.

Baseline/ Existing Heating System	HSPF2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump – standard sized	4.91 HSPF2[870]	7.5 HSPF2[871]	
Electric Resistance (Baseboard)	3.41 HSPF2[872]		
Unknown	4.4 HSPF2	5.3 HSPF2	

HSPF2_ee = Heating Seasonal Performance Factor 2 of efficient Air Source Heat Pump, converted to HSPF2 if rating is in HSPF (kBtu/kWh)

= Actual or program-defined minimum if unknown[873]

$DeratingHeat_{Eff}$ = Efficent ASHP Heating derating

= 0% if Quality Installation is performed

= 10% if Quality Installation is not performed[874]

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[868] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[869] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[870] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to HSPF2.

[871] Based on Minimum Federal Standard effective 1/1/2023.

[872] Electric resistance has a COP of 1.0 which equals 1/0.293 = 3.41 HSPF.

[873] ENERGY STAR minimum.

[874] Based on Cadmus assumption provided in preparation of the 2014 Interstate Power and Light TRM based upon proper refrigerant charge, evaporator airflow, and unit sizing, Assumed consistent for heating and cooling. Appears conservative in

$DeratingHeat_{Base}$ = Baseline Heating derating

= 10%

HSPF2_ClimateAdj= Adjustment factor to account for observed discrepency between seasonal heating performance relative to rated HSPF2 as provided by standard AHRI 210/240 rating conditions.[875]

City (county based upon)	HSPF2_ClimateAdj
1 (Rockford)	77%
2 (Chicago)	77%
3 (Springfield)	91%
4 (Belleville)	91%
5 (Marion)	91%
Weighted Average[876]	
ComEd	77%
Ameren	89%
Statewide	80%

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comparison to ENERGY STAR statements (see ‘Sponsoring an ENERGY STAR Verified HVAC Installation (ESVI) Program’) and so could be considered for future evaluation.

[875] Adjustment factors are based on findings from NEEA, July 2020 ‘EXP07:19 Load-based and Climate-Specific Testing and Rating Procedures for Heat Pumps and Air Conditioners’. See ‘NEEA HP data’ for calculation. Findings were consistent with other reviewed sources including ASHRAE, 2020 ‘Right-Sizing Electric Heat Pump and Auxiliary Heating for Residential Heating Systems Based on Actual Performance Associated with Climate Zone’ and Cadmus, 2022 ‘Residential ccASHP Building Electrification Study’. The difference between HSPF and HSPF2 ratings is based on the change in testing procedure that will correct for some of this effect where ducted systems will have an approximately 9% lower HSPF2 rating as compared to HSPF, based on CEE presentation, July 2022, ‘Testing Testing, M1, 2, 3: Transitioning to New Federal Minimum Standards’.

[876] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

For Example

Time of Sale using ASHP baseline:

For example, a ductless ASHP is installed in a single-family home in Marion with the following nameplate information: 15.2 SEER2, 11 EER2, 9 HSPF2; Cooling capacity: 9,000 Btuh; Heating capacity at 47°F: 10,000 Btuh; Heating capacity at 17°F: 6,800 Btuh with Quality Installation;

ΔkWh = ASHPSiteCoolingImpact + ASHPSiteHeatingImpact

ASHPSiteCoolingImpact = (((956 * 9,000) * 1/(14.3 * (1 - 0.1))) – (956 * 9,000 * 1/(15.2 * (1 – 0)))) / 1,000

= 102 kWh

ASHPSiteHeatingImpact = (((1,270 * 10,000 * 1) * (1/(7.5 * 0.91 * (1 – 0.1)) - 1/(9 * 0.91 * (1-0)))) / 1,000)

= 517 kWh

ΔkWh = 102 + 517

= 619 kWh

Early Replacement:

For example, a 15.2 SEER2, 11 EER2, 9 HSPF2 ductless Air Source Heat Pump with nameplate information as above replaces an existing working ducted Air Source Heat Pump with unknown efficiency ratings in a single family home in Marion:

ΔkWh for remaining life of existing unit (1st 6.7 years):

ASHPSiteCoolingImpact = (((956 * 9,000) * 1/(9.3 * (1 - 0.1))) – (956 * 9,000 * 1/(15.2 * (1 – 0)))) / 1,000

= 462 kWh

ASHPSiteHeatingImpact = (((1,270 * 10,000 * 1) * (1/(5.54 * 0.91 * (1 – 0.1)) - 1/(9 * 0.91 * (1-0)))) / 1,000)

= 1,248 kWh

ΔkWh = 462 + 1,248

= 1,710 kWh

ΔkWh for remaining measure life (next 13.3 years):

= 619 kWh (as example above)

SUMMER COINCIDENT PEAK DEMAND SAVINGS

For all other scenarios:

ΔkW = ((Capacity_cooling * (1/(EER2_base * (1 – DeratingCool$_{Base}$))) – (Capacity_cooling * 1/(EER2_ee * (1 – DeratingCool$_{Eff}$)))) / 1,000 * CF

For Room AC baseline (default for portable HP):

ΔkW = ((#RACUnits * CapacityRAC * (1/(CEERbase * 1.01)))/1,000) – (Capacity_cooling * 1/(EER2_ee * (1 – DeratingCool$_{Eff}$)))) / 1,000 * CF

Where:

EER2_base = Energy Efficiency Ratio 2 of baseline unit (kBtu/kWh). For early replacment measures, the actual EER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment (5.7 years for ductless ASHP). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[877] If unknown, assume default provided below. If

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[877] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

unknown value is used, it should not be derated by age.

Baseline/Existing Cooling System	EER2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Ductless Air Source Heat Pump – standard sized	7.4 EER2	8.5 EER2	
Room AC[878] (default for portable HP) Non-IQ IQ	10.9 CEER 8.7 CEER	Select appropriate baseline from measure 5.1.7. Assume same capacity as efficient. If unknown assume 10.9 CEER.	
No existing cooling	Make '1/EER2_exist' = 0 [879]	10.6 EER2[880]	
Unknown	7.4 EER2	8.5 EER2	

EER2_ee = Energy Efficiency Ratio of efficient Air Source Heat Pump (kBtu/hr / kW)

= Actual. If unknown, assume 11 EER2.[881]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[882]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during peak period)

= 46.6%[883]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[884]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

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[878] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026. For IQ participants this is more likely to be the least efficient units so is consistent with the early replacement baseline from 5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner.

[879] If there is no central cooling in place but the incentive encourages installation of a new ASHP with cooling, the added cooling load should be subtracted from any heating benefit.

[880] Assumes that the decision to replace existing systems includes desire to add cooling.

[881] ENERGY STAR v6.2 minimum specification.

[882] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[883] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[884] *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

Time of Sale:

For example, a one ton, 15.2 SEER2, 11 EER2, 9 HSPF2 Air Source Heat Pump installed in single-family home in Marion with Quality Installation:

ΔkW_{SSP} = (12,000 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.72

= 0.2358 kW

ΔkW_{PJM} = (12,000 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.466

= 0.1526 kW

Early Replacement:

For example, a 1-ton, 15.2 SEER2, 11 EER2, 9 HSPF2 ductless Air Source Heat Pump replaces an existing working ductless Air Source Heat Pump with unknown efficiency ratings in single-family home in Marion with Quality Installation:

ΔkW_{SSP} for remaining life of existing unit (1st 6.7 years):

= (12,000 * (1/(7.5 * (1-0.1)) - 1/(11 * (1-0)))) / 1,000 * 0.72

= 0.4945 kW

ΔkW_{SSP} for remaining measure life (next 13.3 years):

= (12,000 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.72

= 0.2358 kW

ΔkW_{PJM} for remaining life of existing unit (1st 6.7 years):

= (12,000 * (1/(7.5 * (1-0.1)) - 1/(11 * (1-0)))) / 1,000 * 0.466

= 0.3201 kW

ΔkW_{PJM} for remaining measure life (next 13.3 years):

= (12,000 * (1/(9.4 * (1-0.1)) – 1/(11 * (1-0)))) / 1,000 * 0.466

= 0.1526 kW

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-AHPS-V01-270101

REVIEW DEADLINE: 1/1/2029

5.3.25 Air to Water Heat Pump

DESCRIPTION

An Air to Water Heat Pump (AWHP) provides space heating, space cooling, and/or water heating by moving heat between a hydronic heat transfer system and outdoor air. For space heating, an AWHP functions similarly to a boiler system, although the energy source is the heat gathered from the outdoor air. For space cooling, an AWHP moves heat from inside to outside via a specialized air handler. For water heating, an AWHP "pre-heats" water in the DHW system before it enters a standard water heater.

This measure was developed to be applicable to the following program types: TOS, NC, EREP. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Installation of a new Air to Water Heat Pump with a nominal space cooling capacity up to 65 kBTU/hr that is rated to generate 110°F supply water at an outdoor temperature of 5°F with a COP of 1.7 or greater (COP @ A5W110), which is a published rating in all qualifying product literature. The AWHP must be sized to cover most of the heating load with the available hydronic distribution system. The seasonal heating and cooling efficiency factors (SHEF and SCEF) are defined by the AHRI 1700 standard, which is expected to be published in 2026. These are unitless ratings based on the average COP of the heating throughout the heating or cooling season.

DEFINITION OF BASELINE EQUIPMENT

For these products, baseline equipment includes Air Conditioning, Space Heating and Water Heating.

New Construction:

The baseline fuel type is assumed to align with the efficient equipment, unless the program can provide information to assume otherwise, and the algorithms are provided to allow savings to be calculated from any baseline condition. The electric baseline heating equipment is assumed to be a resistance boiler with a COP of 1.0 (3.41 HSPF2). For a gas boiler baseline, assume an AFUE of 84%. If the new AWHP includes cooling, the baseline cooling equipment is assumed to be a central AC meeting the Federal Standard efficiency level: 13.4 SEER2 and 10.6 EER2.[885] If the new AWHP includes a DHW tank, the baseline is assumed to be a 50-gallon electric resistance water heater with a default efficiency of 0.9207 UEF.[886]

Time of Sale:

The baseline is a new replacement unit of the same system type as the existing unit, meeting the baselines provided in the tables below. Only use the cooling and/or DHW baselines if the new AWHP includes cooling and/or DHW equipment.

Unit Type	Efficiency Standard
ASHP	14.3 SEER2 9.4 EER2, 7.5 HSPF2
Natural Gas or LP Furnace	80% AFUE
Natural Gas or LP Boiler	84% AFUE
Oil Furnace	83% AFUE
Oil Boiler	86% AFUE
Central AC	13.4 SEER2, 10.6 EER2

The baseline condition is a new water heater meeting Federal Standard efficiency levels, dependent on the

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[885] The Federal Standard does not include an EER requirement. The value provided is based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018'.

[886] A 50 gallon volume tank for the baseline is assumed to capture market practice of using larger heat pump water heaters to achieve greater efficiency of the heat pump cycle and preventing the unit from going in electric resistance mode.

equipment type and storage volume (in gallons) of the water heater.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[887]
Residential Electric Storage Water Heaters ≤ 75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.8808 – (0.0008 * Rated Storage Volume in Gallons)
		Low	UEF = 0.9254 – (0.0003 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.9307 – (0.0002 * Rated Storage Volume in Gallons)
		High	UEF = 0.9349 – (0.0001 * Rated Storage Volume in Gallons)
	>55 gallon and ≤120 gallon tanks[888]	Very small	UEF = 1.9236 – (0.0011 * Rated Storage Volume in Gallons)
		Low	UEF = 2.0440 – (0.0011 * Rated Storage Volume in Gallons)
		Medium	UEF = 2.1171 – (0.0011 * Rated Storage Volume in Gallons)
		High	UEF = 2.2418 – (0.0011 * Rated Storage Volume in Gallons)
Residential Electric Instantaneous Water Heaters	≤12kW and ≤2 gal	All other	UEF = 0.91
		High	UEF = 0.92
Residential Gas Storage Water Heaters ≤75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.3456 – (0.0020 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5982 – (0.0019 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6483 – (0.0017 * Rated Storage Volume in Gallons)
		High	UEF = 0.6920 – (0.0013 * Rated Storage Volume in Gallons)
	>55 gallon and ≤100 gallon tanks	Very small	UEF = 0.6470 – (0.0006 * Rated Storage Volume in Gallons)
		Low	UEF = 0.7689 – (0.0005 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.7897 – (0.0004 * Rated Storage Volume in Gallons)
		High	UEF = 0.8072 – (0.0003 * Rated Storage Volume in Gallons)
Residential Gas Fired Instantaneous Water Heaters	< 2 gal and >50,000 Btu/h	Very small	UEF = 0.80
		All other	UEF = 0.81
Residential Oil Storage Water Heater	≤50 gallon tanks	Very small	UEF = 0.2509 – (0.0012 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5330 – (0.0016 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6087 – (0.0016 * Rated Storage Volume in Gallons)
		High	UEF = 0.6815 – (0.0014 * Rated Storage Volume in Gallons)

The same draw pattern (very small, low, medium and high draw) should be used for both baseline and efficient units. If using a deemed approach, for units ≤55 gallons – baseline is assumed to be a resistance storage unit with efficiency: 0.9307 – (0.0002 * rated volume in gallons) assuming medium draw.

For units >55 gallons – assume a 50-gallon resistance tank baseline[889] i.e., 0.9299 UEF assuming high draw.

If unknown, assume a 50-gallon resistance tank baseline, at medium draw, therefore 0.9207 UEF.[890]

Early Replacement:

The baseline is the efficiency of the *existing* heating, cooling and hot water equipment for the assumed remaining useful life of the existing unit and a new baseline heating and cooling system for the remainder of the measure life (as provided in tables above).

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[887] All Residential sized Federal Standards are from DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431.

[888] It is assumed that tanks <75,000Btu/h and >55 gallons will not be eligible measures due to the high baseline.

[889] A 50 gallon volume tank for the baseline is assumed to capture market practice of using larger heat pump water heaters to achieve greater efficiency of the heat pump cycle and preventing the unit from going in electric resistance mode.

[890] About 90% of all water heaters are installed in a replace-on-burnout situation and installers strongly prefer like-for-like equipment replacements in these situations, meaning that fuel switching is unlikely in TOS situations. As stated in Opinion Dynamics Ameren Illinois' Market Effects Pilot – Heat Pump Hot Water Market Characterization Report, March 4, 2021.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 20 years (same as for air source heat pumps).[891]

For early replacement, the remaining life of existing equipment is assumed to be 8.3 years for Central AC, 8 years for boilers and 20 years for electric resistance.[892]

DEEMED MEASURE COST

Baseline	Baseline Cost	Deferred Baseline Replacement Cost[893]
New electric resistance boiler[894]	$5,000	N/A
New gas boiler[895]	$8,820	$8,982
New central AC[896]	$5,250	$5,322
New 50-gallon electric storage water heater[897]	$882	$892
New 50-gallon gas storage water heater, medium draw[898]	$1,738	$1,758

AWHP Heating Capacity (kBTU/hr)	Cost
24 up to 30	$6,404
30 up to 36	$7,326
36 up to 42	$8,248
42 up to 48	$9,224
48 up to 54	$10,199
54 up to 60	$11,116
60 up to 66	$12,033
66 up to 72	$12,971

LOADSHAPE

Loadshape R09 - Residential Electric Space Heat (if installed in building with no cooling)

Loadshape R10 - Residential Electric Heating and Cooling

Note for purpose of cost effectiveness screening a fuel switch scenario, the heating kWh increase and cooling kWh

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[891] Based on recommendations from "Final Evaluation Report for: X2001B: Connecticut Measure Life/EUL Update Study-Residential & Commercial" prepared by Michaels Energy and Evergreen Economics, May 11, 2023.

[892] Assume full measure life for replacing electric resistance as we would not expect that resistance heat would fail during the lifetime of the efficient measure.

[893] All baseline replacement costs are consistent with their respective measures and include inflation rate of 2.28%.

[894] "How Much Does Electric Boiler Installation Cost? [2026 Data]", Updated March 6, 2026, https://www.angi.com/articles/electric-boiler-installation-cost.htm

[895] In 2025, a working group was created to update costs for residential HVAC equipment. Heat Pump and Central Air Conditioning costs are based upon Ameren program data. Furnace and Boiler costs are based on Ameren, Nicor, People's Gas, and North Shore Gas program data. Baseline costs have been determined using ratios from Updated Buildings Sector Appliance and Equipment Costs and Efficiencies by Guidehouse and Leidos, prepared for the U.S. Energy Information Administration, March 2023. See file "HVAC Costs – 071825_VEIC.xlsx" for more details.

[896] Ibid., assuming 3.5-ton baseline

[897] Baseline ERWH equipment costs: Energy Solutions (2024). Heat Pump Water Heaters in the Northeast and Mid-Atlantic: Costs and Market Trends. Prepared for: Northeast States for Coordinated Air Use Management (NESCAUM) and The Ozone Transport Commission (OTC). Installation labor cost from same study suggests $308, for a total of $882. Additionally, a review of 18 baseline ERWH models (5 different manufacturers; sizes ranging from 30-50 gallons) listed with online retailers (Home Depot, Lowes, Menards, and Ferguson Supply) available in IL established an average equipment cost of $575.

[898] Supporting document for Energy Conservation Program: Energy Conservation Standards for Consumer Water Heaters. 2023-07-21 Consumer Water Heater Life-Cycle Cost (LCC) and Payback Period Results Analysis (NOPR), EERE-2017-BT-STD-0019-0061.

decrease should be calculated separately such that the appropriate loadshape (i.e., Loadshape R09 - Residential Electric Space Heat and Loadshape R08 – Residential Cooling respectively) can be applied.

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Heat Pumps (during utility peak hour)

= 72%[899]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Heat Pumps (average during PJM peak period)

= 46.6%[900]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Non-fuel switch measures:

ΔkWh = AWHPSiteCoolingImpact + AWHPSiteHeatingImpact + AWHPSiteDHWImpact

AWHPSiteCoolingImpact = [FLHcool * Capacity_cooling * (1/$SEER2_{base}$ – 1/($SCEF_{HP}$ * 3.412))/1000]

AWHPSiteHeatingImpact = [HeatLoad* (1/$HSPF2_{base}$ – 1/($SHEF_{HP}$ * 3.412))/1000]

AWHPSiteDHWImpact = [ElecDHW * %DHWDisplaced * (((1/EF_{ELEC} – 1/EF_{HP}) * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412)]

Fuel switch measures:

Fuel switch measures must produce positive total lifecycle energy savings (i.e., reduction in Btus at the premises) to qualify. This is determined as follows (note for early replacement measures the lifetime savings should be calculated by calculating savings for the remaining useful life of the existing equipment and for the remaining measure life):

SiteEnergySavings (MMBTUs) = FuelSwitchSavings + NonFuelSwitchSavings

FuelSwitchSavings = GasHeatReplaced – AWHPSiteHeatConsumed

NonFuelSwitchSavings = AWHPSiteCoolingImpact + AWHPSiteWaterImpact

GasHeatReplaced = [(HeatLoad * 1/$AFUE_{base}$) / 1,000,000]

AWHPSiteHeatConsumed = [(HeatLoad * 1/($SHEF_{HP}$ * 3.412)) / 1,000,000]

AWHPSiteCoolingImpact = [FLHcool * Capacity_cooling * (1/$SEER2_{base}$ – 1/($SCEF_{HP}$ * 3.412)] / 1,000,000

$AWHPSiteWaterImpact_{Gas}$ = (%DHWDisplaced * ((1/EF_{Gas} - 1/EF_{HP}) * GPD * Household * 365.25 *

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[899] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[900] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

γWater * (T_{OUT} – T_{IN}) * 1.0)) / 1,000,000)

$AWHPSiteWaterImpact_{Elec}$ = (%DHWDisplaced * ((1/EF_{Elec} - 1/EF_{HP}) * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0)) / 1,000,000

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in the table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10
Gas utility only	N/A	SiteEnergySavings * 10

Note for Early Replacement measures, the efficiency of the existing unit should be used for the remaining useful life of the existing equipment, and the efficiency for a new baseline unit should be used for the remaining years of the measure. See assumptions below.

Where:

FLHcool = Full load cooling hours

Dependent on location as below:[901]

Climate Zone (City based upon)	FLHcool Single Family
1 (Rockford)	547
2 (Chicago)	709
3 (Springfield)	779
4 (Belleville)	1082
5 (Marion)	956
Weighted Average[902]	
ComEd	676
Ameren	875
Statewide	731

Capacity_cooling = Cooling Output Capacity of Air to Water Heat Pump (Btu/hr)

= Actual (1 ton = 12,000 Btu/hr)

$SEER2_{base}$ = Seasonal Energy Efficiency Rating of baseline or existing cooling system. For early

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[901] Based on Full Load Hours from ENERGY STAR with adjustments made in a Navigant Evaluation, other cities were scaled using those results and CDD. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[902] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

replacement measures, use actual SEER/SEER2 rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[903] If unknown, assume no central cooling.

Baseline/Existing Cooling System	**SEER2base**		
	Early Replacement (Remaining useful life of existing equipment)	**Early Replacement (Remaining measure life)**	**Time of Sale or New Construction**
Central AC	9.2 SEER2[904]	13.4 SEER2[905]	
No central cooling	13.4 SEER2[906]	13.4 SEER2	

$SCEF_{HP}$ = Seasonal Cooling Efficiency Factor of efficient AWHP unit. Equivalent to average COP over the heating season, including the use of electric resistance backup heat.

= Actual installed

HeatLoad = Calculated heat load for the building

= FLH_heat * Capacity_heat

FLH_heat = Full load hours of heat pump heating

Dependent on location as below:[907]

Climate Zone (City based upon)	**FLH_heat**
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion)	1270
Weighted Average[908]	
ComEd	1766
Ameren	1547
Statewide	1700

Capacity_heat = Heating Output Capacity of Air to Water Heat Pump (Btu/hr)

= Actual installed

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[903] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[904] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to SEER2.

[905] Minimum Federal Standard; Federal Register, Vol. 66, No. 14, Monday, January 22, 2001/Rules and Regulations, p. 7170-7200.

[906] Assumes that the decision to replace existing systems includes desire to add cooling.

[907] Heating EFLH based on ENERGY STAR EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of HDD60, NCDC/NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[908] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

$HSPF2_{base}$ = Heating Seasonal Performance Factor of baseline or existing heating system (kBtu/kWh). For early replacement measures, use actual HSPF/HSPF2 rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time.[909]

= If unknown, assume electric resistance.

Baseline/ Existing Heating System	HSPF2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump	4.91 HSPF2[910]	7.5 HSPF2[911]	
Electric Resistance (Baseboard or Electric Furnace)	3.41 HSPF2[912]		

$SHEF_{HP}$ = Seasonal Heating Efficiency Factor of efficient AWHP unit

= Actual installed

ElecDHW = 1 if existing DHW is electrically heated

= 0 if existing DHW is not electrically heated

%DHWDisplaced = Percentage of total DHW load that the AWHP will provide

= Actual if known

= If unknown and if DHW tank is installed, assume 45%[913]

= 0% if no DHW tank is installed

EF_{ELEC} = Energy Factor (efficiency) of electric water heater

= Actual. If unknown or for new construction, assume 0.9207[914]

EF_{HP} = COP @ A5W110 (Ambient air at 5 degrees, supply water at 110 degrees)

= If unknown, use 1.7

GPD = Gallons Per Day of hot water use per person

= 45.5 gallons hot water per day per household/2.59 people per household[915]

= 17.6

Household = Actual number of people in household. If unknown, use the values in the following table:

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[909] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[910] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to HSPF2.

[911] Based on Minimum Federal Standard effective 1/1/2023.

[912] Electric resistance has a COP of 1.0 which equals 1/0.293 = 3.41 HSPF.

[913] Assumes that the DHW tank can provide 90% of hot water needs for six months of the year (90% * 50% = 45%). See MDPI study.

[914] Assuming a 50-gallon tank baseline at Medium Draw.

[915] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

Household Unit Type	Household[916]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Household type unknown			2.46[917]
Custom	Actual Occupancy or Number of Bedrooms[918]		

365.25 = Days per year

γWater = Specific weight of water

= 8.33 pounds per gallon

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municiplal system

= 50.7°F [919]

1.0 = Heat Capacity of water (1 Btu/lb*°F)

3412 = Conversion from Btu to kWh

$AFUE_{base}$ = Baseline Annual Fuel Utilization Efficiency Rating. For early replacement measures, use actual AFUE rating where it is possible to measure or reasonably estimate for the remaining useful life of the existing equipment. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[920] or if unknown assume default. If unknown value is used, it should not be derated by age.

Baseline/ Existing Heating System	AFUEbase		
	Early Replacement (Remaining useful life of existing equipment)[921]	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Boiler	61.6%	84%	84%

EF_{GAS} = Energy Factor (efficiency) of gas water heater

= Actual. If unknown, assume federal standard:[922]

For <=55 gallons: 0.6483 – (0.0017 * storage capacity in gallons)

For > 55 gallons 0.7897 – (0.0004 * storage capacity in gallons)

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[916] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[917] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[918] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[919] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[920] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[921] Average nameplate efficiencies of all Early Replacement qualifying equipment in Ameren PY3-PY4.

[922] Minimum Federal Standard as of 4/1/2015.

= If tank size unknown, assume 40 gallons and EF_Baseline of 0.58

3412 = Btu per kWh

%IncentiveElectric = % of total incentive paid by electric utility

= Actual

%IncentiveGas = % of total incentive paid by gas utility

= Actual

Non Fuel Switch Illustrative Examples

Time of Sale using ASHP baseline:

For example, an Air to Water Heat Pump is installed in a single-family home in Marion with the following nameplate information: 17 $SCEF_{HP}$, 10 $SHEF_{HP}$, 1.7 EF_{HP}; Cooling capacity: 34,800 Btuh; Heating capacity at 47°F: 33,000 Btuh; Heating capacity at 17°F: 21,200 Btuh with Quality Installation;

$\Delta kWh_{Non\ Fuel\ Switch}$ = AWHPSiteCoolingImpact + AWHPSiteHeatingImpact + AWHPSiteDHWImpact

AWHPSiteCoolingImpact = ((956 * 34,800 * (1/(13.4)) – (956 * 34,800 * (1/17))) / 1,000

= 526 kWh

AWHPSiteHeatingImpact = (1,270 * 33,000) * (1/7.5 – 1/(10 * 3.412))/1000

= 4,360 kWh

AWHPSiteDHWImpact = (1 * 0.45 * (((1/0.9207 – 1/1.7) * 17.6 * 2.46 * 365.25 * 8.33 * (125 – 50.7) * 1.0) / 3412))

=643 kWh

$\Delta kWh_{Non\ Fuel\ Switch}$ = 526 + 4,360 + 643 = 5,529 kWh

Early Replacement:

For example, a 17 $SCEF_{HP}$, 10 $SHEF_{HP}$, 1.7 EF_{HP} Air to Water Heat Pump with nameplate information as above replaces an existing working Air Source Heat Pump with unknown efficiency ratings in a single-family home in Marion:

ΔkWH for remaining life of existing unit (1st 6.7 years):

AWHPSiteCoolingImpact = ((956 * 34,800 * (1/(9.2)) – (956 * 34,800 * (1/17))) / 1,000

= 1,659 kWh

AWHPSiteHeatingImpact = (1,270 * 33,000) * (1/4.91 – 1/(10 * 3.412))/1000

= 7,307 kWh

AWHPSiteDHWImpact = (1 * 0.45 * (((1/0.9207 – 1/1.7) * 17.6 * 2.46 * 365.25 * 8.33 * (125 – 50.7) * 1.0) / 3412))

=643 kWh

$\Delta kWh_{Non\ Fuel\ Switch}$ = 1,659 + 7,307 + 643 = 9.609 kWh

ΔkWH for remaining measure life (next 13.3 years):

= 5,529 kWh (as example above)

Fuel Switch Illustrative Examples

[for illustrative purposes, 50:50 Incentive is used for joint programs]

New construction using gas furnace, central AC, and gas water heater baseline:

For example a 3-ton (Cooling capacity of 34,800Btuh and Heating capacity of 33,000 Btuh), 17 $SCEF_{HP}$, 10 $SHEF_{HP}$, 1.7 EF_{HP} Air to Water Heat Pump installed in single-family home in Marion, in place of a 81,000 Btuh natural gas furnace, 3 ton Central AC unit, and gas water heater:

SiteEnergySavings (MMBTUs) = (GasHeatReplaced – AWHPSiteHeatConsumed) + (AWHPSiteCoolingImpact + AWHPSiteWaterImpact)

GasHeatReplaced = ((HeatLoad * 1/$AFUE_{base}$) / 1,000,000)

= ((1,270 * 33,000) * 1/0.84) / 1,000,000)

= 49.9 MMBtu

Fuel Switch Illustrative Example continued

AWHPSiteHeatConsumed = ((HeatLoad * (1/(SHEF$_{HP}$ * 3.412))/ 1,000,000)

= ((1,270 * 33,000) * (1/(10 * 3.412))/ 1,000,000)

= 1.2 MMBtu

AWHPSiteCoolingImpact = (FLHcool * Capacity_cooling * (1/SEER2$_{base}$ – 1/(SCEF$_{HP}$ * 3.412)) / 1,000,000

= (956 * 34,800 * (1/13.4 – 1/(17 * 3.412))/1,000,000

= 1.9 MMBtu

AWHPSiteWaterImpact$_{Gas}$ = (%DHWDisplaced * ((1/EF$_{Gas}$ - 1/EF$_{HP}$) * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0)) / 1,000,000)

= (0.45 * ((1/0.58 - 1/1.7) * 17.6 * 2.46 * 365.25 * 8.33 * (125 – 50.7) * 1.0)) / 1,000,000)

= 5 MMBtu

SiteEnergySavings (MMBTUs)

= (49.9 – 1.2) + (1.9 + 5) = 55.6 MMBtu [Measure is eligible]

Savings would be claimed as follows:

Measure supported by:	Electric Utility claims:	Gas Utility claims:
Electric utility only	55.6 * 1,000,000/3,412 = 16,295 kWh	N/A
Electric and gas utility	0.5 * 55.6 * 1,000,000/3,412 = 8,148 kWh	0.5 * 55.6 * 10 = 278 Therms
Gas utility only	N/A	55.6 * 10 = 556 Therms

Early Replacement fuel switch:

For example a three ton (Cooling capacity of 34,800 Btuh and Heating capacity of 33,000 Btuh), 17 SCEF$_{HP}$, 10 SHEF$_{HP}$, 1.7 EF$_{HP}$ Air to Water Heat Pump installed in single-family home in Marion, replaces an existing working natural gas furnace, 3-ton Central AC unit, and gas water heater with unknown efficiency ratings:

LifetimeSiteEnergySavings (MMBTUs) = (LifetimeGasHeatReplaced – LifetimeAWHPSiteHeatConsumed) + (LifetimeAWHPSiteCoolingImpact + LifetimeAWHPSiteWaterImpact)

LifetimeGasHeatReplaced = [((HeatLoad * 1/AFUE$_{base}$) / 1,000,000)] * 6 years + [((HeatLoad * 1/AFUE$_{base}$) / 1,000,000)] * 10 years

= (((1,270 * 33,000) * 1/0.616) / 1,000,000) * 6) + (((1,270 * 33,000) * 1/0.84) / 1,000,000) * 10)

=907.1 MMBtu

LifetimeAWHPSiteHeatConsumed = ((HeatLoad * (1/(SHEF$_{HP}$ * 3.412))/ 1,000,000) * 16 years

= ((1,270 * 33,000) * (1/(10 * 3.412))/ 1,000,000) * 16

= 19.7 MMBtu

Fuel Switch Illustrative Example continued

LifetimeAWHPSiteCoolingImpact = ((FLHcool * Capacity_cooling * (1/SEER2$_{base}$ – 1/(SCEF$_{HP}$ * 3.412)) / 1,000,000) * 6 years) + ((FLHcool * Capacity_cooling * (1/SEER2$_{base}$ – 1/(SCEF$_{HP}$ * 3.412)) / 1,000,000) * 10 years)

= ((956 * 34,800 * (1/9.2 – 1/(17 * 3.412))/1,000,000 * 6) + ((956 * 34,800 * (1/13.4 – 1/(17 * 3.412))/1,000,000 * 10)

= 37.3 MMBtu

LifetimeAWHPSiteWaterImpact$_{Gas}$ = (%DHWDisplaced * ((1/EF$_{Gas}$ - 1/EF$_{HP}$) * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0)) / 1,000,000) * 16

= (0.45 * ((1/0.58 - 1/1.7) * 17.6 * 2.46 * 365.25 * 8.33 * (125 – 50.7) * 1.0)) / 1,000,000) * 16

=80 MMBtu

LifetimeSiteEnergySavings (MMBTUs) = (907.1 – 19.7) + (37.3 + 80) = 1,004.7 MMBtu [Measure is eligible]

First 6 years:

SiteEnergySavings_FirstYear (MMBTUs) = (GasHeatReplaced – AWHPSiteHeatConsumed) + (AWHPSiteCoolingImpact + AWHPSiteWaterImpact)

GasHeatReplaced = ((HeatLoad * 1/AFUE$_{base}$) / 1,000,000)

= ((1,270 * 33,000) * 1/0.616) / 1,000,000)

= 68.0 MMBtu

AWHPSiteHeatConsumed = ((HeatLoad * (1/(SHEF$_{HP}$ * 3.412))/ 1,000,000)

= ((HeatLoad * (1/(SHEF$_{HP}$ * 3.412))/ 1,000,000)

= 1.2 MMBtu

AWHPSiteCoolingImpact = ((FLHcool * Capacity_cooling * (1/SEER2$_{base}$ – 1/(SCEF$_{HP}$ * 3.412)) / 1,000,000)

= (956 * 34,800 * (1/9.2 – 1/(17 * 3.412))/1,000,000

= 3.0 MMBtu

AWHPSiteWaterImpact$_{Gas}$ = (%DHWDisplaced * ((1/EF$_{Gas}$ - 1/EF$_{HP}$) * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0)) / 1,000,000)

= (0.45 * ((1/0.58 - 1/1.7) * 17.6 * 2.46 * 365.25 * 8.33 * (125 – 50.7) * 1.0)) / 1,000,000)

= 5 MMBtu

SiteEnergySavings_FirstYear (MMBTUs) = (68.0 – 1.2) + (3.0 + 5) = 74.8 MMBtu

Remaining 10 years:

SiteEnergySavings_PostAdj (MMBTUs) = (GasHeatReplaced – AWHPSiteHeatConsumed) + (AWHPSiteCoolingImpact + AWHPSiteWaterImpact)

GasHeatReplaced = ((1,270 * 33,000) * 1/0.84) / 1,000,000)

= 49.9 MMBtu

Fuel Switch Illustrative Example continued

AWHPSiteHeatConsumed = ((1,270 * 33,000) * (1/(10 * 3.412))/ 1,000,000)

= 1.2 MMBtu

AWHPSiteCoolingImpact = = (FLHcool * Capacity_cooling * (1/SEER2$_{base}$ – 1/(SCEF$_{HP}$ * 3.412)) / 1,000,000

= 1.9 MMBtu

AWHPSiteWaterImpact$_{Gas}$ = (%DHWDisplaced * ((1/EF$_{Gas}$ - 1/EF$_{HP}$) * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0)) / 1,000,000)

=5 MMBtu

SiteEnergySavings_ PostAdj (MMBTUs) = (49.9 – 1.2) + (1.9 + 5) = 55.6 MMBtu

Savings would be claimed as follows:

Measure supported by:	Electric Utility claims:	Gas Utility claims:
Electric utility only	First 6 years: 74.8* 1,000,000/3412 = 21,923 kWh Remaining 10 years: 55.6 * 1,000,000/3412 = 16,295 kWh	N/A
Electric and gas utility	First 6 years: 0.5 * 74.8 * 1,000,000/3412 = 10,961 kWh Remaining 10 years: 0.5 * 55.6 * 1,000,000/3412 = 8,148 kWh	First 6 years: 0.5 * 74.8 * 10 = 374 Therms Remaining 10 years: 0.5 * 55.6 * 10 = 278 Therms
Gas utility only	N/A	First 6 years: 74.8 * 10 = 748 Therms Remaining 10 years: 55.6 * 10 = 556 Therms

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (Capacity_cooling * (1/EER2$_{base}$ - 1/EER$_{HP}$))/1000 * CF

Where:

EER2$_{base}$ = Energy Efficiency Ratio 2 of baseline unit (kBtu/kWh). For early replacment measures, the actual EER2 rating where it is possible to measure or reasonably estimate should be used for the remaining useful life of the existing equipment. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time.[923] If unknown, assume default provided below. If unknown value is used, it should not be derated by age.

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[923] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

Baseline/Existing Cooling System	EER2_base		
	Early Replacement (Remaining useful life of existing equipment)	Early Replacement (Remaining measure life)	Time of Sale or New Construction
Air Source Heat Pump	7.4 EER2[924]	9.4 EER2[925]	
Ground Source Heat Pump	11.2 EER2	11.2 EER2	
Central AC	7.4 EER2	10.6 EER2	
No central cooling	10.6 EER2[926]	10.6 EER2	

EER_{HP} = EER Efficiency of new AWHP unit; ambient air at 95 degrees, water supply at 45 degrees (A95W45)

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

= 72%[927]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during peak period)

= 46.6%[928]

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[924] Based on Opinion Dynamics and Cadmus metering study of Ameren HVAC program participants; See 'AIC HVAC Metering Study Memo FINAL 2_28_2018' Converted to EER2.

[925] Assumed consistent with the EER2 requirements in the Federal Standard for Southwest standards (in the absence of standards for Northen states).

[926] Assumes that the decision to replace existing systems includes desire to add cooling.

[927] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[928] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Time of Sale:

For example, a three ton, 12 EER Air to Water Heat Pump installed in single-family home in Marion with Quality Installation:

ΔkW_{SSP} = (36,000 * (1/(9.4) – 1/(12)) / 1,000 * 0.72

= 0.5974 kW

ΔkW_{PJM} = (36,000 * (1/(9.4) – 1/(12)) / 1,000 * 0.466

= 0.3867 kW

Early Replacement:

For example, a 3-ton, 12 EER Air to Water Heat Pump replaces an existing working Air Source Heat Pump with unknown efficiency ratings in single-family home in Marion with Quality Installation:

ΔkW_{SSP} for remaining life of existing unit (1st 6.7 years):

= (36,000 * (1/(7.4) – 1/(12)) / 1,000 * 0.72

= 1.34 kW

ΔkW_{SSP} for remaining measure life (next 13.3 years):

= (36,000 * (1/(9.4) – 1/(12)) / 1,000 * 0.72

= 0.5974 kW

ΔkW_{PJM} for remaining life of existing unit (1st 6.7 years):

= (36,000 * (1/(7.4) – 1/(12)) / 1,000 * 0.466

= 0.8690 kW

ΔkW_{PJM} for remaining measure life (next 13.3 years):

= (36,000 * (1/(9.4) – 1/(12)) / 1,000 * 0.466

= 0.3867 kW

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HVC-AWHP-V01-270101

REVIEW DEADLINE: 1/1/2029

5.4 Hot Water End Use

5.4.1 Domestic Hot Water Pipe Insulation

DESCRIPTION

This measure describes adding insulation to un-insulated domestic hot water pipes. The measure assumes the pipe wrap is installed either to the first length of both the hot and cold pipe (this is the most cost-effective section to insulate in non-circulating systems, since the water pipes act as an extension of the hot water tank) or to a hot water recirculating loop. Insulating this length therefore helps reduce standby losses. Default savings are provided per 3ft length and are appropriate up to 6ft of the hot water pipe and 3ft of the cold. Where a hot water recirculating pump is in use, this measure is viable for the entire hot water loop.

This measure was developed to be applicable to the following program types: TOS, NC, RF, KITS.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient case is installing pipe wrap insulation to a length of hot water pipe.

DEFINITION OF BASELINE EQUIPMENT

The baseline is an un-insulated hot water pipe.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 12 years.[929]

DEEMED MEASURE COST

The actual installation cost should be used if known. If unknown, the measure cost including material and installation is assumed to be $3 per linear foot.[930] For foam pipe insulation assume a measure cost of $0.26/ft for ½” insulation and $0.31/ft for ¾” insulation.[931]

LOADSHAPE

Loadshape C53 - Flat

COINCIDENCE FACTOR

This measure assumes a flat loadshape since savings relate to reducing standby losses and as such the coincidence factor is 1.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \%Electric\_DHW * ((1 / R_{exist} - 1 / R_{new}) * C_{inside} * L_{effective} * \Delta T * 8{,}766 * ISR) / \eta DHW / 3{,}412$$

Where:

%Electric_DHW = Percentage of DHW savings assumed to be electric

= 100 % for Electric

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[929] . California DEER EUL Table Update 2014-02-05. Average of values for electric DHW (13 years) and gas DHW (11 years).

[930] Consistent with DEER 2008 Database Technology and Measure Cost Data (www.deeresources.com).

[931] Review of website cost data for Homedepot.com, Lowes.com, and Menards.com for locations in Peoria, IL.

= 0 % for Fossil Fuel

= If unknown[932], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[933]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

R_{exist} = Pipe heat loss coefficient of uninsulated pipe (existing) [(hr-°F-ft)/Btu]

= Varies based on pipe size and material. See table below for values.

R_{new} = Pipe heat loss coefficient of insulated pipe (new) [(hr-°F-ft)/Btu]

= Actual (R_{exist} + R value of insulation[934])

C_{inside} = Inside circumference of the pipe [ft]

= Actual (0.5" pipe = 0.1427 ft, 0.75" pipe = 0.2055 ft); See table below for values.

$L_{effective}$ = Effective length of pipe from water heating source covered by pipe insulation (ft) [935]

= $L_{Horizontal} + \alpha L_{Vertical}$

= Actual; See table below for α values. If unknown, assume 3ft of vertical and remaining horizontal.

ΔT = Average temperature difference between supplied water and outside air temperature (°F)

= 60°F [936]

8,766 = Hours per year

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[932] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[933] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[934] Where possible it should be ensured that the R-value of the insulation is at the appropriate mean rating temperature (100F).

[935] In cases with zero wind, heat loss (and therefore) savings is larger from horizontal pipe configurations than vertical pipe configurations due, perhaps to the way in which convective losses are handled. Given that most DHW pipe insulation installations begin with a vertical orientation from the water heater, an adjustment to the engineering calculation is needed. An analysis of the 3E PLUS tool by NAIMA (https://insulationinstitute.org/tools-resources/free-3e-plus/) yielded adjustment factors for horizontal to vertical loss and savings values. See DHW_PipeInsulationCalcs_062121.xlsx for details of the analysis and comparisons.

[936] Assumes 125°F water leaving the hot water tank and average temperature of basement of 65°F.

ISR = In Service Rate

= 0.50 for Kits distribution[937], 0.78 for Virtual Assessment followed by Self-Installation[938], and 1.0 for Direct Install, TOS, or Verified Install program types

ηDHW = Recovery efficiency of electric hot water heater

= 0.98 [939]

3412 = Conversion from Btu to kWh

Parameter assumptions for various pipe sizes and materials:

Type and Size	C_{Inside}[940] (I.D.*π/12) (ft)	Product of Overall Heat Transfer Coefficient and Pipe Area (UA) per foot[941] from bare pipe (BTU/hr·ft·°F)	Pipe Area per linear foot (ft^3)[942]	R_{exist} ((hr·ft·°F)/BTU)	Horizontal to Vertical Adjustment Factor (α)
½" Copper Pipe	0.1427	0.345	0.153	0.444	0.67
¾" Copper Pipe	0.2055	0.417	0.217	0.521	0.72
½" PEX	0.1270	0.438	0.145	0.332	0.73
¾" PEX	0.1783	0.545	0.204	0.374	0.77

For example, insulating 6 feet of 0.75" copper pipe (4ft vertical + 2ft horizontal) with R-5 wrap for electric DHW through a Direct Install program:

$$\Delta kWh = \%Electric\_DHW * (((1 / R_{exist} - 1 / R_{new}) * C_{inside} * L_{effective} * \Delta T * 8{,}766 * 1.0) / \eta DHW) / 3{,}412$$

$$= 1 * (((1/0.521 - 1/3.521) * 0.2055 * (2 + 4 * 0.72) * 60 * 8{,}766 * 1.0) / 0.98)/3{,}412$$

$$= 258 \text{ kWh}$$

The following table provides annual energy savings per foot of pipe insulation for various configurations with electric DHW:

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[937] Results from Home Energy Worksheets completed by student/families in 2020, 2021, and 2022 were nearly the same as values from: 2020 survey research by Guidehouse, conducted with Peoples Gas income qualified recipients of self-install efficiency kits distributed by mail in late 2019 (with 117 survey respondents) and research from 2021 Ameren Illinois Income Qualified participant survey, available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf. Home Energy Worksheets also establish the fraction of participants who indicate they "will install later" for specific measures. Follow-up research completed by Guidehouse for Nicor Gas in 2022 found that, on average, 51.3% of respondents who initially reported that they hadn't installed specific kit measures, but "planned to" subsequently had installed the measures. Combining these findings allows for an ISR that accounts for initial and one round of subsequent installations. To maintain a conservative estimate of ISR, the remaining 48.7% are presumed uninstalled. See: EESchoolKitSubsequentInstall_HEW.xlsx for data and calculations.

[938] An equal weighted average of Direct Install and Kit ISRs. Interest and applicability of measures confirmed through virtual assessment followed by self-installation without verification of install.

[939] Electric water heaters have recovery efficiency of 98%.

[940] See: https://energy-models.com/pipe-sizing-charts-tables (last accessed 5/7/21) for copper pipe sizes and https://www.garagesanctum.com/size-chart/pex-tubing-size-chart/ (last accessed 5/7/21) for PEX pipe sizes.

[941] Laboratory measured values from Hoeschele and Weitzel (2012), Figure 1.

[942] Calculated using the average pipe thickness (I.D. + O.D.)*0.5.

	ΔkWh Savings per Foot of Insulation (kWh/ft)	
Measure Configuration	**Kit Distribution (ISR = 50%)**	**All Other Programs (ISR = 100%)**
Horizontal Pipe Orientation		
½” Copper Pipe insulated with R-3, ½” thick insulation	22	44.0
¾” Copper Pipe insulated with R-3, ½” thick insulation	26.5	52.9
½” PEX insulated with R-3, ½” thick insulation	27.1	54.2
¾” PEX insulated with R-3, ½” thick insulation	33.4	66.7
Vertical Pipe Orientation		
½” Copper Pipe insulated with R-3, ½” thick insulation	14.8	29.5
¾” Copper Pipe insulated with R-3, ½” thick insulation	19.1	38.1
½” PEX insulated with R-3, ½” thick insulation	19.8	39.5
¾” PEX insulated with R-3, ½” thick insulation	25.7	51.3
Unknown		
R-3, ½” thick insulation for ½” pipes – pipe type and configuration unknown (average of vertical and horizontal configurations for ½”pipe)	20.9	41.8
R-3, ½” thick insulation for ¾” pipes – pipe type and configuration unknown (average of vertical and horizontal configurations for ¾”pipe)	26.1	52.2
Unknown pipe type (straight average) and configuration (average of all vertical and horizontal configurations) insulated with R-3, ½” thick insulation	23.5	46.9

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh / 8766$$

Where:

ΔkWh = kWh savings from pipe wrap installation

8766 = Number of hours in a year (since savings are assumed to be constant over year).

For example, insulating 6 feet of 0.75” copper pipe (4ft vertical + 2ft horizontal) with R-5 wrap through a Direct Install program:

$$\Delta kW = 258/8766$$
$$= 0.0294 kW$$

The following table provides peak demand savings per foot of pipe insulation for various configurations with electric DHW:

	ΔkW Savings per Foot of Insulation (kW/ft)	
Measure Configuration	**Kit Distribution (ISR = 50%)**	**All Other Programs (ISR = 100%)**
Horizontal Pipe Orientation		
½” Copper Pipe insulated with R-3, ½” thick insulation	0.0025	0.0050
¾” Copper Pipe insulated with R-3, ½” thick insulation	0.0030	0.0060
½” PEX insulated with R-3, ½” thick insulation	0.0031	0.0062
¾” PEX insulated with R-3, ½” thick insulation	0.0038	0.0076
Vertical Pipe Orientation		
½” Copper Pipe insulated with R-3, ½” thick insulation	0.0017	0.0034
¾” Copper Pipe insulated with R-3, ½” thick insulation	0.0022	0.0043
½” PEX insulated with R-3, ½” thick insulation	0.0023	0.0045
¾” PEX insulated with R-3, ½” thick insulation	0.0030	0.0059
Unknown		
R-3, ½” thick insulation for ½” pipes – pipe type and configuration unknown (average of vertical and horizontal configurations for ½”pipe)	0.0024	0.0048
R-3, ½” thick insulation for ¾” pipes – pipe type and configuration unknown (average of vertical and horizontal configurations for ¾”pipe)	0.0030	0.0060
Unknown pipe type (straight average) and configuration (average of vertical and horizontal configurations for all pipes) insulated with R-3, ½” thick insulation	0.0027	0.0053

FOSSIL FUEL SAVINGS

For Natural Gas DHW systems:

$$\Delta Therm = \%Fossil\_DHW * (((1 / R_{exist} - 1 / R_{new}) * C_{inside} * L_{effective} * \Delta T * 8{,}766 * ISR) / \eta DHW) / 100{,}000$$

Where:

%Fossil_DHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[943], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%

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[943] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[944]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

ηDHW = Recovery efficiency of fossil hot water heater

= 0.78 [945]

Other variables as defined above

For example, insulating 6 feet of 0.75" copper pipe (4ft vertical + 2ft horizontal) with R-5 wrap for Gas DHW through a Direct Install program:

$$\Delta Therm = \%Fossil\_DHW * (((1 / R_{exist} - 1 / R_{new}) * C_{inside} * L_{effective} * \Delta T * 8,766 * ISR) / \eta DHW) / 100,000$$

$$= 1 * (((1/0.521 - 1/3.521) * 0.2055 * (2 + 4 * 0.72) * 60 * 8766 * 1.0) / 0.78 / 100,000$$

$$= 11.06 \text{ therms}$$

The following table provides Natural Gas savings per foot of pipe insulation for various configurations for natural gas DHW:

Measure Configuration	ΔTherm Savings per Foot of Insulation (Therms/ft)	
	Kit Distribution (ISR = 50%)	All Other Programs (ISR = 100%)
Horizontal Pipe Orientation		
½" Copper Pipe insulated with R-3, ½" thick insulation	0.95	1.89
¾" Copper Pipe insulated with R-3, ½" thick insulation	1.14	2.27
½" PEX insulated with R-3, ½" thick insulation	1.16	2.32
¾" PEX insulated with R-3, ½" thick insulation	1.43	2.86
Vertical Pipe Orientation		
½" Copper Pipe insulated with R-3, ½" thick insulation	0.63	1.26
¾" Copper Pipe insulated with R-3, ½" thick insulation	0.82	1.63
½" PEX insulated with R-3, ½" thick insulation	0.85	1.70
¾" PEX insulated with R-3, ½" thick insulation	1.1	2.20
Unknown		
R-3, ½" thick insulation for ½" pipes – pipe type and	0.9	1.79

---

[944] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[945] Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%

	ΔTherm Savings per Foot of Insulation (Therms/ft)	
Measure Configuration	**Kit Distribution (ISR = 50%)**	**All Other Programs (ISR = 100%)**
configuration unknown (average of vertical and horizontal configurations for ½”pipe)		
R-3, ½” thick insulation for ¾” pipes – pipe type and configuration unknown (average of vertical and horizontal configurations for ¾”pipe)	1.12	2.24
Unknown pipe type (straight average) and configuration (average of vertical and horizontal configurations for all pipes) insulated with R-3, ½” thick insulation	1.01	2.01

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HWE-PINS-V10-260101

REVIEW DEADLINE: 1/1/2028

5.4.2 Gas Water Heater

DESCRIPTION

This measure characterizes:

a) Time of sale or new construction:

The purchase and installation of a new efficient gas-fired water heater, in place of a Federal Standard unit in a residential setting. Savings are provided for power-vented, condensing storage, and whole-house tankless units meeting specific Uniform Energy Factor (UEF) criteria.

b) Early replacement:

The early removal of an existing functioning natural gas water heater from service, prior to its natural end of life, and replacement with a new high efficiency unit. Savings are calculated between existing unit and efficient unit consumption during the remaining life of the existing unit, and between new baseline unit and efficient unit consumption for the remainder of the measure life.

This measure was developed to be applicable to the following program types: TOS, NC, EREP.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure, the installed equipment must be a residential gas-fired storage water heater or Instantaneous (tankless) water heater meeting ENERGY STAR[946] criteria. [947]

Water Heater Type	Water Heater Tank Volume (gallons)	Draw Pattern	Minimum Uniform Energy Factor
Gas Storage	≤ 55	Medium	≥ 0.81
		High	≥ 0.86
	> 55	All	≥ 0.86
Gas Instantaneous	All	All	≥ 0.95

DEFINITION OF BASELINE EQUIPMENT

New Construction: The baseline equipment is assumed to be a new, gas-fired storage residential water heater meeting minimum Federal efficiency standards as provided below.

Time of Sale: The baseline equipment is assumed to be the same water heater type as the unit being replaced, if unknown assume a new, gas-fired storage residential water heater meeting minimum Federal efficiency standards as provided below.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[948]
Residential Gas Storage Water Heaters ≤75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.3456 – (0.0020 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5982 – (0.0019 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6483 – (0.0017 * Rated Storage Volume in Gallons)
		High	UEF = 0.6920 – (0.0013 * Rated Storage Volume in Gallons)
	>55 gallon and ≤100 gallon	Very small	UEF = 0.6470 – (0.0006 * Rated Storage Volume in Gallons)
		Low	UEF = 0.7689 – (0.0005 * Rated Storage Volume in Gallons)

---

[946] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[947] ENERGY STAR Product Specification for Residential Water Heaters, Version 5.0, effective April 18, 2023.

[948] DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431. Minimum Federal standard as of 4/16/2015, confirmed no changes as of 4/21/2026; https://www.ecfr.gov/cgi-bin/text-idx?SID=80dfa785ea350ebeee184bb0ae03e7f0&mc=true&node=se10.3.430_132&rgn=div8

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[948]
	tanks	Medium	UEF = 0.7897 – (0.0004 * Rated Storage Volume in Gallons)
		High	UEF = 0.8072 – (0.0003 * Rated Storage Volume in Gallons)
Residential Gas Fired Instantaneous Water Heaters	< 2 gal and >50,000 Btu/h	Very small	UEF = 0.80
		All other	UEF = 0.81

Draw patterns are based on first hour rating (gallons) for storage tanks as shown below:[949]

Storage Water Heater Draw Pattern	
Draw Pattern	**First Hour Rating (gallons)**
Very Small	≥ 0 and < 18
Low	≥ 18 and < 51
Medium	≥ 51 and < 75
High	≥ 75

The same draw pattern (very small, low, medium and high draw) should be used for both baseline and efficient units. If using a deemed approach, for storage water heaters with a storage capacity equal to or less than 55 gallons, the Federal energy factor requirement is calculated as 0.6483 – (0.0017 * storage capacity in gallons) assuming a Medium draw and 0.8072 − (0.0003 × storage capacity in gallons) assuming a High draw for greater than 55 gallon storage water heaters.

Early Replacement: The baseline is the efficiency of the existing gas water heater for the remaining useful life of the unit and the efficiency of a new gas water heater of the same type meeting minimum Federal efficiency standards for the remainder of the measure life.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 14.5 years for gas storage water heaters and 20.0 years for gas instantaneous water heaters.[950]

For early replacement: Remaining life of existing gas storge and instantaneous water heaters is assumed to be 4.8 and 6.7 years, respectively.[951]

DEEMED MEASURE COST

Time of Sale or New Construction:

The incremental capital cost for this measure is dependent on the type of water heater as listed below.[952]

Early Replacement: The full installed cost is provided in the table below. The assumed deferred cost (after 4 years) of replacing existing equipment with a new baseline unit is also provided in the table below. This cost should be discounted to present value using the nominal discount rate.

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[949] Definitions provided in 10 CFR 430, Subpart B, Appendix E, Section 5.4.1

[950] Supporting document for Energy Conservation Program: Energy Conservation Standards for Consumer Water Heaters. 2023-07-21 Consumer Water Heater Life-Cycle Cost (LCC) and Payback Period Results Analysis (NOPR), EERE-2017-BT-STD-0019-0061.

[951] Assumed to be one third of effective useful life

[952] Supporting document for Energy Conservation Program: Energy Conservation Standards for Consumer Water Heaters. 2023-07-21 Consumer Water Heater Life-Cycle Cost (LCC) and Payback Period Results Analysis (NOPR), EERE-2017-BT-STD-0019-0061.

Water Heater Type	Water Heater Tank Volume (gallons)	Draw Pattern	Incremental Cost	Full Install Cost	Deferred Baseline Replacement Cost[953]
Gas Storage	≤ 55	Medium	$230	$1,968	$1,902
		High	$215	$2,051	$2,009
	> 55	All	$215	$2,051	$2,009
Gas Instantaneous	All	All	$293	$1,954	$1,818

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

Time of Sale or New Construction:

$\Delta Therms = (1/ UEF_{BASE} - 1/UEF_{EFFICIENT}) * (GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0)/100,000$

Early replacement:[954]

ΔTherms for remaining life of existing unit (1st 3.7 years for gas storage unit and 1st 6.7 years for gas tankless unit):

$= (1/ UEF_{EXISTING} - 1/UEF_{EFFICIENT}) * (GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0)/100,000$

ΔTherms for remaining measure life (next 7.3 years for gas storage unit and next 13.3 years for gas tankless unit):

$= (1/ UEF_{BASE} - 1/UEF_{EFFICIENT}) * (GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0)/100,000$

Where:

UEF_Baseline = Uniform Energy Factor rating of standard storage water heater according to federal standards[955] provided in table in baseline section and using the same draw pattern as the efficient equipment. For a deemed approach:

= For gas storage water heaters ≤55 gallons: 0.6483 – (0.0017 * storage capacity in

---

[953] The implied baseline cost from the incremental and full cost is calculated and then inflated applying inflation rate of 2.28% for 4 years.

[954] The two equations are provided to show how savings are determined during the initial phase of the measure (existing to efficient) and the remaining phase (new baseline to efficient). In practice, the screening tools used may either require a First Year savings (using the first equation) and then a “number of years to adjustment” and “savings adjustment” input which would be the (new base to efficient savings)/(existing to efficient savings).

[955] Minimum Federal standard as of 4/16/2015, Confirmed no changes as of 4/21/2026.

gallons)

= For gas storage water heaters >55 gallons: 0.8072 − (0.0003 × storage capacity in gallons)

= If tank size is unknown, assume 0.563 for a gas storage water heater with a 50-gallon storage capacity

UEF_Efficient = Uniform Energy Factor Rating for efficient equipment

= Actual. If unknown[956] assume:

Unit Type	Unit Capacity	Draw Pattern	Uniform Energy Factor
Gas Storage	≤ 55 gallons	Medium	0.81
		High	0.86
	> 55 gallons	All	0.86
Gas Tankless	All	All	0.95

UEF_Existing = Uniform Energy Factor rating for existing equipment

= Use actual UEF rating where it is possible to measure or reasonably estimate.

= if unknown assume 0.52 [957]

GPD = Gallons Per Day of hot water use per person

= 45.5 gallons hot water per day per household/2.59 people per household.[958]

= 17.6

Household = Average number of people per household

Household Unit Type	Household[959]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[960]
Custom	Actual Occupancy or Number of Bedrooms[961]		

Use Multifamily if: Building meets utility’s definition for multifamily

365.25 = Days per year, on average

γWater = Specific Weight of water

= 8.33 pounds per gallon

T_{OUT} = Tank temperature

= 125°F

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[956] ENERGY STAR Product Specification for Residential Water Heaters, Version 5.0, effective April 23, 2023.

[957] Based on DCEO Efficient Living Program Data for a sample size of 157 gas water heaters.

[958] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[959] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[960] “Unknown” is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS “Highlights of Structural Characteristics of U.S. Homes by State”, IL data shows 57% of homes are single family detached.

[961] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

T_{IN} = Incoming water temperature from well or municipal system

= 50.7°F [962]

1.0 = Heat Capacity of water (1 Btu/lb*°F)

For example, a 40 gallon condensing gas storage water heater, with a uniform energy factor of 0.86 in a single family IQ house:

ΔTherms = (1/0.58 - 1/0.86) * (17.6 * 2.76 * 365.25* 8.33 * (125 – 50.7) * 1) / 100,000

= 61.6 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HWE-GWHT-V14-270101

REVIEW DEADLINE: 1/1/20230

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[962] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

5.4.3 Heat Pump Water Heaters

DESCRIPTION

A heat pump water heater provides domestic water heating by moving heat between indoor air (conditioned or unconditioned) and a storage water tank.

This measure characterizes:

a) New Construction:
  - The installation of a domestic heat pump water heater meeting ENERGY STAR[963] efficiency standards in a new home.
  - Note that the baseline in this case should be determined via EM&V and the algorithms are provided to allow savings to be calculated from any baseline condition.

b) Time of Sale:
  - The installation of a domestic heat pump water heater in place of a standard electric or fossil fuel-fired water heater in a home.
  - Note that the baseline in this case is an equivalent replacement system to that which exists currently in the home. Where unknown, the baseline can be assumed to be a 50 gallon electric storage water heater with medium draw pattern.

c) Early Replacement
  - The early removal of a functioning fossil-fuel fired water heater from service, prior to its natural end of life, and replacement with a new domestic heat pump water heater.
  - Note that the baseline in this case is the existing equipment being replaced. Savings are calculated between the existing unit and efficient unit consumption during the remaining life of the existing unit, and between a new equivalent replacement system to that which exists currently in the home and efficient unit consumption for the remainder of the measure life.

Savings are presented dependent on the heating system installed in the home, presence of cooling, and presence of dehumidification due to the impact of the heat pump water heater on the heating cooling and dehumidification loads.

This measure was developed to be applicable to the following program types: TOS, NC, ER.
If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be an ENERGY STAR Heat Pump domestic water heater.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is a new water heater meeting federal minimum efficiency standards, dependent on the storage volume (in gallons) of the water heater.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[964]
Residential Electric Storage Water Heaters ≤ 75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.8808 – (0.0008 * Rated Storage Volume in Gallons)
		Low	UEF = 0.9254 – (0.0003 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.9307 – (0.0002 * Rated Storage Volume in Gallons)
		High	UEF = 0.9349 – (0.0001 * Rated Storage Volume in Gallons)
	>55 gallon and ≤120	Very small	UEF = 1.9236 – (0.0011 * Rated Storage Volume in Gallons)
		Low	UEF = 2.0440 – (0.0011 * Rated Storage Volume in Gallons)

---

[963] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[964] All Residential sized Federal Standards are from DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[964]
	gallon tanks [965]	Medium	UEF = 2.1171 – (0.0011 * Rated Storage Volume in Gallons)
		High	UEF = 2.2418 – (0.0011 * Rated Storage Volume in Gallons)
Residential Electric Instantaneous Water Heaters	≤12kW and ≤2 gal	All other	UEF = 0.91
		High	UEF = 0.92
Residential Gas Storage Water Heaters ≤75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.3456 – (0.0020 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5982 – (0.0019 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6483 – (0.0017 * Rated Storage Volume in Gallons)
		High	UEF = 0.6920 – (0.0013 * Rated Storage Volume in Gallons)
	>55 gallon and ≤100 gallon tanks	Very small	UEF = 0.6470 – (0.0006 * Rated Storage Volume in Gallons)
		Low	UEF = 0.7689 – (0.0005 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.7897 – (0.0004 * Rated Storage Volume in Gallons)
		High	UEF = 0.8072 – (0.0003 * Rated Storage Volume in Gallons)
Residential Gas Fired Instantaneous Water Heaters	< 2 gal and >50,000 Btu/h	Very small	UEF = 0.80
		All other	UEF = 0.81
Residential Oil Storage Water Heater	≤50 gallon tanks	Very small	UEF = 0.2509 − (0.0012 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5330 − (0.0016 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6087 − (0.0016 * Rated Storage Volume in Gallons)
		High	UEF = 0.6815 − (0.0014 * Rated Storage Volume in Gallons)

The same draw pattern (very small, low, medium and high draw) should be used for both baseline and efficient units. If using a deemed approach, for units ≤55 gallons – baseline is assumed to be a resistance storage unit with efficiency: 0.9307 – (0.0002 * rated volume in gallons) assuming medium draw.

For units >55 gallons – assume a 50 gallon resistance tank baseline;[966] i.e., 0.9299 UEF assuming high draw .

If unknown, assume a 50 gallon resistance tank baseline, at medium draw, therefore 0.9207 UEF. [967]

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 15 years.[968]

DEEMED MEASURE COST

For Time of Sale or New Construction the incremental installation cost (including labor) should be used. Default equipment and incremental installation costs are provided below.

For retrofit costs, the actual full installation cost should be used (default provided below if unknown).

---

[965] It is assumed that tanks <75,000Btu/h and >55 gallons will not be eligible measures due to the high baseline.

[966] A 50 gallon volume tank for the baseline is assumed to capture market practice of using larger heat pump water heaters to achieve greater efficiency of the heat pump cycle and preventing the unit from going in electric resistance mode.

[967] About 90% of all water heaters are installed in a replace-on-burnout situation and installers strongly prefer like-for-like equipment replacements in these situations, meaning that fuel switching is unlikely in TOS situations. As stated in Opinion Dynamics Ameren Illinois' Market Effects Pilot – Heat Pump Hot Water Market Characterization Report, March 4, 2021.

[968] As recommended in Navigant 'ComEd Effective Useful Life Research Report', May 2018.

Capacity	Voltage	Baseline Installed Cost[969]	Efficient Installed Cost[970]	Incremental Installed Cost
≤55 gallons	120V	\$882[971]	\$2,416	\$1,534
	240V	\$882	\$2,072	\$1,190
>55 gallons	120V	\$882	\$3,884	\$3,002
	240V	\$882	\$2,577	\$1,695

For reference, as needed, additional installation costs are provided below. The total of any additional electrification costs should be divided across all applicable measures weighted by total MMBtu savings.

Additional Installation Item	Number of Instances	Average Cost[972]
Upgrade Electric Panel	3	\$2,523
New Circuit	4	\$338
Air Flow	5	\$425
Thermostatic Mixing Valve	2	\$899

LOADSHAPE

Loadshape R18 - Residential Heat Pump Water Heater

COINCIDENCE FACTOR

The summer Peak Coincidence Factor is assumed to be 12%.[973]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY AND FOSSIL FUEL SAVINGS

Non fuel switch measures:

$$\Delta kWh = (((1/UEF_{BASE} - 1/UEF_{HPWHEFFICIENT}) * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) + CoolingImpact - ElecHeatImpact + Deh\_Reduction$$

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[969] Baseline ERWH equipment costs: Energy Solutions (2024). Heat Pump Water Heaters in the Northeast and Mid-Atlantic: Costs and Market Trends. Prepared for: Northeast States for Coordinated Air Use Management (NESCAUM) and The Ozone Transport Commission (OTC). Installation labor cost from same study suggests \$308, for a total of \$882. Additionally, a review of 18 baseline ERWH models (5 different manufacturers; sizes ranging from 30-50 gallons) listed with online retailers (Home Depot, Lowes, Menards, and Ferguson Supply) available in IL established an average equipment cost of \$575.

[970] Efficient Equipment costs are based on measure cost information from PY2024-YTD2025 Ameren Illinois Retail Products Initiative data for: 19 120V HPWH and 225 240V HPWH sales. In the vast majority of cases, the only cost difference between the installation of a HPWH and an ERWH is the need to install a drain line to redirect condensate from the HPWH. This additional installation cost is assumed to be \$100 for HPWH installations.

[971] As there are no 120V electric resistance water heaters (ERWHs) on the market, 240V ERWHs serve as the baseline product for comparison with 120V HPWHs

[972] Cost information is derived from 198 HPWH installations through the Ameren Illinois Income Qualified Initiative from PY2023-YTD2025. Note panel upgrade cost is consistent with Energy Solutions (2024). Heat Pump Water Heaters in the Northeast and Mid-Atlantic: Costs and Market Trends. Prepared for: Northeast States for Coordinated Air Use Management (NESCAUM) and The Ozone Transport Commission (OTC) – which estimated an average cost of \$2,275 for a panel upgrade.

[973] Calculated from Figure 8 "Combined six-unit summer weekday average electrical demand" in FEMP study; 'Field Testing of Pre-Production Prototype Residential Heat Pump Water Heaters' as (average kW usage during peak period * hours in peak period) / [(annual kWh savings / FLH) * hours in peak period] = (0.1 kW * 5 hours) / [(2100 kWh (default assumptions) / 2533 hours) * 5 hours] = 0.12

CoolingImpact[974] = Cooling savings from conversion of heat in home to water heat

$=((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) - ((1/ UEF_{HPWHEFFICIENT} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412)) * LF * 27\%) / COP_{COOL}) * LM$

ElecHeatImpact = Electric heating cost from conversion of heat in home to water heat (dependent on heating fuel)

$= (((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) - ((1/ UEF_{HPWHEFFICIENT} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412)) * LF * 37\%) / COP_{HEAT}) * (1 - \%FossilHeat)$

Deh_Reduction = Savings resulting from reduced dehumidification (provided in table in variable list below)

$\Delta Therms_{HeatImpact}$ = Fossil heating cost from conversion of heat in home to water heat for homes with Natural Gas heat

$= - (((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) - (GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) / UEF_{HPWHEFFICIENT})) * LF * 37\% * 0.03412) / \eta Heat) * \%FossilHeat$

<u>Fuel switch measures:</u>

Fuel switch measures must produce positive total lifecycle energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows:

SiteEnergySavings (MMBTUs) = [FossilWHReplaced] – [ElectricWHAdded] + [HVACImpacts]

FossilWHReplaced = Fossil fuel consumption of replaced fossil fuel water heater

$= (1/UEF_{GASBASE} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0)/1,000,000$

ElectricWHAdded = Added electric consumption of heat pump water heater

$= (1/ UEF_{HPWHEFFICIENT} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) /1,000,000$

HVACImpacts [counted as non-fuel switch savings] = Heating and cooling impact of heat pump water heater

$= [CoolingImpact * 3,412/1,000,000] - [ElecHeatImpact * 3,412/1,000,000] + [Deh\_reduction * 3,412/1,000,000] - [\Delta Therms_{HeatImpact} * 1/10]$

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

---

[974] This algorithm calculates the heat removed from the air by subtracting the HPWH electric consumption from the total water heating energy delivered. This is then adjusted to account for location of the HP unit and the coincidence of the waste heat with cooling requirements, the efficiency of the central cooling and latent cooling demands.

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10
Gas utility only	N/A	SiteEnergySavings * 10

Note for Early Replacement measures, the efficiency terms of the existing water heater should be used for the remaining useful life of the existing equipment and the efficiency terms for a new baseline unit should be used for the remaining years of the measure. See assumptions below.

Where:

UEF_{BASE} = Uniform Energy Factor (efficiency) of standard water heater according to federal standards provided in table in baseline section and using the same draw pattern as the efficient equipment. For a deemed approach assume electric water heater:

For <=55 gallons: 0.9307 – (0.0002 * rated volume in gallons)

For >55 gallons: Use 0.9299 [975]

= If unknown volume, use 0.9207 [976]

$UEF_{HPWHEFFICIENT}$ = Uniform Energy Factor (efficiency) of Heat Pump water heater

= Actual

GPD = Gallons Per Day of hot water use per person

= 45.5 gallons hot water per day per household/2.59 people per household [977]

= 17.6

Household = Average number of people per household

Household Unit Type	Household[978]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[979]
Custom	Actual Occupancy or Number of Bedrooms[980]		

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[975] Assuming a 50 gallon tank baseline at High Draw due to the accommodate the higher gallon range. 50 gallon is the most common size for HPWHs.

[976] Assuming a 50 gallon tank baseline at Medium Draw.

[977] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[978] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[979] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[980] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

Use Multifamily if: Building meets utility's definition for multifamily

365.25 = Days per year

γWater = Specific weight of water

= 8.33 pounds per gallon

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municiple system

= 50.7°F [981]

1.0 = Heat Capacity of water (1 Btu/lb*°F)

3412 = Conversion from Btu to kWh

CoolingImpact[982] = Cooling savings from conversion of heat in home to water heat

$=(((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0) / 3412) – ((1/ UEF_{HPWHEFFICIENT} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0) / 3412)) * LF * 27\%) / COP_{COOL}) * LM$

Where:

LF = Location Factor

= 1.0 for HPWH installation in a conditioned space

= 0.22 for HPWH installation in an unknown location[983]

= 0.0 for installation in an unconditioned space

27% = Portion of heat removed from surrounding air that results in cooling savings[984]

COP_{COOL} = COP of central air conditioning

= Assume 2.8 if central AC or unknown and 3.0 if heat pump [985]

LM = Latent multiplier to account for latent cooling demand

= 1.33 [986]

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[981] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[982] This algorithm calculates the heat removed from the air by subtracting the HPWH electric consumption from the total water heating energy delivered. This is then adjusted to account for location of the HP unit and the coincidence of the waste heat with cooling requirements, the efficiency of the central cooling and latent cooling demands.

[983] West Hills Energy and Computing (2019) found 78% of HPWHs "are installed in basements that are not intentionally heated."

[984] REMRate determined percentage (27%) of lighting savings that result in reduced cooling loads (lighting is used as a proxy for hot water heating since load shapes suggest their seasonal usage patterns are similar).

[985] To reduce complexity of the measure and since this relates to a small waste heat impact, instead of assuming actual existing unit HVAC efficiency and a mid-life adjustment to account for future replacement efficiency, the code minimum baseline should be applied. Starting from federal baseline of SEER2 13.4 central AC unit, converted to 11.4 EER using algorithm $(-0.02 * SEER^2) + (1.12 * SEER)$ (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = (EER2 * 0.85)/3.412 = 2.8COP. Same calculation starting with federal baseline of SEER2 14.3 heat pump results in COP of 3.0.

[986] A sensible heat ratio (SHR) of 0.75 corresponds to a latent multiplier of 4/3 or 1.33. SHR of 0.75 for typical split system from page 10 of "Controlling Indoor Humidity Using Variable-Speed Compressors and Blowers" by M. A. Andrade and C. W. Bullard, 1999.

ElecHeatImpact = Heating cost from conversion of heat in home to water heat (dependent on heating fuel)

$= (((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0) / 3412) –$

$((1/ UEF_{HPWHEFFICIENT}* GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0) / 3412)) * LF * 37\%) / COP_{HEAT}) * (1 - \%FossilHeat)$

Where:

37% = Portion of heat removed from surrounding air that results in increased heating load[987]

COP_{HEAT} = COP of electric heating system

= actual. If not available use:[988]

System Type	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	1.00
Unknown electric[989]	N/A	1.35

Deh_Reduction = Savings resulting from reduced dehumidification

= values based on table below[990]

Dehumidifcation Status	Deh_Reduction (kWh)
If Dehumidifer is in use	359
If unknown	72

$\Delta Therms_{HeatImpact}$ = Heating cost from conversion of heat in home to water heat for homes with Natural Gas heat [991]

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[987] The operation of a HPWH causes both sensible and latent heat transfer with the surrounding air (and water vapor). Only the sensible heat transfer increases the heating load. The portion of the energy transferred from the surrounding air is based on the average result from REMRate modeling of several different configurations and IL locations of homes (49%). The portion of that which is sensible heat further depends on the typical sensible heat ratio of 0.75 (see previous note) the resulting portion of sensible heat transferred from the surrounding air is: 49% * 0.75 = 37%.

[988] To reduce complexity of the measure and since this relates to a small waste heat impact, instead of assuming actual existing unit HVAC efficiency and a mid-life adjustment to account for future replacement efficiency, the code minimum baseline should be applied. Note efficiency includes duct losses. Defaults provided assume 15% duct loss for heat pumps.

[989] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[990] West Hills Energy and Computing (2019) found that 20% of homes had dehumidifiers in use and in interviews with homeowners found the following reductions in dehumidifier usage: 46% reported “1 month or more reduction”, 32% reported “3 months or more reduction”, and 15% reported removal of a dehumidifier. kWh savings assumptions are based on an average of: Federal Standard, ENERGY STAR, and ENERGY STAR Most Efficient annual energy usage. See HPWH_CalculationSheet.xlsx for calculations.

[991] This is the additional energy consumption required to replace the heat removed from the home during the heating season by the heat pump water heater. kWh_heating (electric resistance) is that additional heating energy for a home with electric resistance heat (COP 1.0). This formula converts the additional heating kWh for an electric resistance home to the MMBtu required in a Natural Gas heated home, applying the relative efficiencies.

$= - (((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0) / 3412) – (GPD * Household * 365.25 * \gamma Water * (T_{OUT} – T_{IN}) * 1.0) / 3412) / UEF_{HPWHEFFICIENT})) * LF * 37\% * 0.03412) / \eta Heat) * \%FossilHeat$

Where:

0.03412 = conversion factor (therms per kWh)

ηHeat = Efficiency of heating system

= Assume 68% for gas furnace or unknown, 71% for oil furnace, 84% for gas boiler and 86% for oil boiler. [992]

%FossilHeat = Factor dependent on heating fuel:

= 100 % for fossil fuel heating

= 0 % for Electric Resistance or Heat Pump

= If unknown[993], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[994]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

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[992] To reduce complexity of the measure and since this relates to a small waste heat impact, instead of assuming actual existing unit HVAC efficiency and a mid-life adjustment to account for future replacement efficiency, the code minimum baseline should be applied. Note efficiency includes duct losses. Defaults provided assume 15% duct loss for heat pumps.

[993] All values except for People's Gas and Northshore Gas are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential baseline Study Results", Oct 31 2024. People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[994] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

For example, a 2.0 UEF heat pump water heater, in a conditioned space in a single family IQ home with gas furnace space heat (68% system efficiency) and central air conditioning (SEER 10.5) in in Belleville and dehumidifier usage is unknown:

ΔkWh = [(1 / 0.9207 – 1 / 2.0) * 17.6 * 2.76 * 365.25* 8.33 * (125 – 50.7) * 1.0] / 3412 + 162.4 – 0 + 72
= 2121 kWh

ΔTherms = -(((((17.6 * 2.76 * 365.25* 8.33 * (125 – 50.7) * 1.0) / 3412) – (17.6 * 2.56 * 365.25* 8.33 * (125 – 50.7) * 1.0 / 3412 / 2.0)) * 1 * 0.37 * 0.03412) / 0.68) * 1
= - 32.0 therms

Fuel Switch example, a 2.0 UEF heat pump water heater, in a conditioned space in a single family IQ home with gas furnace space heat (68% system efficiency) and central air conditioning (SEER 10.5) in in Belleville and dehumidifier usage is unknown, in place of a baseline 0.64UEF gas water heater:

SiteEnergySavings (MMBTUs) = [FossilWHReplaced] – [ElectricWHAdded] + [HVACImpacts]

FossilWHReplaced = (1/UEF$_{GASBASE}$ * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0)/1,000,000
= (1/0.64 * 17.6 * 2.76 * 365.25* 8.33 * (125 – 50.7) * 1.0)/1,000,000
= 17.2 MMBtu

ElectricWHAdded = (1/ UEF$_{HPWHEFFICIENT}$ * GPD * Household * 365.25 * γWater * (T$_{OUT}$ – T$_{IN}$) * 1.0) /1,000,000
= (1/2.0 * 17.6 * 2.76 * 365.25* 8.33 * (125 – 50.7) * 1.0)/1,000,000
= 5.5 MMBtu

HVACImpacts = [CoolingImpact * 3,412/1,000,000] – [ElecHeatImpact * 3,412/1,000,000] + [Deh_reduction * 3,412/1,000,000] – [ΔTherms$_{HeatImpact}$ * 1/10]
= (188.9 * 3412/1000000) – (0 * 3412/1000000) + (72 * 3412/1000000) – (27.7 * 1/10)
= -1.88 MMBtu

SiteEnergySavings (MMBTUs) = 17.2 – 5.5 + (-1.88)
= 9.82 MMBtu

If supported by an electric utility: ΔkWh = ΔSiteEnergySavings * 1,000,000 / 3,412
= 9.82 * 1,000,000/3,412
= 2,878 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh / Hours * CF

Where:

ΔkWh = Electric savings (or increase) of measure

= For non-fuel switch measures, use ΔkWh as provided in Electric Energy Savings section above, for fuel-switch measures use the ΔkWh as provided in the Cost Effectiveness Screening and Load Reduction Forecasting when Fuel Switching section below

Hours = Full load hours of water heater

= 2533 [995]

CF = Summer Peak Coincidence Factor for measure

= 0.12 [996]

For example, a 2.0 UEF heat pump water heater, in a conditioned space in a single family IQ home with gas space heat and central air conditioning in Belleville and dehumidifier usage is unknown:

kW = 2121 / 2533 * 0.12

= 0.100kW

FOSSIL FUEL SAVINGS

Calculation provided together with Electric Energy Savings above.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

Cost Effectiveness Screening and Load Reduction Forecasting when Fuel Switching

This measure can involve fuel switching from fossil fuel to electric.

For the purposes of forecasting load reductions due to fuel switch projects per Section 16-111.5B, changes in site energy use at the customer's meter (using ΔkWh algorithm below), customer switching estimates, NTG, and any other adjustment factors deemed appropriate, should be used.

The inputs to cost effectiveness screening should reflect the actual impacts on the electric and fuel consumption at the customer meter and, for fuel switching measures, should therefore reflect the decrease in one fuel and increase in another, as opposed to the single savings value calculated in the "Electric and Fossil Fuel Energy Savings" section above. Therefore in addition to the calculation of savings claimed, the following values should be used to assess the cost effectiveness of the measure.

ΔTherms = [Gas Water Heating Consumption Replaced] – [$\Delta Therms_{HeatImpact}$]

= $[(1/UEF_{GASBASE} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0)/100{,}000] - [((((GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) - (GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) / 3412) / UEF_{HPWHEFFICIENT})) * LF * 37\% * 0.03412) / \eta Heat) * \%FossilHeat]$

ΔkWh = - [Electric Water Heating Consumption Added] + [CoolingImpact] – [ElecHeatImpact] + [Deh-Reduction]

= $- (1/ UEF_{HPWHEFFICIENT} * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0) /3{,}412] +$

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[995] Full load hours assumption based on Efficiency Vermont analysis of Itron eShapes.

[996] Calculated from Figure 8 "Combined six-unit summer weekday average electrical demand" in FEMP study; 'Field Testing of Pre-Production Prototype Residential Heat Pump Water Heaters' as (average kW usage during peak period * hours in peak period) / [(annual kWh savings / FLH) * hours in peak period] = (0.1 kW * 5 hours) / [(2100 kWh / 2533 hours) * 5 hours] = 0.12

[((((GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412) – ((1/ $UEF_{HPWHEFFICIENT}$ * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412)) * LF * 27%) / COP_{COOL}) * LM] – [((((GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412) – ((1/ $UEF_{HPWHEFFICIENT}$ * GPD * Household * 365.25 * γWater * (T_{OUT} – T_{IN}) * 1.0) / 3412)) * LF * 37%) / COP_{HEAT}) * (1 - %FossilHeat)] + [Deh-Reduction]

MEASURE CODE: RS-HWE-HPWH-V15-260101

REVIEW DEADLINE: 1/1/2029

5.4.4 Low Flow Faucet Aerators

DESCRIPTION

This measure relates to the installation of a low flow faucet aerator in a household kitchen or bath faucet fixture.

This measure may be used for units provided through Efficiency Kits however the in-service rate for such measures should be derived through evaluation results specifically for this implementation methodology.

This measure was developed to be applicable to the following program types: TOS, NC, RF, DI, KITS.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be a low flow faucet aerator, for bathrooms rated at 1.5 gallons per minute (GPM) or less, or for kitchens rated at 2.2 GPM or less. Savings are calculated on an average savings per faucet fixture basis.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is assumed to be a standard bathroom faucet aerator rated at 2.2 GPM or greater, or a standard kitchen faucet aerator rated at 2.2 GPM or greater.

Average measured flow rates are used in the algorithm and are lower, reflecting the penetration of previously installed low flow fixtures (and therefore the freerider rate for this measure should be 0), use of the faucet at less than full flow, debris buildup, and lower water system pressure than fixtures are rated at.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 10 years.[997]

DEEMED MEASURE COST

For time of sale or new construction the incremental cost for this measure is $3,[998] or program actual.

For faucet aerators provided through Direct Install or within Efficiency Kits, the actual program delivery costs (including labor if applicable) should be utilized. If unknown, assume $8 for Direct Install[999] and $3 for Efficiency Kits.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 2.2%.[1000]

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[997] As recommended in Navigant 'ComEd Effective Useful Life Research Report', May 2018.

[998] 2011, Market research average of $3.

[999] Includes assess and install labor time of $5 (20min @ $15/hr)

[1000] Calculated as follows: Assume 18% aerator use takes place during peak hours (based on: Oreo et al, "The end uses of hot water in single family homes from flow trace analysis", 2001.) There are 65 days in the summer peak period, so the percentage of total annual aerator use in peak period is 0.18*65/365 = 3.21%. The number of hours of recovery during peak periods is therefore assumed to be 3.21% *180 = 5.8 hours of recovery during peak period where 180 equals the average annual electric DHW recovery hours for faucet use including SF and MF homes. There are 260 hours in the peak period so the probability you will see savings during the peak period is 5.8/260 = 0.022

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Note these savings are *per* faucet retrofitted[1001] (unless faucet type is unknown, then it is per household).

ΔkWh = %ElectricDHW * ((GPM_base * L_base - GPM_low * L_low) * Household * 365.25 *DF / FPH) * EPG_electric * ISR

Where:

%ElectricDHW = Percentage of DHW savings assumed to be electric

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[1002], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People’s Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[1003]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

GPM_base = Average flow rate, in gallons per minute, of the baseline faucet “as-used.”

= If unknown assume values in table below, or custom based on metering studies,[1004] or if measured during DI:

= Measured full throttle flow * 0.83 throttling factor[1005]

Note, if GPM_base is based upon the deemed assumptions below, since these include

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[1001] This algorithm calculates the amount of energy saved per aerator by determining the fraction of water consumption savings for the upgraded fixture.

[1002] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1003] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[1004] Measurement should be based on actual average flow consumed over a period of time rather than a onetime spot measurement for maximum flow. Studies have shown maximum flow rates do not correspond well to average flow rate due to occupant behavior which does not always use maximum flow.

[1005] 2008, Schultdt, Marc, and Debra Tachibana. Energy related Water Fixture Measurements: Securing the Baseline for Northwest Single Family Homes. 2008 ACEEE Summer Study on Energy Efficiency in Buildings. Page 1-265. www.seattle.gov/light/Conserve/Reports/paper_10.pdf participants that had existing low flow fixtures, the freerider rate for this measure should be 0.

Faucet Type	GPM[1006]
Kitchen	1.63
Bathroom	1.53
If faucet location unknown	1.58

GPM_low = Average flow rate, in gallons per minute, of the low-flow faucet aerator “as-used”

= 0.94,[1007] or custom based on metering studies,[1008] or if measured during DI:

= Rated full throttle flow * 0.95 throttling factor[1009]

L_base = Average baseline daily length faucet use per capita for faucet of interest in minutes

= if available custom based on metering studies, if not use:

Faucet Type	L_base (min/person/day)
Kitchen	4.5[1010]
Bathroom	1.6[1011]
If faucet location unknown (total for household): Single-Family except mobile homes	9.0[1012]
If location unknown (total for household): Multifamily and mobile homes	6.9[1013]
If faucet location and building type unknown (total for household)	8.3[1014]

L_low = Average retrofit daily length faucet use per capita for faucet of interest in minutes

= if available custom based on metering studies, if not use:

[1006] Based on flow meter bag testing conducted from June 2013 to January 2014 by Franklin Energy. Over 300 residential sites in the Chicago area were tested.

[1007] Average retrofit flow rate for kitchen and bathroom faucet aerators from sources 2, 4, 5, and 7(see source table at end of characterization). This accounts for all throttling and differences from rated flow rates. Assumes all kitchen aerators at 2.2 gpm or less and all bathroom aerators at 1.5 gpm or less. The most comprehensive available studies did not disaggregate kitchen use from bathroom use, but instead looked at total flow and length of use for all faucets. This makes it difficult to reliably separate kitchen water use from bathroom water use. It is possible that programs installing low flow aerators lower than the 2.2 gpm for kitchens and 1.5 gpm for bathrooms will see a lower overall average retrofit flow rate.

[1008] Measurement should be based on actual average flow consumed over a period of time rather than a onetime spot measurement for maximum flow. Studies have shown maximum flow rates do not correspond well to average flow rate due to occupant behavior which does not always use maximum flow.

[1009] 2008, Schultdt, Marc, and Debra Tachibana. Energy related Water Fixture Measurements: Securing the Baseline for Northwest Single Family Homes. 2008 ACEEE Summer Study on Energy Efficiency in Buildings. Page 1-265.

[1010] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group. This study of 135 single and Multifamily homes in Michigan metered energy parameters for efficient showerhead and faucet aerators.

[1011] Ibid.

[1012] One kitchen faucet plus 2.83 bathroom faucets. Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1013] One kitchen faucet plus 1.5 bathroom faucets. Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1014] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

Faucet Type	L_low (min/person/day)
Kitchen	4.5[1015]
Bathroom	1.6[1016]
If faucet location unknown (total for household): Single-Family except mobile homes	9.0[1017]
If faucet location unknown (total for household): Multifamily	6.9[1018]
If faucet location and building type unknown (total for household)	8.3[1019]

Household = Average number of people per household

Household Unit Type	Household[1020]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1021]
Custom	Actual Occupancy or Number of Bedrooms[1022]		

Use Multifamily if: Building meets utility's definition for multifamily

365.25 = Days in a year, on average.

DF = Drain Factor

Faucet Type	Drain Factor[1023]
Kitchen	75%
Bath	90%
Unknown	79.5%

FPH = Faucets Per Household

Faucet Type	FPH
Kitchen Faucets Per Home (KFPH)	1

[1015] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1016] Ibid.

[1017] One kitchen faucet plus 2.83 bathroom faucets. Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1018] One kitchen faucet plus 1.5 bathroom faucets. Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1019] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1020] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1021] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1022] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1023] Because faucet usages are at times dictated by volume, only usage of the sort that would go straight down the drain will provide savings. VEIC is unaware of any metering study that has determined this specific factor and so through consensus with the Illinois Technical Advisory Group have deemed these values to be 75% for the kitchen and 90% for the bathroom. If the aerator location is unknown an average of 79.5% should be used which is based on the assumption that 70% of household water runs through the kitchen faucet and 30% through the bathroom (0.7*0.75)+(0.3*0.9)=0.795.

Faucet Type	FPH
Bathroom Faucets Per Home (BFPH): Single-Family except mobile homes	2.83[1024]
Bathroom Faucets Per Home (BFPH): Multifamily and mobile homes	1.5[1025]
If faucet location unknown (total for household): Single-Family except mobile homes	3.83
If faucet location unknown (total for household): Multifamily and mobile homes	2.5
If faucet location and building type unknown (total for household)	3.42[1026]

EPG_electric = Energy per gallon of water used by faucet supplied by electric water heater

= (8.33 * 1.0 * (WaterTemp - SupplyTemp)) / (RE_electric * 3,412)

= (8.33 * 1.0 * (86 – 50.7)) / (0.98 * 3,412)

= 0.0879 kWh/gal (Bath), 0.1054 kWh/gal (Kitchen), 0.1004 kWh/gal (Unknown)

8.33 = Specific weight of water (lbs/gallon)

1.0 = Heat Capacity of water (btu/lb-°F)

WaterTemp = Assumed temperature of mixed water

= 86°F for Bath, 93°F for Kitchen 91°F for Unknown[1027]

SupplyTemp = Assumed temperature of water entering house

= 50.7°F [1028]

RE_electric = Recovery efficiency of electric water heater

= 98% [1029]

3412 = Converts Btu to kWh (btu/kWh)

ISR = In service rate of faucet aerators dependant on install method as listed in table below

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[1024] Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1025] Ibid.

[1026] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1027] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group. If the aerator location is unknown an average of 91% should be used which is based on the assumption that 70% of household water runs through the kitchen faucet and 30% through the bathroom (0.7*93)+(0.3*86)=91F.

[1028] Table 4 in Chen, et. al., “Calculating Average Hot Water Mixes of Residential Plumbing Fixtures”, June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[1029] Electric water heaters have recovery efficiency of 98%.

Selection	ISR
Direct Install	0.955[1030]
Virtual Assessment followed by Unverified Self-Install	0.77[1031,1032]
Requested Efficiency Kit	0.60[1033]
Distributed Efficiency Kit (Income Eligible)	0.46[1034]
Community Distributed Kit	0.45[1035]
Distributed School Efficiency Kit	0.505[1036]

For example, a direct installed kitchen low flow faucet aerator in an individual electric DHW IQ SF home:

$$\Delta kWh = 1.0 * (((1.63 * 4.5 – 0.94 * 4.5) * 2.76 * 365.25 *0.75) / 1) * 0.1054 * 0.93$$

$$= 230.1\ kWh$$

For example, a direct installed bath low flow faucet aerator in a shared electric DHW non-IQ home:

$$\Delta kWh = 1.0 * (((1.53 * 1.6 – 0.94 * 1.6) * 2.09 * 365.25 * 0.90) /1.5) * 0.0879 * 0.93$$

$$= 35.3\ kWh$$

For example, a direct installed low flow faucet aerator in unknown faucet in an individual electric DHW IQ SF home:

$$\Delta kWh = 1.0 * (((1.58 * 9.0 – 0.94 * 9.0) * 2.76 * 365.25 * 0.795) /3.83) * 0.1004 * 0.93$$

$$= 112.5\ kWh$$

Secondary kWh Savings for Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWh_{water} = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ total}$$

Where

[1030] ComEd Energy Efficiency/ Demand Response Plan: Plan Year 2 (6/1/2009-5/31/2010) Evaluation Report: All Electric Single Family Home Energy Performance Tune-Up Program Table 3-8. Navigant, ComEd-Nicor Gas EPY4/GPY1 Multifamily Home Energy Savings Program Evaluation Report DRAFT 2013-01-28. Average from a 2023 survey of multifamily tenants who participated in a 2023 Direct Install program through Ameren Illinois. The ISR for kitchen and bathroom aerators was found to be 97.7% and 98.3%, respectively. Opinion Dynamics, "2023 AIC Multifamily Initiatives Tenant Survey Findings Memo", Ameren Illinois, Multifamily Initiatives, April 24, 2024. These sources have been averaged to arrive at an ISR of 0.955.

[1031] An equal weighted average of Direct Install and Efficiency Kit ISRs. Guidehouse, *In-Service Rates for CY2020 Single Family Virtual Assessment Measures*, August 20, 2020. Interest and applicability of measures confirmed through virtual assessment. Please note, these ISRs do not apply to retail purchases by end user.

[1032] An equal weighted average of Direct Install and Efficiency Kit ISRs. Interest and applicability of measures confirmed through virtual assessment. Please note, these ISRs do not apply to retail purchases by end user.

[1033] A weighted ISR was found by weighting Nicor and Ameren efficiency kit program uptake and their previously found ISRs. This analysis can be found in Faucet Aerators and Showerheads Weighted Average ISR IL TRM.xlsx.

[1034] Average of Guidehouse survey research for Peoples Gas, June 16, 2020 and Research from 2021 Ameren Illinois Income Qualified participant survey, available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf

[1035] Research from 2018 Ameren Illinois Income Qualified participant survey.

[1036] Results from Home Energy Worksheets completed by student/families in 2020, 2021, and 2022 were nearly the same as values from: Opinion Dynamics and Cadmus. 2018 AIC Residential Program Annual Impact Evaluation Report. April 30, 2019. Results from implementer-administered participant survey. Home Energy Worksheets also establish the fraction of participants who indicate they "will install later" for specific measures. Follow-up research completed by Guidehouse for Nicor Gas in 2022 found that, on average, 51.3% of respondents who initially reported that they hadn't installed specific kit measures, but "planned to" subsequently had installed the measures. Combining these findings allows for an ISR that accounts for initial and one round of subsequent intallations. To maintain a conservative estimate of ISR, the remaining 48.7% are presumed uninstalled. See: EESchoolKitSubsequentInstall_HEW.xlsx for data and calculations.

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

= 5,010[1037]

For example, a direct installed kitchen low flow aerator in a single family IQ home

ΔWater (gallons) = (((1.63 * 4.5 – 0.94 * 4.5) * 2.76 * 365.25 *0.75) / 1) * 0.93

= 2,183 gallons

ΔkWh_{water} = 2,183/1,000,000 * 5,010

=10.9 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh / Hours * CF

Where:

ΔkWh = calculated value above. Note do not include the secondary savings in this calculation.

Hours = Annual electric DHW recovery hours for faucet use per faucet

= ((GPM_base * L_base) * Household/FPH * 365.25 * DF) * 0.567[1038] / GPH

Building Type	Faucet location	Calculation	Hours per faucet
Single Family IQ	Kitchen	((1.63 * 4.5) * 2.76/1 * 365.25 * 0.75) * 0.567 / 26.1	120
	Bathroom	((1.53 * 1.6) * 2.76/2.83 * 365.25 * 0.9) * 0.567 / 26.1	17
	Unknown	((1.58* 9.0) * 2.76/3.83 * 365.25 * 0.795) * 0.567 / 26.1	65
Single Family Non-IQ	Kitchen	((1.63 * 4.5) * 2.62/1 * 365.25 * 0.75) * 0.567 / 26.1	114
	Bathroom	((1.53 * 1.6) * 2.62/2.83 * 365.25 * 0.9) * 0.567 / 26.1	16
	Unknown	((1.58* 9.0) * 2.62/3.83 * 365.25 * 0.795) * 0.567 / 26.1	61
Multifamily IQ	Kitchen	((1.63 * 4.5) * 2.3/1 * 365.25 * 0.75) * 0.567 / 26.1	100
	Bathroom	((1.53* 1.6) * 2.3/1.5 * 365.25 * 0.9) * 0.567 / 26.1	27
	Unknown	((1.58 * 6.9) * 2.3/2.5 * 365.25 * 0.795) * 0.567 / 26.1	63
Multifamily Non-IQ	Kitchen	((1.63 * 4.5) * 2.09/1 * 365.25 * 0.75) * 0.567 / 26.1	91
	Bathroom	((1.53* 1.6) * 2.09/1.5 * 365.25 * 0.9) * 0.567 / 26.1	24
	Unknown	((1.58 * 6.9) * 2.09/2.5 * 365.25 * 0.795) * 0.567 / 26.1	57

GPH = Gallons per hour recovery of electric water heater calculated for 69.3°F temp rise (120-50.7), 98% recovery efficiency, and typical 4.5kW electric resistance storage tank.

= 26.1

CF = Coincidence Factor for electric load reduction

= 0.022[1039]

[1037] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

[1038] 56.7% is the proportion of hot 120F water mixed with 50.7F supply water to give 90F mixed faucet water.

[1039] Calculated as follows: Assume 18% aerator use takes place during peak hours (based on: Oreo et al, "The end uses of hot water in single family homes from flow trace analysis", 2001.) There are 65 days in the summer peak period, so the percentage of total annual aerator use in peak period is 0.18*65/365 = 3.21%. The number of hours of recovery during peak periods is

For example, a direct installed kitchen low flow faucet aerator in a single family electric DHW IQ home:

ΔkW =230.1/120 * 0.022

= 0.042 kW

FOSSIL FUEL SAVINGS

ΔTherms = %FossilDHW * ((GPM_base * L_base - GPM_low * L_low) * Household * 365.25 *DF / FPH) * EPG_gas * ISR

Where:

%FossilDHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[1040], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

EPG_gas = Energy per gallon of Hot water supplied by gas

= (8.33 * 1.0 * (WaterTemp - SupplyTemp)) / (RE_gas * 100,000)

= 0.0038 Therm/gal for SF homes (Bath), 0.0045 Therm/gal for SF homes (Kitchen), 0.0043 Therm/gal for SF homes (Unknown)

= 0.0044 Therm/gal for MF homes (Bath), 0.0053 Therm/gal for MF homes (Kitchen), 0.0050 Therm/gal for MF homes (Unknown)

RE_gas = Recovery efficiency of gas water heater

= 78% For individual water heater[1041]

---

therefore assumed to be 3.21% *180 = 5.8 hours of recovery during peak period where 180 equals the average annual electric DHW recovery hours for faucet use including SF and MF homes. There are 260 hours in the peak period so the probability you will see savings during the peak period is 5.8/260 = 0.022

[1040] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1041] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%.

= 67% For shared water heater[1042]

If unknown, use individual water heater value for single family, use shared water heater value for multifamily. Use multifamily if building meets utility's definition for multifamily.

100,000 = Converts Btus to Therms (btu/Therm)

Other variables as defined above.

For example, a direct-installed kitchen low flow faucet aerator in a fuel DHW single family IQ home:

ΔTherms = 1.0 * (((1.63 * 4.5 – 0.94 * 4.5) * 2.76 * 365.25 *0.75) / 1) * 0.0045 * 0.93

= 9.82 Therms

For example, a direct installed bath low flow faucet aerator in a fuel DHW multifamily non-IQ home:

ΔTherms = 1.0 * (((1.53 * 1.6 – 0.94 * 1.6) * 2.09 * 365.25 * 0.90) /1.5) * 0.0044 * 0.93

= 1.77 Therms

For example, a direct installed low flow faucet aerator in unknown faucet in a fuel DHW single family IQ home:

ΔTherms = 1.0 * (((1.58 * 9.0 – 0.94 * 9.0) * 2.76 * 365.25 * 0.795) /3.83) * 0.0043 * 0.93

= 4.82 Therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

ΔWater (gallons) = ((GPM_base * L_base - GPM_low * L_low) * Household * 365.25 *DF / FPH) * ISR

Variables as defined above

For example, a direct installed kitchen low flow aerator in a single family IQ home

ΔWater (gallons) = (((1.63 * 4.5 – 0.94 * 4.5) * 2.76 * 365.25 *0.75) / 1) * 0.93

= 2,183 gallons

For example, a direct installed bath low flow faucet aerator in a multifamily non-IQ home:

ΔWater (gallons) = (((1.53 * 1.6 – 0.94 * 1.6) * 2.09 * 365.25 * 0.90) /1.5) * 0.93

= 4,02 gallons

For example, a direct installed low flow faucet aerator in unknown faucet in a single family IQ home:

ΔWater (gallons) = (((1.58 * 9.0 – 0.94 * 9.0) * 2.76 * 365.25 * 0.795) /3.83) * 0.93

= 1,121 gallons

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

Sources

[1042] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

Source ID	Reference
1	2011, DeOreo, William. California Single Family Water Use Efficiency Study. April 20, 2011.
2	2000, Mayer, Peter, William DeOreo, and David Lewis. Seattle Home Water Conservation Study. December 2000.
3	1999, Mayer, Peter, William DeOreo. Residential End Uses of Water. Published by AWWA Research Foundation and American Water Works Association. 1999.
4	2003, Mayer, Peter, William DeOreo. Residential Indoor Water Conservation Study. Aquacraft, Inc. Water Engineering and Management. Prepared for East Bay Municipal Utility District and the US EPA. July 2003.
5	2011, DeOreo, William. Analysis of Water Use in New Single Family Homes. By Aquacraft. For Salt Lake City Corporation and US EPA. July 20, 2011.
6	2011, Aquacraft. Albuquerque Single Family Water Use Efficiency and Retrofit Study. For Albuquerque Bernalillo County Water Utility Authority. December 1, 2011.
7	2008, Schultdt, Marc, and Debra Tachibana. Energy related Water Fixture Measurements: Securing the Baseline for Northwest Single Family Homes. 2008 ACEEE Summer Study on Energy Efficiency in Buildings.

MEASURE CODE: RS-HWE-LFFA-V16-260101

REVIEW DEADLINE: 1/1/2030

5.4.5 Low Flow Showerheads

DESCRIPTION

This measure relates to the installation of a low flow showerhead in a single or multi-family household.

This measure may be used for units provided through Efficiency Kits; however, the in-service rate for such measures should be derived through evaluation results specifically for this implementation methodology.

This measure was developed to be applicable to the following program types: TOS, RF, NC, DI, KITS.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be a low flow showerhead rated at least 0.5 gallons per minute (GPM) less than the existing showerhead. Savings are calculated on a per showerhead fixture basis.

DEFINITION OF BASELINE EQUIPMENT

For Direct install programs, the baseline condition is assumed to be a standard showerhead rated at 2.0 GPM or greater.

For retrofit and time-of-sale programs, the baseline condition is assumed to be a representative average of existing showerhead flow rates of participating customers including a range of low flow showerheads, standard-flow showerheads, and high-flow showerheads.

Average measured flow rates are used in the algorithm and are lower, reflecting the penetration of previously installed low flow fixtures (and therefore the freerider rate for this measure should be 0), use of the shower at less than full flow, debris buildup, and lower water system pressure than fixtures are rated at.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 10 years.[1043]

DEEMED MEASURE COST

For time of sale or new construction the incremental cost for this measure is $7 or program actual.[1044]

For low flow showerheads provided through Direct Install or within Efficiency Kits, the actual program delivery costs (including labor if applicable) should be utilized. If unknown assume $12 for Direct Install[1045] and $7 for Efficiency Kits.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 2.78%.[1046]

[1043] Table C-6, Measure Life Report, Residential and Commercial/Industrial Lighting and HVAC Measures, GDS Associates, June 2007. Evaluations indicate that consumer dissatisfaction may lead to reductions in persistence, particularly in Multifamily.

[1044] Market research average of $7.

[1045] Includes assess and install labor time of $5 (20min @ $15/hr)

[1046] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, “The end uses of hot water in single family homes from flow trace analysis”, 2001.). There are 65 days in the summer peak period, so the percentage of total annual aerator use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 369 = 7.23 hours of recovery during peak period, where 369 equals the average annual electric DHW recovery hours for showerhead use including SF and MF homes with Direct Install and Retrofit/TOS measures. There are 260 hours in the peak period so the probability you will see savings during the peak period is 7.23/260 = 0.0278

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Note these savings are per showerhead fixture.

ΔkWh = %ElectricDHW * ((GPM_base * L_base - GPM_low * L_low) * Household * SPCD * 365.25 / SPH) * EPG_electric * ISR

Where:

%ElectricDHW = Percentage of DHW savings assumed to be electric

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[1047], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[1048]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

GPM_base = Average flow rate, in gallons per minute, of the baseline faucet "as-used."

Note, if GPM_base is based upon the deemed assumptions below, since these include participants that had existing low flow fixtures, the freerider rate for this measure should be 0.

Program	GPM_base
Direct Install	2.24[1049]
Retrofit, Efficiency Kits, NC or TOS	2.35[1050]

[1047] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1048] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[1049] Based on measurements conducted from June 2013 to January 2014 by Franklin Energy. Over 300 residential sites in the Chicago area were tested.

[1050] Representative value from sources 1, 2, 4, 5, 6 and 7 (See Source Table at end of measure section) adjusted slightly upward to account for program participation which is expected to target customers with existing higher flow devices rather than those with existing low flow devices.

GPM_low = As-used flow rate of the low-flow showerhead, which may, as a result of measurements of program evaulations deviate from rated flows[1051]

L_base = Shower length in minutes with baseline showerhead

= 7.8 min[1052]

L_low = Shower length in minutes with low-flow showerhead

= 7.8 min[1053]

Household = Average number of people per household

Household Unit Type	Household[1054]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1055]
Custom	Actual Occupancy or Number of Bedrooms[1056]		

Use Multifamily if: Building meets utility's definition for multifamily

SPCD = Showers Per Capita Per Day

= 0.6[1057]

365.25 = Days per year, on average.

SPH = Showerheads Per Household so that per-showerhead savings fractions can be determined

Household Type	SPH
Single-Family except mobile homes	1.79[1058]
Multifamily and mobile homes	1.3[1059]
Household type unknown	1.64[1060]
Custom	Actual

Use Multifamily if: Building meets utility's definition for multifamily

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[1051] Note that actual values may be either a) program-specific minimum flow rate, or b) program-specific evaluation-based value of actual effective flow-rate due to increased duration or temperatures. The latter increases in likelihood as the rated flow drops and may become significant at or below rated flows of 1.5 GPM. The impact can be viewed as the inverse of the throttling described in the footnote for baseline flowrate.

[1052] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group. This study of 135 single and Multifamily homes in Michigan metered energy parameters for efficient showerhead and faucet aerators.

[1053] Ibid.

[1054] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1055] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1056] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1057] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1058] Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1059] Ibid.

[1060] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

EPG_electric = Energy per gallon of hot water supplied by electric

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_electric * 3,412)

= (8.33 * 1.0 * (101 – 50.7)) / (0.98 * 3,412)

= 0.125 kWh/gal

8.33 = Specific weight of water (lbs/gallon)

1.0 = Heat Capacity of water (btu/lb-°)

ShowerTemp = Assumed temperature of water

= 101°F[1061]

SupplyTemp = Assumed temperature of water entering house

= 50.7°F [1062]

RE_electric = Recovery efficiency of electric water heater

= 98%[1063]

3412 = Converts Btu to kWh (btu/kWh)

ISR = In service rate of showerhead dependant on install method as listed in table below

Selection	ISR
Direct Install	0.965[1064]
Virtual Assessment followed by Unverified Self-Install	0.803[1065]
Requested Efficiency Kits	0.65[1066]
Distributed Efficiency Kits (Income Eligible)	0.48[1067]
Distributed School Efficiency Kit showerhead	0.574[1068]

[1061] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1062] Table 4 in Chen, et. al., “Calculating Average Hot Water Mixes of Residential Plumbing Fixtures”, June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[1063] Electric water heaters have recovery efficiency of 98%.

[1064] Weighted average of 98% found in ComEd Energy Efficiency/ Demand Response Plan: Plan Year 2 (6/1/2009-5/31/2010) Evaluation Report: All Electric Single Family Home Energy Performance Tune-Up Program Table 3-8 (quantity surveyed = 163), and 87% from ComEd Single Family Retrofits CY2018 Field Work Memo 2019-07-19, Table 1 (quantity surveyed = 15). Alternative ISRs may be developed for program delivery methods based on evaluation results. Navigant, ComEd-Nicor Gas EPY4/GPY1 Multifamily Home Energy Savings Program Evaluation Report FINAL 2013-06-05. Opinion dynamics conducted primary research with tenants of participating multifamily buildings in 2023 to study the removal behavior of tenants post Program Ally direct install of low flow showerheads. Opinion Dynamics, “2023 AIC Multifamily Initiatives Tenant Survey Findings Memo”, Ameren Illinois, Multifamily Initiatives, April 24, 2024. These sources have been averaged to arrive at an ISR of 0.965.

[1065] An equal weighted average of Direct Install and Efficiency Kit ISRs. Interest and applicability of measures confirmed through virtual assessment. Average of homes using 1 Showerhead & 2 Showerhead.

[1066] A weighted ISR was found by weighting Nicor and Ameren efficiency kit program uptake and their previously found ISRs. This analysis can be found in Faucet Aerators and Showerheads Weighted Average ISR IL TRM.xlsx.

[1067] Average of Guidehouse survey research for Peoples Gas, June 16, 2020 and Research from 2021 Ameren Illinois Income Qualified participant survey, available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf

[1068] Results from Home Energy Worksheets completed by student/families in 2020, 2021, and 2022 were nearly the same as values from: Opinion Dynamics and Cadmus. 2018 AIC Residential Program Annual Impact Evaluation Report. April 30, 2019. Results from implementer-administered participant survey. Home Energy Worksheets also establish the fraction of participants who indicate they “will install later” for specific measures. Follow-up research completed by Guidehouse for Nicor Gas in 2022

For example, a direct installed 1.5 GPM low flow showerhead in a single family IQ home with electric DHW where the number of showers is not known:

ΔkWh = 1.0 * ((2.24 * 7.8 – 1.5 * 7.8) * 2.76 * 0.6 * 365.25 / 1.79) * 0.125 * 0.96

= 234 kWh

Secondary kWh Savings for Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure, but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWh_{water} = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ total}$$

Where

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

= 5,010[1069]

For example, a direct installed 1.5 GPM low flow showerhead in a single family IQ home where the number of showers is not known:

ΔWater (gallons) = ((2.24 * 7.8 – 1.5 * 7.8) * 2.76 * 0.6 * 365.25 / 1.79) * 0.96

= 1,872 gallons

ΔkWh_{water} = 1,872/1,000,000 * 5,010

= 9.4 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh/Hours * CF$$

Where:

ΔkWh = calculated value above. Note do not include the secondary savings in this calculation.

Hours = Annual electric DHW recovery hours for showerhead use

= ((GPM_base * L_base) * Household * SPCD * 365.25) * 0.726[1070] / GPH

= 273 for SF Direct Install; 224 for MF Direct Install

= 286 for SF Retrofit, Efficiency Kits, NC and TOS; 236 for MF Retrofit, Efficiency Kits, NC and TOS

Use Multifamily if: Building meets utility's definition for multifamily

GPH = Gallons per hour recovery of electric water heater calculated for 69.3F temp rise (120-50.7), 98% recovery efficiency, and typical 4.5kW electric resistance storage tank.

= 26.1

CF = Coincidence Factor for electric load reduction

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found that, on average, 51.3% of respondents who initially reported that they hadn't installed specific kit measures, but "planned to" subsequently had installed the measures. Combining these findings allows for an ISR that accounts for initial and one round of subsequent intallations. To maintain a conservative estimate of ISR, the remaining 48.7% are presumed uninstalled. See: EESchoolKitSubsequentInstall_HEW.xlsx for data and calculations.

[1069] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

[1070] 72.6% is the proportion of hot 120F water mixed with 50.7F supply water to give 101F shower water.

= 0.0278[1071]

For example, a direct installed 1.5 GPM low flow showerhead in a single family IQ home with electric DHW where the number of showers is not known:

ΔkW = 234/273 * 0.0278

= 0.024 kW

FOSSIL FUEL SAVINGS

ΔTherms = %FossilDHW * ((GPM_base * L_base - GPM_low * L_low) * Household * SPCD * 365.25 / SPH) * EPG_gas * ISR

Where:

%FossilDHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[1072], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[1073]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

EPG_gas = Energy per gallon of Hot water supplied by gas

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_gas * 100,000)

= 0.0054 Therm/gal for SF homes

= 0.0063 Therm/gal for MF homes

RE_gas = Recovery efficiency of gas water heater

[1071] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, "The end uses of hot water in single family homes from flow trace analysis", 2001.). There are 65 days in the summer peak period, so the percentage of total annual aerator use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 369 = 7.23 hours of recovery during peak period where 369 equals the average annual electric DHW recovery hours for showerhead use including SF and MF homes with Direct Install and Retrofit/TOS measures. There are 260 hours in the peak period so the probability you will see savings during the peak period is 7.23/260 = 0.0278

[1072] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1073] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

= 78% For individual water heater[1074]

= 67% For shared water heater[1075]

If unknown, use individual water heater value for single family, use shared water heater value for multifamily. Use multifamily if building meets utility's definition for multifamily.

100,000 = Converts Btus to Therms (btu/Therm)

Other variables as defined above.

For example, a direct installed 1.5 GPM low flow showerhead in a gas fired DHW single family home where the number of showers is not known:

ΔTherms = 1.0 * ((2.24 * 7.8 – 1.5 * 7.8) * 2.76 * 0.6 * 365.25 / 1.79) * 0.0054 * 0.96

= 10.1 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

ΔWater (gallons) = ((GPM_base * L_base - GPM_low * L_low) * Household * SPCD * 365.25 / SPH) * ISR

Variables as defined above

For example, a direct installed 1.5 GPM low flow showerhead in a single family home where the number of showers is not known:

ΔWater (gallons) = ((2.24 * 7.8 – 1.5 * 7.8) * 2.76 * 0.6 * 365.25 / 1.79) * 0.96

= 1,872 gallons

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

SOURCES

[1074] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%.

[1075] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

Source ID	Reference
1	2011, DeOreo, William. California Single Family Water Use Efficiency Study. April 20, 2011.
2	2000, Mayer, Peter, William DeOreo, and David Lewis. Seattle Home Water Conservation Study. December 2000.
3	1999, Mayer, Peter, William DeOreo. Residential End Uses of Water. Published by AWWA Research Foundation and American Water Works Association. 1999.
4	2003, Mayer, Peter, William DeOreo. Residential Indoor Water Conservation Study. Aquacraft, Inc. Water Engineering and Management. Prepared for East Bay Municipal Utility District and the US EPA. July 2003.
5	2011, DeOreo, William. Analysis of Water Use in New Single Family Homes. By Aquacraft. For Salt Lake City Corporation and US EPA. July 20, 2011.
6	2011, Aquacraft. Albuquerque Single Family Water Use Efficiency and Retrofit Study. For Albuquerque Bernalillo County Water Utility Authority. December 1, 2011.
7	2008, Schultdt, Marc, and Debra Tachibana. Energy related Water Fixture Measurements: Securing the Baseline for Northwest Single Family Homes. 2008 ACEEE Summer Study on Energy Efficiency in Buildings.

MEASURE CODE: RS-HWE-LFSH-V15-260101

REVIEW DEADLINE: 1/1/2030

5.4.6 Water Heater Temperature Setback

DESCRIPTION

This measure was developed to be applicable to the following program types: NC, RF, DI, KITS.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

High efficiency is a hot water tank with the thermostat reduced to no lower than 120 degrees.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is a hot water tank with a thermostat setting that is higher than 120 degrees, typically systems with settings of 130 degrees or higher. Note if there are more than one DHW tanks in the home at or higher than 130 degrees and they are all turned down, then the savings per tank can be multiplied by the number of tanks.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The assumed lifetime of the measure is 2 years.

DEEMED MEASURE COST

The incremental cost of a setback is assumed to be $5 for contractor time, or where the measure is installed as part of a kit program, the cost of the informational insert or other product should be used.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

The summer peak coincidence factor for this measure is assumed to be 1.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

For homes with electric DHW tanks:

ΔkWh[1076] = (U * A * (Tpre – Tpost) * Hours * ISR) / (3412 * RE_electric)

Where:

U = Overall heat transfer coefficient of tank (Btu/Hr-°F-ft^2).

= Actual if known. If unknown assume R-12, U = 0.083

A = Surface area of storage tank (square feet)

= Actual if known. If unknown use table below based on capacity of tank. If capacity unknown assume 50 gal tank; A = 24.99ft^2

[1076] Note this algorithm provides savings only from reduction in standby losses. The TAC considered avoided energy from not heating the water to the higher temperature but determined that dishwashers are likely to boost the temperature within the unit (roughly canceling out any savings), faucet and shower use is likely to be at the same temperature so there would need to be more lower temperature hot water being used (cancelling any savings) and clothes washers will only see savings if the water from the tank is taken without any temperature control. It was felt the potential impact was too small to be characterized.

Capacity (gal)	A (ft^2)[1077]
30	19.16
40	23.18
50	24.99
80	31.84

Tpre = Actual hot water setpoint prior to adjustment

Tpost = Actual new hot water setpoint, which may not be lower than 120 degrees

Default Hot Water Temperature Inputs			
Delivery Method	System Type	Tpre	Tpost
Distributed school efficient kit instructions, Instructions provided in all other kit programs[1078, 1079]	Electric	143.0	139.1
	Gas	142.3	136.9
	Other	140.8	137.7
All other[1080]	Electric	143.0	139.1
	Gas	142.3	136.9
	Other	140.8	137.7

Hours = Number of hours in a year (since savings are assumed to be constant over year).

= 8766

ISR = In service rate of measure

= Dependent on program delivery method as listed in table below

Delivery Method	ISR
Distributed school efficient kit instructions	20%[1081]
Instructions provided in all other kit programs	10%[1082]
All other	100%

3412 = Conversion from Btu to kWh

RE_electric = Recovery efficiency of electric hot water heater

= 0.98 [1083]

Deemed savings assumptions forkit programs and non-kit programs are provided in the table below:

Deemed kWh Savings		
Delivery Method	System Type	ΔkWh
	Electric	4.24

[1077] Assumptions from PA TRM. Area values were calculated from average dimensions of several commercially available units, with radius values measured to the center of the insulation.

[1078] DHW Temperature Setpoint EEE Survey Data.pdf,Table 7

[1079] DHW Temperature Setpoint EEE Survey Data.pdf, Table 8

[1080] DHW Temperature Setpoint EEE Survey Data.pdf,Table 7

[1081] DHW Temperature Setpoint EEE Survey Data.pdf, Table 6

[1082] Ibid.

[1083] Electric water heaters have recovery efficiency of 98%.

Deemed kWh Savings		
Delivery Method	**System Type**	**ΔkWh**
Distributed school efficient kit instructions	Gas	5.87
	Other	3.37
All other kit programs	Electric	2.12
	Gas	2.94
	Other	1.69
Non-kit program	All	120.72

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$\Delta kW = \Delta kWh / Hours * CF$

Where:

Hours = 8766

CF = Summer Peak Coincidence Factor for measure

= 1

Deemed savings assumptions for kit programs and non-kit programs are provided in the table below:

Deemed kW Savings		
Delivery Method	**System Type**	**ΔkW**
Distributed school efficient kit instructions	Electric	0.0005
	Gas	0.0007
	Other	0.0004
All other kit programs	Electric	0.0002
	Gas	0.0003
	Other	0.0002
Non-kit program	All	0.0138

FOSSIL FUEL SAVINGS

For homes with gas water heaters:

$\Delta Therms = (U * A * (Tpre – Tpost) * Hours * ISR) / (100,000 * RE\_gas)$

Where

100,000 = Converts Btus to Therms (btu/Therm)

RE_gas = Recovery efficiency of gas water heater

= 78% For SF homes [1084]

[1084] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%.

= 67% For MF homes[1085]

Use Multifamily if: Building has shared DHW

Deemed savings for kit programs and non-kit programs, for both single-family and multi-family settings, are provided in the table below:

Deemed Fossil Fuel Savings			
Delivery Method	**System Type**	**ΔTherms SF**	**ΔTherms MF**
Distributed school efficient kit instructions	Electric	0.18	0.21
	Gas	0.25	0.29
	Other	0.14	0.17
All other kit programs	Electric	0.09	0.11
	Gas	0.13	0.15
	Other	0.07	0.08
Non-kit program	All	5.17	6.02

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HWE-TMPS-V09-240101

REVIEW DEADLINE: 1/1/2028

[1085] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

5.4.7 Water Heater Wrap

DESCRIPTION

This measure relates to a Tank Wrap or insulation “blanket” that is wrapped around the outside of a hot water tank to reduce stand-by losses. This measure applies only for homes that have an electric water heater that is not already well insulated. Generally this can be determined based upon the appearance of the tank,[1086] or by touching the tank[1087].

This measure was developed to be applicable to the following program types: RF, DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The measure is a properly installed, R-8 or greater insulating tank wrap to reduce standby energy losses from the tank to the surrounding ambient area.

DEFINITION OF BASELINE EQUIPMENT

The baseline is a standard electric domestic hot water tank without an additional tank wrap. Gas storage water heaters are excluded due to the limitations of retrofit wrapping and the associated impacts on reduced savings and safety.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 5 years.[1088]

DEEMED MEASURE COST

The incremental cost for this measure will be the actual material cost of procuring and labor cost of installing the tank wrap.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

This measure assumes a flat loadshape and as such the coincidence factor is 1.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

For electric DHW systems:

$$\Delta kWh = ((1/ Rbase - 1 / R_{insul}) * A_{base} * \Delta T * Hours) / (3412 * \eta DHW)$$

Where:

R_{base} = Overall thermal resistance coefficient prior to adding tank wrap (Hr-°F-ft^2/BTU).

R_{insul} = Overall thermal resistance coefficient after addition of tank wrap (Hr-°F-ft^2/BTU).

[1086] Visually determine whether it is insulated by foam (newer, rigid, and more effective) or fiberglass (older, gives to gently pressure, and not as effective)

[1087] If the tank is warm to the touch, consider insulation.

[1088] This estimate assumes the tank wrap is installed on an existing unit with 5 years remaining life.

A_{base} = Surface area of storage tank prior to adding tank wrap (square feet)[1089]

ΔT = Average temperature difference between tank water and outside air temperature (°F)

= 60°F [1090]

Hours = Number of hours in a year (since savings are assumed to be constant over year).

= 8766

3412 = Conversion from Btu to kWh

ηDHW = Recovery efficiency of electric hot water heater

= 0.98 [1091]

The following table has default savings for various tank capacity and pre and post R-VALUES.

Capacity (gal)	Rbase	Rinsul	Abase (ft2)[1092]	ΔkWh	ΔkW
30	8	16	19.16	188	0.0215
30	10	18	19.16	134	0.0153
30	12	20	19.16	100	0.0115
30	8	18	19.16	209	0.0239
30	10	20	19.16	151	0.0172
30	12	22	19.16	114	0.0130
40	8	16	23.18	228	0.0260
40	10	18	23.18	162	0.0185
40	12	20	23.18	122	0.0139
40	8	18	23.18	253	0.0289
40	10	20	23.18	182	0.0208
40	12	22	23.18	138	0.0158
50	8	16	24.99	246	0.0280
50	10	18	24.99	175	0.0199
50	12	20	24.99	131	0.0149
50	8	18	24.99	273	0.0311
50	10	20	24.99	197	0.0224
50	12	22	24.99	149	0.0170
80	8	16	31.84	313	0.0357
80	10	18	31.84	223	0.0254
80	12	20	31.84	167	0.0190
80	8	18	31.84	348	0.0397
80	10	20	31.84	250	0.0286
80	12	22	31.84	190	0.0216

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh / 8766 * CF$$

Where:

ΔkWh = kWh savings from tank wrap installation

[1089] Area includes tank sides and top to account for typical wrap coverage.

[1090] Assumes 125°F water leaving the hot water tank and average temperature of basement of 65°F.

[1091] Electric water heaters have recovery efficiency of 98%.

[1092] Assumptions from PA TRM. Area values were calculated from average dimensions of several commercially available units, with radius values measured to the center of the insulation. Area includes tank sides and top to account for typical wrap coverage.

8766 = Number of hours in a year (since savings are assumed to be constant over year).

CF = Summer Coincidence Factor for this measure

= 1.0

The table above has default kW savings for various tank capacity and pre and post R-values.

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HWE-WRAP-V04-260101

REVIEW DEADLINE: 1/1/2030

5.4.8 Thermostatic Restrictor Shower Valve

DESCRIPTION

The measure is the installation of a thermostatic restrictor shower valve in a single or multi-family household. This is a valve attached to a residential showerhead which restricts hot water flow through the showerhead once the water reaches a set point (generally 95F or lower).

This measure was developed to be applicable to the following program types: RF, NC, DI. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be a thermostatic restrictor shower valve installed on a residential showerhead.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is the residential showerhead without the restrictor valve installed.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 10 years.[1093]

DEEMED MEASURE COST

The incremental cost of the measure should be the actual program cost (including labor if applicable), or $35[1094] plus $20 labor[1095] if not available.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 0.22%.[1096]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \%ElectricDHW * ((GPM\_base\_S * L\_showerdevice) * Household * SPCD * 365.25 / SPH) * EPG\_electric * ISR$$

Where:

%ElectricDHW = Percentage of DHW savings assumed to be electric

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[1093] Assumptions based on NY TRM, Pacific Gas and Electric Company Work Paper PGECODHW113, and measure life of low-flow showerhead.

[1094] Based on actual cost of the showerstart tsv3 adapter from Evolve showerheads.

[1095] Estimate for contractor installation time.

[1096] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, “The end uses of hot water in single family homes from flow trace analysis”, 2001.). There are 65 days in the summer peak period, so the percentage of total annual use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 29.5 = 0.577 hours of recovery during peak period, where 29.5 equals the average annual electric DHW recovery hours for showerhead use prevented by the device including SF and MF homes with Direct Install and Retrofit/TOS measures. There are 260 hours in the peak period so the probability you will see savings during the peak period is 0.577/260 = 0.0022

= 100 % for Electric

= 0 % for Fossil Fuel

= If unknown[1097], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[1098]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

GPM_base_S = Flow rate of the basecase showerhead, or actual if available

Program	GPM
Direct-install, device only	2.24[1099]
New Construction or direct install of device and low flow showerhead	Rated or actual flow of program-installed showerhead
Retrofit or TOS	2.35[1100]

L_showerdevice = Hot water waste time avoided due to thermostatic restrictor valve

= 0.89 minutes[1101]

Household = Average number of people per household

Household Unit Type	Household[1102]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18

[1097] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1098] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[1099] Based on measurements conducted from June 2013 to January 2014 by Franklin Energy. Over 300 residential sites in the Chicago area were tested.

[1100] Representative value from sources 1, 2, 4, 5, 6 and 7 (See Source Table at end of measure section) adjusted slightly upward to account for program participation which is expected to target customers with existing higher flow devices rather than those with existing low flow devices.

[1101] Average of the following sources: ShowerStart LLC survey; "Identifying, Quantifying and Reducing Behavioral Waste in the Shower: Exploring the Savings Potential of ShowerStart", City of San Diego Water Department survey; "Water Conservation Program: ShowerStart Pilot Project White Paper", and PG&E Work Paper PGECODHW113.

[1102] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

Household Unit Type	Household[1102]		
	IQ Participants	Non-IQ Participants	All Participants
Household type unknown			2.46[1103]
Custom	Actual Occupancy or Number of Bedrooms[1104]		

Use Multifamily if: Building meets utility's definition for multifamily

SPCD = Showers Per Capita Per Day

= 0.6[1105]

365.25 = Days per year, on average.

SPH = Showerheads Per Household so that per-showerhead savings fractions can be determined

Household Type	SPH
Single-Family	1.79[1106]
Multifamily	1.3[1107]
Household type unknown	1.64[1108]
Custom	Actual

Use Multifamily if: Building meets utility's definition for multifamily

EPG_electric = Energy per gallon of hot water supplied by electric

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_electric * 3412)

= (8.33 * 1.0 * (101 – 50.7)) / (0.98 * 3412)

= 0.125 kWh/gal

8.33 = Specific weight of water (lbs/gallon)

1.0 = Heat Capacity of water (btu/lb-°)

ShowerTemp = Assumed temperature of water

= 101F [1109]

SupplyTemp = Assumed temperature of water entering house

= 50.7°F [1110]

RE_electric = Recovery efficiency of electric water heater

[1103] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1104] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1105] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1106] Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1107] Ibid.

[1108] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1109] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1110] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

= 98% [1111]

3412 = Converts Btu to kWh (btu/kWh)

ISR = In service rate of showerhead

= Dependent on program delivery method as listed in table below

Selection	ISR
Direct Install - Single Family	0.98[1112]
Direct Install – Multi Family	0.95[1113]
Efficiency Kits	To be determined through evaluation

Use Multifamily if: Building meets utility's definition for multifamily

For example, a direct installed valve in a single-family IQ home with electric DHW:

$$\Delta kWh = 1.0 * (2.24 * 0.89 * 2.76 * 0.6 * 365.25 / 1.79) * 0.125 * 0.98$$

$$= 82.5\ kWh$$

Secondary kWh Savings for Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure, but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWh_{water} = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ total}$$

Where

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

=5,010[1114]

For example, a direct installed thermostatic restrictor device in a single family IQ home where the number of showers is not known:

$$\Delta Water\ (gallons) = ((2.24* 0.89) * 2.76 * 0.6 * 365.25 / 1.79) * 0.98$$

$$= 660\ gallons$$

$$\Delta kWh_{water} = 660/1{,}000{,}000 * 5{,}010$$

$$= 3.3\ kWh$$

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh/Hours * CF$$

Where:

ΔkWh = calculated value above. Note do not include the secondary savings in this calculation.

[1111] Electric water heaters have recovery efficiency of 98%.

[1112] Deemed values are from ComEd Energy Efficiency/ Demand Response Plan: Plan Year 2 (6/1/2009-5/31/2010) Evaluation Report: All Electric Single Family Home Energy Performance Tune-Up Program Table 3-8. Alternative ISRs may be developed for program delivery methods based on evaluation results.

[1113] Navigant, ComEd-Nicor Gas EPY4/GPY1 Multifamily Home Energy Savings Program Evaluation Report FINAL 2013-06-05

[1114] This factor include 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

Hours = Annual electric DHW recovery hours for wasted showerhead use prevented by device

= ((GPM_base_S * L_showerdevice) * Household * SPCD * 365.25) * 0.726[1115] / GPH

GPH = Gallons per hour recovery of electric water heater calculated for 69.3F temp rise (120-50.7), 98% recovery efficiency, and typical 4.5kW electric resistance storage tank.

= 26.1

= 31.1 for SF Direct Install; 25.5 for MF Direct Install

= 32.6 for SF Retrofit and TOS; 26.7 for MF Retrofit and TOS

Use Multifamily if: Building meets utility's definition for multifamily

CF = Coincidence Factor for electric load reduction

= 0.0022[1116]

For example, a direct installed thermostatic restrictor device in a single family IQ home with electric DHW where the number of showers is not known.

ΔkW = 82.5/31.1 * 0.0022

= 0.0058 kW

FOSSIL FUEL SAVINGS

ΔTherms = %FossilDHW * ((GPM_base_S * L_showerdevice)* Household * SPCD * 365.25 / SPH) * EPG_gas * ISR

Where:

%FossilDHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[1117], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%

[1115] 72.6% is the proportion of hot 120F water mixed with 50.7F supply water to give 101F shower water.

[1116] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, "The end uses of hot water in single family homes from flow trace analysis", 2001.). There are 65 days in the summer peak period, so the percentage of total annual use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 29.5 = 0.577 hours of recovery during peak period, where 29.5 equals the average annual electric DHW recovery hours for showerhead use prevented by the device including SF and MF homes with Direct Install and Retrofit/TOS measures. There are 260 hours in the peak period so the probability you will see savings during the peak period is 0.577/260 = 0.0022

[1117] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[1118]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

EPG_gas = Energy per gallon of Hot water supplied by gas

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_gas * 100,000)

= 0.0054 Therm/gal for SF homes

= 0.0063 Therm/gal for MF homes

RE_gas = Recovery efficiency of gas water heater

= 78% For SF homes[1119]

= 67% For MF homes[1120]

Use Multifamily if: Building has shared DHW.

100,000 = Converts Btus to Therms (btu/Therm)

Other variables as defined above.

For example, a direct installed thermostatic restrictor device in a gas fired DHW single family IQ home where the number of showers is not known:

ΔTherms = 1.0 * ((2.24 * 0.89) * 2.76 * 0.6 * 365.25 / 1.79) * 0.0054 * 0.98

= 3.6 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

ΔWater (gallons) = ((GPM_base_S * L_showerdevice) * Household * SPCD * 365.25 / SPH) * ISR

Variables as defined above

[1118] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[1119] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%.

[1120] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

For example, a direct installed thermostatic restrictor device in a single family IQ home where the number of showers is not known:

ΔWater (gallons) = ((2.24 * 0.89) * 2.76 * 0.6 * 365.25 / 1.79) * 0.98

= 660 gallons

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

SOURCES

Source ID	Reference
1	2011, DeOreo, William. California Single Family Water Use Efficiency Study. April 20, 2011.
2	2000, Mayer, Peter, William DeOreo, and David Lewis. Seattle Home Water Conservation Study. December 2000.
3	1999, Mayer, Peter, William DeOreo. Residential End Uses of Water. Published by AWWA Research Foundation and American Water Works Association. 1999.
4	2003, Mayer, Peter, William DeOreo. Residential Indoor Water Conservation Study. Aquacraft, Inc. Water Engineering and Management. Prepared for East Bay Municipal Utility District and the US EPA. July 2003.
5	2011, DeOreo, William. Analysis of Water Use in New Single Family Homes. By Aquacraft. For Salt Lake City Corporation and US EPA. July 20, 2011.
6	2011, Aquacraft. Albuquerque Single Family Water Use Efficiency and Retrofit Study. For Albuquerque Bernalillo County Water Utility Authority. December 1, 2011.
7	2008, Schultdt, Marc, and Debra Tachibana. Energy related Water Fixture Measurements: Securing the Baseline for Northwest Single Family Homes. 2008 ACEEE Summer Study on Energy Efficiency in Buildings.
8	2011, Lutz, Jim. "Water and Energy Wasted During Residential Shower Events: Findings from a Pilot Field Study of Hot Water Distribution Systems", Energy Analysis Department Lawrence Berkeley National Laboratory, September 2011.
9	2008, Water Conservation Program: ShowerStart Pilot Project White Paper, City of San Diego, CA.
10	2012, Pacific Gas and Electric Company, Work Paper PGECODHW113, Low Flow Showerhead and Thermostatic Shower Restriction Valve, Revision # 4, August 2012.
11	2008, "Simply & Cost Effectively Reducing Shower Based Warm-Up Waste: Increasing Convenience & Conservation by Attaching ShowerStart to Existing Showerheads", ShowerStart LLC.
12	2014, New York State Record of Revision to the TRM, Case 07-M-0548, June 19, 2014.

MEASURE CODE: RS-HWE-TRVA-V10-260101

REVIEW DEADLINE: 1/1/2028

5.4.9 Shower Timer

DESCRIPTION

Shower Timers are designed to make it easy for people to consistently take short showers, resulting in water and energy savings.

The shower timer provides a reminder to participants on length of their shower visually or auditorily.

This measure was developed to be applicable to the following program type: KITS, DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The shower timer should provide a reminder to participants to keep showers to a length of 5 minutes or less.

DEFINITION OF BASELINE EQUIPMENT

The baseline is no shower timer.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The deemed lifetime is 2 years.[1121]

DEEMED MEASURE COST

For shower timers provided in Efficiency Kits, the actual program delivery costs should be utilized.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 2.78%.[1122]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh = %Electric DHW * GPM * (L_base – L_timer) * Household * Days/yr * SPCD * UsageFactor * EPG_Electric

Where:

%Electric DHW = Percentage of DHW savings assumed to be electric

= 100 % for Electric

= 0 % for Fossil Fuel

[1121] Estimate of persistence of behavior change instigated by the shower timer.

[1122] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, "The end uses of hot water in single family homes from flow trace analysis", 2001.). There are 65 days in the summer peak period, so the percentage of total annual aerator use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 369 = 7.23 hours of recovery during peak period, where 369 equals the average annual electric DHW recovery hours for showerhead use including SF and MF homes with Direct Install and Retrofit/TOS measures. There are 260 hours in the peak period so the probability you will see savings during the peak period is 7.23/260 = 0.0278

= If unknown[1123], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[1124]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

GPM = Flow rate of showerhead as used

= Custom, to be determined through evaluation. If data is not available use 1.93[1125]

L_base = Number of minutes in shower without a shower timer

=7.8 minutes[1126]

L_timer = Number of minutes in shower after shower timer

= Custom, to be determined through evaluation. If data is not available use 5.79.[1127]

Household = Number in household using timer

Household Unit Type	**Household[1128]**		
	IQ Participants	**Non-IQ Participants**	**All Participants**
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1129]
Custom	Actual Occupancy or Number of Bedrooms[1130]		

Days/yr = 365.25

SPCD = Showers Per Capita Per Day

[1123] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1124] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[1125] Navigant Elementary Education GPY4 Evaluation Report, dated May 12, 2016. Average of all utilities.

[1126] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group. This study of 135 single and Multifamily homes in Michigan metered energy parameters for efficient showerhead and faucet aerators.

[1127] Navigant Elementary Education GPY4 Evaluation Report, dated May 12, 2016. Average of all utilities.

[1128] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1129] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1130] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

= 0.6[1131]

UsageFactor = How often each participant is using shower timer

=Custom, to be determined through evaluation. If data is not available use 0.34[1132]

EPG_Electric = Energy per gallon of hot water supplied by electric

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_electric * 3412)

= (8.33 * 1.0 * (101 – 50.7)) / (0.98 * 3412)

=0.125 kWh/gal

Where:

ShowerTemp = Assumed temperature of water

= 101°F[1133]

SupplyTemp = Assumed temperature of water entering house

= 50.7°F [1134]

Based on default assumptions provided above, the savings for a single family IQ home would be:

ΔkWh = %Electric DHW * GPM * (L_base – L_timer) * Household * Days/yr * SPCD * UsageFactor * EPG_Electric

= 0.25 * 1.93 * (7.8 – 5.79) * 2.76 * 365.25 * 0.6 * 0.34 * 0.125

= 24.9 kWh

Secondary kWh Savings for Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure, but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

ΔkWh_{water} = ΔWater (gallons) / 1,000,000 * $E_{water\ total}$

Where

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

=5,010[1135]

Based on default assumptions provided above, the savings for a single family IQ home would be:

ΔWater (gallons) = GPM * (L_base – L_timer) * Household ***** Days/yr * SPCD * UsageFactor

= 1.93 * (7.8 – 5.79) * 2.76 * 365.25 * 0.6 * 0.34

= 797.8 gallons

[1131] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1132] Navigant Elementary Education GPY4 Evaluation Report, dated May 12, 2016. Average of all utilities.

[1133] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1134] Table 4 in Chen, et. al., “Calculating Average Hot Water Mixes of Residential Plumbing Fixtures”, June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[1135] This factor include 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy’s ‘IL TRM: Energy per Gallon Factor, May 2018 paper’.

ΔkWh_{water} = 797.8/1,000,000 * 5010

= 4.0 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ΔkWh/Hours * CF

Where:

ΔkWh = calculated value above. Note do not include the secondary savings in this calculation.

Hours = Annual electric DHW recovery hours for showerhead use

= (GPM_base * L_base * Household * SPCD * UsageFactor * 365.25) * 0.726 [1136] / GPH

GPH = Gallons per hour recovery of electric water heater calculated for 69.3F temp rise (120-50.7), 98% recovery efficiency, and typical 4.5kW electric resistance storage tank.

= 26.1

CF = Coincidence Factor for electric load reduction

= 0.0278[1137]

Based on default assumptions provided above, the savings for a single family IQ home would be:

Hours = (1.93 * 7.8 * 2.76 * 0.6 * 0.34 * 365.25) * 0.726/26.1

= 86.1 Hours

ΔkW = ΔkWh/Hours * CF

= 24.9 / 86.1 * 0.0278

= 0.0080 kW

FOSSIL FUEL SAVINGS

ΔTherms = %FossilDHW * GPM * (L_base – L_timer) * Household * Days/yr * SPCD * UsageFactor * EPG_Gas

%FossilDHW = Percentage of DHW savings assumed to be fossil fuel

= 100 % for Fossil Fuel

= 0 % for Electric

= If unknown[1138], use the following table:

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%

[1136] 72.6% is the proportion of hot 120F water mixed with 50.7F supply water to give 101F shower water.

[1137] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, “The end uses of hot water in single family homes from flow trace analysis”, 2001.). There are 65 days in the summer peak period, so the percentage of total annual aerator use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 369 = 7.23 hours of recovery during peak period where 369 equals the average annual electric DHW recovery hours for showerhead use including SF and MF homes with Direct Install and Retrofit/TOS measures. There are 260 hours in the peak period so the probability you will see savings during the peak period is 7.23/260 = 0.0278

[1138] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

	Location				
Utility	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People’s Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[1139]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

EPG_gas = Energy per gallon of Hot water supplied by gas

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_gas * 100,000)

= 0.00537 Therm/gal for SF homes

= 0.00625 Therm/gal for MF homes

RE_gas = Recovery efficiency of gas water heater

= 78% For SF homes [1140]

= 67% For MF homes[1141]

Use Multifamily if: Building has shared DHW.

100,000 = Converts Btus to Therms (btu/Therm)

Other variables as defined above.

Based on default assumptions provided above, the savings for a single family IQ home would be:

Δ Therms = %FossilDHW * GPM * (L_base – L_timer) * Household ***** Days/yr * SPCD * UsageFactor * EPG_Gas

= 0.75 * 1.93 * (7.8 – 5.79) * 2.76 * 365.25 * 0.6 * 0.34 * 0.00537

= 3.2 Therms

WATER DESCRIPTIONS AND CALCULATION

ΔWater (gallons) = GPM * (L_base – L_timer) * Household ***** Days/yr * SPCD * UsageFactor

Variables as defined above

Based on default assumptions provided above, the savings for a single family home would be:

ΔWater (gallons) = GPM * (L_base – L_timer) * Household ***** Days/yr * SPCD * UsageFactor

---

[1139] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[1140] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%.

[1141] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

= 1.93 * (7.8 – 5.79) * 2.76 * 365.25 * 0.6 * 0.34

= 797.8 gallons

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-DHW-SHTM-V08-260101

REVIEW DEADLINE: 1/1/2030

5.4.10 Pool Covers

DESCRIPTION

This measure refers to the installation of covers on residential use pools that are heated with gas-fired equipment located either indoors or outdoors. By installing pool covers, the heating load on the pool boiler will be reduced by reducing the heat loss from the water to the environment and the amount of actual water lost due to evaporation (which then requires additional heated water to make up for it). An additional benefit to pool covers are the electricity savings from the reduced fresh water required to replace the evaporated water.

The main source of energy loss in pools is through evaporation. This is particularly true of outdoor pools where wind plays a larger role. The point of installing pool covers is threefold. First, it will reduce convective losses due to the wind by shielding the water surface. Second, it will insulate the water from the colder surrounding air. And third, it will reduce radiative losses to the night sky. In doing so, evaporative losses will also be minimized, and the boiler will not need to work as hard in replenishing the pool with hot water to keep the desired temperature.

This measure can be used for pools that (1) currently do not have pool covers, (2) have pool covers that are past the useful life of the existing cover, or (3) have pool covers that are past their warranty period and have failed.

This measure was developed to be applicable to the following program type: RF. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

For indoor pools, the efficient case is the installation of an indoor pool cover with a 5 year warranty on an indoor pool that is used all year.

For outdoor pools, the efficient case is the installation of an outdoor pool cover with a 5 year warranty on an outdoor pool that is used through the summer season.

DEFINITION OF BASELINE EQUIPMENT

For indoor pools, the base case is an uncovered indoor pool that operates all year.

For outdoor pools, the base case is an outdoor pool that is uncovered and is open through the summer season.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The useful life of this measure is assumed to be 6 years.[1142]

DEEMED MEASURE COST

The table below shows the costs for the various options and cover sizes. Since this measure covers a mix of various sizes, the average cost of these options is taken to be the incremental measure cost. [1143] Costs are per square foot.

Cover Size	Edge Style	
	Hemmed (indoor)	Weighted (outdoor)
1-299 sq. ft.	$3.86	$3.12
300-999 sq. ft.	$3.50	$2.16
Average	$3.68	$2.64

LOADSHAPE

Loadshape R15 – Residential Pool Pumps

[1142] The effective useful life of a pool cover is typically one year longer than its warranty period. SolaPool Covers. Pool Covers Website, FAQ- "How long will my SolaPool cover blanket last?". Pool covers are typically offered with 3 and 5 year warranties with at least one company offering a 6 year warranty. Conversation with Trade Ally. Knorr Systems

[1143] Pool Cover Costs derived from three leading online realtors, see Pool Covers Costs.xlsx .

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

Secondary kWh Savings for Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure, but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWh_{water} = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ supply}$$

Where

$E_{water\ supply}$ = Water Supply Energy Factor (kWh/Million Gallons)

= 2,571[1144]

For example**:**

For a 392 ft2 Indoor Swimming Pool:

ΔWater = WaterSavingFactor x Size of Pool

= 15.28 gal./ft2/year x 392 ft2

= 5,990 gal./year

ΔkWhwater = ΔWater / 1,000,000 * Ewater total

= 5,990 gal./year / 1,000,000 * 2,571 kWh/million gallons

= 15.4 kWh/year

For a 392 ft2 Outdoor Swimming Pool:

ΔWater = WaterSavingFactor x Size of Pool

= 8.94 gal./ft2/year x 392 ft2

= 3,504 gal./year

ΔkWhwater = ΔWater / 1,000,000 * $E_{water\ supply}$

= 3,504 gal./year / 1,000,000 * 2,571 kWh/million gallons

= 9.0 kWh/year

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

The calculations are based on modeling runs using RSPEC! Energy Smart Pools Software that was created by the U.S. Department of Energy. [1145]

[1144] This factor include 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'. Note since the water loss associated with this measure is due to evaporation and does not discharge into the wastewater system, only the water supply factor is used here.

[1145] Full method and supporting information found in reference document: IL TRM – Residential Pool Covers WorkPaper.docx. Note that the savings estimates are based upon Chicago weather data.

$$\Delta \text{Therms} = \text{SavingFactor} \times \text{Size of Pool}$$

Where

Savings factor = dependant on pool location and listed in table below:[1146]

Location	Therm / sq-ft
Indoor	2.61
Outdoor	1.01

Size of Pool = Actual. If unknown assume 392 ft^2 [1147]

WATER IMPACT DESCRIPTIONS AND CALCULATION

$$\Delta \text{Water (gallons)} = \text{WaterSavingFactor} \times \text{Size of Pool}$$

Where

WaterSavingFactor = Water savings for this measure dependant on pool location and listed in table below:[1148]

Location	Annual Savings Gal / sq-ft
Indoor	15.28
Outdoor	8.94

Size of Pool = 392 ft^2

DEEMED O&M COST ADJUSTMENT CALCULATION

There are no O&M cost adjustments for this measure.

MEASURE CODE: RS-HWE-PLCV-V02-240101

REVIEW DEADLINE: 1/1/2029

[1146] Calculations can be found in Residential Pool Covers.xlsx

[1147] The average size of an installed in-ground swimming poll is 14 ft x 28 ft, giving a surface area of 392 ft^2. <https://www.homeadvisor.com/cost/swimming-pools-hot-tubs-and-saunas/inground-pool/>

[1148] Ibid.

5.4.11 Drain Water Heat Recovery

DESCRIPTION

Drain Water Heat Recovery (DWHR) is a technology that captures waste heat in the drain line during a shower event, using the reclaimed heat to preheat cold water that is then delivered either to the shower or the water heater. The device can be installed in either an equal flow configuration (with preheated water being routed to both the water heater and the shower) or an unequal flow configuration (preheated water directed to either the water heater or shower). The energy harvested from a DWHR device is maximized in an equal flow configuration. It uses a non-regenerative heat exchanger to pre-heat the incoming cold fresh water with the outgoing warm drain water. It has been proven that DWHR devices only recover energy during simultaneous draws,[1149] i.e., showers, and that for energy savings purposes all other water draws can be ignored. Savings are calculated per drain water heat recovery unit. Other benefits include increased first-hour rating of water tank, improved comfort due to slower temperature degradation at run-out and reduction of coincident peak demand.[1150]

This measure was developed to be applicable to the following program types: RF, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Efficient equipment is a DWHR unit retrofitted to the main drain which includes outlets from showers, sinks and other fixtures too. Note, that the DWHR unit can either be installed in a vertical configuration or a horizontal configuration. Although, this measure covers both horizontal and vertical DWHR,[1151] the energy savings calculations focuses on vertical. Due to the lack of any moving parts, no maintenance is required for either types of DWHR units. Vertical units are said to comprise 95% of the market currently.[1152]

The device can be installed in either an equal flow configuration or an unequal flow configuration. An equal flow installation is ideal with all the incoming cold water passing through the DWHR heat exchanger apparatus, after which it splits into cold water and inlet to water heater. Units should be installed in single-family homes and multi-family homes.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is a storage type water heater without DWHR devices in a residential application.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 30 years.[1153]

DEEMED MEASURE COST

The incremental cost for this measure is $744 per unit.[1154]

LOADSHAPE

Load Shape R03 – Residential Electric DHW

[1149] Charles Zaloum, John Gusdorf, and Anil Parekh; "Performance Evaluation of Drain Water Heat Recovery Technology at the Canadian Centre for Housing Technology", January 2007, accessed April 2020.

[1150] G.Proskiw, "Technology Profile: Residential Greywater Heat Recovery Systems", June 1998, accessed April 2020.

[1151] 2019 Title 24, Part 6 CASE Report. "Drain Water Heat Recovery – Final Report."

[1152] Ibid

[1153] Ibid

[1154] 2019 Title 24, Part 6 CASE Report. "Drain Water Heat Recovery – Final Report.", average of 4 ft and 5 ft units. Page 21.

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 2.78%.[1155]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

For electric water heating, annual energy savings per unit are calculated through the following formula:

$$\Delta kWh = \frac{(ShowerTemp - SupplyTemp) * 8.33\frac{BTU}{gal{\cdot}°F} * GPM * T_{shower-length} * Household * N_{units} * \mathrm{SPCD} * 365.25\frac{days}{yr} * SF}{3412\frac{BTU}{kWh} * RE}$$

Where:

ShowerTemp = assumed water temperature during shower

= 101°F[1156]

SupplyTemp = assumed temperature of cold water entering house

= 50.7°F[1157]

8.33 = Energy required (BTU) to heat one gallon of water by one degree Fahrenheit

GPM = gallon per minute, flow rate of showerhead

= 2.35 Gallon/minute[1158]

$T_{shower-length}$ = shower length in minutes

= 7.8 minutes[1159]

Household = average number of people per household

Household Unit Type	Household[1160]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1161]

[1155] Assume coincidence factor for DWHR units is the same with that of low flow showerheads (see Illinois Statewide Technical Reference Manual for Energy Efficiency, section 5.4.5, low flow showerheads)

[1156] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1157] US DOE Building America Program, Building America Analysis Spreadsheet (for Chicago, IL), Office of Energy Efficiency & Renewable Energy.

[1158] Current Illinois Statewide Technical Reference Manual for Energy Efficiency, section 5.4.5, low flow showerheads, for Retrofit and New Construction

[1159] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group. This study of 135 single and Multifamily homes in Michigan metered energy parameters for efficient showerhead and faucet aerators.

[1160] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1161] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

Household Unit Type	Household[1160]		
	IQ Participants	Non-IQ Participants	All Participants
Custom	Actual Occupancy or Number of Bedrooms[1162]		

N_{units} = Number of units in a multifamily building with drains connected to the DWHR unit

Household Unit	N_{units}
Single-Family	1
Multi-Family	1 or Actual

SPCD = Showers Per Capita Per Day

= 0.6[1163]

365.25 = Days per year, on average.

SF = Water heating energy savings factor

= 0.466[1164]

3,412 = Conversion factor, 1 kWh equals 3,412 BTU

RE = Recovery efficiency of electric water heater:

= Actual or:

= 0.98[1165] for Electric Resistance

= 3.69[1166] for Electric HPWH

For example, for electric water heating, DHWR energy savings for a single family IQ home can be calculated as follows:

ΔkWh = ((101 – 50.7) * 8.33 * 2.35 * 7.8 * 2.76 * 1 * 0.6 * 365.25 * 0.466) / (3412 * 0.98)

= 647.4kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \frac{\Delta kWh}{Hours} * CF$$

Where:

ΔkWh = calculated value from above.

Hours = Annual electric DHW recovery hours for showerhead use

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[1162] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1163] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1164] Codes and Standards Enhancement (CASE) Initiative, 2019 California Building Energy Efficiency Standards, Title 24, Part 6 Report. "Drain Water Heat Recovery - Final Report." July 2017, pg 17.

[1165] Review of AHRI database shows that electric water heaters have a recovery efficiency of 98%.

[1166] Review of AHRI database shows that Electric Heat Pump Water Heaters support this recovery efficiency. For the raw data, and calculations, please see AHRI_ RES Water Heaters 2025.xlsx.

$$= \frac{(GPM * Tshower{-}length) * Npersons * SPCD * 365.25\ ) * 0.726}{GPH}$$ [1167]

= 286 for SF

= 234 for MF

Use Multifamily if: Building meets utility’s definition for multifamily

GPH = Gallons per hour recovery of electric water heater calculated for 69.3°F temp rise (120-50.7), 98% recovery efficiency, and typical 4.5kW electric resistance storage tank.

= 26.1

CF = Coincidence Factor for electric load reduction

= 0.0278

For example, When a DHWR unit is installed in a Single Family home, summer coincident peak demand savings can be calculated as follows:

ΔkW = (647.4 / 286) * 0.0278

= 0.0629 kW

FOSSIL FUEL SAVINGS

For gas water heating, annual energy savings per unit are calculated through the following formula:

$$\Delta \text{Therms} = \frac{(\text{ShowerTemp} - \text{SupplyTemp}) * 8.33\frac{\text{BTU}}{\text{gal}\cdot{}^{\circ}\text{F}} * \text{GPM} * \text{T}_{\text{shower-length}} * \text{N}_{\text{persons}} * \text{N}_{\text{units}} * \text{SPCD} * 365.25\frac{\text{days}}{\text{yr}} * \text{SF}}{100{,}000\frac{\text{BTU}}{\text{therm}} * \text{RE}}$$

Where:

100,000 = Conversion factor, 1 therm equals 100,000 BTU

RE = efficiency of gas water heater: 79% for single family[1168] and 67% for multi family[1169]

For example, for gas water heating, DHWR energy savings for single family IQ home can be calculated as follows:

ΔTherms= ((101 – 50.7) * 8.33 * 2.35 * 7.8 * 2.76 * 1 * 0.6 * 365.25 * 0.466) / (100000 * 0.79)

= 27.4 therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

[1167] 72.6% is the proportion of hot 120F water mixed with 50.7F supply water to give 101F shower water.

[1168] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 79%.

[1169] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

MEASURE CODE: RS-DHW-DWHR-V06-260101

REVIEW DEADLINE: 1/1/2029

5.4.12 Recirculating Pump Controls

DESCRIPTION

Demand control recirculation pumps seek to reduce inefficiency by combining control via temperature and demand inputs, whereby the controller will not activate the recirculation pump unless both (a) the recirculation loop return water has dropped below a prescribed temperature (e.g., 100°F) and (b) a Central Domestic Hot Water (CDHW) demand is sensed as water flow through the CDHW system.

This measure was developed to be applicable to the following program types: TOS, RF, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Re-circulating pump shall cycle on based on (a) the recirculation loop return water dropping below a prescribed temperature (e.g. 100°F) and (b) a CDHW demand is sensed as water flow through the CDHW system.

There are three alternative technologies that are considered in this characterization:

- Timer-based. This technology allows the user to program a schedule to perform recirculation during specific windows throughout the day.
- Aquastat-controlled. This type of control calls for recirculation when the water temperature at one point in the system falls below a certain pre-programmed setpoint.
- On-Demand. This technology senses the demand as water flow through the CDHW system. These types of system are most adequate on small central water heating systems.

DEFINITION OF BASELINE EQUIPMENT

The base case for this measure category is existing, uncontrolled recirculation pumps on either electric or gas-fired Central Domestic Hot Water systems (CDHW).

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The effective useful life is 15 years.[1170]

DEEMED MEASURE COST

The average cost of the demand controller circulation kit is $150 with an installation cost of $72 for a total measure cost of $222.[1171]

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

N/A

[1170] Benningfield Group. (2009). *PY 2009 Monitoring Report: Demand Control for Multifamily Central Domestic Hot Water.* Folsom, CA: Prepared for Southern California Gas Company, October 30, 2009.

[1171] The incremental cost is sourced as a weighted average of control types, as sourced from the Northwest Power and Conservation Council, Regional Technical Forum, Unit Energy Savings Measures, Circulator Pump, December 5, 2023 (‘ComResCirculatorPumps_v4_0.xlsm’)

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \Delta kWh_{heater} * + \Delta kWh_{pump}$$

$$\Delta kWh_{heater} = \frac{(T_{out} - T_{in}) * GPD * HouseHold * 365.25 * \gamma Water * 1 * \left(\frac{1}{UEF_{heater}}\right)}{3412} * SF$$

Where:

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municiple system

= 50.7°F [1172]

GPD = Gallons hot water per day per person

= 17.6 gallons per day[1173]

Household = Average number of people per household

Household Unit Type	Household[1174]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1175]
Custom	Actual Occupancy or Number of Bedrooms[1176]		

γWater = Specific weight capacity of water (lb/gal)

= 8.33 lbs/gal

1 = Specific heat of water (Btu/lb.°F)

UEF_{heater} = Rated efficiency of water heater expressed as Uniform Energy Factor (UEF);

Note, the same draw pattern (very small, low, medium and high draw) should be used for both baseline and efficient units.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[1177]
Residential Electric Storage	≤55 gallon tanks	Very small	UEF = 0.8808 – (0.0008 * Rated Storage Volume in Gallons)

[1172] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[1173] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[1174] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1175] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1176] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1177] All Residential sized Federal Standards are from DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[1177]
Water Heaters ≤ 75,000 Btu/h		Low	UEF = 0.9254 – (0.0003 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.9307 – (0.0002 * Rated Storage Volume in Gallons)
		High	UEF = 0.9349 – (0.0001 * Rated Storage Volume in Gallons)
	>55 gallon and ≤120 gallon tanks [1178]	Very small	UEF = 1.9236 – (0.0011 * Rated Storage Volume in Gallons)
		Low	UEF = 2.0440 – (0.0011 * Rated Storage Volume in Gallons)
		Medium	UEF = 2.1171 – (0.0011 * Rated Storage Volume in Gallons)
		High	UEF = 2.2418 – (0.0011 * Rated Storage Volume in Gallons)
Residential Electric Instantaneous Water Heaters	≤12kW and ≤2 gal	All other	UEF = 0.91
		High	UEF = 0.92
Residential-duty Commercial Electric Instantaneous Water Heaters	> 12kW and ≤58.6 kW and ≤2 gal	All	UEF = 0.80

Draw patterns are based on first hour rating (gallons) for storage tanks and maximum flow (GPM) for instantaneous as shown below:[1179]

Storage Water Heater Draw Pattern	
Draw Pattern	**First Hour Rating (gallons)**
Very Small	≥ 0 and < 18
Low	≥ 18 and < 51
Medium	≥ 51 and < 75
High	≥ 75

Instantaneous Water Heater Draw Pattern	
Draw Pattern	**Max GPM**
Very Small	≥ 0 and < 1.7
Low	≥ 1.7 and < 2.8
Medium	≥ 2.8 and < 4
High	≥ 4

3412 = Converts Btu to kWh

SF = Savings factor based on Building type

Building Type	Savings Factor[1180]
Single-Family - Deemed	9%
Multifamily - Deemed	9%

$$\Delta kWh_{pump} = \frac{HP_{recirculating} * 0.75 * (8760 - Pump_{hrs\ controlled})}{Motor_{eff}}$$

[1178] It is assumed that tanks <75,000Btu/h and >55 gallons will not be eligible measures due to the high baseline.

[1179] Definitions provided in 10 CFR 430, Subpart B, Appendix E, Section 5.4.1.

[1180] The savings factor from ACEEE Hot Water Forum. Control Methods, Code Requirements and Energy Savings. 9% is assumed to be the savings factor for multifamily and Single-Family buildings.

Where:

$HP_{recirculating}$ = the size of the recirculating pump in HP

= Actual. If unknown, default to 1/12 hp[1181]

0.75 = Conversion factor kW/HP

8760 = Hours of operation of uncontrolled recirculating pump

$Pump_{hrs\ controlled}$ = The table below corresponds to the control types for residences

Hours of operation[1182]	
Timer	7,300
Aquastat-Controlled	1,095
On Demand	61

$Motor_{eff}$ = The efficiency of the pump motor

= Actual, if unknown, default to 70%[1183]

FOSSIL FUEL SAVINGS

Natural gas energy savings are calculated for natural gas storage water heaters per the equations given below.

$$\Delta Therms = \frac{(T_{out} - T_{in}) * HotWaterUse_{Gallon} * \gamma Water * 1 * \left(\frac{1}{EF_{Gas}}\right)}{100{,}000} * SF$$

Where:

100,000 = Converts Btu to Therms

EF_{gas} = Rated efficiency of baseline water heater (expressed as Uniform Energy Factor (UEF) or Thermal Efficiency as provided below).

Use actual or the minimum efficiency from the Federal Standard

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[1184]
Residential Gas Storage Water Heaters ≤75,000 Btu/h	≤55 gallon tanks	Very small	UEF = 0.3456 – (0.0020 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5982 – (0.0019 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6483 – (0.0017 * Rated Storage Volume in Gallons)
		High	UEF = 0.6920 – (0.0013 * Rated Storage Volume in Gallons)
	>55 gallon and ≤100 gallon tanks	Very small	UEF = 0.6470 – (0.0006 * Rated Storage Volume in Gallons)
		Low	UEF = 0.7689 – (0.0005 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.7897 – (0.0004 * Rated Storage Volume in Gallons)
		High	UEF = 0.8072 – (0.0003 * Rated Storage Volume in Gallons)
Residential-duty Commercial High Capacity Storage Gas-Fired Storage Water Heaters > 75,000	≤120 gallon tanks	Very small	UEF = 0.2674 – (0.0009 * Rated Storage Volume in Gallons)
		Low	UEF = 0.5362 – (0.0012 * Rated Storage Volume in Gallons)
		Medium	UEF = 0.6002 – (0.0011 * Rated Storage Volume in Gallons)

[1181] DOE, Circulator Pump Technical Support Document, 2022 (2016-BT-STD-0004-0121). Circulator Pump Breakdowns by Nominal Horsepower and Sector for each Application. It was determined that 95 percent of hot water recirculation pumps are 1/12 hp or less.

[1182] DOE, Circulator Pump Technical Support Document, 2022 (2016-BT-STD-0004-0121)DOE

[1183] Fractional horsepower motors that are 1/12 hp or greater and less than 1 hp are not covered under NEMA design standards must have a minimum motor efficiency of 70 percent when rated in accordance with DOE 10 CFR 431.

[1184] All Residential sized Federal Standards are from DOE Standard 10 CFR 430, Residential-Duty and Commercial Federal Standard are from DOE Standard 10 CFR 431.

Equipment Type	Sub Category	Draw Pattern	Federal Standard – Uniform Energy Factor[1184]
Btu/h		High	UEF = 0.6597 – (0.0009 * Rated Storage Volume in Gallons)
Commercial Gas Storage Water Heaters >75,000 Btu/h and ≤155,000 Btu/h	>120 gallon tanks	All	80% $E_{thermal}$, Standby Losses = (Q /800 + 110√Rated Storage Volume in Gallons)
Commercial Gas Storage Water Heaters >155,000 Btu/h			
Residential Gas Instantaneous Water Heaters ≤ 200,000 Btu/h	≤2 gal	Very low	UEF = 0.80
		All other	UEF = 0.81
Commercial Gas Instantaneous Water Heaters > 200,000 Btu/h	<10 gal	All	80% $E_{thermal}$
	≥10 gal	All	78% $E_{thermal}$

Draw patterns are based on first hour rating (gallons) for storage tanks and maximum flow (GPM) for instantaneous as shown below:[1185]

Storage Water Heater Draw Pattern	
Draw Pattern	**First Hour Rating (gallons)**
Very Small	≥ 0 and < 18
Low	≥ 18 and < 51
Medium	≥ 51 and < 75
High	≥ 75

Instantaneous Water Heater Draw Pattern	
Draw Pattern	**Max GPM**
Very Small	≥ 0 and < 1.7
Low	≥ 1.7 and < 2.8
Medium	≥ 2.8 and < 4

SF = Savings factor based on Building type

Building Type	Savings Factor[1186]
Single-Family - Deemed	9%
Multifamily - Deemed	9%

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

[1185] Definitions provided in 10 CFR 430, Subpart B, Appendix E, Section 5.4.1.

[1186] The savings factor from ACEEE Hot Water Forum. Control Methods, Code Requirements and Energy Savings. 9% is assumed to be the savings factor for multifamily and Single-Family buildings.

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HWE-CDHW-V03-260101

REVIEW DEADLINE: 1/1/2028

5.4.13 Auto-Diverting Tub Spout System

DESCRIPTION

This measure consists of replacing existing tub spouts and showerheads with an automatically diverting tub spout and showerhead system with a normally closed valve between the existing shower arm and showerhead. When the water temperature reaches a set point (generally 95°F), the thermostatic actuator will engage the anti-leak diverter in the tub spout. The water will divert to a showerhead with a normally closed valve that will prevent the hot water from going down the drain prior to the user entering the shower, thereby eliminating behavioral waste and tub spout leakage waste.

This measure was developed to be applicable to the following program types: RF, NC, DI, KITS. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

There are two options under this measure: installing the full system and only installing the no-leak tub spout.

To qualify for the full system measure, the installed equipment must be an anti-leak, automatically diverting tub spout system with thermostatic actuator technology installed with an efficient showerhead equipped with a normally closed valve.

To qualify for the tub spout only measure, the installed equipment must be an anti-leak

DEFINITION OF BASELINE EQUIPMENT

The baseline condition for the full system is a residential tub spout with standard diverter, no thermostatic restrictor valve, and a standard showerhead rated at 2.0 GPM or greater.

The baseline condition for the tub spout only measure is a residential tub spout with a standard diverter.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 10 years.[1187]

DEEMED MEASURE COST

For the full tub spout with TSV and showerhead, the incremental cost of the measure should be the actual program cost (including labor if applicable), or $117.66[1188] plus $40[1189] labor if applicable.

If just the tub spout is installed (i.e., reuse existing showerhead), the incremental cost of the measure is $66.90 plus $20[1190] labor.

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 1.69%[1191]

[1187] Measure life is assumed to be consistent with 5.4.5 Low Flow Showerheads.

[1188] Average cost from online research at Lowes.com, HomeDepot.com, and Menards.com on 5/2/2024.

[1189] Estimate for contractor installation time. Based on 2X cost for thermostatic restrictor shower valve installation in TRM 5.4.8 (1X for showerhead / TSV install, 1X for tub spout).

[1190] Estimate for contractor installation time. Based on cost for thermostatic restrictor shower valve installation in TRM 5.4.8.

[1191] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, “The end uses of hot water in single family homes from flow trace analysis”, 2001.). There are 65 days in the summer peak period, so the percentage of total annual use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 223.7 = 4.38 hours of recovery during peak period, where 223.7 equals the average annual electric DHW recovery

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

For the full system:

ΔWater (gallons) = Showerhead Behavioral Waste + Tub Spout Behavioral Waste + Diverter Waste + Low Flow Showerhead Savings

For the no-leak tub spout:

ΔWater (gallons) = Tub Spout Behavioral Waste + Diverter Waste

Showerhead Behavioral Waste = $\%WUE_{SH}$ * GPM_base * L_showerdevice * SPCD * 365.25 * Household / SPH

Tub Spout Behavioral Waste = $\%WUE_{TS}$ * GPM_spout * L_showerdevice * SPCD * 365.25 * Household / SPH

Diverter Waste = DLR * L_base * SPCD * 365.25 * Household / SPH

Low Flow Showerhead Savings = (GPM_base * L_base - GPM_low * L_low) * SPCD * 365.25 * Household / SPH

ΔkWh = %ElectricDHW * ΔWater (gallons) * EPG_electric * ISR

Where:

$\%WUE_{SH}$ = % of warm up events for showerhead

= 60%[1192]

$\%WUE_{TS}$ = % of warm up events for tub spout

= 40%[1193]

GPM_spout = Flow rate of the tub spout

= 5.0 GPM[1194]

GPM_base = Flow rate of the basecase showerhead, or actual if available

Program	GPM
Direct-install, device only	2.24[1195]
New Construction or direct install of device and low flow showerhead	Rated or actual flow of program-installed showerhead
Retrofit or TOS	2.35[1196]

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hours for showerhead use. There are 260 hours in the peak period so the probability you will see savings during the peak period is 4.38/260 = 0.0169

[1192] Arkansas Technical Reference Manual, Version 9.1, pg. 162. https://apsc.arkansas.gov/programs-initiatives-activities/energy-efficiency/

[1193] Ibid.

[1194] Ibid.

[1195] Based on measurements conducted from June 2013 to January 2014 by Franklin Energy. Over 300 residential sites in the Chicago area were tested.

[1196] Representative value from sources 1, 2, 4, 5, 6 and 7 (See Source Table at end of measure section) adjusted slightly upward to account for program participation which is expected to target customers with existing higher flow devices rather than those with existing low flow devices.

GPM_low = As-used flow rate of the low-flow showerhead, which may, as a result of measurements of program evaulations deviate from rated flows, see table below[1197]:

L_showerdevice = Hot water waste time avoided due to thermostatic restrictor valve

= 0.89 minutes[1198]

SPCD = Showers Per Capita Per Day

= 0.6[1199]

365.25 = Days per year, on average

Household = Average number of people per household

Household Unit Type	Household[1200]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1201]
Custom	Actual Occupancy or Number of Bedrooms[1202]		

Use Multifamily if: Building meets utility's definition for multifamily

SPH = Showerheads Per Household so that per-showerhead savings fractions can be Determined

Household Type	SPH
Single-Family	1.79[1203]
Multifamily	1.3[1204]
Household type unknown	1.64[1205]
Custom	Actual

Use Multifamily if: Building meets utility's definition for multifamily

DLR = Diverter leakage rate, gallons per minute

[1197] Note that actual values may be either a) program-specific minimum flow rate, or b) program-specific evaluation-based value of actual effective flow-rate due to increased duration or temperatures. The latter increases in likelihood as the rated flow drops and may become significant at or below rated flows of 1.5 GPM. The impact can be viewed as the inverse of the throttling described in the footnote for baseline flowrate.

[1198] Average of the following sources: ShowerStart LLC survey; "Identifying, Quantifying and Reducing Behavioral Waste in the Shower: Exploring the Savings Potential of ShowerStart", City of San Diego Water Department survey; "Water Conservation Program: ShowerStart Pilot Project White Paper", and PG&E Work Paper PGECODHW113.

[1199] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1200] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1201] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1202] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1203] Based on findings from a 2009 ComEd residential survey of 140 sites, provided by Cadmus.

[1204] Ibid.

[1205] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

= 0.8 GPM[1206]

L_base = Shower length in minutes with baseline showerhead

= 7.8 minutes[1207]

L_low = Shower length in minutes with low-flow showerhead

= 7.8 minutes[1208]

%ElectricDHW = Percentage of DHW savings assumed to be electric

= 100% for Electric

= 0% for Fossil Fuel

= If unknown[1209], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	19.7%	30.6%	63.3%	67.3%	31.4%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
People's Gas	2.1%	2.0%	1.7%	2.4%	2.2%
Northshore Gas	1.5%	1.8%	10.0%	2.4%	2.4%
Nicor Gas	7.6%	9.9%	14.4%	22.6%	10.0%
All DUs[1210]					**29%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

EPG_electric = Energy per gallon of hot water supplied by electric

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_electric * 3,412)

= (8.33 * 1.0 * (101 – 50.7)) / (0.98 * 3,412)

= 0.125 kWh/gal

8.33 = Specific weight of water (lbs/gallon)

1.0 = Heat Capacity of water (btu/lb-°)

ShowerTemp = Assumed temperature of water

[1206] Arkansas Technical Reference Manual, Version 9.1, pg. 162. https://apsc.arkansas.gov/programs-initiatives-activities/energy-efficiency/

[1207] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group. This study of 135 single and Multifamily homes in Michigan metered energy parameters for efficient showerhead and faucet aerators.

[1208] Ibid.

[1209] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1210] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

= 101°F [1211]

SupplyTemp = Assumed temperature of water entering house

= 50.7°F [1212]

RE_electric = Recovery efficiency of electric water heater

= 98% [1213]

3412 = Converts Btu to kWh (btu/kWh)

ISR = In service rate

Selection	ISR
Direct Install - Single Family	0.98[1214]
Direct Install – Multi Family	0.95[1215]
Efficiency Kits	To be determined through evaluation

Use Multifamily if: Building meets utility's definition for multifamily

Secondary kWh Savings for Water Supply and Wastewater Treatment

The following savings should be included in the total savings for this measure, but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWh_{water} = \Delta Water\ (gallons) / 1{,}000{,}000 * E_{water\ total}$$

Where

$E_{water\ total}$ = IL Total Water Energy Factor (kWh/Million Gallons)

= 5,010[1216]

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \Delta kWh/Hours * CF$$

Where:

ΔkWh = calculated value above. Note do not include the secondary savings in this calculation.

Hours = Annual electric DHW recovery hours for showerhead use

= ((GPM_base * L_base) * Household * SPCD * 365.25) * 0.726[1217] / GPH

GPH = Gallons per hour recovery of electric water heater calculated for 69.3°F temp rise (120-50.7),

---

[1211] Cadmus and Opinion Dynamics Showerhead and Faucet Aerator Meter Study Memorandum dated June 2013, directed to Michigan Evaluation Working Group.

[1212] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

[1213] Electric water heaters have recovery efficiency of 98%.

[1214] Deemed values are from ComEd Energy Efficiency/ Demand Response Plan: Plan Year 2 (6/1/2009-5/31/2010) Evaluation Report: All Electric Single Family Home Energy Performance Tune-Up Program Table 3-8. Alternative ISRs may be developed for program delivery methods based on evaluation results.

[1215] Navigant, ComEd-Nicor Gas EPY4/GPY1 Multifamily Home Energy Savings Program Evaluation Report FINAL 2013-06-05

[1216] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

[1217] 72.6% is the proportion of hot 120F water mixed with 50.7F supply water to give 101F shower water.

98% recovery efficiency, and typical 4.5kW electric resistance storage tank.

= 26.1

CF = Coincidence Factor for electric load reduction

= 1.69%[1218]

FOSSIL FUEL SAVINGS

ΔTherms = %FossilDHW * Gallons Saved * EPG_gas * ISR

Where:

%FossilDHW = Percentage of DHW savings assumed to be fossil fuel

= 100% for Fossil Fuel

= 0% for Electric

= If unknown[1219], use the following table:

	Location				
Utility	**Single Family**	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	80.3%	69.4%	36.7%	32.7%	68.6%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
People's Gas	97.9%	98.0%	98.3%	97.6%	97.8%
Northshore Gas	98.5%	98.2%	90.0%	97.6%	97.6%
Nicor Gas	92.4%	90.1%	85.6%	77.4%	90.0%
All DUs[1220]					**71%**

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

EPG_gas = Energy per gallon of Hot water supplied by gas

= (8.33 * 1.0 * (ShowerTemp - SupplyTemp)) / (RE_gas * 100,000)

= 0.0054 Therm/gal for SF homes

= 0.0063 Therm/gal for MF homes

RE_gas = Recovery efficiency of gas water heater

[1218] Calculated as follows: Assume 11% showers take place during peak hours (based on: Oreo et al, "The end uses of hot water in single family homes from flow trace analysis", 2001.). There are 65 days in the summer peak period, so the percentage of total annual use in peak period is 0.11*65/365 = 1.96%. The number of hours of recovery during peak periods is therefore assumed to be 1.96% * 223.7 = 4.38 hours of recovery during peak period, where 223.7 equals the average annual electric DHW recovery hours for showerhead use. There are 260 hours in the peak period so the probability you will see savings during the peak period is 4.38/260 = 0.0169

[1219] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1220] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

= 78% For individual water heater[1221]

= 67% For shared water heater[1222]

If unknown, use individual water heater value for single family, use shared water heater value for multifamily. Use multifamily if building meets utility’s definition for multifamily.

100,000 = Converts Btus to Therms (btu/Therm)

Other variables as defined above.

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

Calculation provided together with Electric Energy Savings above.

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

Sources

Source ID	Reference
1	2011, DeOreo, William. California Single Family Water Use Efficiency Study. April 20, 2011.
2	2000, Mayer, Peter, William DeOreo, and David Lewis. Seattle Home Water Conservation Study. December 2000.
3	1999, Mayer, Peter, William DeOreo. Residential End Uses of Water. Published by AWWA Research Foundation and American Water Works Association. 1999.
4	2003, Mayer, Peter, William DeOreo. Residential Indoor Water Conservation Study. Aquacraft, Inc. Water Engineering and Management. Prepared for East Bay Municipal Utility District and the US EPA. July 2003.
5	2011, DeOreo, William. Analysis of Water Use in New Single Family Homes. By Aquacraft. For Salt Lake City Corporation and US EPA. July 20, 2011.
6	2011, Aquacraft. Albuquerque Single Family Water Use Efficiency and Retrofit Study. For Albuquerque Bernalillo County Water Utility Authority. December 1, 2011.
7	2008, Schultdt, Marc, and Debra Tachibana. Energy related Water Fixture Measurements: Securing the Baseline for Northwest Single Family Homes. 2008 ACEEE Summer Study on Energy Efficiency in Buildings.

MEASURE CODE: **RS-HWE-ADTS-V02-260101**

REVIEW DEADLINE: **1/1/2029**

[1221] DOE Final Rule discusses Recovery Efficiency with an average around 0.76 for Gas Fired Storage Water heaters and 0.78 for standard efficiency gas fired tankless water heaters up to 0.95 for the highest efficiency gas fired condensing tankless water heaters. These numbers represent the range of new units however, not the range of existing units in stock. Review of AHRI Directory suggests range of recovery efficiency ratings for new Gas DHW units of 70-87%. Average of existing units is estimated at 78%.

[1222] Water heating in Multifamily buildings is often provided by a larger central boiler. This suggests that the average recovery efficiency is somewhere between a typical central boiler efficiency of 0.59 and the 0.75 for single family homes. An average efficiency of 0.67 is used for this analysis as a default for Multifamily buildings.

5.4.14 Residential Solar Water Heater

DESCRIPTION

A solar water heater provides water heating by collecting solar thermal energy and transferring it to the domestic water heating system to offset energy needed from electricity or fossil fuels. The solar water heater consists of a solar thermal collection panel which heats a heat transfer fluid, a heat exchanger tank inside the home where the heat is transferred from the heat transfer fluid to the domestic hot water supply, a pump to move the heat transfer fluid, and a controller which operates the system. In Illinois, solar water heating systems typically require a backup water heater to provide a portion of the water heating load.

This measure characterizes the installation of a solar water heating system with a new or existing backup water heater in a home. The backup water heater may be an existing electric resistance or natural gas water heater, a new electric resistance or natural gas water heater, or an integrated electric resistance backup heater in the solar water heating system.

This measure was developed to be applicable to the following program types: TOS, NC, ER.
If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be an ENERGY STAR[1223] certified solar water heating system with a Solar Uniform Energy Factor (SUEF) of 3.00 or greater for systems with electric backup or a SUEF of 1.8 or greater for systems with gas backup. The solar water heating systems must meet the Solar Rating and Certification Corporation (SRCC™) OG-300 standard and be designed for a minimum 50% Solar Fraction (SF). Solar water heating systems in Illinois must have a backup water heater to meet year-round water heating needs. Backup water heaters installed with solar systems are assumed to be electric or natural gas instantaneous (tankless) water heaters, at high draw, with minimum efficiencies of 0.92 UEF or 0.81 UEF, respectively.

DEFINITION OF BASELINE EQUIPMENT

For Time of Sale (TOS) and New Construction (NC), the baseline condition is a new electric or natural gas water heater meeting federal minimum efficiency standards. For all electric solar water heating systems, assume a 50-gallon electric resistance storage water heater baseline, at medium draw, with 0.9207 UEF. For solar water heating systems with a natural gas water heater backup, assume a 50-gallon natural gas storage water heater, at medium draw, with 0.5633 UEF.

For Early Replacement (ER), the baseline condition is the existing electric or natural gas water heater.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 25 years[1224].

DEEMED MEASURE COST

For Time of Sale or New Construction the incremental installation cost (including labor) should be used. Defaults are provided below. Actual efficient costs can also be used although care should be taken as installation costs can vary significantly due to complexities of a particular site.

For retrofit costs, the actual full installation cost should be used (default provided below if unknown).

Baseline Installed Cost:

[1223] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification and corresponding Qualified Products List should continue to be used through the effective period of this TRM.

[1224] GSA Honeycomb Solar Thermal Collector, GPG-027, August 2016

Item	Default Cost
Baseline Installed Cost	\$882[1225]
New Solar Water Heater System	\$6,757[1226]
Incremental Cost	\$5,875

LOADSHAPE

Loadshape R18 - Residential Heat Pump Water Heater

COINCIDENCE FACTOR

The summer Peak Coincidence Factor is assumed to be 12%.[1227]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY AND FOSSIL FUEL SAVINGS

Solar water heating systems with electric backup:

TOS & NC:

$$\Delta\text{kWh} \quad = \frac{\left(\left(\frac{1}{UEF_{Base}} - \frac{1}{UEF_{Solar}}\right) * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0\right)}{3412}$$

ER:

$$\Delta\text{kWh} \quad = \frac{\left(\frac{1}{UEF_{Exist}} * SF * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0\right)}{3412}$$

Solar water heating systems with natural gas backup:

TOS & NC:

$$\Delta\text{kWh} \quad = Electric\ penalty\ for\ solar\ circulating\ pump = \frac{-P\_pump * Hours\_pump * SF}{1000}$$

$$\Delta\text{therms} = \frac{\left(\left(\frac{1}{UEF_{BaseFF}} - \frac{1}{UEF_{SolarFF}}\right) * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0\right)}{100{,}000}$$

ER:

$$\Delta\text{kWh} \quad = Electric\ penalty\ for\ solar\ circulating\ pump = \frac{-P\_pump * Hours\_pump * SF}{1000}$$

[1225] Baseline ERWH equipment costs: Energy Solutions (2024). Heat Pump Water Heaters in the Northeast and Mid-Atlantic: Costs and Market Trends. Prepared for: Northeast States for Coordinated Air Use Management (NESCAUM) and The Ozone Transport Commission (OTC).). Installation labor cost from same study suggests \$308, for a total of \$882. Additionally, a review of 18 baseline ERWH models (5 different manufacturers; sizes ranging from 30-50 gallons) listed with online retailers (Home Depot, Lowes, Menards, and Ferguson Supply) available in IL established an average equipment cost of \$575.

[1226] California eTRM, Measure ID SWWH032, in effect 1/1/2026.

[1227] Calculated from Figure 8 "Combined six-unit summer weekday average electrical demand" in FEMP study; 'Field Testing of Pre-Production Prototype Residential Heat Pump Water Heaters' as (average kW usage during peak period * hours in peak period) / [(annual kWh savings / FLH) * hours in peak period] = (0.1 kW * 5 hours) / [(2100 kWh (default assumptions) / 2533 hours) * 5 hours] = 0.12

$$\Delta\text{therms} = \frac{\left(\frac{1}{UEF_{ExistFF}} * SF * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0\right)}{100{,}000}$$

Where:

UEF_{BASE} = Uniform Energy Factor (efficiency) of standard electric water heater according to federal standards. Assume electric storage water heater:

= 0.9207 [1228]

UEF_{SOLAR} = Uniform Energy Factor (efficiency) equivalent of all electric solar water heating system.

Note: Do not use the Solar Uniform Energy Factor.

$= \frac{UEF_{Backup}}{(1 - SF)}$

SF = Solar Fraction of installed solar water heater

= Actual, per design or provided on SRCC certification.

If SRCC certification, use WI – Milwaukee value for Climate Zones 1 and 2, MO – St Louis for Climate Zones 4 and 5 and an average of the two for Climate Zone 3 or if location is unknown.

UEF_{Backup} = Uniform Energy Factor of backup water heater.

= Actual. If unknown assume 0.92 [1229]

UEF_{Exist} = Uniform Energy Factor of existing electric water heater.

= Use actual UEF rating where it is possible to measure or reasonably estimate.

= If unknown assume 0.9207 [1230]

UEF_{BaseFF} = Uniform Energy Factor (efficiency) of standard gas water heater according to federal standards. Assume gas storage water heater:

= 0.5633 [1231]

$UEF_{SolarFF}$ = Uniform Energy Factor equivalent of solar water heating system with a gas backup.

Note: Do not use the Solar Uniform Energy Factor.

$= \frac{UEF_{BackupFF}}{(1 - SF)}$

SF = Solar Fraction of installed solar water heater

= Actual, per design or provided on SRCC certification.

If SRCC certification, use WI – Milwaukee value for Climate Zones 1 and 2, MO – St Louis for Climate Zones 4 and 5 and an average of the two for Climate Zone 3 or if location is unknown.

$UEF_{BackupFF}$ = Uniform Energy Factor of backup water heater.

= Use actual UEF rating where it is possible to measure or reasonably estimate.

[1228] Assuming a 50 gallon tank baseline at Medium Draw.

[1229] Assuming a 50 gallon tank baseline at Medium Draw.

[1230] Assuming an existing 50 gallon electric storage water heater at Medium Draw installed after 2015.

[1231] Assuming a new 50 gallon gas storage baseline at Medium Draw.

= If unknown assume 0.81[1232]

$UEF_{ExistFF}$ = Uniform Energy Factor of existing water heater.

= Use actual UEF rating where it is possible to measure or reasonably estimate.

= If unknown assume 0.5633[1233]

GPD = Gallons Per Day of hot water use per person

= 45.5 gallons hot water per day per household/2.59 people per household [1234]

= 17.6

Household = Actual number of people in household. If unknown, use the values in the following table:

Household Unit Type	Household[1235]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[1236]
Custom	Actual Occupancy or Number of Bedrooms[1237]		

365.25 = Days per year

γWater = Specific weight of water

= 8.33 pounds per gallon

T_{OUT} = Tank temperature

= 125°F

T_{IN} = Incoming water temperature from well or municiple system

= 50.7°F [1238]

1.0 = Heat Capacity of water (1 Btu/lb*°F)

3412 = Conversion from Btu to kWh

100,000 = Conversion from Btu to therms

P_pump = Rated power of circulation pump in watts

= Actual. If unknown, use 60W.

Hours_pump = Annual pump operating hours

[1232] Assuming a new instantaneous gas backup at High Draw.

[1233] Assuming an existing 50 gallon electric storage water heater at Medium Draw installed after 2015.

[1234] Deoreo, B., and P. Mayer. Residential End Uses of Water Study Update. Forthcoming. ©2015 Water Research Foundation. Reprinted With Permission.

[1235] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[1236] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[1237] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

[1238] Table 4 in Chen, et. al., "Calculating Average Hot Water Mixes of Residential Plumbing Fixtures", June 2020, reports a value of 50.7°F for inlet water temperature for U.S. Census Division 3.

= Full load hours * SF

For example, solar water heater with Solar Fraction of 0.56 with electric backup with UEF of 0.92 is installed in a single-family IQ home.

UEFsolar = 1/((1-0.56)/0.92)

= 2.1

ΔkWh $= ((1/UEF_{Base} - 1/UEF_{Solar}) * GPD * Household * 365.25 * \gamma Water * (T_{OUT} - T_{IN}) * 1.0)$ / 3412

ΔkWh = ((1/0.9207 – 1/2.1) * 17.6 * 2.76 * 365.25 * 8.33 * (125-50.7) * 1)/3,412

= 1,963 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \frac{\Delta kWh}{Hours} * CF$$

Where:

ΔkWh = Electric savings (or increase) of measure

Hours = Full load hours of water heater

= 2,533 [1239]

CF = Summer Peak Coincidence Factor for measure

= 0.12 [1240]

For example, solar water heater with Solar Fraction of 0.56 with electric backup with UEF of 0.92 is installed in a single-family IQ home.

ΔkW = 1,963/2533 * 0.12

= 0.0930 kW

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-HWE-RSWH-V02-270101

REVIEW DEADLINE: 1/1/2030

[1239] Full load hours assumption based on Efficiency Vermont analysis of Itron eShapes.

[1240] Calculated from Figure 8 "Combined six-unit summer weekday average electrical demand" in FEMP study; 'Field Testing of Pre-Production Prototype Residential Heat Pump Water Heaters' as (average kW usage during peak period * hours in peak period) / [(annual kWh savings / FLH) * hours in peak period] = (0.1 kW * 5 hours) / [(2100 kWh (default assumptions) / 2533 hours) * 5 hours] = 0.12

5.5 Lighting End Use

5.5.1 Compact Fluorescent Lamp (CFL)—Retired 12/31/2018, Removed in v8

5.5.2 ENERGY STAR Specialty Compact Fluorescent Lamp (CFL)—Retired 12/31/2018, Removed in v8

5.5.3 ENERGY STAR Torchiere—Retired 12/31/2018, Removed in v8

5.5.4 Exterior Hardwired Compact Fluorescent Lamp (CFL) Fixture—Retired 12/31/2018, Removed in v8

5.5.5 Interior Hardwired Compact Fluorescent Lamp (CFL) Fixture—Retired 12/31/2018, Removed in v8

5.5.6 LED Specialty Lamps

DESCRIPTION

This measure describes savings from a variety of specialty LED lamp types (including globe, decorative and downlights). This characterization assumes that the LED lamp is installed in a residential location. Only Direct Install programs can continue to utilize this measure.

This measure was developed to be applicable to the following program types: DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure the installed equipment must be an ENERGY STAR[1241] LED lamp or fixture or equivalent to the most recent version of ENERGY STAR specifications. Note a new ENERGY STAR specification v2.1 becomes effective on 1/2/2017.

DEFINITION OF BASELINE EQUIPMENT

Specialty and Directional lamps were not included in the original definition of General Service Lamps in the Energy Independence and Security Act of 2007 (EISA). Therefore, the initial baseline is an incandescent / halogen lamp described in the table below.

A DOE Final Rule released on 1/19/2017 updated the EISA regulations to remove the exemption for these lamp types such that they become subject to the backstop provision defined within the original legislation. In September 2019 this decision was revoked in a new DOE Final Rule. However, in May 2022 DOE reversed this decision by issuing a Final rule for both the broadened General Service Lamp definition as well as the implementation of the 45 lumen per watt backstop. DOE stated that it will use its enforcement discretion to minimize impacts on the supply chain and effectively allow companies to continue the manufacture and import of noncompliant bulbs through the remainder of 2022, and allow retailers to continue selling them with limited enforcement until July 2023.

As of 1/1/2026, no savings are claimed for programs unless via direct install programs. Direct Install programs where it can be shown that the LED is replacing working inefficient lighting should continue to use the existing inefficient lighting as baseline and assume a measure life of 2 years.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The average rated life for Decorative lamps on the ENERGY STAR Qualified Products list (accessed 6/16/2020) is approximately 17,000 hours, and for Directional Lamps is approximately 25,000 hours.

However, the measure life is assumed to be two years for Direct Install, reflecting the expected remaining life of the baseline halogen/incandescent lamp.

DEEMED MEASURE COST

The actual cost of the bulb installed through Direct Install should be used. If the cost is unknown, assume the following:[1242]

Bulb Type	LED
Directional	$5.18
Decorative and Globe	$3.40

[1241] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[1242] Baseline and LED lamp costs for both directional and decorative and globe are based on field data collected by CLEAResult and provided by ComEd. See ComEd Pricing Projections 06302016.xlsx for analysis.

LOADSHAPE

Loadshape R06 - Residential Indoor Lighting

Loadshape R07 - Residential Outdoor Lighting

COINCIDENCE FACTOR

The summer peak coincidence factor is assumed to be 0.109 for residential and in-unit multifamily bulbs,[1243], 0.273 for exterior bulbs[1244] and 0.117 for unknown[1245]. Use Multifamily if the building meets the utility's definition for multifamily.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh = ((WattsBase - WattsEE) / 1000) * ISR * Hours * WHFe

Where:

$Watts_{base}$ = Input wattage of the existing lamp. Reference the table below for default values.[1246]

$Watts_{EE}$ = Actual wattage of LED installed. If unknown, use default provided below.

[1243] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1244] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for specialty LEDs in exterior applications.

[1245] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1246] See file "LED Lamp Updates 2021-06-09" for details on Guidehouse lamp wattage calculations based on equivalent baseline wattage and LED wattage of available ENERGY STAR product.

Decorative Lamps – ENERGY STAR Minimum Luminous Efficacy = 65Lm/W for all lamps

Bulb Type	Minimum Lumens	Maximum Lumens	LED Wattage (Watts$_{EE}$)	Baseline (Watts$_{Base}$)	Delta Watts (WattsEE)
Omni-Directional 3-Way	1,100	1,999	14.7	100	85.3
	2,000	2,700	22.6	150	127.4
Globe (medium and intermediate bases less than 750 lumens)	310	349	3.0	25	22
	350	499	4.7	40	35.3
	500	574	5.7	60	54.3
	575	649	6.5	75	68.5
	650	1,000	8.2	100	91.8
Globe (candelabra bases less than 1050 lumens)	310	349	3.5	25	21.5
	350	499	4.4	40	35.6
	500	574	5.5	60	54.5
Decorative (Shapes B, BA, C, CA, DC, F, G, medium and intermediate bases less than 750 lumens)	310	499	4.3	40	35.7
	500	800	5.8	60	54.2
Decorative (Shapes B, BA, C, CA, DC, F, G, candelabra bases less than 1050 lumens)	310	499	4.2	40	35.8
	500	650	5.5	60	54.5
Decorative (Shape ST)	310	499	6.5	40	33.5
	500	999	8.8	60	51.2
	1000	1500	10.0	100	90.0
Decorative (Shape S)	310	340	2.25	25	22.8

Directional Lamps - ENERGY STAR Minimum Luminous Efficacy = 70Lm/W for <90 CRI lamps and 61 Lm/W for >=90CRI lamps.

For Directional R, BR, and ER lamp types:[1247]

Bulb Type	Minimum Lumens	Maximum Lumens	LED Wattage (Watts$_{EE}$)	Baseline (Watts$_{Base}$)	Delta Watts (WattsEE)
Reflector lamp types with medium screw bases (PAR20, PAR30(S,L), PAR38,	400	649	7.0	50	43
	650	899	10.7	75	64.3
	900	1,049	13.9	90	76.1
	1,050	1,199	13.8	100	86.2

[1247] From pg. 13 of the ENERGY STAR Specification for lamps v2.1

Bulb Type	Minimum Lumens	Maximum Lumens	LED Wattage (Watts$_{EE}$)	Baseline (Watts$_{Base}$)	Delta Watts (WattsEE)
R40, etc.) w/ diameter >2.25" (*see exceptions below)	1,200	1,499	15.9	120	104.1
	1,500	1,999	18.9	150	131.1
	2,000	3,299	27.3	250	222.7
Reflector lamp types with medium screw bases (PAR16, R14, R16, etc.) w/ diameter <2.25" (*see exceptions below)	310	374	4.6	35	30.4
	375	600	6.4	50	43.6
*BR30, BR40, or ER40	650	949	9.3	65	55.7
	950	1,099	12.7	75	62.3
	1,100	1,399	14.4	85	70.6
	1,400	1,600	16.6	100	83.4
	1,601	1,800	22.2	120	97.8
*R20	450	524	6.0	40	34.0
	525	750	7.1	45	37.9
*MR16	310	324	3.8	20.0	16.2
	325	369	4.8	25.0	20.2
	370	400	4.9	25.0	20.1

For PAR, MR, and MRX Lamps Types:

For these highly focused directional lamp types, it is necessary to have Center Beam Candle Power (CBCP) and beam angle measurements to accurately estimate the equivalent baseline wattage. The formula below is based on the ENERGY STAR Center Beam Candle Power tool.[1248] If CBCP and beam angle information are not available or if the equation below returns a negative value (or undefined), use the manufacturer's recommended baseline wattage equivalent.[1249]

$$\mathrm{Wattsbase} =$$

$$375.1 - 4.355(D) - \sqrt{227{,}800 - 937.9(D) - 0.9903(D^2) - 1479(BA) - 12.02(D * BA) + 14.69(BA^2) - 16{,}720 * \ln(CBCP)}$$

Where:

D = Bulb diameter (e.g. for PAR20 D = 20)

BA = Beam angle

CBCP = Center beam candle power

The result of the equation above should be rounded DOWN to the nearest wattage established by ENERGY STAR:

Diameter	Permitted Wattages
16	20, 35, 40, 45, 50, 60, 75
20	50
30S	40, 45, 50, 60, 75

[1248] See 'ESLampCenterBeamTool.xls'.

[1249] The ENERGY STAR Center Beam Candle Power tool does not accurately model baseline wattages for lamps with certain bulb characteristic combinations – specifically for lamps with very high CBCP.

Diameter	Permitted Wattages
30L	50, 75
38	40, 45, 50, 55, 60, 65, 75, 85, 90, 100, 120, 150, 250

Additional EISA non-exempt bulb types:

Bulb Type	Minimum Lumens	Maximum Lumens	LED Wattage ($Watts_{EE}$)	Baseline ($Watts_{Base}$)	Delta Watts (WattsEE)
Dimmable Twist, Globe (less than 5" in diameter and > 749 lumens), candle (shapes B, BA, CA > 749 lumens), Candelabra Base Lamps (>1049 lumens), Intermediate Base Lamps (>749 lumens)	310	399	4.0	25	21.0
	400	749	6.6	29	22.4
	750	899	9.6	43	33.4
	900	1,399	13.1	53	39.9
	1,400	1,999	16.0	72	56.0

ISR = In Service Rate or the percentage of lamps rebated that get installed

Program	In Service Rate (ISR)
Direct Install	94.5%[1250]

Hours = Average hours of use per year

Installation Location	Annual hours of use (HOU)
Residential and In-Unit Multi Family	763[1251]
Exterior	2,475[1252]
Unknown	1,020[1253]

WHFe = Waste heat factor for energy to account for cooling savings from efficient lighting

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[1250] Consistent with assumption for standard LEDs (in the absence of evidence that it should be different for this bulb type). Based upon average of Navigant low income single family direct install field work LED ISR and review of the PY2 and PY3 ComEd Direct Install program surveys. This value includes bulb failures in the 1st year to be consistent with the Commission approval of annualization of savings for first year savings claims. ComEd PY2 All Electric Single Family Home Energy Performance Tune-Up Program Evaluation, Navigant Consulting, December 21, 2010.

[1251] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1252] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for specialty LEDs in exterior applications.

[1253] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

Bulb Location	WHFe
Interior single family	1.06 [1254]
Multifamily in unit	1.04 [1255]
Exterior or uncooled location	1.0
Unknown location	1.046[1256]

Use Multifamily if: Building meets utility's definition for multifamily

For example, a 13W PAR20 LED is installed through a direct install program and installed in place of a 750 lumen PAR20 incandescent screw-in lamp with medium screw base, diameter >2.5" in a single family interior location:

$$\Delta kWh = (((75 - 13) / 1,000) * 0.945 * 763 * 1.06$$

$$= 47.4 \text{ kWh}$$

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

$$\Delta kWh^{1257} = - (((WattsBase - WattsEE) / 1,000) * ISR * Hours * HF) / \eta Heat$$

Where:

HF = Heating Factor or percentage of light savings that must be heated

= 49% for interior location [1258]

= 0% for exterior location

= 42% for unknown location [1259]

ηHeat = Efficiency in COP of Heating equipment

= Actual. If not available use: [1260]

[1254] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * SEER^2) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

[1255] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1256] Unknown is weighted average of interior v exterior (assuming 15% exterior specialty lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1257] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1258] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1259] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1260] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown[1261]	N/A	N/A	1.28

For example, a 13W PAR20 LED is purchased through a ComEd upstream program and installed in place of a 750 lumen PAR20 incandescent screw-in lamp with medium screw base, diameter >2.5" in a single family interior location with a 2016 heat pump:

ΔkWh = - (((75 - 13) / 1,000) * 0.945 * 763 * 0.49) / 2.04

= - 10.7 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ((WattsBase - WattsEE) / 1,000) * ISR * WHFd * CF

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family	1.11[1262]
Multifamily in unit	1.07[1263]
Exterior or uncooled location	1.0
Unknown location	1.083[1264]

Use Multifamily if: Building meets utility’s definition for multifamily

CF = Summer Peak Coincidence Factor for measure

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degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

[1261] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1262] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

[1263] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from “Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009” which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1264] Unknown is weighted average of interior v exterior (assuming 15% exterior specialty lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

= 0.109 for residential and in-unit multifamily bulbs[1265], 0.273 for exterior bulbs,[1266] and 0.117 for unknown.[1267]

Use Multifamily if: Building meets utility's definition for multifamily

Other factors as defined above

For example, a 13W PAR20 LED is installed through a direct install program and installed in place of a 750 lumen PAR20 incandescent screw-in lamp with medium screw base, diameter >2.5" in a single family interior location:

ΔkW = (((75 - 13) / 1,000) * 0.945 * 1.11* 0.109

= 0.0071 kW

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

Δtherms = - (((WattsBase - WattsEE) / 1,000) * ISR * (1-Leakage) * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior[1268]

= 0% for exterior location

= 42% for unknown location[1269]

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency.

= 0.70 [1270]

Other factors as defined above

[1265] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1266] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for specialty LEDs in exterior applications.

[1267] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1268] Average result from REMRate modeling of several different configurations and IL locations of homes

[1269] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1270] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

For example, a 13W PAR20 LED is purchased through a ComEd upstream program and installed in place of a 750 lumen PAR20 incandescent screw-in lamp with medium screw base, diameter >2.5" in single family interior location with gas heating at 70% total efficiency:

Δtherms = - (((75 - 13) / 1,000) * 0.945 * 763 * 0.49* 0.03412) / 0.70

= - 1.07 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-LTG-LEDD-V18-260101

REVIEW DEADLINE: 1/1/2028

5.5.7 LED Exit Signs

DESCRIPTION

This measure characterizes the savings associated with installing a Light Emitting Diode (LED) exit sign in place of a fluorescent or incandescent exit sign in a Multifamily building within unit (use 4.5.5 Commercial Exit Signs for multifamily common area exit signs). Light Emitting Diode exit signs have a string of very small, typically red or green, glowing LEDs arranged in a circle or oval. The LEDs may also be arranged in a line on the side, top or bottom of the exit sign. LED exit signs provide the best balance of safety, low maintenance, and very low energy usage compared to other exit sign technologies.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is assumed to be an exit sign illuminated by LEDs.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is assumed to be an existing fluorescent or incandescent model.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 5 years.[1271]

DEEMED MEASURE COST

The actual material and labor costs should be used if available. If actual costs are unavailable, assume a total installed cost of at $32.50.[1272]

LOADSHAPE

Loadshape C53 - Flat

COINCIDENCE FACTOR

The summer peak coincidence factor for this measure is assumed to be 100%.[1273]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = ((WattsBase - WattsEE) / 1000) * HOURS * WHF_e$$

Where:

WattsBase = Actual wattage if known, if unknown assume the following:

Baseline Type	$Watts_{Base}$
Incandescent	35W[1274]
CFL (dual sided)	14W[1275]

[1271] Estimate of remaining life of existing unit being replaced.

[1272] Price includes new exit sign/fixture and installation. LED exit sign cost/unit is $22.50 based on the NYSERDA Deemed Savings Database and review of LED exit signs available as of April 2023, and assuming I labor cost of 15 minutes @ $40/hr.

[1273] Assuming continuous operation of an LED exit sign, the Summer Peak Coincidence Factor is assumed to equal 1.0.

[1274] Based on review of available product.

[1275] Average CFL single sided (5W, 7W, 9W) from Appendix B 2013-14 Table of Standard Fixture Wattages.

Baseline Type	$Watts_{Base}$
CFL (single sided)	7W
Unknown	7W

WattsEE = Actual wattage if known, if single sided or unknown assume 2W, if dual sided assume 4W.[1276]

HOURS = Annual operating hours

= 8766

WHF_e = Waste heat factor for energy; accounts for cooling savings from efficient lighting.

= 1.04[1277]

Default if replacing incandescent fixture

ΔkWh = (35 – 2)/1000 * 8766 * 1.04

= 301 kWh

Default if replacing dual sided fluorescent fixture

ΔkWh = (14 – 4)/1000 * 8766 * 1.04

= 91 kWh

Default if replacing single sided fluorescent (or unknown) fixture

ΔkWh = (7 – 2)/1000 * 8766 * 1.04

= 46 kWh

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

ΔkWh[1278] = - (((WattsBase - WattsEE) / 1000) * Hours * HF) / ηHeat

Where:

HF = Heating Factor or percentage of light savings that must be heated

= 49%[1279]

ηHeat = Efficiency in COP of Heating equipment

= Actual. If not available use: [1280]

[1276] Average LED single sided (2W) from Appendix B 2013-14 Table of Standard Fixture Wattages.

[1277] The value is estimated at 1.04 (calculated as 1 + (0.45*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 3.1 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * $SEER_2$) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 *0.85/3.412 = 2.8COP) and estimate of 45% of multi family buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1278] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1279] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1280] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown[1281]	N/A	N/A	1.28

For example, a 2.0 COP (including duct loss) Heat Pump heated building:

If incandescent fixture: ΔkWh = -((35 – 2)/1000 * 8766 * 0.49) / 2

= -71 kWh

If unknown fixture ΔkWh = -((7 – 2)/1000 * 8766 * 0.49) / 2

= -10.7 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = ((WattsBase - WattsEE) / 1000) * WHF_d * CF$$

Where:

WHF_d = Waste heat factor for demand to account for cooling savings from efficient lighting. The cooling savings are only added to the summer peak savings.

=1.07[1282]

CF = Summer Peak Coincidence Factor for measure

= 1.0

Default if incandescent fixture

ΔkW = (35 – 2)/1000 * 1.07 * 1.0

= 0.035 kW

Default if dual sided fluorescent fixture

ΔkW = (14 – 4)/1000 * 1.07 * 1.0

= 0.0107 kW

Default if single sided fluorescent fixture

ΔkW = (7 – 2)/1000 * 1.07 * 1.0

Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

[1281] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1282] The value is estimated at 1.11 (calculated as 1 + (0.45 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

= 0.0054 kW

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated building, or if heating fuel is unknown.

ΔTherms = - (((WattsBase - WattsEE) / 1000) * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% [1283]

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency.

= 0.70 [1284]

Other factors as defined above

Default if incandescent fixture

ΔTherms = - (((35 - 2) / 1000) * 8766 * 0.49* 0.03412) / 0.70

= -6.9 therms

Default if dual sided fluorescent fixture

ΔTherms = - (((14 - 4) / 1000) * 8766 * 0.49* 0.03412) / 0.70

= -2.1 therms

Default if single sided fluorescent fixture

ΔTherms = - (((7 - 2) / 1000) * 8766 * 0.49* 0.03412) / 0.70

= -1.05 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

The annual O&M Cost Adjustment savings should be calculated using the following component costs and lifetimes.

	Baseline Measures	
Component	Cost	Life (yrs)
Lamp	$12.45[1285]	1.37 years[1286]

[1283] Average result from REMRate modeling of several different configurations and IL locations of homes

[1284] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

[1285] Consistent with assumption for a Standard CFL bulb ($2.45) with an estimated labor cost of $10 (assuming $40/hour and a task time of 15 minutes).

[1286] Assumes a lamp life of 12,000 hours and 8766 run hours 12000/8766 = 1.37 years.

MEASURE CODE: RS-LTG-LEDE-V05-260101

REVIEW DEADLINE: 1/1/2028

5.5.8 LED Screw Based Omnidirectional Bulbs

DESCRIPTION

This characterization provides savings assumptions for LED Screw Based Omnidirectional (e.g., A-Type lamps) lamps within the Income Qualified residential and multifamily sectors. This characterization assumes that the LED lamp is installed in a residential location. Only Direct Install programs can continue to utilize this measure.

This measure was developed to be applicable to the following program types: DI

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

In order for this characterization to apply, new lamps must be ENERGY STAR[1287] labeled or equivalent to the most recent version of ENERGY STAR specifications. Note a new ENERGY STAR specification v2.1 became effective on 1/2/2017.

DEFINITION OF BASELINE EQUIPMENT

In 2012, Federal legislation stemming from the Energy Independence and Security Act of 2007 (EISA) will require all general-purpose light bulbs between 40 watts and 100 watts to have ~30% increased efficiency, essentially phasing out standard incandescent technology. In 2012, the 100 w lamp standards apply; in 2013 the 75 w lamp standards will apply, followed by restrictions on the 60 w and 40 w lamps in 2014. Since measures installed under this TRM all occur after 2014, baseline equipment are the values after EISA. These are shown in the baseline table below.

Additionally, an EISA backstop provision was included that would require replacement baseline lamps to meet an efficacy requirement of 45 lumens/watt or higher beginning on 1/1/2020. In December 2019, DOE issued a final determination for General Service Incandescent Lamps (GSILs), finding that this more stringent standard was not economically justified. However, in May 2022 DOE reversed this decision by issuing a Final rule for both the broadened General Service Lamp definition as well as the implementation of the 45 lumen per watt backstop. DOE stated that it will use its enforcement discretion to minimize impacts on the supply chain and effectively allow companies to continue the manufacture and import of noncompliant bulbs through the remainder of 2022, and allow retailers to continue selling them with limited enforcement until July 2023.

As of 1/1/2026, no savings are claimed for programs unless via direct install programs. Direct Install programs where it can be shown that the LED is replacing working inefficient lighting should continue to use the existing inefficient lighting as baseline and assume a measure life of 2 years.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The average rated life for Omnidirectional lamps on the ENERGY STAR Qualified Products list (accessed 6/16/2020) is approximately 20,000 hours.

However, the measure life is assumed to be two years for Direct Install, reflecting the expected remaining life of the baseline halogen/incandescent lamp.

DEEMED MEASURE COST

The actual LED lamp cost installed through Direct Install should be used. If cost is unknown, assume the $2.70 per lamp[1288]

LOADSHAPE

Loadshape R06 – Residential Indoor Lighting

[1287] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[1288] Baseline and LED lamp costs are based on field data collected by CLEAResult and provided by ComEd. See ComEd Pricing Projections 06302016.xlsx for analysis.

Loadshape R07 – Residential Outdoor Lighting

COINCIDENCE FACTOR

The summer peak coincidence factor is assumed to be 0.128 for Residential and in-unit Multi Family bulbs,[1289] 0.273 for exterior bulbs,[1290] and 0.135 for unknown,[1291]

Use Multifamily if: Building meets utility's definition for multifamily.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = ((Watts_{base} - Watts_{EE})/1000) * ISR * Hours * WHF_e$$

Where:

$Watts_{base}$ = Input wattage of the existing lamp. Reference the "LED New and Baseline Assumptions" table for default values.

$Watts_{EE}$ = Actual wattage of LED installed. If unknown, use default provided below:[1292]

LED New and Baseline Assumptions Table

Minimum Lumens	Maximum Lumens	LED Wattage (WattsEE)	Baseline (WattsBase)	Delta Watts (WattsEE)
310	399	4.0	25	21.0
400	749	6.6	29	22.4
750	899	9.6	43	33.4
900	1,399	13.1	53	39.9
1,400	1,999	16.0	72	56.0
2,000	2,999	21.8	150	128.2
3,000	3,299	28.9	200	171.1

ISR = In Service Rate, the percentage of lamps rebated that are actually in service.

Program	In Service Rate (ISR)
Direct Install	94.5%[1293]

[1289] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1290] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1291] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1292] See file "LED Lamp Updates 2021-06-09" for details on Guidehouse lamp wattage calculations based on equivalent baseline wattage and LED wattage of available ENERGY STAR product.

[1293] Based upon average of Navigant low income single family direct install field work LED ISR and Standard CFL assumption in the absence of better data, and is based upon review of the PY2 and PY3 ComEd Direct Install program surveys. This value includes bulb failures in the 1st year to be consistent with the Commission approval of annualization of savings for first year savings claims. ComEd PY2 All Electric Single Family Home Energy Performance Tune-Up Program Evaluation, Navigant Consulting, December 21, 2010.

Hours = Average hours of use per year

Installation Location	Hours
Residential and in-unit Multi Family	1,089[1294]
Exterior	2,475[1295]
Unknown	1,159[1296]

WHFe = Waste heat factor for energy to account for cooling energy savings from efficient lighting

Bulb Location	WHFe
Interior single family	1.06 [1297]
Multifamily in unit	1.04 [1298]
Exterior or uncooled location	1.0
Unknown location	1.051[1299]

For example, an 8W LED lamp, 450 lumens, is installed in the interior of a home through Direct Install.

ΔkWh = ((29.0 - 8) /1000) * 0.945 * 1,089 * 1.06

= 22.9 kWh

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

ΔkWh[1300] = - (((WattsBase - WattsEE) / 1000) * ISR * Hours * HF) / ηHeat

Where:

HF = Heating Factor or percentage of light savings that must be heated

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[1294] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1295] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1296] Based on a weighted average of hours of use in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1297] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * SEER^2) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

[1298] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1299] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1300] Negative value because this is an increase in heating consumption due to the efficient lighting.

= 49% for interior[1301]

= 0% for exterior or unheated location

= 42% for unknown location[1302]

ηHeat = Efficiency in COP of Heating equipment

= actual. If not available use:[1303]

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown[1304]	N/A	N/A	1.28

For example: using the same 8 W LED that is installed in home with 2.0 COP Heat Pump (including duct loss) through a Direct Install program:

ΔkWh = - (((29 - 8) / 1000) * 0.945 * 1,089 * 0.42) / 2.0

= - 4.5 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ((WattsBase - WattsEE) / 1000) * ISR * WHFd * CF

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family	1.11[1305]

[1301] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1302] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1303] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

[1304] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see "HC6.9 Space Heating in Midwest Region.xls", using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1305] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

Bulb Location	WHFd
Multifamily in unit	1.07[1306]
Exterior or uncooled location	1.0
Unknown location	1.093[1307]

CF = Summer Peak Coincidence Factor for measure.

Bulb Location	CF
Interior	0.128[1308]
Exterior	0.273[1309]
Unknown	0.135[1310]

Other factors as defined above

For example: for the same 8 W LED that is installed in a single family interior location through a Direct Install program:

ΔkW = ((29 - 8) / 1000) * 0.945 * 1.11 * 0.128

= 0.0028 kW

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

ΔTherms = - (((WattsBase - WattsEE) / 1000) * ISR * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior[1311]

= 0% for exterior location

= 42% for unknown location[1312]

[1306] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1307] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1308] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1309] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1310] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1311] Average result from REMRate modeling of several different configurations and IL locations of homes

[1312] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency.

= 0.70 [1313]

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-LTG-LEDA-V17-260101

REVIEW DEADLINE: 1/1/2028

[1313] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
$(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70$

5.5.9 LED Fixtures

DESCRIPTION

This characterization provides savings assumptions for LED Fixtures and is broken into five five fixture types formerly listed by ENERGY STAR: Indoor Fixtures (including track lighting, wall-wash, sconces, ceiling and fan lights), Task and Downlight Under Cabinet Fixtures, including LED desk lamps (linear under cabinet fixtures are exempt from EISA and so can be found in measure 5.5.13), Outdoor Fixtures (including flood light, hanging lights, security/path lights, outdoor porch lights), and Downlight Fixtures.

Only Direct Install programs can continue to utilize this measure.

This measure was developed to be applicable to the following program types: DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

In order for this characterization to apply, new LED fixtures, except downlights must be equivalent to the ENERGY STAR Luminaries Specification v2.2 (effective 8/15/2019)[1314]. Downlights must be ENERGY STAR listed and certified according to ENERGY STAR Downlights specification v1.0 (effective 11/1/2023). Specifications are as follows:

Fixture Category	Lumens/Watt
Indoor	65
Downlight Task and Under Cabinet	50
Outdoor	60
Downlight	55

DEFINITION OF BASELINE EQUIPMENT

The baseline condition for this measure is assumed to be an average of EISA-equivalent wattages for ENERGY STAR-qualified products. Most of the lamp types in this measure are considered specialty so the baseline adjustments are consistent with the 5.5.6 LED Specialty Lamps.

Specialty and Directional lamps were not included in the original definition of General Service Lamps in the Energy Independence and Security Act of 2007 (EISA). Therefore, the initial baseline is an incandescent / halogen lamp described in the tables below.

A DOE Final Rule released on 1/19/2017 updated the EISA regulations to remove the exemption for these lamp types such that they become subject to the backstop provision defined within the original legislation. In September 2019 this decision was revoked in a DOE Final Rule. However, in May 2022 DOE reversed this decision by issuing a Final rule for both the broadened General Service Lamp definition as well as the implementation of the 45 lumen per watt backstop. DOE stated that it will use its enforcement discretion to minimize impacts on the supply chain and effectively allow companies to continue the manufacture and import of noncompliant bulbs through the remainder of 2022, and allow retailers to continue selling them with limited enforcement until July 2023.

As of 1/1/2026, no savings are claimed unless via direct install programs. Direct Install programs where it can be shown that the LED is replacing working inefficient lighting should continue to use the existing inefficient lighting as baseline and assume a measure life of 2 years.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The lifetime of a fixture is a function of its rated life and average hours of use. The rated life is 47,000 hours for

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[1314] ENERGY STAR support for LED lamps and LED fixtures, except downlights, is discontinued as of 12/31/2024. The referenced specifications are the most recent ones in effect and should be used as guidelines when qualifying lamps and fixtures.

indoor and downlight, 45,000 for downlight task and under cabinet, and 49,000 for outdoor fixtures.[1315]

However, the measure life is assumed to be two years for Direct Install, reflecting the expected remaining life of the baseline halogen/incandescent lamp.

DEEMED MEASURE COST

The actual cost of the fixture installed through Direct Install should be used.

LOADSHAPE

Loadshape R06 - Residential Indoor Lighting

Loadshape R07 - Residential Outdoor Lighting

COINCIDENCE FACTOR

The summer peak coincidence factor is assumed to be 0.119 for residential and in-unit multifamily fixtures,[1316] 0.273 for exterior fixtures,[1317] and 0.127 for unknown.[1318]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = ((Watts_{base} - Watts_{EE})/1000) * ISR * Hours * WHF_e$$

Where:

$Watts_{Base}$ = Input wattage of the existing fixture. Reference table below for default values for each fixture category;[1319].

$Watts_{EE}$ = Actual wattage of LED fixture installed - If unknown, use default provided below:[1320]

Fixture Category	$Watts_{Base}$	$Watts_{EE}$
Indoor	88.5	22.4
Downlight Task and Under Cabinet	45.2	11.6
Outdoor	79.6	18.3
Downlight	72.8	20.3

ISR = In Service Rate, the percentage of units rebated that are actually in service

= 1.0[1321]

[1315] Average rated lives are based on the average rated lives of fixtures available on the ENERGY STAR qualifying list as of 2/26/2018.

[1316] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs. Average of values for standard and specialty bulbs.

[1317] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1318] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1319] See “Analysis” tab within file Residential LED Fixtures_Analysis_June 2018.xlsx for baseline calculations.

[1320] Average of ENERGY STAR product category watts for products at or above the version 2.1 efficacy specification

[1321] ISR recommendation for fixtures in the Dunsky Energy Consulting, Livingston Energy Innovations and Opinion Dynamics Corporation; NEEP Emerging Technology Research Report, p 6-22.

Hours = Average hours of use per year

Fixture Category	Hours
Indoor and Downlight	926[1322]
Task/Under Cabinet	730[1323]
Outdoor	2,475[1324]

WHFe = Waste heat factor for energy to account for cooling energy savings from efficient lighting

Bulb Location	WHFe
Interior single family	1.06 [1325]
Multifamily in unit	1.04 [1326]
Exterior or uncooled location	1.0
Unknown location	1.051[1327]

For example, an indoor LED fixture is installed through a Direct Install program:

ΔkWh = ((88.5 – 22.4) /1000) * 1.0 * 926 * 1.06

= 64.9 kWh

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

ΔkWh[1328] = - (((WattsBase - WattsEE) / 1000) * ISR * Hours * HF) / ηHeat

Where:

HF = Heating Factor or percentage of light savings that must be heated

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[1322] Assuming 365.25 days/year and average of recommended values for standard LED lamps (2.98) and specialty LED lamps (2.09) in interior locations from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs

[1323] Task/under cabinet hours of use are estimated at 2 hours per day.

[1324] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1325] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * SEER^2) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

[1326] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1327] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1328] Negative value because this is an increase in heating consumption due to the efficient lighting.

= 49%[1329] for interior location

= 0% for exterior or unheated location

= 42%[1330] for unknown location

ηHeat = Efficiency in COP of Heating equipment

= actual. If not available use:[1331]

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown[1332]	N/A	N/A	1.28

For example, using the same indoor LED fixture that is installed in home with 2.0 COP Heat Pump (including duct loss) through a Direct Install Program:

ΔkWh = - (((88.5 – 22.4) / 1000) * 1.0 * 926 * 0.49) / 2.0

= - 15.0 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ((WattsBase - WattsEE) / 1 000) * ISR * WHFd * CF

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family	1.11[1333]

[1329] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1330] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1331] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

[1332] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1333] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

Bulb Location	WHFd
Multifamily in unit	1.07[1334]
Exterior or uncooled location	1.0
Unknown location	1.093[1335]

CF = Summer Peak Coincidence Factor for measure.

Bulb Location	CF
Interior	0.119[1336]
Exterior	0.273[1337]
Unknown	0.127[1338]

Other factors as defined above

For example, for the same indoor LED fixture that is installed in a single family interior location through a direct install program, the demand savings are:

ΔkW = ((88.5 – 22.4) / 1000) * 1.0 * 1.11 * 0.119

= 0.0087 kW

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

ΔTherms = - (((WattsBase - WattsEE) / 1000) * ISR * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior or unknown location[1339]

= 0% for exterior location

= 42% for unknown location[1340]

[1334] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from “Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009” which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1335] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1336] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs. Average of values for standard and specialty bulbs.

[1337] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1338] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1339] Average result from REMRate modeling of several different configurations and IL locations of homes

[1340] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency.

= 0.70 [1341]

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-LTG-LDFX-V08-260101

REVIEW DEADLINE: 1/1/2028

[1341] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

5.5.10 Holiday String Lighting

DESCRIPTION

This measure categorizes the savings from customers handing in incandescent string lighting typically used during the holidays and receiving equivalent LED string lighting. LED bulbs on string lights can consume up to 98% less power when compared to incandescent bulbs. Besides less energy to operate, LED string lighting offers many other advantages over incandescent: longer bulb life, a higher brightness, less heat buildup making them safer especially when used indoors on live trees, and better durability since they use a plastic covering over the diode instead of a glass bulb.[1342]

This measure applies to mini, C7, and C9 bulb shape types used in residential locations. Description of the bulb types of string lighting are listed below: [1343, 1344]

Mini:	About 1/4” wide x 5/8” high with a shape described as a miniature candle with a pointed tip. The mini is the most common type of string light today and shares about 80% of the market. They have a female-to-male push type base.
C7:	Approximately 1” wide x 1-1/2” high with a shape described as a strawberry. The C7 (and C9) are thought of as more “old fashioned” or traditional since they were the first types of string lighting used for decorative purposes. The C7 shares about 7% of the market and has a screw-in E12 candelabra base.
C9:	Similar in shape to the C7, the C9 is slightly larger at 1-1/4” wide x 2-1/2” high. The C9 shares about 5% of the market and has a screw-in E17 intermediate base.

A third variant of the “C” bulb exists, which is called C6. However, due to lack of availability of the C6 incandescent from retailers, it is assumed the market has already adopted the LED as the baseline for this bulb shape type and should not be claimed for utility program savings.

The implementation strategy for this measure is only geared towards residential customers. Furthermore, the deemed hours of operation are sourced on residential only. As such, the proposed deemed split of 100% Residential and 0% Commercial assumptions should be used.

This measure was developed to be applicable to the following program types: EREP. To ensure that the baseline is appropriate, the measure is limited to an exchange event where the customer has to turn in a string of inefficient lighting.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

To qualify for this measure, new string lights must be LED and one of the eligible bulb shape categories listed in this measure (mini, C7, C9).

Some manufacturers offer integrated “smart” control of new LED strings; however, these are not included in this measure.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is the existing incandescent mini, C7, or C9 string lighting turned in during an exchange event.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The rated lifespan of LED bulbs for string lighting is in the range of 20,000 to 100,000 hours of use. However, the measure lifetime is capped at 7 years due to wear on bulbs and string from weather, sunlight, and annual installation

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[1342] See ‘Christmas Lights Buying Guide – Hayneedle’.

[1343] See ‘Christmas Lights Buying Guide – Hayneedle’.

[1344] See ‘Christmas Lights Guide Visual’.

and storage.[1345]

DEEMED MEASURE COST

Where possible, the actual, full cost of new LED string lighting should be used. If unavailable, assume the following costs.

Bulb Type	Measure Cost[1346]
Mini	\$15.38
C7	\$21.42
C9	\$17.28

Loadshape

Loadshape R16; Residential Holiday String Lighting

COINCIDENCE FACTOR

Due to the seasonal nature and evening operation of holiday string lights, there is no expected reduction in a utility's peak demand.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = ((Watts_{base}-Watts_{EE})/1000) * ISR * (1-Leakage) * Hours *WHF_e$$

Where:

$Watts_{base}$ = Total wattage of the existing incandescent string lights = Bulb Wattage * # Bulbs; see table below for baseline bulb wattage assumptions

$Watts_{EE}$ = Actual total wattage of the new LED string lights = Bulb Wattage * # Bulbs. If unknown, assume total wattage of new LED string lights = Bulb Wattage * # Bulbs; see table below for LED bulb wattage assumptions

Where:

Bulb Wattage = Reference the "Bulb Wattage Assumptions" table below.

Bulb Wattage Assumptions[1347]

Type	Incandescent Bulb (Watts)	LED Bulb (Watts)
Mini	0.40	0.07
C7	5.00	0.48
C9	7.00	2.00

Bulbs = Actual quantity of bulbs on the string. If baseline is unknown, assume same as the new string.

ISR = In Service Rate, or percentage of string lights that get installed. Derive from program

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[1345] LED string lighting lifetime from https://www.christmasdesigners.com/blog/how-long-do-led-christmas-lights-really-last/'How Long Do LED Christmas Lights Really Last Christmas Designers'

[1346] See file Holiday Lights Research and Calcs_2018.xlsx for CLEAResult research on holiday string lighting costs.

[1347] Average wattages from PGE "Cost of holiday lights", published December 2021, and PA PUC Feb 2021.

evaluation analysis, otherwise assume 100%.

Leakage = Adjustment to account for the percentage of program string lights that move out (and in, if deemed appropriate) of the Utility Jurisdiction.

= For an exchange event, assume 0% if customer is required to be a utility customer. If not, determine leakage rate through evaluation. If customer is not required to be utility customer and if leakage is not determined through evaluation, use the deemed leakage rates LED omnidirectional bulbs sold through Upstream (TOS) programs:[1348]

ComEd:	1.6%
Ameren:	13.1%

Hours = Average hours of use per year

= 210 hours[1349]

WHFe = Waste heat factor for energy to account for cooling energy savings from efficient lighting, assumed value of 1.0 since operation of string lights (if indoors) does not coincide with cooling season and there are no interactive effects for outdoor string lights.

For example, a customer replaces a 50-bulb mini incandescent string with a 50-bulb mini LED string through exchange event:

$$\Delta kWh = ((0.40 * 50) – (0.07 * 50))/1000) * 1.00 * (1 - 0) * 210 * 1.0$$

$$= 3.5 \text{ kWh}$$

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

$$\Delta kWh^{1350} = - (((WattsBase - WattsEE)/1000) * ISR * (1-Leakage) * Hours * HF) / \eta Heat$$

Where:

HF = Heating Factor or percentage of light savings that must be heated
= 49% for interior or unknown location[1351]
= 0% for exterior or unheated location

ηHeat = Efficiency in COP of Heating equipment

= actual. If not available, use:[1352]

System Type	Age of Equipment	HSPF2 Estimate	COPheat (COP Estimate) = (HSPF2/3.412) * 0.85
Heat Pump	Before 2006	5.8	1.44

[1348] Leakage rate is based upon review of PY8-CY2018 evaluations from ComEd and PY8 for Ameren.

[1349] Based on typical holiday lighting hours of use (6 hours per day, 7 days per week for 5 weeks) from California Municipal Utilities Association "TRM 205 LED Holiday Lights."

[1350] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1351] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1352] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	COPheat (COP Estimate) = (HSPF2/3.412) * 0.85
(if age unknown assume 2006-2014)	After 2006-2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown[1353]	N/A	N/A	1.28

For example, using the same 50-bulb mini LED string that is installed in home with 2.0 COP Heat Pump (including duct loss):

ΔkWh = - ((((0.40 * 50) – (0.07 * 50))/1000) * 1.00 * (1 - 0) * 210 * 0.49) / 2.0

= - 0.8 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

Heating penalty if installed in a natural gas heated home, or if heating fuel is unknown.

ΔTherms = - (((WattsBase - WattsEE)/1000) * ISR * (1-Leakage) * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior or unknown location [1354]

= 0% for exterior location

0.03412 = Converts kWh to Therms

ηHeat = Actual heating system efficiency

= 70% [1355]

[1353] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1354] Average result from REMRate modeling of several different configurations and IL locations of homes.

[1355] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey). In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in

For example, using the same 50-bulb mini LED string that is installed in a single family interior location with gas heating at 70% total efficiency:

Δtherms = - ((((0.40 * 50) – (0.07 * 50))/1000) * 1.00 * (1 - 0) * 210 * 0.49 * 0.03412) / 0.70

= - 0.08 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-LTG-LEDH-V05-260101

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the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

5.5.11 LED Nightlights

DESCRIPTION

This measure describes savings from LED nightlights. This characterization assumes that the LED nightlight is installed in a residential location.

This measure was developed to be applicable to the following program types: TOS, NC.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

For this characterization to apply, the high-efficiency equipment must be a qualified LED nightlight.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is assumed to be an incandescent/halogen nightlight.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The estimated useful life of the is estimated is 8 years.[1356]

DEEMED MEASURE COST

Where possible, the actual cost should be used and compared to the baseline cost. If the incremental cost is unknown, assume the following:[1357]

Bulb Type	Year	Incandescent	LED	Incremental Cost
Nightlights	All	$2.84	$6.19	$3.35

LOADSHAPE

Loadshape R07 - Residential Outdoor Lighting

COINCIDENCE FACTOR

Demand savings is assumed to be zero for this measure.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

ΔkWh = ((WattsBase - WattsEE) / 1000) * ISR * (1-Leakage) * Hours * WHFe

Where:

$\text{Watts}_{\text{base}}$ = Actual wattage if known, if unknown, assume 7W.[1358]

Watts_{EE} = Actual wattage of LED purchased / installed.

ISR = In Service Rate or the percentage of nightlights rebated that get installed

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[1356] Southern California Edison Company, "LED, Electroluminescent & Fluorescent Night Lights", Work Paper WPSCRELG0029 Rev. 1, February 2009, p. 2. and p.3.

[1357] Average cost data provided in Stanley Mertz, "LED Nightlights Energy Efficiency Retail products programs", March 2018.

[1358] Based on Stanley Mertz, "LED Nightlights Energy Efficiency Retail products programs", March 2018.

Program	In Service Rate (ISR) [1359]
Retail (Time of Sale)	97.6%[1360]
Direct Install	96.9%[1361]
School Kits	83.3%[1362]

Leakage = Adjustment to account for the percentage of program bulbs that move out (and in if deemed appropriate)[1363] of the Utility Jurisdiction.

KITS programs = Determined through evaluation

Upstream (TOS) Lighting programs = Use deemed assumptions below:[1364]

ComEd:	2.0%
Ameren:	13.1%

Hours = Average hours of use per year

= 4,380[1365]

WHFe = Waste heat factor for energy to account for cooling savings from efficient lighting

Bulb Location	WHFe
Interior single family	1.06 [1366]

[1359] In Service Rates now represent the lifetime In Service Rates with the second and third year installations discounted by the Real Discount Rate of 2.0%. Lifetime ISR assumptions for efficiency kits are based upon comparing with CFL Distribution First year ISR and multiplying by the CFL Distribution Final ISR value, capped at 95%, and second and third year estimates based on same proportion of future installs. For all other programs The 98% Lifetime ISR assumption is based upon the standard CFL measure in the absence of any better reference. This value is based upon review of two evaluations:
'Nexus Market Research, RLW Analytics and GDS Associates study; "New England Residential Lighting Markdown Impact Evaluation, January 20, 2009' and 'KEMA Inc, Feb 2010, Final Evaluation Report:, Upstream Lighting Program, Volume 1.' This implies that only 2% of bulbs purchased are never installed. The second and third year installations are based upon Ameren analysis of the Californian KEMA study showing that 54% of future installs occur in year 2 and 46% in year 3.

[1360] 1st year in service rate is based upon analysis of ComEd PY8, PY9 and CY2018 and Ameren PY8 intercept data (see 'RES Lighting ISR_2019.xlsx' for more information).

[1361] Consistent with assumption for standard CFLs (in the absence of evidence that it should be different for this bulb type). Based upon review of the PY2 and PY3 ComEd Direct Install program surveys. This value includes bulb failures in the 1st year to be consistent with the Commission approval of annualization of savings for first year savings claims. ComEd PY2 All Electric Single Family Home Energy Performance Tune-Up Program Evaluation, Navigant Consulting, December 21, 2010.

[1362] 1st year ISR for school kits based on ComEd PY9 data for the Elementary Energy Education program.

[1363] Leakage in is only appropriate to credit to IL utility program savings if it is reasonably expected that the IL utility program marketing efforts played an important role in influencing customer to purchase the light bulbs. Furthermore, consideration that such customers might be free riders should be addressed. If leakage in is assessed, efforts should be made to ensure no double counting of savings occurs if the evaluation is estimating both leakage in and spillover savings of light bulbs.

[1364] Leakage rate is based upon review of PY7-9 evaluations from ComEd and PY5,6 and 8 for Ameren (see for more information).

[1365] Assumes nightlight is operating 12 hours per day, consistent with the 2016 Pennsylvania TRM.

[1366] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * $SEER^2$) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

Bulb Location	WHFe
Multifamily in unit	1.04 [1367]
Unknown location	1.054[1368]

For example, a 0.3W LED nightlight is direct installed in single family interior location within ComEd territory:

ΔkWh = ((7 – 0.3) / 1000) * 0.969 * (1 – 0) * 4380 * 1.06

= 30.1 kWh

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

ΔkWh[1369] = - (((WattsBase - WattsEE) / 1000) * ISR * Hours * HF) / ηHeat

Where:=(

HF = Heating Factor or percentage of light savings that must be heated

= 49% for interior[1370]

ηHeat = Efficiency in COP of Heating equipment

= Actual. If not available use: [1371]

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown[1372]	N/A	N/A	1.28

[1367] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from “Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009” which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1368] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1369] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1370] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1371] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

[1372] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

For example, a 0.3W LED nightlight is direct installed in single family interior location with a 2016 heat pump:

ΔkWh = - (((7 – 0.3) / 1000) * 0.969 * (1-0) * 4380 * 0.49) / 2.04

= - 6.83 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = ((WattsBase - WattsEE) / 1 000) * ISR * (1-Leakage) * WHFd * CF

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family or unknown location	1.11[1373]
Multifamily in unit	1.07[1374]
Unknown location	1.098[1375]

CF = Summer Peak Coincidence Factor for measure.

= 0

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

Δtherms = - (((WattsBase - WattsEE) / 1000) * ISR * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior[1376]

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency

= 0.70 [1377]

Other factors as defined above

[1373] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

[1374] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1375] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1376] Average result from REMRate modeling of several different configurations and IL locations of homes

[1377] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:

(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

For example, a 0.3W LED nightlight is direct installed in single family interior location with gas heating at 70% total efficiency:

Δtherms = - (((7 – 0.3) / 1000) * 0.969 * (1-0) * 4380 * 0.49* 0.03412) / 0.70

= - 0.68 therms

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

MEASURE CODE: RS-LTG-NITL-V04-260101

REVIEW DEADLINE: 1/1/2028

5.5.12 Connected LED Lamps

DESCRIPTION

Many home devices in the market have become integrated with smart technology in recent years. Home devices able to connect to Wifi or a mobile network allow the user to control the device over the internet. This measure defines the savings associated with connected lighting. Connected LEDs allow for remote user control through a smart device, such as smart phone, tablet, or smart speaker. The standard LED provides light in one shade at one lumen level and color temperature. Connected LEDs have options integrated that allow for customizable color, color temperature, and lumen output. The Connected LED can also be turned on and off with a set schedule or controlled remotely. Savings from this measure come from both reduced hours of operation and dimming.

This measure was developed to be applicable to the following program types: TOS, NC

DEFINITION OF EFFICIENT EQUIPMENT

For this characterization to apply, the efficient condition must be LED lighting that is controlled by a smart device. The savings for this measure are the estimated incremental control savings compared to a non-connected efficient lamp. Some connected LEDs come with hubs for managing their operations. Connected LEDs with hubs do not qualify for this savings characterization, as the energy use by the hub cancels out the savings attributed to the connectivity of the lamp.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is the efficient LED without the connected capabilities.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The deemed measure life is 8.1 years for exterior application.[1378] For all other applications, lifetimes are capped at 10 years.[1379]

DEEMED MEASURE COST

The incremental cost can be assumed to be $20, the difference between the average cost of the baseline non-connected LED and the average cost of the connected LED.[1380]

LOADSHAPE

Loadshape R06 – Residential Indoor Lighting

Loadshape R07 – Residential Outdoor Lighting

COINCIDENCE FACTOR

The summer peak coincidence factor is provided below:

Bulb Location	CF
Interior Omnidirectional	0.128[1381]
Interior Specialty	0.109[1382]

[1378] The average rated life for Omnidirectional lamps on the ENERGY STAR Qualified Products list (accessed 6/16/2020) is approximately 20,000 hours. 20000/2475 (exterior hours of use) = 8.1 years.

[1379] Based on recommendation in the Dunsky Energy Consulting, Livingston Energy Innovations and Opinion Dynamics Corporation; NEEP Emerging Technology Research Report, p 6-18.

[1380] Estimate based on review of available product and estimates provided in King J., ACEEE, “Energy Impacts of Smart Home Technologies”, April 2018.

[1381] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1382] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

Bulb Location	CF
Exterior	0.273[1383]
Unknown Omnidirectional	0.135[1384]
Unknown Specialty	0.117[1385]

Use Multifamily if: Building meets utility's definition for multifamily.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta\text{kWh} = ((\frac{WattsEE}{1000} * HOURS * SVGe * WHFe) - StandbykWh) * ISR * (1 - Leakage)$$

Where:

WattsEE = Actual wattage of LED. If unknown, then use defaults in 5.5.6 LED Specialty Lamps or 5.5.8 LED Screw Based Omnidirectional Bulbs.

HOURS = Average hours of use per year

Installation Location	Hours
Residential and in-unit Multi Family Omnidirectional	1,089[1386]
Residential and in-unit Multi Family Specialty	763[1387]
Exterior	2,475[1388]
Unknown	1,159[1389]
Unknown Specialty	1,020[1390]

SVGe = Percentage of annual lighting energy saved by lighting control; determined on a site-specific basis or using default below

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[1383] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1384] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1385] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1386] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1387] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1388] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1389] Based on a weighted average of hours of use in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1390] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

= 0.37[1391]

ISR = In Service Rate, the percentage of lamps rebated that are actually in service.

Program		Weighted Average 1st year In Service Rate (ISR) [1392]
Retail (Time of Sale)		97.4%
Direct Install		94.5%
Efficiency Kits	LED Distribution	82.3%
	School Kits	83.3%
	Direct Mail Kits	91.2%
	Direct Mail Kits, Income Qualified	94.2%
	Community Distributed Kits	94.8%
Food Bank / Pantry Distribution		97.5%

Leakage = Adjustment to account for the percentage of program bulbs that move out (and in if deemed appropriate)[1393] of the Utility Jurisdiction.

KITS programs = Determined through evaluation

Upstream (TOS) Lighting programs = Use deemed assumptions below:[1394]

ComEd:	0.8%
Ameren:	13.1%

All other programs = 0

WHFe = Waste heat factor for energy to account for cooling savings

Bulb Location	WHFe
Interior single family	1.06 [1395]

[1391] Based on Lockheed Martin, 'Home Energy Management System/Cmart Lighting Pilot for National Grid's Massachusetts and Rhode Island Residential Energy Efficiency Programs', Final Report, March 18, 2019. The study found the energy consumption of the LED to be 11.5/1000 * 1200 hours = 13.8kWh. Savings from the smart lamp included both geo fencing (96% of studied homes providing 5.1kWh of savings) and in-room occupancy (3% of studied homes providing 6.6kWh of savings), for a total savings of 5.1kWh (0.96*5.1 + 0.03*6.6). As a percentage of the LED consumption this is 5.1/13.8 = 37%.

[1392] ISRs are consistent with the LED Screw Based Standard Lamp measure, however since 2nd and 3rd year savings for this measure are so minimal, for ease of implementation the 3 year installs are discounted using the real discount rate (2.0%) a single assumption.

[1393] Leakage in is only appropriate to credit to IL utility program savings if it is reasonably expected that the IL utility program marketing efforts played an important role in influencing customer to purchase the light bulbs. Furthermore, consideration that such customers might be free riders should be addressed. If leakage in is assessed, efforts should be made to ensure no double counting of savings occurs if the evaluation is estimating both leakage in and spillover savings of light bulbs.

[1394] Leakage rate is based upon review of PY8-CY2018 evaluations from ComEd and PY8 for Ameren.

[1395] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * $SEER^2$) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 *0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

Bulb Location	WHFe
Multifamily in unit	1.04 [1396]
Exterior or uncooled location	1.0
Unknown location Omnidirectional	1.051[1397]
Unknown location Specialty	1.046[1398]

StandbykWh = Standby power draw of the controlled lamp. Use actual value from manufacturer specification. If not known then assume:

= 0.63 kWh[1399]

For example, a 9W Connected LED is purchased through a ComEd upstream program.

$\Delta kWh_{1st\ year\ installs}$ = (((9/1000) * 1,089 * 0.37 * 1.051) – 0.63) * 0.9 * (1 – 0.008)

= 2.84 kWh

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

$$\Delta kWh^{1400} = -\frac{((WattsEE * Hours * SVGe) - StandbykWh) * ISR * (1 - Leakage) * HF}{1000 * \eta Heat}$$

Where:

HF = Heating Factor or percentage of light savings that must be heated

= 49% for interior[1401]

ηHeat = Efficiency in COP of Heating equipment

= Actual. If not available use: [1402]

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump	Before 2006	5.8	1.44

[1396] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1397] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1398] Unknown is weighted average of interior v exterior (assuming 15% exterior specialty lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1399] Based on Lockheed Martin, 'Home Energy Management System/Cmart Lighting Pilot for National Grid's Massachusetts and Rhode Island Residential Energy Efficiency Programs', Final Report, March 18, 2019.

[1400] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1401] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1402] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
(if age unknown assume 2006-2014)	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown[1403]	N/A	N/A	1.28

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta\text{kWh} = (\frac{WattsEE}{1000}) * SVGd * WHFd * ISR * (1 - Leakage) * CF$$

Where:

SVGd = Percentage of annual lighting demand saved by lighting control; determined on a site-specific basis or using default below

= 0.37[1404]

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family	1.11[1405]
Multifamily in unit	1.07[1406]
Exterior or uncooled location	1.0
Unknown location Omnidirectional	1.093[1407]
Unknown location Specialty	1.083[1408]

CF = Summer Peak Coincidence Factor for measure.

Bulb Location	CF
Interior Omnidirectional	0.128[1409]

[1403] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see "HC6.9 Space Heating in Midwest Region.xls", using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1404] Assumed equal to SVGe.

[1405] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

[1406] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1407] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1408] Unknown is weighted average of interior v exterior (assuming 15% exterior specialty lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1409] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

Bulb Location	CF
Interior Specialty	0.109[1410]
Exterior	0.273[1411]
Unknown Omnidirectional	0.135[1412]
Unknown Specialty	0.117[1413]

For example, a 9W Connected LED is purchased through a ComEd upstream program.

$\Delta kW_{1st\ year\ installs}$ = (((9/1000) * 0.37 * 1.093)) * 0.9 * (1 – 0.008)

= 0.0032 kW

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

$$\Delta Therms = -\frac{((WattsEE * Hours * SVGe) - StandbykWh) * ISR * (1 - Leakage) * HF * 0.03412}{1000 * \eta Heat}$$

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior[1414]

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency

= 0.70 [1415]

Other factors as defined above

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

NA

[1410] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1411] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1412] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1413] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1414] Average result from REMRate modeling of several different configurations and IL locations of homes

[1415] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:

(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

DEEMED O&M COST ADJUSTMENT CALCULATION

NA

MEASURE CODE: RS-LTG-LEDC-V06-260101

REVIEW DEADLINE: 1/1/2029

5.5.13 EISA Exempt LED Lighting

DESCRIPTION

This characterization provides savings assumptions for LED lamps and fixture types that are exempt from the EISA legislation. This characterization assumes that the LED lamp is installed in a residential location. Where the implementation strategy does not allow for the installation location to be known (e.g., an upstream retail program) a deemed split of 97% Residential and 3% Commercial assumptions should be used.[1416]

This measure was developed to be applicable to the following program types: TOS, NC, EREP, DI, KITS.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

In order for this characterization to apply, new lamps must be ENERGY STAR[1417] labeled or equivalent to the most recent version of ENERGY STAR specifications or be listed on the Design Lights Consortium Qualifying Product List. Note a new ENERGY STAR specification v2.1 became effective on 1/2/2017.

DEFINITION OF BASELINE EQUIPMENT

This measure is only for lamp and fixture types that are exempt from EISA, including lamps with an initial lumen output of less than 310 lumens, with initial lumen output greater than 3,300 lumens, and Task/Undercabinet Fixtures with a linear fluorescent baseline.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The average rated life for lamps on the ENERGY STAR Qualified Products list (accessed 6/16/2020) is approximately 20,000 hours for omnidirectional lamps, 17,000 hours for decorative lamps and 25,000 for directional lamps. The deemed measure life is 8 years for exterior omnidirectional lamps and 6.9 years for exterior decorative lamps and lifetimes are capped at 10 years for other applications.[1418] For early replacement measures, if replacing a halogen or incandescent bulb, the remaining life is assumed to be 333 hours. For CFL's, the remaining life is 3,333 hours.[1419]

The rated life of linear task and under cabinet fixtures is 45,000 hours[1420] and for T-LEDS is 50,000 hours. However, all fixture lifetimes are capped at 15 years.[1421]

DEEMED MEASURE COST

The price of LED lamps is falling quickly. Where possible, the actual LED lamp cost should be used and compared to the baseline cost provided below. If the incremental cost is unknown, assume the following:

Type	Incremental Cost
Omni-directional A-Lamps	$1.45[1422]

[1416] RES v C&I split is based on a weighted (by sales volume) average of ComEd PY8, PY9 and CY2018 and Ameren PY8 in store intercept survey results. See 'RESvCI Split_2019.xlsx'.

[1417] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[1418] Based on recommendation in the Dunsky Energy Consulting, Livingston Energy Innovations and Opinion Dynamics Corporation; NEEP Emerging Technology Research Report, p 6-18.

[1419] Representing a third of the expected lamp lifetime.

[1420] Average rated lives are based on the average rated lives of fixtures available on the ENERGY STAR qualifying list as of 2/26/2018.

[1421] Based on recommendation in the Dunsky Energy Consulting, Livingston Energy Innovations and Opinion Dynamics Corporation; NEEP Emerging Technology Research Report, p 6-18.

[1422] Baseline and LED lamp costs are based on field data collected by CLEAResult and provided by ComEd. See ComEd Pricing Projections 06302016.xlsx for analysis.

Type	Incremental Cost
Decorative	\$1.66
Directional	\$1.65
Linear Task/Under Cabinet	\$18[1423]
T-LEDs	\$13[1424]

LOADSHAPE

Loadshape R06 – Residential Indoor Lighting

Loadshape R07 – Residential Outdoor Lighting

COINCIDENCE FACTOR

The summer peak coincidence factor is assumed to be 0.128 for Residential and in-unit Multi Family bulbs,[1425] 0.273 for exterior bulbs,[1426] and 0.135 for unknown,[1427]

Use Multifamily if: Building meets utility’s definition for multifamily.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = ((Watts_{base} - Watts_{EE})/1000) * ISR * (1-Leakage) * Hours * WHF_e$$

Where:

$Watts_{base}$ = Input wattage of the existing or baseline system. Reference the “LED New and Baseline Assumptions” table for default values.

$Watts_{EE}$ = Actual wattage of LED purchased / installed. If unknown, use default provided below:[1428]

[1423] Incremental costs for task/under cabinet and downlight fixtures are from the 2018 Michigan Energy Measures Database.

[1424] Consistent with measure 4.5.4 LED Bulbs and Fixtures in Volume 2.

[1425] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1426] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1427] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1428] See file “LED Lamp Updates 2021-06-09” for details on Guidehouse lamp wattage calculations based on equivalent baseline wattage and LED wattage of available ENERGY STAR product.

LED New and Baseline Assumptions Table

Type		Minimum Lumens	Maximum Lumens	LED Wattage (WattsEE)	Baseline (WattsBase)	Delta Watts
A-Lamps		120	309	4.0	25	21.0
		3,300	3,999	28.9	200	171.1
		4,000	5,000	35.7	300	264.3
Decorative	Globe (medium and intermediate bases less than 750 lumens)	150	309	3.0	25	22
	Globe (candelabra bases less than 1050 lumens)	150	309	3.5	25	21.5
	Decorative (Shapes B, BA, C, CA, DC, F, G, medium and intermediate bases less than 750 lumens)	160	299	2.6	25	22.4
		300	309	4.3	40	35.7
	Decorative (Shapes B, BA, C, CA, DC, F, G, candelabra bases less than 1050 lumens)	120	159	1.5	15	13.5
		160	299	2.7	25	22.3
		300	309	4.2	40	35.8
	Decorative (Shape ST)	250	309	6.5	40	33.5
	Decorative (Shape S)	50	75	1.0	11	10.0
		100	120	1.2	15	13.8
		120	309	2.25	25	22.8
Directional	Reflector lamp types with medium screw bases (PAR20, PAR30(S,L), PAR38, R40, etc.) w/ diameter >2.25"	3,300	4,200	27.3	250	222.7
	Reflector lamp types with medium screw bases (PAR16, R14, R16, etc.) w/ diameter <2.25" (*see exceptions below)	280	309	4.6	35	30.4
	*MR16	250	309	3.8	20.0	16.2
Linear Task/Under Cabinet[1429]		0	2999	11.6	29.1	17.5
		3000	4499	28.0	57	29.0
		4500	5999	39.2	84.5	56.5
		6000	7499	49.9	120	70.1
		7500		90.6	180	89.4
T-LEDs		0	1,199	8.9	15	6.1
		1,200	2,399	15.8	28.2	12.4
		2,400		22.9	41.8	18.9

ISR = In Service Rate, the percentage of lamps rebated that are actually in service.

[1429] See “Linear Strip LED Fixture Lumen Buckets.xlsx” for details on the calculation of Linear Task/Under Cabinet values.

Program		In Service Rate (ISR)[1430]
Retail (Time of Sale)		97.4%[1431]
Direct Install		94.5%[1432]
Virtual Assessment followed by Unverified Self-Install		97.5%[1433]
Efficiency Kits[1434]	LED Distribution[1435]	82.3%
	School Kits[1436]	83.3%
	Direct Mail Kits[1437]	91.2%
	Direct Mail Kits, Income Qualified[1438]	60%
	Community Distributed Kits[1439]	94.8%
Food Bank / Pantry Distribution[1440]		97.5%[1441]

Leakage = Adjustment to account for the percentage of program bulbs that move out (and in if deemed appropriate)[1442] of the Utility Jurisdiction.

[1430] In Service Rates now represent the lifetime In Service Rates with the second and third year installations discounted by the Real Discount Rate of 2.0%. Lifetime ISR assumptions for efficiency kits are based upon comparing with CFL Distribution First year ISR and multiplying by the CFL Distribution Final ISR value, capped at 95%, and second and third year estimates based on same proportion of future installs. For all other programs Tthe 98% Lifetime ISR assumption is based upon the standard CFL measure in the absence of any better reference. This value is based upon review of two evaluations:
'Nexus Market Research, RLW Analytics and GDS Associates study; "New England Residential Lighting Markdown Impact Evaluation, January 20, 2009' and 'KEMA Inc, Feb 2010, Final Evaluation Report:, Upstream Lighting Program, Volume 1.' This implies that only 2% of bulbs purchased are never installed. The second and third year installations are based upon Ameren analysis of the Californian KEMA study showing that 54% of future installs occur in year 2 and 46% in year 3.

[1431] 1st year in service rate is based upon analysis of ComEd PY8, PY9 and CY2018 and Ameren PY8 intercept data (see 'RES Lighting ISR_2019.xlsx' for more information).

[1432] Based upon average of Navigant low income single family direct install field work LED ISR and Standard CFL assumption in the absence of better data, and is based upon review of the PY2 and PY3 ComEd Direct Install program surveys. This value includes bulb failures in the 1st year to be consistent with the Commission approval of annualization of savings for first year savings claims. ComEd PY2 All Electric Single Family Home Energy Performance Tune-Up Program Evaluation, Navigant Consulting, December 21, 2010.

[1433] An equal weighted average of Direct Install and Direct Mail Kit ISRs. Interest and applicability of measures confirmed through virtual assessment.

[1434] In Service Rates provided are for the bulb within a kit only. Given the significant differences in program design and the level of education provided through Efficiency Kits programs, the evaluators should apply the ISR estimated through evaluations (either past evaluations or the current program year evaluation) of the specific Efficiency Kits program. In cases where program-specific evaluation results for an ISR are unavailable, the default ISR values for Efficiency Kits provide may be used.

[1435] Free bulbs provided without request, with little or no education. Consistent with Standard CFL assumptions.

[1436] 1st year ISR for school kits based on ComEd PY9 data for the Elementary Energy Education program. Final ISR assumptions are based upon comparing with CFL Distribution First year ISR and multiplying by the CFL Distribution Final ISR value, and second and third year estimates based on same proportion of future installs.

[1437] Opt-in program to receive kits via mail, with little or no education. Consistent with Standard CFL assumptions.

[1438] Research from 2021 Ameren Illinois Income Qualified participant survey (customer self-report), available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf

[1439] Kits distributed in a community setting, targeted to income qualified communities. Research from 2018 Ameren Illinois Income Qualified participant survey.

[1440] Free bulbs provided through local food banks and food pantries.

[1441] 1st year ISR is determined based on online surveys conducted for ComEd CY2018 Food Bank LED Distribution program. See 'CY2018 ComEd Foodbank LED Dist Survey Results_Navigant'.

[1442] Leakage in is only appropriate to credit to IL utility program savings if it is reasonably expected that the IL utility program marketing efforts played an important role in influencing customer to purchase the light bulbs. Furthermore, consideration that such customers might be free riders should be addressed. If leakage in is assessed, efforts should be made to ensure no double counting of savings occurs if the evaluation is estimating both leakage in and spillover savings of light bulbs.

KITS programs = Determined through evaluation

Upstream (TOS) Lighting programs = Use deemed assumptions below:[1443]

ComEd: 0.8%

Ameren: 13.1%

All other programs = 0

Hours = Average hours of use per year

Type	Installation Location	Hours
Omnidirectional A-Lamps	Residential and in-unit Multi Family	1,089[1444]
	Exterior	2,475[1445]
	Unknown	1,159[1446]
Decorative and Directional Lamps	Residential and In-Unit Multi Family	763[1447]
	Exterior	2,475[1448]
	Unknown	1,020[1449]
Linear Task/Under Cabinet	All	730[1450]
T-LEDs	All	730[1451]

WHFe = Waste heat factor for energy to account for cooling energy savings from efficient lighting

Bulb Location	WHFe
Interior single family	1.06 [1452]
Multifamily in unit	1.04 [1453]

[1443] Leakage rate is based upon review of PY8-CY2018 evaluations from ComEd and PY8 for Ameren.

[1444] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1445] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1446] Based on a weighted average of hours of use in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1447] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1448] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for specialty LEDs in exterior applications.

[1449] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1450] Linear Task/Under Cabinet hours of use are estimated at 2 hours per day.

[1451] Consistent with Linear Task/Under Cabinet assumption.

[1452] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * SEER^2) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

[1453] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table

Bulb Location	WHFe
Exterior or uncooled location	1.0
Unknown location	1.051[1454]

For example, an 4W LED lamp, 300 lumens, is installed in the interior of a home. The customer purchased the lamp through a ComEd upstream program:

$$\Delta kWh = ((25.0 - 4) /1000) * 0.784 * (1 - 0.008) * 1,089 * 1.06$$
$$= 18.9 \text{ kWh}$$

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

$$\Delta kWh^{1455} = - (((WattsBase - WattsEE) / 1000) * ISR * (1-Leakage) * Hours * HF) / \eta Heat$$

Where:

HF = Heating Factor or percentage of light savings that must be heated

= 49% for interior[1456]

= 0% for exterior or unheated location

= 42% for unknown location[1457]

ηHeat = Efficiency in COP of Heating equipment

= actual. If not available use:[1458]

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00

HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1454] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1455] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1456] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1457] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1458] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Unknown[1459]	N/A	N/A	1.28

For example: using the same 4W LED that is installed in home with 2.0 COP Heat Pump (including duct loss) through a ComEd upstream program:

$\Delta kWh_{1st\ year}$ = - (((25 - 4) / 1000) * 0.784 * (1-0.008) * 1,089 * 0.42) / 2.0

= - 3.7 kWh

Second and third year install savings should be calculated using the appropriate ISR and the delta watts and hours from the install year.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = ((WattsBase - WattsEE) / 1000) * ISR * (1-Leakage) * WHFd * CF$$

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family	1.11[1460]
Multifamily in unit	1.07[1461]
Exterior or uncooled location	1.0
Unknown location	1.093[1462]

CF = Summer Peak Coincidence Factor for measure.

Bulb Location	CF
Interior	0.128[1463]
Exterior	0.273[1464]
Unknown	0.135[1465]

[1459] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1460] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

[1461] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from “Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009” which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1462] Unknown is weighted average of interior v exterior (assuming 5% exterior lighting based on distribution of LEDs from on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study) and SF v MF interior based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1463] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1464] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1465] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

Other factors as defined above

For example: for the same 4W LED that is installed in a single family interior location through a ComEd upstream program:

ΔkW = ((25 - 4) / 1000) * 0.784 * (1-0.008) * 1.11 * 0.128

= 0.0023 kW

Second and third year install savings should be calculated using the appropriate ISR and the delta watts and hours from the install year.

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

ΔTherms = - (((WattsBase - WattsEE) / 1000) * ISR * (1-Leakage) * Hours * HF * 0.03412) / ηHeat

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior[1466]

= 0% for exterior location

= 42% for unknown location[1467]

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency.

= 0.70 [1468]

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

For Omni-directional A-lamps, the baseline lamp is assumed to need replacing after 1000 hours. Therefore a baseline cost of $1.25 should be applied every 0.92 years for interior applications, 0.40 years for exterior applications and 0.86 years for unknown.

For Decorative a baseline cost of $1.74 should be applied every 0.92 years for interior applications, 0.40 years for exterior applications and 0.86 years for unknown.

[1466] Average result from REMRate modeling of several different configurations and IL locations of homes

[1467] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1468] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

For Directional a baseline cost of $3.53 should be applied every 0.92 years for interior applications, 0.40 years for exterior applications and 0.86 years for unknown.

For Linear Task/Under Cabinet and T-LEDs, with a linear fluorescent baseline, there is assumed no O&M impact since the baseline lamp life is 18,000 – 30,000 hours and which is longer than the assumed measure life.

It is important to note that for cost-effectiveness screening purposes, the O&M cost adjustments should only be applied in cases where the light bulbs area actually in service and so should be multiplied by the appropriate ISR.

MEASURE CODE: RS-LTG-LEDE-V4-260101

REVIEW DEADLINE: 1/1/2028

5.5.14 Ultra-Efficient LED Lighting

DESCRIPTION

This characterization provides savings assumptions for a variety of ultra-efficient LED screw-based lamp types including omnidirectional and specialty (globe, decorative and downlights) types. This characterization assumes that the LED lamp is installed in a residential location. Where the implementation strategy does not allow for the installation location to be known (e.g., an upstream retail program not in a store 'easily accessed by income qualified communities' (see discussion below)) a deemed split of 97% Residential and 3% Commercial assumptions should be used.

This measure was developed to be applicable to the following program types: TOS, NC, EREP, KITS, DI. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

In order for this characterization to apply, new lamps must exceed efficiency specifications defined in the Baseline Efficacy Tables below. Consult the tables to find the *minimum efficacy* that can be considered ultra-efficient for each bulb type.

Actual lamp wattages of the efficient equipment should be used to determine savings.

DEFINITION OF BASELINE EQUIPMENT

For TOS, NC or Kit programs, the baseline equipment is a standard LED bulb. See Baseline Efficacy tables below for specific baseline efficacies by lamp type and lumen output.

For Direct Install programs where it can be shown that the LED bulb is replacing working inefficient lighting, the existing inefficient lighting is baseline for the assumed remaining life of the existing lamp, and a standard LED bulb for the remainder of the measure life. A mid-life adjustment is therefore applied after 2 years, see Mid-Life Adjustment section below.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

According to the ENERGY STAR[1469] Qualified Products list (accessed 6/16/2020), the average rated life for Omnidirectional lamps is approximately 20,000 hours, 17,000 hours for decorative and 25,000 for directional lamps. Measure life is should be calculated by dividing these rated life assumptions with the hours of use. For direct install programs, a mid-life adjustment is applied after 2 years.

DEEMED MEASURE COST

The actual ultra-efficient LED lamp cost should be used. For incremental cost, assume a baseline cost according to the following table[1470]:

Bulb Type	Standard LED Baseline Cost
Omnidirectional	$2.70
Directional	$5.18
Decorative and Globe	$3.40

[1469] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[1470] Baseline and LED lamp costs are based on field data collected by CLEAResult and provided by ComEd. See ComEd Pricing Projections 06302016.xlsx for analysis. Given LED prices are expected to continue declining assumed costs should be reassessed on an annual basis and replaced with IL specific LED program information when available.

For Direct Install, assume the full ultra-efficient LED install cost, and a deferred baseline replacement cost (after 2 years) as provided above. This cost should be discounted to present value using the nominal societal discount rate.

LOADSHAPE

Loadshape R06 – Residential Indoor Lighting

Loadshape R07 – Residential Outdoor Lighting

COINCIDENCE FACTOR

For omnidirectional: The summer peak coincidence factor is assumed to be 0.128 for Residential and in-unit Multi Family bulbs,[1471] 0.273 for exterior bulbs,[1472] and 0.135 for unknown,[1473]

For specialty bulbs: The summer peak coincidence factor is assumed to be 0.109 for residential and in-unit multifamily bulbs,[1474], 0.273 for exterior bulbs[1475] and 0.117 for unknown[1476].

Use Multifamily if the building meets the utility's definition for multifamily.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta \text{kWh} = \left(\frac{(Wattsbase - WattsEE)}{1000}\right) * ISR \ * (1 - Leakage) \ * \ Hours \ * WHFe$$

Where:

$\text{Watts}_{\text{base}}$ = LumensEE / $\text{Efficacy}_{\text{Base}}$

LumensEE = Lumens of ultra-efficient lamp

= Actual

$\text{Efficacy}_{\text{Base}}$ = Efficacy (Lumens/Watt) or standard efficiency LED baseline bulb.

= See table below[1477]:

[1471] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1472] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1473] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1474] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1475] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for specialty LEDs in exterior applications.

[1476] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1477] Average lumens per watt for each lamp type as provided in standard LED measures, based on Guidehouse file "LED Lamp Updates 2021-06-09".

Lamp Type	Minimum Lumens	Maximum Lumens	$Efficacy_{Base}$ (Lumens/Watt)
Omnidirectional	120	3,299	93.6
Decorative	310	2,700	100.6
Directional	310	3,299	81.6
Additional EISA Non-Exempt Bulb Types	310	1,999	91.1

.

$Watts_{EE}$ = Actual wattage of LED purchased / installed must be used. ISR = In Service Rate, the percentage of lamps rebated that are actually in service.

Program		In Service Rate (ISR)[1478]
Retail (Time of Sale)		97.4%[1479]
Direct Install		94.5%[1480]
Virtual Assessment followed by Unverified Self-Install		97.5%[1481]
Efficiency Kits[1482]	LED Distribution[1483]	82.3%
	School Kits[1484]	83.3%
	Direct Mail Kits[1485]	91.2%
	Community Distributed Kits[1486]	94.8%

[1478] In Service Rates now represent the lifetime In Service Rates with the second and third year installations discounted by the Real Discount Rate of 2.0%. Lifetime ISR assumptions for efficiency kits are based upon comparing with CFL Distribution First year ISR and multiplying by the CFL Distribution Final ISR value, capped at 95%, and second and third year estimates based on same proportion of future installs. For all other programs Tthe 98% Lifetime ISR assumption is based upon the standard CFL measure in the absence of any better reference. This value is based upon review of two evaluations:
'Nexus Market Research, RLW Analytics and GDS Associates study; "New England Residential Lighting Markdown Impact Evaluation, January 20, 2009' and 'KEMA Inc, Feb 2010, Final Evaluation Report:, Upstream Lighting Program, Volume 1.' This implies that only 2% of bulbs purchased are never installed. The second and third year installations are based upon Ameren analysis of the Californian KEMA study showing that 54% of future installs occur in year 2 and 46% in year 3.

[1479] 1st year in service rate is based upon analysis of ComEd PY8, PY9 and CY2018 and Ameren PY8 intercept data (see 'RES Lighting ISR_2019.xlsx' for more information).

[1480] Based upon average of Navigant low income single family direct install field work LED ISR and Standard CFL assumption in the absence of better data, and is based upon review of the PY2 and PY3 ComEd Direct Install program surveys. This value includes bulb failures in the 1st year to be consistent with the Commission approval of annualization of savings for first year savings claims. ComEd PY2 All Electric Single Family Home Energy Performance Tune-Up Program Evaluation, Navigant Consulting, December 21, 2010.

[1481] An equal weighted average of Direct Install and Direct Mail Kit ISRs. Interest and applicability of measures confirmed through virtual assessment.

[1482] In Service Rates provided are for the bulb within a kit only. Given the significant differences in program design and the level of education provided through Efficiency Kits programs, the evaluators should apply the ISR estimated through evaluations (either past evaluations or the current program year evaluation) of the specific Efficiency Kits program. In cases where program-specific evaluation results for an ISR are unavailable, the default ISR values for Efficiency Kits provide may be used.

[1483] Free bulbs provided without request, with little or no education. Consistent with Standard CFL assumptions.

[1484] 1st year ISR for school kits based on ComEd PY9 data for the Elementary Energy Education program. Final ISR assumptions are based upon comparing with CFL Distribution First year ISR and multiplying by the CFL Distribution Final ISR value, and second and third year estimates based on same proportion of future installs.

[1485] Opt-in program to receive kits via mail, with little or no education. Consistent with Standard CFL assumptions.

[1486] Kits distributed in a community setting, targeted to income qualified communities. Research from 2018 Ameren Illinois Income Qualified participant survey.

Program	In Service Rate (ISR)[1478]
Food Bank / Pantry Distribution[1487]	97.5%[1488]

Leakage = Adjustment to account for the percentage of program bulbs that move out (and in if deemed appropriate)[1489] of the Utility Jurisdiction.

KITS programs = Determined through evaluation

Upstream (TOS) Lighting programs = Use deemed assumptions below:[1490]

ComEd: 0.95%

Ameren: 13.1%

All other programs = 0

Hours = Average hours of use per year depending on bulb type

Installation Location	Omnidirectional Hours	Specialty Hours
Residential and in-unit Multi Family	1,089[1491]	763[1492]
Exterior	2,475[1493]	2,475[1494]
Unknown	1,159[1495]	1,020[1496]

WHFe = Waste heat factor for energy to account for cooling energy savings from efficient lighting

Bulb Location	WHFe
Interior single family	1.06 [1497]

[1487] Free bulbs provided through local food banks and food pantries.

[1488] 1st year ISR is determined based on online surveys conducted for ComEd CY2018 Food Bank LED Distribution program. See 'CY2018 ComEd Foodbank LED Dist Survey Results_Navigant'.

[1489] Leakage in is only appropriate to credit to IL utility program savings if it is reasonably expected that the IL utility program marketing efforts played an important role in influencing customer to purchase the light bulbs. Furthermore, consideration that such customers might be free riders should be addressed. If leakage in is assessed, efforts should be made to ensure no double counting of savings occurs if the evaluation is estimating both leakage in and spillover savings of light bulbs.

[1490] Leakage rate is based upon an average of the decorative and omnidirectional leakage values provided fom a review of evaluations from ComEd and Ameren.

[1491] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1492] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1493] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1494] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for specialty LEDs in exterior applications.

[1495] Based on a weighted average of hours of use in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1496] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1497] The value is estimated at 1.06 (calculated as 1 + (0.66*(0.27 / 2.8)). Based on cooling loads decreasing by 27% of the lighting savings (average result from REMRate modeling of several different configurations and IL locations of homes), assuming

Bulb Location	WHFe
Multifamily in unit	1.04 [1498]
Exterior or uncooled location	1.0
Unknown location	1.049[1499]

HEATING PENALTY

If electric heated home (if heating fuel is unknown assume gas, see Fossil Fuel section):

$$\Delta kWh^{1500} = -\frac{((WattsBase - WattsEE) * ISR * (1-Leakage) * Hours * HF)}{1{,}000 * \eta Heat}$$

Where:

HF = Heating Factor or percentage of light savings that must be heated

= 49% for interior[1501]

= 0% for exterior or unheated location

= 42% for unknown location[1502]

ηHeat = Efficiency in COP of Heating equipment

= actual. If not available use:[1503]

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00

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typical cooling system operating efficiency of 2.8 COP (starting from standard assumption of SEER2 13.4 central AC unit, converted to 11.4 EER2 using algorithm (-0.02 * SEER^2) + (1.12 * SEER) (from Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder), converted to COP and including distribution efficiency = EER2 * 0.85/3.412 = 2.8COP) and 66% of homes in Illinois having central cooling ("Table HC7.9 Air Conditioning in Homes in Midwest Region, Divisions, and States, 2009 from Energy Information Administration", 2009 Residential Energy Consumption Survey)

[1498] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1499] Unknown is the average of the 5.5.6 LED Specialty Lamps and 5.5.8 LED Screw Based Omnidirectional Bulbs unknown assumptions.

[1500] Negative value because this is an increase in heating consumption due to the efficient lighting.

[1501] This means that heating loads increase by 49% of the lighting savings. This is based on the average result from REMRate modeling of several different configurations and IL locations of homes.

[1502] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1503] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note efficiency should include duct losses. Defaults provided assume 15% duct loss for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	COP_{HEAT} (COP Estimate) = (HSPF2/3.412)*0.85
Unknown[1504]	N/A	N/A	1.28

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW \quad = \frac{(WattsBase - WattsEE)}{1000} * ISR * (1 - Leakage) * WHFd * CF$$

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

Bulb Location	WHFd
Interior single family	1.11[1505]
Multifamily in unit	1.07[1506]
Exterior or uncooled location	1.0
Unknown location	1.088[1507]

CF = Summer Peak Coincidence Factor for measure. See table depening on the bulb type

Bulb Location	Omnidirectional CF	Specialty CF
Interior	0.128[1508]	0.109[1509]
Exterior	0.273[1510]	0.273[1511]
Unknown	0.135[1512]	0.177[1513]

[1504] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see "HC6.9 Space Heating in Midwest Region.xls", using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1505] The value is estimated at 1.11 (calculated as 1 + (0.66 * 0.466 / 2.8)). See footnote relating to WHFe for details. Note the 46.6% factor represents the average Residential cooling coincidence factor calculated by dividing average load during the peak hours divided by the maximum cooling load.

[1506] As above but using estimate of 45% of multifamily buildings in Illinois having central cooling (based on data from "Table HC7.1 Air Conditioning in U.S. Homes, By Housing Unit Type, 2009" which is for the whole of the US, scaled to IL air conditioning prevalence compared to US average)

[1507] Unknown is the average of the 5.5.6 LED Specialty Lamps and 5.5.8 LED Screw Based Omnidirectional Bulbs unknown assumptions.

[1508] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1509] Based on the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs.

[1510] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1511] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for specialty LEDs in exterior applications.

[1512] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1513] Based on a weighted average of coincidence factors in interior and exterior applications, assuming 5% exterior lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

Other factors as defined above

FOSSIL FUEL SAVINGS

Heating penalty if Natural Gas heated home, or if heating fuel is unknown.

$$\Delta\text{Therms} = -\frac{((WattsBase - WattsEE) * ISR * (1 - Leakage) * Hours * HF * 0.03412)}{1{,}000 * \eta Heat}$$

Where:

HF = Heating factor, or percentage of lighting savings that must be replaced by heating system.

= 49% for interior[1514]

= 0% for exterior location

= 42% for unknown location[1515]

0.03412 = Converts kWh to Therms

ηHeat = Average heating system efficiency.

= 0.70 [1516]

MID-LIFE ADJUSTMENT

For Direct Install programs a mid-life adjustment should be applied after two years. To calculate the adjustment perform the following calculation:

$$\text{Mid-life adjustment} = \frac{(Standard\ LED\ Lamp\ wattage - Ultra\ Efficient\ Lamp\ Wattage)}{(Existing\ Replaced\ Lamp\ Wattage - Ultra\ Efficient\ Lamp\ Wattage)}$$

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-LTG-ULED-V2-260101

REVIEW DEADLINE: 1/1/2029

[1514] Average result from REMRate modeling of several different configurations and IL locations of homes

[1515] Based on a weighted average of interior and exterior hours of use from the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs, assuming 15% exterior specialty lighting. The distribution of LEDs is based on the on-site lighting inventory conducted as part of the IL Statewide LED Lighting Logger study.

[1516] This has been estimated assuming that natural gas central furnace heating is typical for Illinois residences (66% of Illinois homes have a Natural Gas Furnace (based on Energy Information Administration, 2009 Residential Energy Consumption Survey) In 2000, 24% of furnaces purchased in Illinois were condensing (based on data from GAMA, provided to Department of Energy during the federal standard setting process for residential heating equipment - see Furnace Penetration.xls). Furnaces tend to last up to 20 years and so units purchased 10 years ago provide a reasonable proxy for the current mix of furnaces in the State. Assuming typical efficiencies for condensing and non-condensing furnaces and duct losses, the average heating system efficiency is estimated as follows:
(0.24*0.92) + (0.76*0.8) * (1-0.15) = 0.70

5.5.15 IQ Integrated Porchlight with Motion Sensor – Provisional

DESCRIPTION

This measure is an integrated LED Outdoor Porchlight with a motion sensor provided to income qualified households for energy savings and to provide security and safety. Integrated LED Fixtures with motion sensor are superior to standard porch lights with screw-in bulbs because:

- Integrated fixtures can have higher luminaire efficiencies providing more directed light where it is required and therefore reducing necessary wattage;
- Motion sensors switch off the light when not required, preventing the reliance of the homeowner to switch on and off;
- The sealed units are more weather resistant preventing moisture damage and increasing lifetime.

This measure was developed to be applicable to the following program types: DI.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as an Integrated LED Fixture with a motion sensor exceeding efficacy criteria of 60 lumens/watt (note ENERGY STAR no longer qualifies LED fixtures, but this is the last ENERGY STAR Luminaire Specification v2.2 (effective 8/15/2019 to 12/31/2024) specification). The effectiveness of the fixture in delivering light where required (Light Output Ratio (LOR)) is assumed to be 90%, based on eligible fixture photometric reports.

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is the existing old, inefficient or damaged porchlight, without a motion sensor and utilizing screw-based lamps. It is assumed that 50% of existing lamps are screw based LEDs and 50% are CFLs[1517]. This same baseline is used in the limited instances where the existing porchlight is in-operable or non-existent since security lighting is required by building codes and considered a fundamental right for the occupants.

The effectiveness of the fixture in delivering light where required (Light Output Ratio (LOR)) of the existing fixture is assumed to be 50%.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The lifetime of the fixture is a function of its rated life and average hours of use. The rated life is assumed to be 50,000 for outdoor fixtures. However, fixture lifetimes are capped at 15 years.[1518]

Note a baseline shift is assumed to occur, when the existing CFL lamps burn out and the only option for purchase is a LED lamp. Note reduced savings continue beyond that time due to the significantly higher light output ratio of the integrated fixture, and due to the motion sensor.

DEEMED MEASURE COST

The actual cost of the fixture installed through Direct Install should be used. A default of $120 is provided based on $80 measure cost[1519] and $40 installation cost[1520] .

LOADSHAPE

Loadshape R07 - Residential Outdoor Lighting

[1517] GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024, Table 3-6, Appendix A.

[1518] Based on recommendation in the Dunsky Energy Consulting, Livingston Energy Innovations and Opinion Dynamics Corporation; NEEP Emerging Technology Research Report, p 6-18.

[1519] Internet review of prices on Home Depot and Lowe’s web sites.

[1520] Estimated at thirty minute installation time based on web research at $80/hr labor cost.

COINCIDENCE FACTOR

The summer peak coincidence factor is assumed to be 0.273 for exterior fixtures.[1521]

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh \quad = \Delta kWh_{Lighting} + \Delta kWh_{Controls}$$

$$\Delta kWh_{Lighting} \ = \left(\frac{Watts_{Base} \ - \ Watts_{EE}}{1{,}000}\right) * Hours * ISR * WHF_E$$

$$\Delta kWh_{Controls} = \frac{Watts_{EE}}{1{,}000} \ * \ Hours \ * \ (ESF_{EE} \ - \ ESF_{Base}) * ISR * \ WHF_E$$

Where:

$Watts_{Base}$ = Input wattage of the existing porchlight fixture.

= Actual. If unknown, assume a 1,400-1,999 lumen fixture with 50% LED (16W) and 50% CFL (20W) lamps[1522] for total baseline wattage of 18W[1523].

$Watts_{EE}$ = Actual wattage of LED fixture installed - If unknown, assume 8.9W[1524]

Hours = Average hours of use per year for existing fixture without motion sensor

= 2,475[1525]

ESF_{Base} = Energy Savings Factor of the uncontrolled lighting fixture that existed before the new lighting controls were installed

= 0%

ESF_{EE} = Energy Savings Factor of the light with motion sensor

= 81.6%[1526]

[1521] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1522] GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024, Table 3-6, Appendix A.

[1523] See file "LED Lamp Updates 2021-06-09" for details on Guidehouse lamp wattage calculations based on equivalent baseline wattage and LED wattage of available ENERGY STAR product.

[1524] 8.9W is estimated by applying ratio of inefficient fixture to integrated fixture relative Light Output Ratio to the baseline LED lamp 16W = (16 * 0.5/0.9 = 8.9W). This means that an 8.9W Integrated fixtures with LOR of 0.9 would provide approximately the same lumen output as an existing fixture with 16W screw based lamp and LOR of 0.5.

[1525] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1526] Measure assumes that with the motion sensor, the porchlight will be triggered 15 times per night with 5 minute run times, ISR = In Service Rate, the percentage of units rebated that are actually in service

= 1.0 for Direct Install

WHFe = Waste heat factor for energy to account for cooling energy savings from efficient lighting

= 1 for exterior lighting

For example, using defaults provided an integrated LED fixture with motion sensor would save:

$$\Delta kWh = \Delta kWh_{Lighting} + \Delta kWh_{Controls}$$

$$\Delta kWh_{Lighting} = ((18 – 8.9)/1{,}000) * 2{,}475 * 1.0 * 1.0$$

$$= 22.5 \text{ kWh}$$

$$\Delta kWh_{Controls} = (8.9/1{,}000) * 2475 * (0.816 – 0) * 1.0 * 1.0$$

$$= 18.0 \text{ kWh}$$

$$\Delta kWh = 22.5 + 18.0$$

$$= 40.5 \text{ kWh}$$

MID-LIFE BASELINE ADJUSTMENT

During the lifetime of the new integrated LED fixture, the existing CFL bulb would be required to be replaced and at that stage the only option would be an LED. It is assumed this would happen after two years. Note a reduced savings continue due to the significantly higher light output ratio of the integrated fixture, and the motion sensor.

Default savings after mid-life adjustment:

$$\Delta kWh_{Lighting} = ((16 – 8.9)/1{,}000) * 2{,}475 * 1.0 * 1.0$$

$$= 17.6 \text{ kWh}$$

$$\Delta kWh_{Controls} = (8.9/1{,}000) * 2475 * (0.816 – 0) * 1.0 * 1.0$$

$$= 18.0 \text{ kWh}$$

$$\Delta kWh = 17.6 + 18.0$$

$$= 35.6 \text{ kWh}$$

Therefore apply mid-life adjustment of 35.6/40.5 = 88% after 2 years.

HEATING PENALTY

N/A for exterior fixture.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = ((WattsBase - WattsEE) / 1{,}000) * ISR * WHFd * CF$$

Where:

WHFd = Waste heat factor for demand to account for cooling savings from efficient lighting.

= 1.0 for exterior location

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for a total of 456.6 hours. ESFEE is therefore estimated as 456.6/2475 = 81.6%.

CF = Summer Peak Coincidence Factor for measure.

= 0.273[1527]

Other factors as defined above

For example, using defaults provided an integrated LED fixture with motion sensor would save:

ΔkW = ((18 – 8.9) / 1,000) * 1.0 * 1.0 * 0.273

= 0.0025 kW

FOSSIL FUEL SAVINGS

N/A for exterior fixture.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

Installing an Integrated LED Porchlight will prevent the need for a replacement LED lamp, assumed to cost \$2.70[1528] after 2 years.

MEASURE CODE: RS-LTG-PLFX-V01-270101

REVIEW DEADLINE: 1/1/2028

[1527] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. the IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide coincidence factors for screw-based omnidirectional LEDs in exterior applications.

[1528] Baseline and LED lamp costs are based on field data collected by CLEAResult and provided by ComEd. See ComEd Pricing Projections 06302016.xlsx for analysis.

5.5.16 Residential Lighting Controls – Provisional

DESCRIPTION

This measure relates to the installation of new motion sensor or daylighting sensors and controls on a new or existing lighting system.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

A lamp or lighting fixture that is controlled by any of the control strategies characterized in this measure; motion sensors, daylighting (dusk to dawn) or dual (motion and daylighting) controls.

DEFINITION OF BASELINE EQUIPMENT

The baseline is assumed to be the existing lighting system and can include manual or no controls. Note where an existing inefficient fixture is replaced with an efficient fixture with control, use the fixture measure to calculate savings from the wattage reduction first, then assume the efficient fixture without control as the baseline for the control measure.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 10 years.[1529]

DEEMED MEASURE COST

The actual cost of the control device installed through Direct Install should be used.

LOADSHAPE

R07 - Residential Outdoor Lighting

COINCIDENCE FACTOR

Exterior controls only allow lighting to operate during night hours, so the summer peak demand savings is zero.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \frac{Watts_{Controlled}}{1000} * Hours * (ESF_{EE} - ESF_{Base}) * WHFe * ISR$$

Where:

$Watts_{Controlled}$ = Total lighting load connected to the control device, in watts. Note where an existing inefficient light is replaced with an efficient fixture with control, use the wattage of the efficient fixture's lighting component.

= Actual

ESF_{EE} = Energy Savings Factor (represents the percentage reduction to the operating Hours

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[1529] Based on research conducted by Guidehouse, interviewing 46 contractors, reported in 'ComEd Retrofit Add-On EUL Results Memo. January 27, 2020.

from the non-controlled lighting system) from the new lighting controls installed.

Lighting Control Type	Energy Savings Factor
Exterior Motion Sensor	41%[1530]
Exterior Dusk to Dawn	29%[1531]
No Lighting Control	0%

ESF_{Base} = Energy Savings Factor of the uncontrolled lighting fixture that existed before the new lighting controls were installed

= 0

Hours = Hours of use prior to the control being installed

= 2,475[1532]

ISR = In Service Rate, the percentage of units rebated that are actually in service

= 1.0 through Direct Install

kW Conversion = Watts/1000

WHFe = Waste heat factor for energy to account for cooling energy savings for exterior/outoor applications

= 1

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \frac{Watts_{Controlled}}{1000} * ISR * WHFd * CF$$

Where:

CF = Retrofit Summer Peak Coincidence Factor the lighting system with lighting controls installed. For exterior lighting controls CF

= 0[1533].

WHFd = Waste heat factor for energy to account for cooling energy savings for exterior/outoor or uncooled locations

= 1.

[1530] Exterior sensors are based upon data from "Application Assessment of Bi-Level LED Parking Lot Lighting" p6.

[1531] Calculated based on 2hr/day reduction over Hours = 730/2475 = 29.45%. Precision limited to 2 decimal places to align with commercial measure deemed ESF values.

[1532] Based on lighting logger study conducted as part of the PY5/6 ComEd Residential Lighting Program evaluation. The IL Statewide LED Lighting Logger study conducted as part of the PY8/PY9 evaluations of the Ameren Illinois and ComEd Residential Lighting programs was unable to provide hours of use for screw-based omnidirectional LEDs in exterior applications.

[1533] Based on Navigant verified value using 2014 Astronomical Applications Department, U.S. Naval Observatory data for ComEd's service territory. See Navigant Memorandum 'RE: LED Street Lighting Program Hours of Use for the ComEd and DCEO Programs. June 21, 2017'.

For example, dusk-to-dawn sensors included on a 12W LED fixture installed on the front exterior of a single-family home, where the previous device had no controls:

ΔkWh $= \frac{Watts_{Controlled}}{1000} * Hours * (ESF_{EE} - ESF_{Base}) * WHFe * ISR$

= 0.012 * 2,475 * (29% - 0%) * 1 * 1

= 8.6 kWh

ΔkW $= \frac{Watts_{Controlled}}{1000} * ISR * WHFd * CF$

= 0.012 * 1 * 1 * 0

= 0 kW

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

MEASURE CODE: RS-LTG-RLCO-V01-270101

REVIEW DEADLINE: 1/1/2028

5.6 Shell End Use

5.6.1 Air Sealing

DESCRIPTION

Thermal shell air leaks are sealed through strategic use and location of air-tight materials. Leaks are detected and leakage rates measured with the assistance of a blower-door. The algorithm for this measure can be used when the program implementation does not allow for more detailed forecasting through the use of residential modeling software. Prescriptive savings are provided for use only when a blower door test is not conducted.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Air sealing materials and diagnostic testing should meet all eligibility program qualification criteria. The initial and final tested leakage rates should be performed in such a manner that the identified reductions can be properly discerned, particularly in situations wherein multiple building envelope measures may be implemented simultaneously.

DEFINITION OF BASELINE EQUIPMENT

The existing air leakage should be determined through approved and appropriate test methods using a blower door. The baseline condition of a building upon first inspection significantly impacts the opportunity for cost-effective energy savings through air-sealing. Savings are provided for prescriptive air sealing measures when a blower door test is not conducted.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life for any air sealing (except window film, door sweeps or AC covers – see below) is assumed to be 20 years.[1534]

The following measure lives should be used for Rx products savings:

Rx Measure	Lifetime
Shrink-fit window film	1
Room AC cover	3[1535]
Door sweeps	5[1536]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years or 13 years for boilers.[1537] See section below for detail.

DEEMED MEASURE COST

The actual capital cost for this measure should be used in screening.

LOADSHAPE

Loadshape R08 - Residential Cooling

Loadshape R09 - Residential Electric Space Heat

[1534] As recommended in Navigant 'ComEd Effective Useful Life Research Report', May 2018.

[1535] New York Standard approach for Estimating Energy Savings from Energy Efficiency Programs V13, 2026; Accessed May 2026.

[1536] While products may be designed to last longer, with frequent movement and friction and installation by homeowners the effectiveness of the product is estimated to continue for 10 years.

[1537] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1538]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1539]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1540]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1541]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1542]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

[1538] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1539] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1540] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1541] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1542] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Methodology 1: Blower Door Test

Required methodology when blower door testing is conducted.

ΔkWh = ΔkWh_cooling + ΔkWh_heatingElectric + ΔkWh_heatingFurnace

Where:

ΔkWh_cooling = If central cooling, reduction in annual cooling requirement due to air sealing

= [(((CFM50_existing - CFM50_new)/N_cool) * 60 * 24 * CDD * DUA * LoadFactor * 0.018) / (1,000 * ηCool) * LM * $ADJ_{AirSealingCool}$] * $IE_{NetCorrection}$ * %Cool

CFM50_existing = Infiltration at 50 Pascals as measured by blower door before air sealing.

= Actual

CFM50_new = Infiltration at 50 Pascals as measured by blower door after air sealing.

= Actual

N_cool = Conversion factor from leakage at 50 Pascal to leakage at natural conditions

=Dependent on location and number of stories:[1543]

Climate Zone (City based upon) [1544]	N_cool (by # of stories)			
	1	1.5	2	3 +
1 (Rockford)	39.5	35.0	32.1	28.4
2 (Chicago)	38.9	34.4	31.6	28.0
3 (Springfield)	41.2	36.5	33.4	29.6
4 (St Louis, MO)	40.4	35.8	32.9	29.1
5 (Paducah, KY)	43.6	38.6	35.4	31.3

60 * 24 = Converts Cubic Feet per Minute to Cubic Feet per Day

CDD = Cooling Degree Days

= Dependent on location:[1545]

Climate Zone (City based upon)	CDD 65
1 (Rockford)	877
2 (Chicago)	1047

[1543] N-factor is used to convert 50-pascal blower door air flows to natural air flows and is dependent on geographic location and # of stories. These were developed by applying the LBNL infiltration model (see LBNL paper 21040, *Exegisis of Proposed ASHRAE Standard 119: Air Leakage Performance for Detached Single-Family Residential Buildings*; Sherman, 1986; page v-vi, Appendix page 7-9) to the reported wind speeds and outdoor temperatures provided by the NRDC 30 year climate normals. For more information see Bruce Harley, CLEAResult "Infiltration Factor Calculations Methodology.doc".

[1544] Note, the methodology for developing n-factors requires hourly normals as opposed to annual normals which are used for other assumptions in the TRM. Hourly normals were not available for all sites used for other climate assumptions and so the nearest locations were used (St Louis, MO for Belleville, IL and Paducah, KY for Marion, IL).

[1545] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F.

Climate Zone (City based upon)	CDD 65
3 (Springfield)	1183
4 (Belleville)	1641
5 (Marion/Murphysboro)	1450

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).

= 0.90 [1546]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1547]

0.018 = Specific Heat Capacity of Air (Btu/ft^3*°F)

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2 or CEER) of Air Conditioning equipment (kBtu/kWh) * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1548] or if unknown assume the following.[1549] If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3

[1546] This factor utilizes data from a metering study: Pigg, Scott, D. Cautley, and K. Koski, (2016). “Improving Installation and Maintenance Practices for Minnesota Residential Furnaces, Air Conditioners and Heat Pumps”, prepared for Minnesota Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over ½ of the actual annual operating hours for the highest operating hours homes in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois’ hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data. .

[1547] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

[1548] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1549] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Room AC[1550]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1551]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

LM = Latent multiplier to account for latent cooling demand[1552]

Climate Zone (City based upon)	LM
1 (Rockford)	3.3
2 (Chicago)	3.2
3 (Springfield)	3.7
4 (St Louis, MO)	3.6
5 (Paducah, KY)	3.7

$ADJ_{AirSealingCool}$ = Adjustment for cooling savings to account for inaccuracies in engineering algorithms[1553]

Measure	$ADJ_{AirSealingCool}$
Air sealing and attic insulation	114%
Air sealing without attic insulation	100%

$IE_{NetCorrection}$ = 100% if not income eligible or air sealing is installed without attic insulation.

= 110% if installing air sealing and attic insulation in income eligible projects with a deemed NTG value of 1.0 to offset net savings adjustment inherent when using

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[1550] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1551] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1552] Derived by calculating the sensible and total loads in each hour. For more information see Bruce Harley, CLEAResult "Infiltration Factor Calculations Methodology.doc". Note, the methodology requires hourly normals as opposed to annual normals which are used for other assumptions in the TRM. Hourly normals were not available for all sites used for other climate assumptions and so the nearest locations were used (St Louis, MO for Belleville, IL and Paducah, KY for Marion, IL).

[1553] As demonstrated in air sealing and insulation research by Navigant, see Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company.

These adjustment factors are based on a consumption data analysis using matching to non-participants. The values are therefore between net and gross with respect to free ridership. Like all consumption data analyses, they are net with respect to participant spillover and gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Consistent with Section 7.2 of the Illinois EE Policy Manual, applicable net-to-gross adjustments to the savings will be determined as part of the annual SAG net-to-gross process. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

$ADJ_{AirSealingCool}$ of 114% [1554]

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[1555]	98.9%	96.5%	99.8%	98.7%	98.6%

ΔkWh_heatingElectric = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to air sealing

= [(((CFM50_existing - CFM50_new)/N_heat) * 60 * 24 * HDD * 0.018) /ηHeat] *%ElectricHeat

N_heat = Conversion factor from leakage at 50 Pascal to leakage at natural conditions

= Based on climate zone, building height and exposure level:[1556]

Climate Zone (City based upon)	N_heat (by # of stories)			
	1	1.5	2	3 +
1 (Rockford)	23.8	21.1	19.3	17.1
2 (Chicago)	23.9	21.1	19.4	17.2
3 (Springfield)	24.2	21.5	19.7	17.4
4 (St Louis, MO)	25.4	22.5	20.7	18.3
5 (Paducah, KY)	27.8	24.6	22.6	20.0

HDD = Heating Degree Days

= Dependent on location:[1557]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266

[1554] The additional value of 10% was selected to acknowledge that some portion of the regression-derived adjustment factors accounts for gross impact effects, and that removing net effects embedded in the adjustment factors would increase savings to some degree. A review of historical NTG values for air sealing and insulation measures in non-income eligible populations did not provide definitive guidance for estimating the net component of the adjustment factors. Historically, free ridership has ranged from 9% to 26% for like measures, and spillover has ranged from 1% to 14%, while NTGs have ranged from 0.75 to 1.05. The midpoint of the NTG range would be 0.90, a 10% reduction from 1.0.

[1555] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1556] N-factor is used to convert 50-pascal blower door air flows to natural air flows and is dependent on geographic location and # of stories. These were developed by applying the LBNL infiltration model (see LBNL paper 21040, *Exegisis of Proposed ASHRAE Standard 119: Air Leakage Performance for Detached Single-Family Residential Buildings*; Sherman, 1986; page v-vi, Appendix page 7-9) to the reported wind speeds and outdoor temperatures provided by the NRDC 30 year climate normals. For more information see Bruce Harley, CLEAResult "Infiltration Factor Calculations Methodology.doc". Note, the methodology for developing n-factors requires hourly normals as opposed to annual normals which are used for other assumptions in the TRM. Hourly normals were not available for all sites used for other climate assumptions and so the nearest locations were used (St Louis, MO for Belleville, IL and Paducah, KY for Marion, IL).

[1557] National Climatic Data Center, calculated from 1981-2010 climate normals with a base temp of 60°F.

Climate Zone (City based upon)	HDD 60
4 (Belleville)	3188
5 (Marion/Murphysboro)	3390

ηHeat = Efficiency of heating system

= Actual heat efficiency * distribution efficiency (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1558] or if not available refer to default table below.[1559] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) = (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown (for use in program evaluation only)[1560]	N/A	N/A	1.32

3412 = Converts Btu to kWh

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump
= 0 % for Fossil Fuels

= If unknown[1561], use the following table:

[1558] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1559] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1560] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see "HC6.9 Space Heating in Midwest Region.xls", using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

[1561] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1562]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

For example: energy savings from air sealing. Energy savings for attic insulation are included in a separate example in Section 5.6.5: Ceiling/Attic Insulation.

Assume a 2-story single family non-income eligible home in Chicago completes air sealing, installs attic insulation, has 10.5 SEER central cooling and a heat pump with COP of 2 (1.92 including distribution losses), and has pre and post blower door test results of 3,400 and 2,250 CFM:

$\Delta kWh = \Delta kWh\_cooling + \Delta kWh\_heating$

$= [(((3{,}400 - 2{,}250) / 31.6) * 60 * 24 * 1{,}047 * 0.90 * 0.018) / (1{,}000 * 10.5) * 3.2 * 114\%] * 100\% * 100\% + [(((3{,}400 - 2{,}250) / 19.4) * 60 * 24 * 4{,}798 * 0.018) / (1.92 * 3{,}412)] * 100\%$

$= 308.8 + 1{,}125$

$= 1{,}433.8$ kWh

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: $= \Delta Therms * \%FurnaceFossil * F_e * 29.3 * ADJ_{AirSealingHeatFan}$

If electric furnace: $= \Delta kWh\_heating * F_e * \%FurnaceElectric * ADJ_{AirSealingHeatFan}$

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1563]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

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[1562] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[1563] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1564]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1565]

29.3 = kWh per therm

$ADJ_{AirSealingHeatFan}$ = Adjustment for fan savings during heating season to account for inaccuracies in engineering algorithms[1566]

Measure	$ADJ_{AirSealingHeatFan}$
Air sealing and attic insulation	113%
Air sealing without attic insulation	100%

For example: energy savings from air sealing. Energy savings for attic insulation are included in a separate example in Section 5.6.5: Ceiling/Attic Insulation.

Assume a well shielded, 2-story non-income eligible single family home in Chicago completes air sealing, installs attic insulation, has a gas furnace with system efficiency of 70%, and has pre and post blower door test results of 3,400 and 2,250 CFM (see therm calculation in Fossil Fuel Savings section):

ΔkWh_heatingGas = 77.8 * 1 * 0.0314 * 29.3 * 113%

= 80.8 kWh

[1564] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1565] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

[1566] As demonstrated in air sealing and insulation research by Navigant, see Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company. These adjustment factors are based on a consumption data analysis using matching to non-participants. The values are therefore between net and gross with respect to free ridership. Like all consumption data analyses, they are net with respect to participant spillover and gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Consistent with Section 7.2 of the Illinois EE Policy Manual, applicable net-to-gross adjustments to the savings will be determined as part of the annual SAG net-to-gross process. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

Methodology 2: Prescriptive Infiltration Reduction Measures

Savings shall only be calculated via Methodology 2 if a blower door test is not conducted.

$$\Delta kWh = (\Delta kWh\_Heating + \Delta kWh\_Cooling)$$

$$\Delta kWh\_Heating = (\Delta kWh_{gasket\_heat} * n_{gasket} * ISR + \Delta kWh_{windows\_heat} * sf_{windows} * ISR + \Delta kWh_{sweep\_heat} * n_{sweep} * ISR + \Delta kWh_{spray\ foam} * Oz_{spray\ foam} * ISR + \Delta kWh_{sealing\_heat} * lf_{sealing} * ISR + \Delta kWh_{WX\_heat} * lf_{WX} * ISR + \Delta kWh_{AC\ Cover\_heat} * n_{Cover} * ISR)$$

$$\Delta kWh\_Cooling = (\Delta kWh_{gasket\_cool} * n_{gasket} * ISR + \Delta kWh_{windows\_cool} * sf_{windows} * ISR + \Delta kWh_{sweep\_cool} * n_{sweep} * ISR + \Delta kWh_{sealing\_cool} * lf_{sealing} * ISR + \Delta kWh_{WX\_cool} * lf_{WX} * ISR)$$

Where:

ΔkWh_{gasket} = Annual kWh savings from installation of air sealing gasket on an electric outlet on an external wall.

Climate Zone	ΔkWh_{gasket_heat} / gasket		ΔkWh_{gasket_cool} / gasket		
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1567]	Unknown Cooling[1568]
1 (Rockford)	12.5	7.7	1.2	0.5	1.1
2 (Chicago)	11.5	7.1	1.4	0.6	1.2
3 (Springfield)	10.0	6.2	1.8	0.7	1.5
4 (Belleville)	7.1	4.4	2.4	1.0	2.1
5 (Marion)	6.9	4.3	2.0	0.8	1.8
Unknown	10.5	6.5	1.6	0.6	1.4

n_{gasket} = Number of gaskets installed

$\Delta kWh_{windows}$ = Annual kWh savings from installation of Shrink-Fit Window Kit[1569]

Climate Zone	$\Delta kWh_{windows\_heat}$ / square ft	
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump
1 (Rockford)	4	2.1
2 (Chicago)	3.9	2
3 (Springfield)	3.3	1.7
4 (Belleville)	2.5	1.3
5 (Marion)	2.6	1.3

[1567] Estimated by multiplying by 0.41 LoadFactor described above.

[1568] Unknown cooling values in all tables are based on 78% of homes having Central AC, 20.6% having window AC and 1.6% having no AC, assumptions derived from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1569] Prescriptive savings are based upon "Cost Benefit Analysis for 2018, Annual Report submitted to Virginia Natural Gas, Inc., submitted by Nexant." July 31, 2018. Adjusted for relative HDD of Virginia Beach VA with the IL climate zones. See "Window Film Savings Calculation.xlsx" for more information.

$sf_{windows}$ = square footage of shrink-fit window film

ΔkWh_{sweep} = Annual kWh savings from installation of a door sweep on a door between conditioned and unconditioned space

Climate Zone	ΔkWh_{sweep_heat} / sweep		ΔkWh_{sweep_cool} / sweep		
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1570]	Unknown Cooling
1 (Rockford)	47.8	29.5	4.7	1.9	4.0
2 (Chicago)	43.9	27.1	5.5	2.3	4.7
3 (Springfield)	38.3	23.6	6.8	2.8	5.8
4 (Belleville)	27.3	16.9	9.3	3.8	8.0
5 (Marion)	26.6	16.4	7.8	3.2	6.8
Unknown	40.3	24.9	6.0	2.5	5.2

n_{sweep} = Number of sweeps installed

$\Delta kWh_{spray\ foam}$ = Annual kWh savings per ounce of spray foam product[1571]

$\Delta kWh_{spray\ foam}$ per oz (heating)		$\Delta kWh_{spray\ foam}$ per oz (cooling)		
Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1572]	Unknown Cooling
27.4	16.9	0.61	0.25	0.52

$Oz_{spray\ foam}$ = Ounce of spray foam product

= Actual (default of 12oz for consumer product (or if unknown) or 20 oz for professional product)

$\Delta kWh_{sealing}$ = Annual kWh per linear foot savings from other air sealing products such as caulk, or polyethlylene tape in locations between conditioned and unconditioned space.

= For retail and kit programs:

Climate Zone	$\Delta kWh_{sealing\_heat}$ / linear ft		$\Delta kWh_{sealing\_cool}$ / linear ft		
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1573]	Unknown Cooling
1 (Rockford)	2.8	1.7	0.3	0.1	0.2

[1570] Estimated by multiplying by 0.41 LoadFactor described above.

[1571] Savings derived from Bibee et al., "Air Sealing Existing Homes with Foam-in-a-Can Rivals Energy Cost Benefits of CFLs", ASHRAE 2010.See "ASHRAE spray foam paper quick analysis_VEIC.xls" for details.

[1572] Estimated by multiplying by 0.41 LoadFactor described above.

[1573] Estimated by multiplying by 0.41 LoadFactor described above.

Climate Zone	$\Delta kWh_{sealing\_heat}$ / linear ft		$\Delta kWh_{sealing\_cool}$ / linear ft		
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1573]	Unknown Cooling
2 (Chicago)	2.6	1.6	0.3	0.1	0.3
3 (Springfield)	2.2	1.4	0.4	0.2	0.3
4 (Belleville)	1.6	1.0	0.5	0.2	0.5
5 (Marion)	1.6	1.0	0.5	0.2	0.4
Unknown	2.4	1.5	0.4	0.1	0.3

= For programs using professional air sealing contractors in homes or multifamily buildings were blower door testing is not possible, v14 prescriptive assumptions may be used. The TAC will work on developing an improved approach for these installations for v16.

Climate Zone	$\Delta kWh_{sealing\_heat}$ / linear ft		$\Delta kWh_{sealing\_cool}$ / linear ft		
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1574]	Unknown Cooling
1 (Rockford)	11.6	5.8	0.11	0.05	0.10
2 (Chicago)	11.2	5.6	0.12	0.05	0.10
3 (Springfield)	9.7	4.8	0.15	0.06	0.13
4 (Belleville)	7.7	3.9	0.21	0.09	0.18
5 (Marion)	7.9	3.9	0.18	0.07	0.15
Unknown	11.6	5.8	0.11	0.05	0.10

$lf_{sealing}$ = linear feet of caulking, sealing, spray foam or polyethylene tape

ΔkWh_{WX} = Annual kWh savings from window weatherstripping or door weatherstripping

Climate Zone	ΔkWh_{WX_heat} / linear ft		ΔkWh_{WX_cool} / linear ft		
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump	With Central Cooling	With Room AC Cooling[1575]	Unknown Cooling
1 (Rockford)	2.6	1.6	0.3	0.1	0.2
2 (Chicago)	2.4	1.5	0.3	0.1	0.3
3 (Springfield)	2.1	1.3	0.4	0.1	0.3
4 (Belleville)	1.5	0.9	0.5	0.2	0.4
5 (Marion)	1.4	0.9	0.4	0.2	0.4
Unknown	2.2	1.3	0.3	0.1	0.3

lf_{WX} = Linear feet of window weatherstripping or door weatherstripping

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[1574] Estimated by multiplying by 0.41 LoadFactor described above.

[1575] Estimated by multiplying by 0.41 LoadFactor described above.

$\Delta kWh_{AC\ Cover\_heat}$ = Annual kWh savings from installing a cover over a Room AC unit. Use this measure for residential and multi family in-unit applications. Commercial or common area multi family should use 4.4.38 Covers and Gap Sealers for Room Air Conditioners.

Climate Zone	$\Delta kWh_{Room\ AC\ Cover\_heat}$ / cover[1576]	
(City based upon)	Electric Resistance (Baseboard or Electric Furnace)	Heat Pump
1 (Rockford)	116.5	69.1
2 (Chicago)	106.3	63.1
3 (Springfield)	93.1	55.2
4 (Belleville)	66.2	39.3
5 (Marion)	64.5	38.3

NOTE: There are no cooling energy savings associated with the Room AC cover measure, as the cover is intended for use only during the heating season and will be removed during the cooling season.

n_{cover} = Number of Room AC covers installed.

ISR = In service rate of weatherization kits dependent on install method as listed below:[1577]

[1576] The deemed savings were calculated using the algorithm specified in Methodology 1. The document "There are Holes in Our Walls" prepared for the Urban Green Council estimates leakage at 19 CFM under a 10 Pa pressure differential (2011.04.14-Holes-in-Our-Walls.pdf see page 13). This value was converted to an equivalent leakage rate at a 50 Pa pressure differential using the Infiltration Power Law relationship developed by Lawrence Berkeley Laboratory (Estimation of Infiltration from leakage and Climate Indicators - see page 1). For N factor, a two-story building was assumed based on ResStock building stock analysis (state: IL; file: IL_upgrade0.csv.gz).

[1577] For any airsealing kit measure, if research indicates that a certain percentage of participants who indicated during the original ISR survey that they plan to install are found to have actually installed at a later date, these future installs can be claimed as 2nd or 3rd year installs through an errata.

Selection	ISR
Distributed School Weatherization Kits	0.57[1578]
Distributed Self-Install Income-Qualified Kits[1579]	
Weatherstripping	0.63
Outlet and Switch Gaskets	0.40[1580]
Window Kit	0.57
Door sweep	0.62[1581]
Other Distributed Self-Install Income-Qualified Measures	0.67[1582]
Opt-in Weatherization Kits[1583]	
V-seal weatherstripping	0.68
Cell foam tape weatherstripping	0.72
Rope Caulk	0.60
Switch and outlet gaskets	0.76
Door sweep	0.68
Other Self-Install Weatherization Measures	0.69
Retail (DIY Stores)[1584]	
Spray Foam Insulation	0.59
Tube Caulking	0.63
Retail (Other Stores)	
Spray Foam Insulation and Tube Caulking	0.8
Other Retail Self-Install Weatherization Measures[1585]	
Doorsweeps and Room AC covers	0.95
Weatherstripping and gaskets	0.85
Direct Install	1.0

[1578] Results from Home Energy Worksheets completed by student/families in 2020, 2021, and 2022 were nearly the same as values from: LLUME Advising LLC. School-Based Energy Education Programs: Goals, Challenges, and Opportunities. October 2015. See result for AEP Ohio Weather stripping/door sweep/gaskets kit in table on page 17. Home Energy Worksheets also establish the fraction of participants who indicate they “will install later” for specific measures. Follow-up research completed by Guidehouse for Nicor Gas in 2022 found that, on average, 51.3% of respondents who initially reported that they hadn’t installed specific kit measures, but “planned to” subsequently had installed the measures. Combining these findings allows for an ISR that accounts for initial and one round of subsequent installations. To maintain a conservative estimate of ISR, the remaining 48.7% are presumed uninstalled. See: EESchoolKitSubsequentInstall_HEW.xlsx for data and calculations.

[1579] Guidehouse. Income Eligible Gas Kits ISR Special Study Results. June 16, 2020.

[1580] Research from 2021 Ameren Illinois Income Qualified participant survey, available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf

[1581] Research from 2021 Ameren Illinois Income Qualified participant survey, available on IL SAG website: https://ilsag.s3.amazonaws.com/AIC-Income-Qualified-Initiative-Participant-Survey-Results-Memo-FINAL-2022-02-01.pdf

[1582] Straight average of other measures.

[1583] Table 16, Illinois TRM Workpaper ESK ISR Follow-up Survey 2023-05-30

[1584] Guidehouse and Verdant, “ComEd Canned Spray Foam and Caulking Gross Parameter Research Findings”. May 15, 2026. This study was limited to large DIY stores (e.g. Lowes Home Depot, Menards). The TAC discussed potential reasons why other stores may support different markets who may have different use cases for purchases. In the absence of empirical evaluation evidence, other store types are assigned a 0.8 ISR until additional evaluation can be performed.

[1585] In the absence of empirical evaluation results, these values are an estimate of potential partial usage of products purchased. The Guidehouse and Verdant study found 85-88% usage of products that could be partially used.

For example, 5 gaskets, 2 door sweeps, 10 linear feet of window weatherstripping and an AC cover is provided in a Distributed Self-Install Income-Qualified Kits for a home in Rockford with electric resistance and cooling

$$\Delta kWh = (\Delta kWh\_Heating + \Delta kWh\_Cooling)$$

$$\Delta kWh\_Heating = (\Delta kWh_{gasket\_heat} * n_{gasket} * ISR + \Delta kWh_{windows\_heat} * sf_{windows} * ISR + \Delta kWh_{sweep\_heat} * n_{sweep} * ISR + \Delta kWh_{sealing\_heat} * lf_{sealing} * ISR + \Delta kWh_{WX\_heat} * lf_{WX} * ISR + \Delta kWh_{AC\ Cover\_heat} * n_{cover} * ISR)$$

$$\Delta kWh\_Cooling = (\Delta kWh_{gasket\_cool} * n_{gasket} * ISR + \Delta kWh_{windows\_cool} * sf_{windows} * ISR + \Delta kWh_{sweep\_cool} * n_{sweep} * ISR + \Delta kWh_{sealing\_cool} * lf_{sealing} * ISR + \Delta kWh_{WX\_cool} * lf_{WX} * ISR)$$

$$\Delta kWh\_Heating = (12.48 * 5 * 0.4) + (47.81 * 2 * 0.62) + (1.73 * 10 * 0.63) + (116.5*1*0.67)$$

$$= 173.2\ kWh$$

$$\Delta kWh\_Cooling = (1.01 * 5 * 0.4) + (3.89 * 2 * 0.62) + (0.14 * 10 * 0.63) + 0$$

$$= 7.7\ kWh$$

$$\Delta kWh = (173.2 + 7.7)$$

$$= 180.9\ kWh$$

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = (\Delta kWh\_cooling / FLH\_cooling) * CF$$

Where:

ΔkWh_cooling = Cooling savings from measure

FLH_cooling = Full load hours of air conditioning

= Dependent on location:[1586]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1,082	982
5 (Marion/Murphysboro)	956	868
Weighted Average[1587]	676	603

[1586] Full load hours for Chicago, Moline and Rockford are provided in “Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting”, p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1587] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide

Climate Zone (City based upon)	Single Family	Multifamily
ComEd	875	791
Ameren	731	655
Statewide		

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1588]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1589]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1590]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1591]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1592]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

Other factors as defined above.

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average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1588] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1589] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1590] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1591] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1592] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

For example: energy savings from air sealing. Energy savings for attic insulation are included in a separate example in Section 5.6.5: Ceiling/Attic Insulation.

Assume a well shielded, 2-story non-income eligible single family home in Chicago completes air sealing, installs attic insulation, has 10.5 SEER central cooling and a heat pump with COP of 2.0, and has pre and post blower door test results of 3,400 and 2,250 CFM:

ΔkW_{SSP} = 308.8 / 709 * 0.68

= 0.29 kW

ΔkW_{PJM} = 308.8 / 709 * 0.466

= 0.202 kW

FOSSIL FUEL SAVINGS

Methodology 1: Blower Door Test

Required methodology when blower door testing is conducted.

If Fossil Fuel heating:

$\Delta Therms$ = (((CFM50_existing - CFM50_new)/N_heat) * 60 * 24 * HDD * 0.018) / (ηHeat * 100,000) * $ADJ_{AirSealingFossilHeat}$ * $IE_{NetCorrection}$ * %FossilHeat

Where:

N_heat = Conversion factor from leakage at 50 Pascal to leakage at natural conditions

= Based on climate zone and building height:[1593]

Climate Zone (City based upon)	N_heat (by # of stories)			
	1	1.5	2	3
1 (Rockford)	23.8	21.1	19.3	17.1
2 (Chicago)	23.9	21.1	19.4	17.2
3 (Springfield)	24.2	21.5	19.7	17.4
4 (St Louis, MO)	25.4	22.5	20.7	18.3
5 (Paducah, KY)	27.8	24.6	22.6	20.0

HDD = Heating Degree Days

= dependent on location:[1594]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266
4 (Belleville)	3188
5 (Marion/Murphysboro)	3390

[1593] N-factor is used to convert 50-pascal blower door air flows to natural air flows and is dependent on geographic location and # of stories. These were developed by applying the LBNL infiltration model (see LBNL paper 21040, *Exegisis of Proposed ASHRAE Standard 119: Air Leakage Performance for Detached Single-Family Residential Buildings*; Sherman, 1986; page v-vi, Appendix page 7-9) to the reported wind speeds and outdoor temperatures provided by the NRDC 30 year climate normals. For more information see Bruce Harley, CLEAResult “Infiltration Factor Calculations Methodology.doc”. Note, the methodology for developing n-factors requires hourly normals as opposed to annual normals which are used for other assumptions in the TRM. Hourly normals were not available for all sites used for other climate assumptions and so the nearest locations were used (St Louis, MO for Belleville, IL and Paducah, KY for Marion, IL).

[1594] National Climatic Data Center, National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate).[1595] Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1596] or if unknown assume 72% for existing system efficiency (including distribution efficiency)[1597]. If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

$ADJ_{AirSealingFossilHeat}$ = Adjustment for fossil heating savings to account for inaccuracies in engineering algorithms:[1598]

Measure	$ADJ_{AirSealingFossilHeat}$
Air sealing and attic insulation	76%
Air sealing without attic insulation	100%

$IE_{NetCorrection}$ = 100% if not income eligible or air sealing is installed without attic insulation

= 110% if installing air sealing and attic insulation in income eligible projects with a deemed NTG value of 1.0 to offset net savings adjustment inherent when using $ADJ_{AirSealingFossilHeat}$ of 76%[1599]

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heating

= 0 % for Electric Resistance or Heat Pump

= If unknown[1600], use the following table:

[1595] Ideally, the System Efficiency should be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test. The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see 'BPI Distribution Efficiency Table') or by performing duct blaster testing.

[1596] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1597] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

[1598] As demonstrated in air sealing and insulation research by Navigant, see Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company. These adjustment factors are based on a consumption data analysis using matching to non-participants. The values are therefore between net and gross with respect to free ridership. Like all consumption data analyses, they are net with respect to participant spillover and gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Consistent with Section 7.2 of the Illinois EE Policy Manual, applicable net-to-gross adjustments to the savings will be determined as part of the annual SAG net-to-gross process. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

[1599] The additional value of 10% was selected to acknowledge that some portion of the regression-derived adjustment factors accounts for gross impact effects, and that removing net effects embedded in the adjustment factors would increase savings to some degree. A review of historical NTG values for air sealing and insulation measures in non-income eligible populations did not provide definitive guidance for estimating the net component of the adjustment factors. Historically, free ridership has ranged from 9% to 26% for like measures, and spillover has ranged from 1% to 14%, while NTGs have ranged from 0.75 to 1.05. The midpoint of the NTG range would be 0.90, a 10% reduction from 1.0.

[1600] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1601]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

For example, energy savings from air sealing. Energy savings for attic insulation are included in a separate example in Section 5.6.5: Ceiling/Attic Insulation.

Assume a 2-story non-income eligible single family home in Chicago completes air sealing, installs attic insulation, has a gas furnace with system efficiency of 72%, and has pre and post blower door test results of 3,400 and 2,250 CFM:

$$\Delta Therms = (((3{,}400 - 2{,}250)/19.4) * 60 * 24 * 4{,}798 * 0.018) / (0.72 * 100{,}000) * 76\% * 100\%$$

$$= 77.8 \text{ therms}$$

Methodology 2: Prescriptive Infiltration Reduction Measures[1602]

Savings shall only be calculated via Methodology 2 when a blower door test is not conducted.

$$\Delta therms = (\Delta therms_{gasket} * n_{gasket} * ISR + \Delta therms_{windows} * sf_{windows} * ISR + \Delta therms_{sweep} * n_{sweep} * ISR + \Delta therms_{spray\ foam} * Oz_{spray\ foam} * ISR + \Delta therms_{sealing} * lf_{sealing} * ISR + \Delta therms_{WX} * lf_{WX} * ISR + \Delta therms_{AC\ cover} * n_{cover} * ISR)$$

Where:

$\Delta therms_{gasket}$ = Annual therm savings from installation of air sealing gasket on an electric outlet on an external wall.

Climate Zone (City based upon)	$\Delta therms_{gasket}$ / gasket Fossil Heat
1 (Rockford)	0.59
2 (Chicago)	0.54
3 (Springfield)	0.47
4 (Belleville)	0.34
5 (Marion)	0.33
Unknown	0.50

[1601] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

[1602] Prescriptive savings are based upon "Evaluation of the Weatherization Residential Assistance Partnership and Helps Programs (WRAP/Helps)." Middletown, CT: KEMA, 2010. Accessed July 30, 2015, and adjusted for relative HDD of Bridgeport/Hartford CT with the IL climate zones. See 'Rx Airsealing HDD adjustment.xls' for more information.

n_{gasket} = Number of gaskets installed

$\Delta therms_{windows}$ = Annual therm savings from installation of Shrink-Fit Window Kit:[1603]

Climate Zone (City based upon)	$\Delta therms_{windows}$ / square ft Fossil Heat
1 (Rockford)	0.191
2 (Chicago)	0.183
3 (Springfield)	0.156
4 (Belleville)	0.121
5 (Marion)	0.123

$sf_{windows}$ = square footage of shrink-fit window film

$\Delta therms_{sweep}$ = Annual therm savings from installation of door sweep on a door between conditioned and unconditioned space

Climate Zone (City based upon)	$\Delta therms_{sweep}$ / sweep Fossil Heat
1 (Rockford)	2.27
2 (Chicago)	2.08
3 (Springfield)	1.81
4 (Belleville)	1.30
5 (Marion)	1.26
Unknown	1.91

n_{sweep} = Number of sweeps installed

$\Delta therms_{spray\ foam}$ = Annual therm savings per ounce of spray foam product[1604]

= 1.65 therms per oz

$Oz_{spray\ foam}$ = Ounce of spray foam product

= Actual (default of 12oz for consumer product (or if unknown) or 20 oz for professional product)

$\Delta kWh_{sealing}$ = Annual kWh per linear foot savings from other air sealing products such as caulk, or polyethlylene tape in locations between conditioned and unconditioned space.

$\Delta therms_{sealing}$ = Annual therm per linear foot savings from other air sealing products such as caulk or polyethlylene tape in locations between conditioned and unconditioned space.

= For retail and kit programs:

Climate Zone (City based upon)	$\Delta therms_{sealing}$ / linear ft Fossil Heat
1 (Rockford)	0.13
2 (Chicago)	0.12

[1603] Prescriptive savings are based upon "Cost Benefit Analysis for 2018, Annual Report submitted to Virginia Natural Gas, Inc., submitted by Nexant." July 31, 2018. Adjusted for relative HDD of Virginia Beach VA with the IL climate zones. See "Window Film Savings Calculation.xlsx" for more information.

[1604] Savings derived from Bibee et al., "Air Sealing Existing Homes with Foam-in-a-Can Rivals Energy Cost Benefits of CFLs", ASHRAE 2010.See "ASHRAE spray foam paper quick analysis_VEIC.xls" for details.

Climate Zone (City based upon)	$\Delta therms_{sealing}$ / linear ft Fossil Heat
3 (Springfield)	0.11
4 (Belleville)	0.08
5 (Marion)	0.07
Unknown	0.11

= For programs using professional air sealing contractors in homes or multifamily buildings were blower door testing is not possible, v14 prescriptive assumptions may be used. The TAC will work on developing an improved approach for these installations for v16.

Climate Zone (City based upon)	$\Delta therms_{sealing}$ / linear ft Fossil Heat
1 (Rockford)	0.54
2 (Chicago)	0.52
3 (Springfield)	0.45
4 (Belleville)	0.36
5 (Marion)	0.37
Unknown	0.54

$lf_{sealing}$ = linear feet of caulking, sealing, spray foam or polyethylene tape

$\Delta therms_{WX}$ = Annual therm savings from window weatherstripping or door weatherstripping

Climate Zone (City based upon)	$\Delta therms_{sx}$ / linear ft Fossil Heat
1 (Rockford)	0.12
2 (Chicago)	0.11
3 (Springfield)	0.10
4 (Belleville)	0.07
5 (Marion)	0.07
Unknown	0.10

lf_{WX} = Linear feet of window weatherstripping or door weatherstripping

$\Delta therms_{AC\ cover}$ = Annual therms savings from installing a cover over a Room AC unit

Climate Zone (City based upon)	$\Delta therms_{Room\ AC\ cover}$ / cover Fossil Heat[1605]
1 (Rockford)	5.6
2 (Chicago)	5.1
3 (Springfield)	4.5
4 (Belleville)	3.2

[1605] The deemed savings were calculated using the algorithm specified in Methodology 1. The document "There are Holes in Our Walls" prepared for the Urban Green Council estimates leakage at 19 CFM under a 10 Pa pressure differential (2011.04.14-Holes-in-Our-Walls.pdf see page 13). This value was converted to an equivalent leakage rate at a 50 Pa pressure differential using the Infiltration Power Law relationship developed by Lawrence Berkeley Laboratory (Estimation of Infiltration from leakage and Climate Indicators - see page 1). For N factor, a two-story building was assumed based on ResStock building stock analysis (state: IL; file: IL_upgrade0.csv.gz).

Climate Zone (City based upon)	$\Delta therms_{Room\ AC\ cover}$ / cover Fossil Heat[1605]
5 (Marion)	3.1

n_{cover} = Number of Room AC covers installed

Other assumptions as defined above

Mid-Life adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC (13.4 SEER2 * 0.85)	11.4 SEER2
	Heat Pump (14.3 SEER2 * 0.85)	12.2 SEER2
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.5HSPF/3.412)*0.85	1.87 COP
	Gas Furnace 80% AFUE * 0.85	68% AFUE
	Oil Furnace 83% AFUE * 0.85	71% AFUE
	Gas Boiler	84% AFUE
	Oil Boiler	86% AFUE

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimate to be 10 years or 13 years for boilers.[1606] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: **RS-SHL-AIRS-V16-270101**

REVIEW DEADLINE: **1/1/2029**

[1606] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

5.6.2 Basement Sidewall Insulation

DESCRIPTION

Insulation is added to a basement or crawl space. Insulation added above ground in conditioned space is modeled the same as wall insulation. Below ground insulation is adjusted with an approximation of the thermal resistance of the ground. Insulation in semi-conditioned spaces is modeled by reducing the degree days to reflect the smaller but non-zero contribution to heating and cooling load. Cooling savings only consider above grade insulation, as below grade has little temperature difference during the cooling season.

A conditioned space is defined as a space within the thermal envelope[1607] of the building that is intentionally heated or cooled for occupancy (bedrooms, living room, bathrooms, kitchen, etc.). A non-conditioned space is defined as a space outside of the thermal envelope of the building that is not intentionally heated or cooled for occupancy. A semi-conditioned space is defined as a space within the thermal envelope that is not intentionally heated or cooled for occupancy (unfinished basement).

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

This measure requires a member of the implementation staff or a participating contractor to evaluate the pre and post R-values and measure surface areas. The requirements for participation in the program will be defined by the utilities.

DEFINITION OF BASELINE EQUIPMENT

The existing condition will be evaluated by implementation staff or a participating contractor and is likely to be no basement wall or ceiling insulation.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 30 years.[1608]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years or 13 years for boilers.[1609] See section below for detail.

DEEMED MEASURE COST

The actual installed cost for this measure should be used in screening.

DEEMED O&M COST ADJUSTMENTS

N/A

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

[1607] Thermal envelope refers to the shell of the building as a barrier to unwanted heat or mas transfer between the interior of the building and the outside conditions: IPCC, https://archive.ipcc.ch/publications_and_data/ar4/wg3/en/ch6s6-4-2.html

[1608] As recommended in Guidehouse 'EMV Group A, Deliverable 16 EUL Research – Residential Insulation', prepared for California Public Utilities Commission, June 2021.

[1609] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1610]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1611]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1612]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1613]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1614]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Where available savings from shell insulation measures should be determined through a custom analysis. When that is not feasible for the program the following engineering algorithms can be used with the inclusion of an adjustment factor to de-rate the heating savings.

ΔkWh = (ΔkWh_cooling + ΔkWh_heatingElectric + ΔkWh_heatingFurnace)

Where:

ΔkWh_cooling = If central cooling, reduction in annual cooling requirement due to insulation

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[1610] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1611] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1612] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1613] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1614] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

= ((((1/R_old_AG - 1/(R_added+R_old_AG)) * L_basement_wall_total * H_basement_wall_AG * (1-Framing_factor) * 24 * CDD * DUA * LoadFactor) / (1000 * ηCool)) * $ADJ_{BasementCool}$ * %Cool

R_added = R-value of additional spray foam, rigid foam, or cavity insulation.

R_old_AG = R-value value of foundation wall above grade.

= Actual, if unknown assume 1.0.[1615]

L_basement_wall_total = Length of basement wall around the entire insulated perimeter (ft)

H_basement_wall_AG = Height of insulated basement wall above grade (ft)

Framing_factor = Adjustment to account for area of framing when cavity insulation is used

= 0% if Spray Foam or External Rigid Foam

= 25% if studs and cavity insulation[1616]

24 = Converts hours to days

CDD = Cooling Degree Days

= Dependent on location and whether basement is conditioned, if unknown assume semi-conditioned:[1617]

Climate Zone (City based upon)	Conditioned CDD 65	Semi-Conditioned (CDD 75)[1618]
1 (Rockford)	877	326
2 (Chicago)	1047	354
3 (Springfield)	1183	448
4 (Belleville)	1641	532
5 (Marion)	1450	516
Weighted Average[1619]	1098	380

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).

= 0.90 [1620]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC

[1615] ORNL Builders Foundation Handbook, crawl space data from Table 5-5: Initial Effective R-values for Uninsulated Foundation System and Adjacent Soil, 1991.

[1616] ASHRAE, 2001, "Characterization of Framing Factors for New Low-Rise Residential Building Envelopes (904-RP)," Table 7.1

[1617] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1618] Five year-average (2018 to 2022) cooling degree days with a base temperature of 75 F. Data from DegreeDays.net were used in this table because the climate normals from NCEI/NCDC used elsewhere are not available at base temps above 72F.

[1619] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1620] This factor utilizes data from a metering study: Pigg, Scott, D. Cautley, and K. Koski, (2016): "Improving Installation and Maintenance Practices for Minnesota Residential Furnaces, Air Conditioners, and Heat Pumps", prepared for Minnesota Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over ½ of the actual annual operating hours for the highest operating hours home in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois' hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data.

v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1621]

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2 or CEER) of cooling system (kBtu/kWh) * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1622] or if unknown assume the following.[1623] If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[1624]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1625]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

$ADJ_{BasementCool}$ = Adjustment for cooling savings from basement wall insulation to account for prescriptive engineering algorithms overclaiming savings[1626]

[1621] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

[1622] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1623] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1624] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1625] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1626] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo "Results for AIC PY6 HPwES Billing Analysis", dated February 20, 2015. TAC negotiated adjustment factor is 80%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

= 75%

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[1627]	98.9%	96.5%	99.8%	98.7%	98.6%

ΔkWh_heatingElectric = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to insulation

= [(((1/R_old_AG - 1/(R_added+R_old_AG)) * L_basement_wall_total * H_basement_wall_AG * (1-Framing_factor)) + ((1/R_old_BG - 1/(R_added+R_old_BG)) * L_basement_wall_total * (H_basement_wall_total - H_basement_wall_AG) * (1-Framing_factor))] * 24 * HDD) / (3,412 * ηHeat)) * $ADJ_{BasementHeat}$ *%ElectricHeat

Where:

R_old_BG = R-value value of foundation wall below grade (including thermal resistance of the earth) [1628]

= Actual R-value of wall plus Average Earth R-value from table below

= dependent on depth of foundation (H_basement_wall_total – H_basement_wall_AG):

= Actual R-value of wall plus average earth R-value by depth in table below

Below Grade R-value									
Depth below grade (ft)	0	1	2	3	4	5	6	7	8
Earth R-value (°F-ft^2-h/Btu)	2.44	4.50	6.30	8.40	10.44	12.66	14.49	17.00	20.00
Average Earth R-value (°F-ft2-h/Btu)	2.44	3.47	4.41	5.41	6.42	7.46	8.46	9.53	10.69
Total BG R-value (earth + R-1.0 foundation) default	3.44	4.47	5.41	6.41	7.42	8.46	9.46	10.53	11.69

H_basement_wall_total = Total height of basement wall (ft)

HDD = Heating Degree Days

= dependent on location and whether basement is conditioned, if unknown assume semi-conditioned:[1629]

[1627] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1628] Adapted from Table 1, page 24.4, of the 1977 ASHRAE Fundamentals Handbook

[1629] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F for a conditioned basement and 50°F for an unconditioned basement), consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in "Statistical Analysis of Historical State-Level Residential Energy Consumption Trends," 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

Climate Zone (City based upon)	Conditioned HDD 60	Semi-Conditioned HDD 50
1 (Rockford)	5230	3233
2 (Chicago)	4798	2845
3 (Springfield)	4266	2456
4 (Belleville)	3188	1651
5 (Marion/Murphysboro)	3390	1750
Weighted Average[1630]	4631	2732

ηHeat = Efficiency of heating system

= Actual (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1631] or if not available refer to default table below.[1632] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 -2014	6.5	1.62
	2015 on	7	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown (for use in program evaluation only)	N/A	N/A	1.32

$ADJ_{BasementHeat}$ = Adjustment for basement wall insulation to account for prescriptive engineering algorithms overclaiming savings[1633]

= 63%

[1630] Weighted based on number of occupied residential housing units in each zone.

[1631] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1632] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1633] TAC negotiated factor of 60% was originally proposed, then, during update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Fossil fuel heating

= If unknown[1634], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1635]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

For example, a single family home in Chicago with a 20 by 25 by 7 foot R-2.25 semi-conditioned basement, with 3 feet above grade, insulated with R-13 of interior spray foam, 10.5 SEER Central AC and 2.26 (1.92 including distribution losses) COP Heat Pump:

ΔkWh = (ΔkWh_cooling + ΔkWh_heating)

= [((((1/2.25 - 1/(13 + 2.25))*(20+25+20+25) * 3 * (1 - 0)) * 24 * 354 * 0.90)/(1000 * 10.5)) * 0.75 * 100%] + [(((((1/2.25 - 1/(13 + 2.25)) * (20+25+20+25) * 3 * (1-0)) + ((1 / (2.25 + 6.42) – 1 / (13 + 2.25 + 6.42)) * (20+25+20+25) * 4 * (1-0))) * 24 * 2845) / (3412 * 1.92)) * 0.63 * 100%]

= (55.8 + 835.3)

= 891.1 kWh

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%

[1634] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1635] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

Heating System Type	%FurnaceFossil
Unknown Fossil Heat	87%[1636]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1637]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1638]

29.3 = kWh per therm

For example, a single family home in Chicago with a 20 by 25 by 7 foot unconditioned basement, with 3 feet above grade, insulated with R-13 of interior spray foam, and a 70% efficient furnace (for therm calculation see Fossil Fuel Savings section :

= 76.0 * 1 * 0.0314 * 29.3

= 69.9 kWh

SUMMER COINCIDENT PEAK DEMAND

ΔkW = (ΔkWh_cooling / FLH_cooling) * CF

Where:

FLH_cooling = Full load hours of air conditioning

= dependent on location:[1639]

Climate Zone (City based upon)	Single Family	Multifamily		
	Conditioned	Semi-Conditioned[1640]	Conditioned	Semi-Conditioned
1 (Rockford)	547	203	499	185
2 (Chicago)	709	240	629	213

[1636] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1637] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1638] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

[1639] Full load hours for Chicago, Moline and Rockford are provided in “Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting”, p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1640] Semi-Conditioned are estimated based on the ratio of CDD between conditioned and semi-conditioned spaces.

Climate Zone (City based upon)	Single Family	Multifamily		
	Conditioned	Semi-Conditioned[1640]	Conditioned	Semi-Conditioned
3 (Springfield)	779	295	707	268
4 (Belleville)	1082	351	982	318
5 (Marion)	956	340	868	309
Weighted Average[1641]				
ComEd	676	234	603	209
Ameren	875	303	791	274
Statewide	731	253	655	227

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or room A/C (during utility peak hour)

= 68%[1642]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1643]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1644]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or room A/C (average during PJM peak period)

= 46.6%[1645]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1646]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

[1641] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1642] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1643] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1644] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1645] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1646] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

For example, a single family home in Chicago with a 20 by 25 by 7 foot semi-conditioned basement, with 3 feet above grade, insulated with R-13 of interior spray foam, 10.5 SEER Central AC and 2.26 COP Heat Pump:

ΔkW_{SSP} = 55.8 / 240* 0.68

= 0.158 kW

ΔkW_{PJM} = 55.8 / 240 * 0.466

= 0.108 kW

FOSSIL FUEL SAVINGS

If Fossil Fuel heating:

ΔTherms = (((((1/R_old_AG - 1/(R_added+R_old_AG)) * L_basement_wall_total * H_basement_wall_AG * (1-Framing_factor)) + ((1/R_old_BG - 1/(R_added+R_old_BG)) * L_basement_wall_total * (H_basement_wall_total - H_basement_wall_AG) * (1-Framing_factor))) * 24 * HDD) / (ηHeat * 100,000)) * $ADJ_{BasementHeat}$ * %FossilHeat

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1647] or if unknown assume 72% for existing system efficiency (including distribution efficiency)[1648]. If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heating

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[1649], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1650]					75.4%

[1647] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1648] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

[1649] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1650] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above

For example, a single family home in Chicago with a 20 by 25 by 7 foot R-2.25 basement, with 3 feet above grade, insulated with R-13 of interior spray foam, and a 72% efficient furnace:

$$= (((((1/2.25 - 1/(13 + 2.25)) * (20+25+20+25) * 3 * (1-0)) + ((1/8.67 - 1/(13 + 8.67)) * (20+25+20+25) * 4 * (1 - 0))) * 24 * 2845) / (0.72 * 100{,}000)) * 0.63 * 100\%$$

= 76.0 therms

Mid-Life adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC (13.4 SEER2 * 0.85)	11.4 SEER2
	Heat Pump (14.3 SEER2 * 0.85)	12.2 SEER2
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.5HSPF/3.412)*0.85	1.87 COP
	Gas Furnace 80% AFUE * 0.85	68% AFUE
	Oil Furnace 83% AFUE * 0.85	71% AFUE
	Gas Boiler	84% AFUE
	Oil Boiler	86% AFUE

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimate to be 10 years or 13 years for boilers.[1651] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

[1651] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

MEASURE CODE: RS-SHL-BINS-V17-270101

REVIEW DEADLINE: 1/1/2030

5.6.3 Floor Insulation Above Crawlspace

DESCRIPTION

Insulation is added to the floor above a vented crawl space that does not contain pipes or HVAC equipment. If there are pipes, HVAC, or a basement, it is desirable to keep them within the thermal envelope by insulating the crawl space walls and ground. Insulating the floor separates the conditioned space above from the space below the floor, and is only acceptable when there is nothing underneath that could freeze or would operate less efficiently in an environment resembling the outdoors. Even in the case of an empty, unvented crawl space, it is still considered best practice to seal and insulate the crawl space perimeter rather than the floor. Not only is there generally less area to insulate this way, but there are also moisture control benefits. There is a "Basement Insulation" measure for perimeter sealing and insulation. This measure assumes the insulation is installed above an vented crawl space and should not be used in other situations.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

This measure requires a member of the implementation staff or a participating contractor to evaluate the pre and post R-values and measure surface areas. The requirements for participation in the program will be defined by the utilities.

DEFINITION OF BASELINE EQUIPMENT

The existing condition will be evaluated by implementation staff or a participating contractor and is likely to be no insulation on any surface surrounding a crawl space.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 30 years.[1652]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years or 13 years for boilers.[1653] See section below for detail.

DEEMED MEASURE COST

The actual installed cost for this measure should be used in screening.

DEEMED O&M COST ADJUSTMENTS

N/A

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's

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[1652] As recommended in Guidehouse 'EMV Group A, Deliverable 16 EUL Research – Residential Insulation', prepared for California Public Utilities Commission, June 2021.

[1653] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1654]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1655]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1656]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1657]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1658]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Where available savings from shell insulation measures should be determined through a custom analysis. When that is not feasible for the program the following engineering algorithms can be used with the inclusion of an adjustment factor to de-rate the heating savings.

ΔkWh = (ΔkWh_cooling + ΔkWh_ heatingElectric + ΔkWh_heatingFurnace)

Where:

ΔkWh_cooling = If central cooling, reduction in annual cooling requirement due to insulation

= ((((1/R_old - 1/(R_added+R_old)) * Area * (1-Framing_factor)) * 24 * CDD * DUA * LoadFactor) / (1000 * ηCool))) * $ADJ_{FloorCool}$ * %Cool

R_old = R-value value of floor before insulation, assuming 3/4” plywood subfloor and carpet with pad

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[1654] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1655] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC’s 2010 system peak; ‘Impact and Process Evaluation of Ameren Illinois Company’s Residential HVAC Program (PY5)’.

[1656] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1657] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1658] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

= Actual. If unknown assume 3.53 for site built homes [1659] and 2.61 for mobile homes[1660]

R_added= R-value of additional spray foam, rigid foam, or cavity insulation.

Area = Total floor area to be insulated

Framing_factor = Adjustment to account for area of framing

= 12% for site built homes[1661]

= 0 for mobile home belly wrap insulation

24 = Converts hours to days

CDD = Cooling Degree Days

Climate Zone (City based upon)	Conditioned CDD65[1662]
1 (Rockford)	877
2 (Chicago)	1047
3 (Springfield)	1183
4 (Belleville)	1641
5 (Marion)	1450
Weighted Average[1663]	1098

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).

= 0.90 [1664]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1665]

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2 or CEER) of cooling system (kBtu/kWh) * Distribution Efficiency

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[1659] Based on 2005 ASHRAE Handbook – Fundamentals: assuming ¾" subfloor, ½" carpet with rubber pad, and accounting for a still air film above and below: 0.68 + 0.94 + 1.23 + 0.68 = 3.53

[1660] Based on 2017 ASHRAE Handbook – Fundamentals: assuming a composite of 4 layers: 1) still indoor air film above floor system (0.68), 2) blended floor covering (r=0.935): 25% tile/linoleum (r=0.05) and 75% ½"carpet with rubber pad (r=1.23), 3) 5/8" particle board subflooring (r=0.82), and 4) exterior air film (0.17): 0.68 + 0.935 + 0.82 + 0.17 = 2.61.

[1661] ASHRAE, 2001, "Characterization of Framing Factors for New Low-Rise Residential Building Envelopes (904-RP)," Table 7.1

[1662] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1663] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1664] This factor utilizes data from a metering study: Pigg, Scott, D. Cautley, and K. Koski, (2016): "Improving Installation and Maintenance Practices for Minnesota Residential Furnaces, Air Conditioners and Heat Pumps", prepared for Minnesota Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over ½ of the actual annual operating hours for the highest operating hours home in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois' hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data.

[1665] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1666] or if unknown assume the following.[1667] If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[1668]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1669]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

$ADJ_{FloorCool}$ = Adjustment for cooling savings from floor to account for prescriptive engineering algorithms overclaiming savings[1670]

= 75%

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				

[1666] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1667] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1668] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1669] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1670] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo "Results for AIC PY6 HPwES Billing Analysis", dated February 20, 2015. TAC negotiated adjustment factor is 80%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Unknown (for use in program evaluation only)[1671]	98.9%	96.5%	99.8%	98.7%	98.6%

ΔkWh_heatingElectric = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to insulation

= (((1/R_old - 1/(R_added + R_old)) * Area * (1-Framing_factor) * 24 * HDD)/ (3,412 * ηHeat)) * $ADJ_{FloorHeat}$ *%ElectricHeat

HDD = Heating Degree Days:[1672]

Climate Zone (City based upon)	Conditioned HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266
4 (Belleville)	3188
5 (Marion/Murphysboro)	3390
Weighted Average[1673]	4631

ηHeat = Efficiency of heating system

= Actual Heating Efficiency * Distribution Efficiency (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1674] or if not available refer to default table below.[1675] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 -2014	6.5	1.62
	2015 on	7	1.74

[1671] Based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024.

[1672] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 50°F to account for lower impact of unconditioned space on heating system. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1673] Weighted based on number of occupied residential housing units in each zone.

[1674] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1675] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown (for use in program evaluation only)	N/A	N/A	1.32

$ADJ_{FloorHeat}$ = Adjustment for floor insulation to account for prescriptive engineering algorithms overclaiming savings[1676]

= 63%

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Fossil Fuel heating

= If unknown[1677], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1678]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

[1676] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo “Results for AIC PY6 HPwES Billing Analysis”, dated February 20, 2015. TAC negotiated adjustment factor is 60%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

[1677] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1678] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

For example, a single family home in Chicago with a 20 by 25 footprint, insulated with R-30 spray foam above the crawlspace, a 10.5 SEER Central AC and a newer heat pump:

ΔkWh = (ΔkWh_cooling + ΔkWh_heating)

= ((((1/3.53 -1/(30+3.53))*(20*25)*(1-0.12)* 24 * 1047*0.90)/(1000*10.5)) * 0.75 * 1 + (((1/3.53 -1/(30+3.53))*(20*25)*(1-0.12) * 24 * 4798)/(3412*1.74)) * 0.63 * 1)

= (180.1 + 1362.8)

= 1542.9 kWh

ΔkWh_heatingFurnace = If *furnace* (fossil fuel and electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1679]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1680]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1681]

29.3 = kWh per therm

For example, a single family home in Chicago with a 20 by 25 footprint, insulated with R-30 spray foam above the crawlspace, and a 70% efficient gas furnace (for therm calculation see Fossil Fuel Savings section):

ΔkWh = 66.6 * 1 * 0.0314 * 29.3

= 61.3 kWh

[1679] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1680] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1681] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = (\Delta kWh\_cooling / FLH\_cooling) * CF$$

Where:

FLH_cooling = Full load hours of air conditioning

= Dependent on location:[1682]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[1683]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1684]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1685]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1686]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1687]

[1682] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1683] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1684] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1685] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1686] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1687] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1688]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

For example, a single family home in Chicago with a 20 by 25 footprint, insulated with R-30 spray foam above the crawlspace, a 10.5 SEER Central AC and a newer heat pump:

ΔkW_{SSP} = 181.7 / 709 * 0.68

= 0.058 kW

ΔkW_{SSP} = 60.9 / 709 * 0.466

= 0.040 kW

FOSSIL FUEL SAVINGS

If Fossil Fuel heating:

ΔTherms = (((1/R_old - 1/(R_added+R_old)) * Area * (1-Framing_factor) * 24 * HDD) / (100,000 * ηHeat)) * $ADJ_{FloorHeat}$ * %FossilHeat

Where:

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1689] or if unknown assume 72% for existing system efficiency (including distribution efficiency).[1690] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heating

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[1691], use the following table:

[1688] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1689] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1690] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

[1691] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1692]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

For example, a single family home in Chicago with a 20 by 25 footprint, insulated with R-30 spray foam above the crawlspace, and a 72% efficient furnace:

$$\Delta Therms = ((1 / 3.53 – 1 /(30 + 3.53))*(20 * 25) * (1 - 0.12) * 24 * 4798) / (100,000 * 0.72) * 0.63 * 1$$

$$= 112.4 \text{ therms}$$

Mid-Life adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC (13.4 SEER2 * 0.85)	11.4 SEER2
	Heat Pump (14.3 SEER2 * 0.85)	12.2 SEER2
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.5HSPF/3.412)*0.85	1.87 COP
	Gas Furnace 80% AFUE * 0.85	68% AFUE
	Oil Furnace 83% AFUE * 0.85	71% AFUE
	Gas Boiler	84% AFUE
	Oil Boiler	86% AFUE

[1692] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimate to be 10 years or 13 years for boilers.[1693] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-FINS-V19-270101

REVIEW DEADLINE: 1/1/2030

[1693] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

5.6.4 Wall Insulation

DESCRIPTION

Insulation is added to wall cavities. This measure requires a member of the implementation staff evaluating the pre and post R-values and measure surface areas. The efficiency of the heating and cooling equipment in the home should also be evaluated if possible.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

This measure requires a member of the implementation staff or a participating contractor to evaluate the pre and post R-values and measure surface areas. The requirements for participation in the program will be defined by the utilities.

DEFINITION OF BASELINE EQUIPMENT

The existing condition will be evaluated by implementation staff or a participating contractor and is likely to be empty wall cavities.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 30 years.[1694]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years or 13 years for boilers.[1695] See section below for detail.

DEEMED MEASURE COST

The actual installed cost for this measure should be used in screening.

LOADSHAPE

Loadshape R08 - Residential Cooling

Loadshape R09 - Residential Electric Space Heat

Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1696]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

[1694] As recommended in Guidehouse 'EMV Group A, Deliverable 16 EUL Research – Residential Insulation', prepared for California Public Utilities Commission, June 2021.

[1695] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

[1696] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

= 72%[1697]

$CF_{SSP, MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1698]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1699]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1700]

$CF_{PJM, MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Where available savings from shell insulation measures should be determined through a custom analysis. When that is not feasible for the program the following engineering algorithms can be used with the inclusion of an adjustment factor to de-rate the heating savings.

ΔkWh = ΔkWh_cooling + ΔkWh_heatingElectric + ΔkWh_heatingFurnace

Where

ΔkWh_cooling = If central cooling, reduction in annual cooling requirement due to wall insulation

= ((((1/R_old - 1/R_wall) * A_wall * (1-Framing_factor_wall)) * 24 * CDD * DUA * LoadFactor) / (1000 * ηCool)) * $ADJ_{WallCool}$* %Cool

R_wall = R-value of new wall assembly (including all layers between inside air and outside air).

R_old = R-value value of existing assembly and any existing insulation.

(Minimum of R-5 for uninsulated assemblies)[1701]

A_wall = Net area of insulated wall (ft^2)

Framing_factor_wall = Adjustment to account for area of framing

= 25%[1702]

[1697] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1698] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1699] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1700] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1701] An estimate based on review of Madison Gas and Electric, Exterior Wall Insulation, R-value for no insulation in walls, and NREL's Building Energy Simulation Test for Existing Homes (BESTEST-EX).

[1702] ASHRAE, 2001, "Characterization of Framing Factors for New Low-Rise Residential Building Envelopes (904-RP)," Table 7.1

24 = Converts hours to days

CDD = Cooling Degree Days

= dependent on location:[1703]

Climate Zone (City based upon)	CDD 65
1 (Rockford)	877
2 (Chicago)	1047
3 (Springfield)	1183
4 (Belleville)	1641
5 (Marion)	1450
Weighted Average[1704]	1098

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).

= 0.90 [1705]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1706]

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2 or CEER) of cooling system (kBtu/kWh) * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1707] or if unknown assume the following.[1708] If unknown value is used, it should not

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[1703] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F. There is a county mapping table Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1704] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1705] This factor utilizes data from a metering study: Pigg, Scott, D. Caultlet, and K. Koski, (2016): "Improving Installation and Maintenace Practices for Minnesota Residentail Furnaces, Air Conditioners and Heat Pumps", prepared for Minnestora Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over 1/2 of the actual annual operating hours for the highest operating hours home in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois' hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data.

[1706] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

[1707] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1708] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[1709]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1710]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

$ADJ_{WallCool}$ = Adjustment for cooling savings from wall insulation to account for inaccuracies in prescriptive engineering algorithms[1711]

= 75%

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[1712]	98.9%	96.5%	99.8%	98.7%	98.6%

kWh_heatingElectric = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to wall insulation

= (((1/R_old - 1/R_wall) * A_wall * (1-Framing_factor_wall) * 24 * HDD) / (ηHeat * 3412)) * $ADJ_{WallHeat}$ * %ElectricHeat

HDD = Heating Degree Days

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converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1709] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1710] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1711] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo "Results for AIC PY6 HPwES Billing Analysis", dated February 20, 2015. TAC negotiated adjustment factor is 80%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

[1712] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

= Dependent on location:[1713]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266
4 (Belleville)	3188
5 (Marion)	3390
Weighted Average[1714]	4631

ηHeat = Efficiency of heating system

= Actual Heating Efficiency * Distribution Efficiency (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1715] or if not available refer to default table below.[1716] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 -2014	6.5	1.62
	2015 on	7	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown (for use in program evaluation only)	N/A	N/A	1.32

3412 = Converts Btu to kWh

$ADJ_{WallHeat}$ = Adjustment for heating savings to account for inaccuracies in prescriptive engineering algorithms. [1717]

[1713] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F, consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in "Statistical Analysis of Historical State-Level Residential Energy Consumption Trends," 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1714] Weighted based on number of occupied residential housing units in each zone.

[1715] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1716] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1717] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate

= 63%

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Fossil Fuel heating

= If unknown[1718], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1719]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

For example, a single family home in Chicago with 990 ft^2 of R-5 walls insulated to R-11, 10.5 SEER Central AC and 2.26 (1.92 including distribution losses) COP Heat Pump:

ΔkWh = (ΔkWh_cooling + ΔkWh_heating)

= (((((1/5 - 1/11) * 990 * (1-0.25)) * 1,047 * 0.90 * 24)/ (1,000 * 10.5)) * 75% * 100%) + (((((1/5 - 1/11) * 990 * (1-0.25)) * 4,798 * 24) / (1.92 * 3,412)) * 63% * 100%)

= 130.8 + 897

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%

---

efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1717] TAC negotiated adjustment factor was 60%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

[1718] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1719] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

Heating System Type	%FurnaceFossil
Unknown Fossil Heat	87%[1720]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1721]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1722]

29.3 = kWh per therm

For example, a single family home in Chicago with 990 ft^2 of R-5 walls insulated to R-11 with a gas furnace with system efficiency of 66% (for therm calculation see Fossil Fuel Savings section):

ΔkWh_heatingGas = 89.0 * 1 * 0.0314 * 29.3

= 81.9 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (ΔkWh_cooling / FLH_cooling) * CF

Where:

FLH_cooling = Full load hours of air conditioning

= Dependent on location as below:[1723]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868

[1720] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1721] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1722] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

[1723] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

Climate Zone (City based upon)	Single Family	Multifamily
Weighted Average[1724]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1725]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1726]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1727]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1728]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1729]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

For example, a single family home in Chicago with 990 ft^2 of R-5 walls insulated to R-11, 10.5 SEER Central AC, and 2.26 COP Heat Pump:

ΔkW_{SSP} = 130.8 / 709 * 0.68

= 0.1250 kW

ΔkW_{PJM} = 130.8 / 709 * 0.466

= 0.086 kW

[1724] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1725] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1726] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1727] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1728] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1729] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

FOSSIL FUEL SAVINGS

If Fossil Fuel heating:

ΔTherms = (((1/R_old - 1/R_wall) * A_wall * (1-Framing_factor_wall) * 24 * HDD) / (ηHeat * 100,000 Btu/therm)) * $ADJ_{WallHeat}$* %FossilHeat

Where:

HDD = Heating Degree Days

= Dependent on location:[1730]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266
4 (Belleville)	3188
5 (Marion)	3390
Weighted Average[1731]	4631

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate).[1732] Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1733] or if unknown assume 72% for existing system efficiency (including distribution efficiency).[1734] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heating

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[1735], use the following table:

[1730] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F, consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in "Statistical Analysis of Historical State-Level Residential Energy Consumption Trends," 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1731] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1732] Ideally, the System Efficiency should be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test. The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see 'BPI Distribution Efficiency Table') or by performing duct blaster testing.

[1733] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1734] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

[1735] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1736]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

For example, a single family home in Chicago with 990 ft^2 of R-5 walls insulated to R-11, with a gas furnace with system efficiency of 66%:

ΔTherms = ((((1/5 - 1/11) * 990 * (1-0.25)) * 24 * 4798) / (0.66 * 100,000)) * 63% * 100%

= 89.0 therms

Mid-Life adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC (13.4 SEER2 * 0.85)	11.4 SEER2
	Heat Pump (14.3 SEER2 * 0.85)	12.2 SEER2
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.5HSPF/3.412)*0.85	1.87 COP
	Gas Furnace 80% AFUE * 0.85	68% AFUE
	Oil Furnace 83% AFUE * 0.85	71% AFUE
	Gas Boiler	84% AFUE
	Oil Boiler	86% AFUE

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment,

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[1736] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

estimate to be 10 years or 13 years for boilers.[1737] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-WINS-V16-270101

REVIEW DEADLINE: 1/1/2030

[1737] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

5.6.5 Ceiling/Attic Insulation

DESCRIPTION

Insulation is added to the attic. This measure requires a member of the implementation staff evaluating the pre and post R-values and measure surface areas. The efficiency of the heating and cooling equipment in the home should also be evaluated if possible.

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

This measure requires a member of the implementation staff or a participating contractor to evaluate the pre and post R-values and measure surface areas. The requirements for participation in the program will be defined by the utilities.

DEFINITION OF BASELINE EQUIPMENT

The existing condition will be evaluated by implementation staff or a participating contractor and is likely to be little or no attic insulation.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 32 years.[1738]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years or 13 years for boilers.[1739] See section below for detail.

DEEMED MEASURE COST

The actual installed cost for this measure should be used in screening.

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1740]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

[1738] As recommended in Guidehouse 'EMV Group A, Deliverable 16 EUL Research – Residential Insulation', prepared for California Public Utilities Commission, June 2021.

[1739] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

[1740] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

= 72%[1741]

$CF_{SSP, MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1742]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1743]

$CF_{PJM SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1744]

$CF_{PJM, MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Where available savings from shell insulation measures should be determined through a custom analysis. When that is not feasible for the program the following engineering algorithms can be used with the inclusion of an adjustment factor to de-rate the heating savings.

ΔkWh = (ΔkWh_cooling + ΔkWh_heatingElectric + ΔkWh_heatingFurnace)

Where:

ΔkWh_cooling = If central cooling, reduction in annual cooling requirement due to ceiling/attic insulation

= ((((1/R_old - 1/R_attic) * A_attic * (1-Framing_factor_attic)) * 24 * CDD * DUA * LoadFactor) / (1000 * ηCool)) * $ADJ_{AtticCool}$ * $IE_{NetCorrection}$ * %Cool

R_attic = R-value of new attic assembly (including all layers between inside air and outside air).

R_old = R-value value of existing assembly and any existing insulation.

(Minimum of R-3 for uninsulated assemblies)[1745]

A_attic = Total area of insulated ceiling/attic (ft^2)

Framing_factor_attic = Adjustment to account for area of framing

= 7%[1746]

[1741] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1742] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1743] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1744] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1745] Component estimate of airfilm above and below, sheathing and sheet rock, (0.68+0.5+0.45+0.68 = 2.3) is rounded up to R-3.

[1746] Ibid.

24 = Converts hours to days

CDD = Cooling Degree Days

= dependent on location:[1747]

Climate Zone (City based upon)	CDD 65
1 (Rockford)	877
2 (Chicago)	1047
3 (Springfield)	1183
4 (Belleville)	1641
5 (Marion)	1450
Weighted Average[1748]	1098

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).

= 0.90 [1749]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1750]

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2 or CEER) of cooling system (kBtu/kWh) * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1751] or if unknown assume the following.[1752] If unknown value is used, it should not

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[1747] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F. There is a county mapping table Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1748] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1749] This factor utilizes data from a metering study: Pigg, Scott, D. Caultlet, and K. Koski, (2016): "Improving Installation and Maintenace Practices for Minnesota Residentail Furnaces, Air Conditioners and Heat Pumps", prepared for Minnestora Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over 1/2 of the actual annual operating hours for the highest operating hours home in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois' hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data.

[1750] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

[1751] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1752] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[1753]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1754]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

$ADJ_{AtticCool}$ = Adjustment for cooling savings to account for inaccuracies in engineering algorithms[1755]

= 114%

$IE_{NetCorrection}$ = 100% if not income eligible or attic insulation is installed without air sealing

= 110% if installing air sealing and attic insulation in income eligible projects with a deemed NTG value of 1.0 to offset net savings adjustment inherent when using $ADJ_{AtticCool}$ of 114%[1756]

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				

[1753] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1754] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1755] As demonstrated in air sealing and insulation research by Navigant, see Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company. Adjustment factor was derived from a consumption data regression analysis with an experimental design that does not require further net savings adjustment for non-income eligible populations. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

[1756] The additional value of 10% was selected to acknowledge that some portion of the regression-derived adjustment factors accounts for gross impact effects, and that removing net effects embedded in the adjustment factors would increase savings to some degree. A review of historical NTG values for air sealing and insulation measures in non-income eligible populations did not provide definitive guidance for estimating the net component of the adjustment factors. Historically, free ridership has ranged from 9% to 26% for like measures, and spillover has ranged from 1% to 14%, while NTGs have ranged from 0.75 to 1.05. The midpoint of the NTG range would be 0.90, a 10% reduction from 1.0.

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Unknown (for use in program evaluation only)[1757]	98.9%	96.5%	99.8%	98.7%	98.6%

kWh_heatingElectric = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to attic insulation

= ((((1/R_old - 1/R_attic) * A_attic * (1-Framing_factor_attic)) * 24 * HDD) / (ηHeat * 3,412)) * $ADJ_{AtticElectricHeat}$*%ElectricHeat

HDD = Heating Degree Days

= Dependent on location:[1758]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266
4 (Belleville)	3188
5 (Marion)	3390
Weighted Average[1759]	4631

ηHeat = Efficiency of heating system

= Actual Heating Efficiency * Distribution Efficiency (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1760] or if not available refer to default table below.[1761] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
	Before 2006	5.8	1.44

[1757] Based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024.

[1758] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F, consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in “Statistical Analysis of Historical State-Level Residential Energy Consumption Trends,” 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1759] Weighted based on number of occupied residential housing units in each zone.

[1760] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1761] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	After 2006 -2014	6.5	1.62
	2015 on	7	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown (for use in program evaluation only)	N/A	N/A	1.32

3412 = Converts Btu to kWh

$ADJ_{AtticElectricHeat}$ = Adjustment for electric heating savings to account for inaccuracies in engineering algorithms[1762]

= 63%

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Fossil Fuel heat

= If unknown[1763], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1764]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

[1762] As demonstrated in air sealing and insulation research by Navigant, Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

[1763] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1764] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

For example, energy savings from ceiling/attic insulation. Energy savings for air sealing are included in a separate example in Section 5.6.1: Air Sealing.

Assume a non-income eligible single family home in Chicago installs 700 ft^2 of attic insulation, completes air sealing, has 10.5 SEER Central AC and 2.26 (1.92 including distribution losses) COP Heat Pump, and has pre and post attic insulation R-values of R-5 and R-38, respectively:

ΔkWh = (ΔkWh_cooling + ΔkWh_heating)

= (((((1/5 - 1/38) * 700 * (1-0.07)) * 1,047 * 0.90 * 24)/ (1,000 * 10.5)) * 114% * 100% * 100%) + (((((1/5 - 1/38) * 700 * (1-0.07)) * 4,798 * 24) / (1.92 * 3,412)) * 63% * 100%)

= 277 + 1,252

= 1,529 kWh

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3 * $ADJ_{AtticHeatFan}$

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e * $ADJ_{AtticHeatFan}$

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1765]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1766]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1767]

29.3 = kWh per therm

$ADJ_{AtticHeatFan}$ = Adjustment for fan savings to account for inaccuracies in engineering algorithms[1768]

[1765] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1766] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1767] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

[1768] As demonstrated in air sealing and insulation research by Navigant, see Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company. Adjustment factor was derived from a consumption data regression analysis with an experimental design that does not require further net savings adjustment for non-income eligible populations. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

= 113%

For example: energy savings from ceiling/attic insulation. Energy savings for air sealing are included in a separate example in Section 5.6.1: Air Sealing.

Assume a non-income eligible single family home in Chicago installs 700 ft^2 of attic insulation, completes air sealing, has a gas furnace with system efficiency of 66% (for therm calculation see Fossil Fuel Savings section), and has pre and post attic insulation R-values of R-5 and R-38, respectively:

ΔkWh = 150 * 1 * 0.0314 * 29.3 * 113%

= 156 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (ΔkWh_cooling / FLH_cooling) * CF

Where:

FLH_cooling = Full load hours of air conditioning

= Dependent on location as below:[1769]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[1770]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1771]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1772]

[1769] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1770] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1771] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1772] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

$CF_{SSP, MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1773]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1774]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1775]

$CF_{PJM, MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

For example, energy savings from ceiling/attic insulation. Energy savings for air sealing are included in a separate example in Section 5.6.1: Air Sealing.

Assume a non-income eligible single family home in Chicago installs 700 ft^2 of attic insulation, has 10.5 SEER Central AC and 2.26 COP Heat Pump, and has pre and post attic insulation R-values of R-5 and R-38, respectively:

ΔkW_{SSP} = 277 / 709 * 0.68

= 0.26 kW

ΔkW_{PJM} = 156 / 709 * 0.466

= 0.10 kW

FOSSIL FUEL SAVINGS

If Fossil Fuel heating:

$$\Delta Therms = ((((1/R\_old - 1/R\_attic) * A\_attic * (1-Framing\_factor\_attic)) * 24 * HDD) / (\eta Heat * 100{,}000\ Btu/therm) * ADJ_{AtticGasHeat} * IE_{NetCorrection} * \%FossilHeat$$

Where:

HDD = Heating Degree Days

= Dependent on location:[1776]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266

[1773] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1774] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1775] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1776] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F, consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in “Statistical Analysis of Historical State-Level Residential Energy Consumption Trends,” 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

Climate Zone (City based upon)	HDD 60
4 (Belleville)	3188
5 (Marion)	3390
Weighted Average[1777]	4631

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate).[1778] Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1779] or if not available, use 72% for existing system efficiency (including distribution efficiency).[1780] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

$ADJ_{AtticGasHeat}$ = Adjustment for gas heating savings to account for inaccuracies in engineering algorithms[1781]

= 76%

$IE_{NetCorrection}$ = 100% if not income eligible or attic insulation is installed without air sealing

= 110% if installing air sealing and attic insulation in income eligible projects with a deemed NTG value of 1.0 to offset net savings adjustment inherent when using $ADJ_{AtticGasHeat}$ of 76% [1782]

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil fuel heat

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

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[1777] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1778] Ideally, the System Efficiency should be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test. The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see 'BPI Distribution Efficiency Table') or by performing duct blaster testing.

[1779] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1780] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

[1781] As demonstrated in air sealing and insulation research by Navigant, Navigant (2018). C*omEd and Nicor Gas Air Sealing and Insulation Research Report.* Presented to Commonwealth Edison Company and Nicor Gas Company. Adjustment factor was derived from a consumption data regression analysis with an experimental design that does not require further net savings adjustment for non-income eligible populations. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

[1782] The additional value of 10% was selected to acknowledge that some portion of the regression-derived adjustment factors accounts for gross impact effects, and that removing net effects embedded in the adjustment factors would increase savings to some degree. A review of historical NTG values for air sealing and insulation measures in non-income eligible populations did not provide definitive guidance for estimating the net component of the adjustment factors. Historically, free ridership has ranged from 9% to 26% for like measures, and spillover has ranged from 1% to 14%, while NTGs have ranged from 0.75 to 1.05. The midpoint of the NTG range would be 0.90, a 10% reduction from 1.0.

= If unknown[1783], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1784]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

For example, energy savings from ceiling/attic insulation. Energy savings for air sealing are included in a separate example in Section 5.6.1: Air Sealing.

Assume a non-income eligible single family home in Chicago installs 700 ft^2 of attic insulation, has a gas furnace with system efficiency of 66%, and has pre and post attic insulation R-values of R-5 and R-38, respectively:

ΔTherms = ((((1/5 - 1/38) * 700 * (1-0.07)) * 24 * 4,798) / (0.66 * 100,000)) * 76% * 100% * 100%

= 150 therms

Mid-Life adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC (13.4 SEER2 * 0.85)	11.4 SEER2
	Heat Pump (14.3 SEER2 * 0.85)	12.2 SEER2
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.5HSPF/3.412)*0.85	1.87 COP
	Gas Furnace 80% AFUE * 0.85	68% AFUE
	Oil Furnace 83% AFUE * 0.85	71% AFUE

[1783] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1784] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

Efficiency Assumption	System Type	New Baseline Efficiency
	Gas Boiler	84% AFUE
	Oil Boiler	86% AFUE

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimate to be 10 years or 13 years for boilers.[1785] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-AINS-V10-270101

REVIEW DEADLINE: 1/1/2030

[1785] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

5.6.6 Rim/Band Joist Insulation

DESCRIPTION

This measure describes savings from adding insulation (either rigid or spray foam) to rim/band joist cavities. This measure requires a member of the implementation staff evaluating the pre- and post-project R-values and to measure surface areas. The efficiency of the heating and cooling equipment in the home should also be evaluated if possible.

A conditioned space is defined as a space within the thermal envelope[1786] of the building that is intentionally heated or cooled for occupancy (bedrooms, living room, bathrooms, kitchen, etc.). A non-conditioned space is defined as a space outside of the thermal envelope of the building that is not intentionally heated or cooled for occupancy (roof attic, etc.). A semi-conditioned space is defined as a space within the thermal envelope that is not intentionally heated or cooled for occupancy (unfinished basement).

This measure was developed to be applicable to the following program types: RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

This measure requires a member of the implementation staff or a participating contractor to evaluate the pre and post R-values and measure surface areas. The requirements for participation in the program will be defined by the utilities.

DEFINITION OF BASELINE EQUIPMENT

The existing condition will be evaluated by implementation staff or a participating contractor and is likely to be empty wall cavities and little or no attic insulation.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 30 years.[1787]

Note a mid-life adjustment to account for replacement of HVAC equipment during the measure life should be applied after 10 years or 13 years for boilers[1788]. See section below for detail.

DEEMED MEASURE COST

The actual installed cost for this measure should be used in screening.

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's capacity market.

[1786] Thermal envelope refers to the shell of the building as a barrier to unwanted heat or mass transfer between the interior of the building and the outside conditions: IPCC, https://archive.ipcc.ch/publications_and_data/ar4/wg3/en/ch6s6-4-2.html

[1787] As recommended in Guidehouse 'EMV Group A, Deliverable 16 EUL Research – Residential Insulation', prepared for California Public Utilities Commission, June 2021.

[1788] This is intentionally longer than the assumptions found in the early replacement measures as the application of this measure will occur in a variety of homes that will not be targeted for early replacement HVAC systems.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1789]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1790]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during system peak hour)

= 67%[1791]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1792]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1793]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF SAVINGS

ELECTRIC ENERGY SAVINGS

Where available savings from shell insulation measures should be determined through a custom analysis. When that is not feasible for the program the following engineering algorithms can be used with the inclusion of an adjustment factor to de-rate the heating savings.

ΔkWh = (ΔkWh_cooling + ΔkWh_ heatingElectric + ΔkWh_heatingFurnace)

Where:

ΔkWh_cooling = If central cooling, reduction in annual cooling requirement due to insulation

$$= \frac{\left(\frac{1}{R_{Old}} - \frac{1}{R_{Rim}}\right) * A_{Rim} * (1 - FramingFactor_{Rim}) * CDD * 24 * DUA * LoadFactor * ADJ_{BasementCool} * \%Cool}{(1000 * \eta Cool)}$$

R_{Rim} = R-value of new rim/band joist assembly (including all layers between inside air and outside air).

[1789] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1790] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1791] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1792] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1793] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

R_{old} = R-value value of existing assembly and any existing insulation.

(Minimum of R-5 for uninsulated assemblies)[1794]

A_{Rim} = Net area of insulated rim/band joist (ft^2)

$FramingFactor_{Rim}$ = Adjustment to account for area of framing

= 5%[1795]

24 = Converts hours to days

CDD = Cooling Degree Days

= dependent on location, if unknown assume semi-conditioned:[1796]

Climate Zone (City based upon)	Conditioned (CDD 65)	Semi-conditioned (CDD 75)[1797]
1 (Rockford)	877	326
2 (Chicago)	1047	354
3 (Springfield)	1183	448
4 (Belleville)	1641	532
5 (Marion)	1450	516
Weighted Average[1798]	1098	380

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).

= 0.90 [1799]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1800]

[1794] An estimate based on review of Madison Gas and Electric, Exterior Wall Insulation, R-value for no insulation in walls, and NREL's Building Energy Simulation Test for Existing Homes (BESTEST-EX).

[1795] Assumes the average framing factor for joists running from front-to-back (0.094) and from side-to-side (0). The front-to-back FF was calculated based on 1.5" joists for every 16" (1.5"/16" = 0.094). The side-to-side FF is 0 since joists are continuous and uninterrupted.

[1796] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1797] Five year-average (2018 to 2022) cooling degree days with a base temperature of 75 F. Data from DegreeDays.net were used in this table because the climate normals from NCEI/NCDC used elsewhere are not available at base temps above 72F.

[1798] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1799] This factor utilizes data from a metering study: Pigg, Scott, D. Caultlet, and K. Koski, (2016): "Improving Installation and Maintenace Practices for Minnesota Residentail Furnaces, Air Conditioners and Heat Pumps", prepared for Minnestora Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over 1/2 of the actual annual operating hours for the highest operating hours home in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois' hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data.

[1800] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

1000 = Converts Btu to kBtu

ηCool = Efficiency (SEER2 or CEER) of cooling system (kBtu/kWh) * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1801] or if unknown assume the following.[1802] If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[1803]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1804]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

$ADJ_{BasementCool}$ = Adjustment for cooling savings from basement wall and rim/band joist insulation to account for prescriptive engineering algorithms overclaiming savings[1805]

= 75%

%Cool = Percent of homes that have cooling

[1801] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1802] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[1803] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1804] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024.

[1805] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo “Results for AIC PY6 HPwES Billing Analysis”, dated February 20, 2015. TAC negotiated adjustment factor is 80%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[1806]	98.9%	96.5%	99.8%	98.7%	98.6%

kWh_heatingElectric = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to insulation

$$= \frac{\left(\frac{1}{R_{old}} - \frac{1}{R_{Rim}}\right) * A_{Rim} * (1 - FramingFactor_{Rim}) * HDD * 24 * ADJ_{BasementHeat} * \%ElectricHeat}{(\eta Heat * 3412)}$$

HDD = Heating Degree Days

= Dependent on location, if unknown assume semi-conditioned:[1807]

Climate Zone (City based upon)	Conditioned (HDD 60)	Semi-conditioned (HDD 50)
1 (Rockford)	5230	3233
2 (Chicago)	4798	2845
3 (Springfield)	4266	2456
4 (Belleville)	3188	1651
5 (Marion/Murphysboro)	3390	1750
Weighted Average[1808]	4631	2732

ηHeat = Efficiency of heating system

= Actual Heat Efficiency * Distribution Efficiency (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1809] or if not available, refer to default table below.[1810] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

[1806] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1807] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F for a conditioned basement and 50°F for an unconditioned basement), consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in "Statistical Analysis of Historical State-Level Residential Energy Consumption Trends," 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[1808] Weighted based on number of occupied residential housing units in each zone.

[1809] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1810] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency)= (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown (for use in program evaluation only)[1811]	N/A	N/A	1.32

3412 = Converts Btu to kWh

$ADJ_{BasementHeat}$ = Adjustment for basement wall and rim/band joist insulation to account for prescriptive engineering algorithms overclaiming savings[1812]

= 63%

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Fossil Fuel heat

= If unknown[1813], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1814]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is

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[1811] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1811] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps.

[1812] TAC negotiated adjustment factor was 60%, then during update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

[1813] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1814] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

known that the participant has a gas supply, the values from the gas utility above should be applied.

For example, a single-family home in Chicago with 100 ft^2 of uninsulated rim joist cavities in an semi-conditioned basement that is insulated to R-13. The home has 10.5 SEER Central AC and 2.26 (1.92 including distribution losses) COP Heat Pump:

ΔkWh = (ΔkWh_cooling + ΔkWh_heating)

= (((1/5 - 1/13) * 100 * (1-0.05) * 354 * 24 * 0.90 * 1 * 0.75) / (1000 * 10.5)) + (((1/5 - 1/13) * 100 * (1-0.05) * 2845 * 24 * 0.63 * 1) / (1.92 * 3412))

= 6.4 + 76.8

= 83.25 kWh

ΔkWh_heatingFurnace = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1815]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1816]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1817]

29.3 = kWh per therm

[1815] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1816] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1817] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

For example, a single family home in Chicago with 100 ft^2 of uninsulated rim joist cavities in an unconditioned basement that is insulated to R-13. The home has a gas furnace with system efficiency of 66% (for therm calculation see Fossil Fuel Savings section):

ΔkWh = 7.62 * 1 * 0.0314 * 29.3

= 7.0 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (ΔkWh_cooling / FLH_cooling) * CF

Where:

FLH_cooling = Full load hours of air conditioning

= Dependent on location as below:[1818]

Climate Zone (City based upon)	Single Family		Multifamily	
	Conditioned	Semi-Conditioned[1819]	Conditioned	Semi-Conditioned
1 (Rockford)	547	203	499	185
2 (Chicago)	709	240	629	213
3 (Springfield)	779	295	707	268
4 (Belleville)	1082	351	982	318
5 (Marion)	956	340	868	309
Weighted Average[1820]				
ComEd	676	234	603	209
Ameren	875	303	791	274
Statewide	731	253	655	227

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1821]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single family homes (during system peak hour)

= 72%[1822]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multifamily homes (during

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[1818] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1819] Semi-Conditioned are estimated based on the ratio of CDD between conditioned and semi-conditioned spaces.

[1820] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1821] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1822] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

system peak hour)

= 67%[1823]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1824]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single family homes (average during PJM peak period)

= 46.6%[1825]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multifamily homes (average during peak period)

= 28.5%

For example, a single family home in Chicago with 100 ft^2 of semi-insulated rim joist cavities in an unconditioned basement that is insulated to R-13. The home has 10.5 SEER Central AC and 2.26 (1.92 including distribution losses) COP Heat Pump:

ΔkW_{SSP} = 6.4 / 240 * 0.68

= 0.018 kW

ΔkW_{PJM} = 6.4 / 240 * 0.466

= 0.012 kW

FOSSIL FUEL SAVINGS

If Fossil Fuel heating:

$$\Delta Therms = \frac{\left(\frac{1}{R_{old}} - \frac{1}{R_{Rim}}\right) * A_{Rim} * (1 - FramingFactor_{Rim}) * HDD * 24 * ADJ_{BasementHeat} * \%FossilHeat}{(\eta Heat * 100{,}000)}$$

Where:

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate).[1826] Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1827] or if not available, use 72% for existing system efficiency (including distribution efficiency).[1828] If unknown

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[1823] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1824] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1825] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1826] Ideally, the System Efficiency should be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test. The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see 'BPI Distribution Efficiency Table') or by performing duct blaster testing.

[1827] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1828] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

value is used, it should not be derated by age. If actual Distribution Efficiency is not available use 85% for central ducted systems.

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heat

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[1829], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1830]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

For example, a single family home in Chicago with 100 ft^2 of uninsulated rim joist cavities in an unconditioned basement that is insulated to R-13. The home has a gas furnace with system efficiency of 66%:

ΔTherms = ((1/5 - 1/13) * 100 * (1-0.05) * 2845 * 24 * 0.63 * 1) / (0.66 * 100,000)

= 7.62 therms

Mid-Life adjustment

In order to account for the likely replacement of existing heating and cooling equipment during the lifetime of this measure, a mid-life adjustment should be applied. To calculate the adjustment, re-calculate the savings above using the following new baseline system efficiency assumptions:

Efficiency Assumption	System Type	New Baseline Efficiency
ηCool	Central AC (13.4 SEER2 * 0.85)	11.4 SEER2
	Heat Pump (14.3 SEER2 * 0.85)	12.2 SEER2
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.5HSPF/3.412)*0.85	1.87 COP

[1829] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1830] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

Efficiency Assumption	System Type	New Baseline Efficiency
	Gas Furnace 80% AFUE * 0.85	68% AFUE
	Oil Furnace 83% AFUE * 0.85	71% AFUE
	Gas Boiler	84% AFUE
	Oil Boiler	86% AFUE

This reduced annual savings should be applied following the assumed remaining useful life of the existing equipment, estimate to be 10 years or 13 years for boilers.[1831] Note if the existing equipment efficiency is greater than the new baseline efficiency listed above, do not apply a mid-life adjustment.

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-RINS-V09-270101

REVIEW DEADLINE: 1/1/2030

[1831] This is intentionally longer than the assumption found in the early replacement measures as the application of this measure will occur in a variety of homes and will not be targeting those homes appropriate for early replacement HVAC systems.

5.6.7 Low-E Storm Window

DESCRIPTION

Emissivity is a measure of thermal radiation emitted by an object’s surface. Emissivity values range from 0 to 1 with 1 being the emissivity of a black body. Low emissivity (low-e) storm window inserts reduce the rate of thermal radiation of the window assembly through the interaction of multiple properties. The low-e surface of the insert means that the window will transfer heat at a reduced rate. The newly created air gap between the window and the insert combined with the low emissivity of the insert improves thermal performance of the window assembly. The inserts include weather-stripping as a means of sealing the connection which reduces air infiltration. This measure offers benefits during both heating and cooling seasons, for both natural gas and electricity. In addition to energy benefits, this measure offers non-energy benefits including increased comfort and noise reduction.

The calculation of savings presented in this section apply to single and multifamily residential applications with no portable window air conditioners. Small commercial applications with operating characteristics similar to a residential profile are also eligible for the savings presented here.

This measure was developed to be applicable to the following program types: RF, DI. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is a window insert installed over either the interior or exterior of the baseline window. The insert must be ENERGY STAR[1832] certified and meet the ENERGY STAR storm windows key product criteria.

ENERGY STAR key product criteria for storm windows[1833]

Climate Zone	Emissivity	Solar Transmission
1 - Rockford	≤ 0.22	> 0.55
2 - Chicago		
3 - Springfield		
4 - Belleville		Any
5 – Marion		

DEFINITION OF BASELINE EQUIPMENT

The baseline condition is an existing single-pane or double-pane window with clear glass and any frame type: metal, vinyl, or wood.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 20 years.[1834]

DEEMED MEASURE COST

The incremental cost for this measure is $7.85 per square foot material cost. Applications using professional window installers should include an additional $30 per window installation cost.[1835]

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat

[1832] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[1833] ENERGY STAR Storm Windows Key Product Criteria, accessed February 2020.

[1834] Pacific Northwest National Laboratory for the U.S. Department of Energy, “Task ET-WIN-PNNL-FY13-01-5.3: Database of Low-e Storm Window Energy Performance across U.S. Climate Zones,” September 2013: page 5.

[1835] Ibid.

Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the average savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1836]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1837]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1838]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1839]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1840]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta \mathrm{kWh} = \Delta \mathrm{kWh}_{\mathrm{cooling}} + \Delta \mathrm{kWh}_{\mathrm{heatingElectric}} + \Delta \mathrm{kWh}_{\mathrm{heatingFurnace}}$$

$$\Delta \mathrm{kWh}_{\mathrm{cooling}} = \mathrm{CS}_{\mathrm{cz}} * \mathrm{Area}_{\mathrm{window}}$$

$$\Delta \mathrm{kWh}_{\mathrm{heatingElectric}} = \mathrm{EHS}_{\mathrm{cz}} * \mathrm{Area}_{\mathrm{window}}$$

[1836] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1837] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1838] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1839] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1840] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

$\Delta \text{kWh}_{\text{heatingFurnace}} =$

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * F_e * 29.3

If electric furnace: = ΔkWh_heatingElectric * %FurnaceElectric * F_e

Where:

CS_{cz} = Annual cooling savings per area of window by climate zone, see table below.

Cooling savings per window area by climate zone and baseline window condition[1841]

Climate Zone	Single Pane Base Window (kWh/ft^2)	Double Pane Base Window (kWh/ft^2)
1 - Rockford	0.46	0.33
2 - Chicago	0.47	0.34
3 - Springfield	0.62	0.45
4 - Belleville	0.88	0.64
5 - Marion	0.77	0.56

EHS_{cz} = Annual electric heating savings per area of window by climate zone, see table below

Heating savings per window area by climate zone, heating type, and baseline window condition[1842]

	Electric Resistance Heat (Baseboard or Electric Furnace)		Electric Heat Pump	
Climate Zone	Single Pane Base Window (kWh/ft^2)	Double Pane Base Window (kWh/ft^2)	Single Pane Base Window (kWh/ft^2)	Double Pane Base Window (kWh/ft^2)
1 - Rockford	16.84	1.90	9.31	1.05
2 - Chicago	16.09	1.81	8.89	1.00
3 - Springfield	13.78	1.55	7.61	0.86
4 - Belleville	10.63	1.20	5.87	0.66
5 - Marion	10.82	1.22	5.98	0.67

[1841] Based on savings modeled by EPA, “ES Storm Windows RESFEN Data and Calculations.xlsx”, April 2017. Whole House Cooling energy values from the “Raw Data-Exterior Storm Windows” and “Raw Data-Interior Storm Windows,” Climate Zone 5, Location IL Chicago, wood frame, single pane, exterior low-E (0.148 panel) and interior low-E (0.148 panel) were used to calculated savings. EPA only reported single pane modeling results. In order to estimate impacts for double pane windows, ratios of double pane to single pane cooling energy was applied as reported by the Pacific Northwest National Laboratory for the U.S. Department of Energy, “Task ET-WIN-PNNL-FY13-01-5.3: Database of Low-e Storm Window Energy Performance across U.S. Climate Zones,” September 2013. Values from Appendix C, table C.8 for Chicago, Illinois were used to calculate the ratio of double pane to single pane cooling energy. See “Low E Window Workpaper Supporting Calculations.xlsx” for reference. The was data modified for different heating zones of Illinois.

[1842] Based on savings modeled by EPA, “ES Storm Windows RESFEN Data and Calculations.xlsx”, April 2017. Whole House Heating energy values from the “Raw Data-Exterior Storm Windows” and “Raw Data-Interior Storm Windows,” Climate Zone 5, Location IL Chicago, wood frame, single pane, exterior low-E (0.148 panel) and interior low-E (0.148 panel) were used to calculated savings. EPA only reported single pane modeling results. In order to estimate impacts for double pane windows, ratios of double pane to single pane cooling energy was applied as reported by the Pacific Northwest National Laboratory for the U.S. Department of Energy, “Task ET-WIN-PNNL-FY13-01-5.3: Database of Low-e Storm Window Energy Performance across U.S. Climate Zones,” September 2013. Values from Appendix C, table C.8 for Chicago, Illinois were used to calculate the ratio of double pane to single pane heating energy. See “Low E Window Workpaper Supporting Calculations.xlsx” for reference. To convert from “Furnace” savings to electric, it is assumed a furnace efficiency of 72%, electric resistance of 100% and heat pump of 1.81 (average of pre-2006 and 2006-2014 federal standard).

$Area_{window}$ = Total area of installed window inserts. Use site specific value.

$\Delta Therms$ = Therm savings from fossil fuel heating as calculated below

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1843]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1844]

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption, 3.14%[1845]

29.3 = Conversion factor, kWh per therm

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta \mathrm{kW} = \left(\frac{\Delta \mathrm{kWh_{cooling}}}{\mathrm{FLH_{cooling}}}\right) * \mathrm{CF}$$

Where:

$FLH_{cooling}$ = Full load hours of air conditioning based on climate zone.

= Dependent on location:[1846]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707

[1843] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1844] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[1845] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

[1846] Full load hours for Chicago, Moline and Rockford are provided in “Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting”, p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

Climate Zone (City based upon)	Single Family	Multifamily
4 (Belleville)	1,082	982
5 (Marion)	956	868
Weighted Average[1847]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1848]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1849]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1850]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1851]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1852]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

FOSSIL FUEL SAVINGS

$$\Delta Therms = GHS_{cz} * Area_{window}$$

Where:

GHS_{cz} = Annual fossil fuel heating savings per area of window by climate zone, see table below

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[1847] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1848] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1849] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1850] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1851] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1852] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Heating savings per window area by climate zone and baseline window condition[1853]

Climate Zone	Single Pane Base Window (therms/ft^2)	Double Pane Base Window (therms/ft^2)
1 - Rockford	0.80	0.09
2 - Chicago	0.76	0.09
3 - Springfield	0.65	0.07
4 - Belleville	0.50	0.06
5 - Marion	0.51	0.06

$Area_{window}$ = Total area of installed window inserts. Use site specific value.

For example, a single family gas heated residence in Rockford installs 10 window inserts over single pane windows. Each window is 12 square feet for a total window area of 120 square feet.

$$\Delta Therms = 0.80 * 120 = 95.81\ therms$$

$$\Delta kWh = 0.46 * 120 + 95.81 * 0.0314 * 29.3 = 143.37\ kWh$$

$$\Delta kW_{PJM} = \left(\frac{143.37}{547}\right) * 0.466 = 0.12\ kW$$

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-LESW-V06-270101

REVIEW DEADLINE: 1/1/2028

[1853] Based on savings modeled by EPA, “ES Storm Windows RESFEN Data and Calculations.xlsx”, April 2017. Whole House Heating energy values from the “Raw Data-Exterior Storm Windows” and “Raw Data-Interior Storm Windows,” Climate Zone 5, Location IL Chicago, wood frame, single pane, exterior low-E (0.148 panel) and interior low-E (0.148 panel) were used to calculated savings. EPA only reported single pane modeling results. In order to estimate impacts for double pane windows, ratios of double pane to single pane cooling energy was applied as reported by the Pacific Northwest National Laboratory for the U.S. Department of Energy, “Task ET-WIN-PNNL-FY13-01-5.3: Database of Low-e Storm Window Energy Performance across U.S. Climate Zones,” September 2013. Values from Appendix C, table C.8 for Chicago, Illinois were used to calculate the ratio of double pane to single pane heating energy. See “Low E Window Workpaper Supporting Calculations.xlsx” for reference.

5.6.8 High Performance Windows

DESCRIPTION

High Performance Windows (HPWs) greatly improve building thermal envelope performance compared to code standard double-glazed windows. HPWs must achieve a U-value ≤ 0.22 for the Northern climate zone,[1854] or ≤ 0.25 for the North-Central climate zone. High performance windows significantly decrease heat loss through a building's envelope in a number of ways: by adding one or more additional panes of glass in the insulating glass unit (IGU), applying additional coatings to the glass panes, adding new gas fill, and/or using thermally improved spacers.

HPWs' reduced heat transfer significantly effects home energy savings as windows are often the weakest part of any building envelope. In addition to reducing heat transfer, HPWs also reduce air infiltration, thereby contributing to decreased HVAC loads. HPWs provide benefits for both heating and cooling seasons, and for both natural gas- and electrically-heated and cooled homes. They also have non-energy benefits such as increased thermal comfort and decreased outside noise.

This measure was developed for the following program types: New Construction (NC), Time of Sale (TOS), and Early Replacement (EREP). If applied to other program types, the measure savings should be verified.

By default, any "standard" window replacement (i.e. replacing an existing window of the same size with no structural changes to building) should be considered TOS/EREP for savings purposes unless the local code is explicitly triggered, in which case NC savings values shall be used.[1855]

DEFINITION OF EFFICIENT EQUIPMENT

HPWs are windows that meet the ENERGY STAR®[1856] version 7.0 performance specifications shown below:

Table 1: Key Product Criteria for High Performance Windows[1857]

IL Degree-Day Zone	ENERGY STAR Climate Zone	U-Value	SHGC	Prescriptive or Performance-Based
1 – Rockford 2 – Chicago 3 – Springfield	Northern	≤ 0.22	≥ 0.17	Prescriptive
		= 0.23	≥ 0.35	Equivalent Energy Performance
		= 0.24		
		= 0.25	≥ 0.40	
		= 0.26		
4 – Belleville	North-Central	≤ 0.25	≤ 0.40	Prescriptive
5 – Marion				Prescriptive

HPWs can achieve these performance specifications in a number of ways. Some examples of HPWs include:

- Thin Triple Windows (TTW) – the insulating glass unit (IGU) contains three panes of glass. A thin pane of center glass allows the IGU to fit within a standard window frame, eliminating the need to redesign the window. The inclusion of a thin pane of center glass allows for an additional surface for low-E coating, reducing the window's emissivity of thermal radiation and the rate of heat transfer by improving the U-value of the IGU and overall assembly. TTWs have two equal width panes of glass on the exterior and

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[1854] In some cases, HPWs can have U-values of up to 0.26 in the Northern climate zone if the window meets alternative, performance-based SHGC thresholds. See **Error! Reference source not found.** for the specifications.

[1855] Preliminary analysis indicates an overwhelming majority of Illinois residents live in municipalities with code exemptions for windows being replaced for the same size/in the existing opening (e.g. Chicago does not require a building permit for "repairing or replacing (in-kind) an exterior window or skylight in the existing opening". Link: https://www.chicago.gov/city/en/sites/guide-to-building-permits/home/help/faq/DOB/bldg-permit-not-required/worktype/exterior.html). Therefore the assumption is that code is not triggered until proven otherwise. For future TRM revisions, this assumption may be revisited.

[1856] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[1857] ENERGY STAR® Version 7.0 Residential Windows, Doors, and Skylights Final Specification.

interior of the IGU and a thin center piece of glass that allows the IGU to fit within an existing double-pane window frame.

- Triple Pane Windows – conventional triple pane windows that contain three panes of standard thickness glass. These windows provide an additional surface for a low-e coating and provide improved thermal performance by decreasing a window's emissivity and improving the window's resistance to heat loss. These windows are typically heavier than double-panes or TTWs and require a redesign of the window to allow the heavier, wider IGU to fit within the window frame.
- Double-pane windows that have low-e coatings on the two surfaces that face the cavity between the two panes of glass as well as on the interior-facing interior pane of glass, warm edge spacers, and improved frame thermal properties (e.g., adding foam or other insulation to the frame cavities).[1858]

DEFINITION OF BASELINE EQUIPMENT

New Construction: The tables below show International Energy Conservation Code (IECC) 2018 and IECC 2021 window codes for new construction. For first permits dated November 1, 2022 or later in the city of Chicago, or January 1, 2024 for the remainder of Illinois, residential new construction must be built in accordance with IECC 2021.

Table 2: IECC – Fenestration Requirements[1859,1860,1861]

IL Degree-Day Zone	IECC Climate Zone	U-Value	SHGC
1 – Rockford	5	≤ 0.30 (IECC 2018, 2021) ≤ 0.28 (IECC 2024)	*Not Rated*[1862] (IECC 2018, 2024) ≤ 0.40 (IECC 2021)
2 – Chicago			
3 – Springfield			
4 – Belleville	4	≤ 0.32 (IECC 2018) ≤ 0.30 (IECC 2021, 2024)	*Not Rated*[1863] (IECC 2018) ≤ 0.40 (IECC 2021, 2024)
5 – Marion			

Time of Sale and Early Replacement in Existing Homes:

Table 3: Existing Homes – Existing Window Values: Double Pane[1864]

[1858] Stephen Selkowitz Consultants. Study of High-Performance Windows Incremental Manufacturing Cost. Prepared for NEEA, Report #E23-336. January 3, 2023.

[1859] 2018 International Energy Conservation Code, Fifth Version: November 2021. TABLE R402.1.2. https://codes.iccsafe.org/content/IECC2018P5/chapter-4-re-residential-energy-efficiency

[1860] 2021 International Energy Conservation Code, Second Version: September 2021. TABLE R402.1.2. https://codes.iccsafe.org/content/IECC2021P2/chapter-4-re-residential-energy-efficiency

[1861] 2024 International Energy Conservation Code, First Version: May 2024. TABLE R402.1.2. https://codes.iccsafe.org/content/IECC2024P1/chapter-4-re-residential-energy-efficiency

[1862] Value used in modeling: SHGC=0.30. Engineering judgement made during EnergyPlus modeling by Lili Yu and Robert Hart, Lawrence Berkeley National Laboratory, May 11, 2023.

[1863] Value used in modeling: SHGC=0.30. Engineering judgement made during EnergyPlus modeling by Lili Yu and Robert Hart, Lawrence Berkeley National Laboratory, May 11, 2023.

[1864] Engineering judgement made during EnergyPlus modeling by Lili Yu and Robert Hart, Lawrence Berkeley National Laboratory, "High Performance Windows - Illinois Modeled Savings Summary," April 2021. Informed by air sealing and insulation research by Navigant, see Navigant (2018). ComEd and Nicor Gas Air Sealing and Insulation Research Report. Presented to Commonwealth Edison Company and Nicor Gas Company.

IL Degree-Day Zone	U-Value	SHGC
1 – Rockford	0.55	0.63
2 – Chicago		
3 – Springfield		
4 – Belleville		
5 – Marion		

Table 4: Existing Homes – Existing Window Values: Single Pane[1865]

IL Degree-Day Zone	U-Value	SHGC
1 – Rockford	1.0	0.76
2 – Chicago		
3 – Springfield		
4 – Belleville		
5 – Marion		

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 40 years.[1866]

The remaining life of existing equipment is assumed to be 13 years.[1867]

DEEMED MEASURE COST

The incremental cost for this measure depends on the program delivery type/baseline and climate zone.

New Construction (NC) and Time of Sale (TOS): includes only equipment cost above baseline:

IL Degree-Day Zone	ENERGY STAR Climate Zone	NC or TOS[1868]
1 – Rockford 2 – Chicago 3 - Springfield	Northern	$3.85/ft^2
4 – Belleville 5 – Marion	North-Central	$2.18/ft^2

Early Replacement (EREP): Actual equipment and labor costs for installation, less the present value of the assumed deferred replacement cost, should be used. If this is unknown, assume the defaults below. The deferred cost (after 13 years) of replacing existing windows with a new code required double-pane baseline unit is assumed to be $48.50 per square foot[1869].

IL Degree-Day Zone	ENERGY STAR Climate Zone	EREP
1 – Rockford 2 – Chicago	Northern	$52.35/ft^2

[1865] Ibid

[1866] The Northwest Power Plan (NPCC). Please see sheet "Source Summary" within file: Com-Windows-2021P_V17.xlsx. Link: https://nwcouncil.app.box.com/s/u0dgjxkoxoj2tttym81uka3wrjcy6bo6/file/655810989510

[1867] Assumed to be one third of effective useful life. For future TRM versions, recommend RUL be informed from program research.

[1868] Based on US EPA. ENERGY STAR® Windows, Doors, and Skylights Draft 1 Version 7 Stakeholder Webinar. July 27, 2021. https://www.energystar.gov/sites/default/files/asset/document/V7_Stakeholder%20Meeting_7-27-2021_final.pdf. Costs on slide 20 were averaged across both SHGC values as both can meet ENERGY STAR v.7 performance specifications. These costs assume a 3'x5' (15ft^2) window.

[1869] $37.82 inflated using 1.91% rate.

IL Degree-Day Zone	ENERGY STAR Climate Zone	EREP
3 - Springfield		
4 – Belleville 5 – Marion	North-Central	$50.68/ft^2

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the average savings over the defined summer peak period, and is presented so that savings can be bid into PJM's Forward Capacity Market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1870]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1871]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1872]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1873]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1874]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

[1870] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1871] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1872] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1873] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1874] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \Delta kWh_{cooling} + \Delta kWh_{heating} + \Delta kWh_{fan}$$

$$\Delta kWh = CS_{cz} * Area_{window}$$

Where:

CS_{cz} = Annual heating, cooling + fan savings per area of window by climate zone, see Tables 5-7 below.

$Area_{window}$ = Total area of installed high performance windows. Use site specific value.

Table 5: Air Conditioner with Gas Furnace – electric savings per window area (kWh/ft^2)[1875]

IL Degree-Day Zone	NC (IECC 2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	EREP: Single Pane
1 – Rockford	0.58	0.60	0.41	1.22	2.33
2 – Chicago	0.60	0.61	0.41	1.20	2.24
3 – Springfield	0.51	0.69	0.47	1.39	2.70
4 – Belleville	0.53	0.78	0.14	1.39	2.74
5 – Marion	0.62	0.78	0.12	1.25	2.64

Table 6: Air Conditioner with Electric Resistance (Baseboard or Electric Furnace) Heat – electric savings per window area (kWh/ft^2)[1876]

IL Degree-Day Zone	NC (IECC 2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	EREP: Single Pane
1 – Rockford	2.42	2.58	1.94	4.24	14.77
2 – Chicago	2.71	2.79	1.78	4.04	13.43
3 – Springfield	2.64	2.30	1.60	3.70	11.39
4 – Belleville	2.97	2.07	1.45	4.10	12.35
5 – Marion	2.16	1.86	1.23	3.95	9.88

Table 7: Heat Pump – electric savings per window area (kWh/ft^2)[1877]

IL Degree-Day Zone	NC (IECC 2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	EREP: Single Pane
1 – Rockford	1.73	1.52	1.28	7.62	19.68
2 – Chicago	1.53	1.69	1.11	6.95	17.14
3 – Springfield	1.92	1.24	1.02	6.24	15.01
4 – Belleville	1.76	1.37	0.83	6.36	14.98
5 – Marion	1.43	1.34	0.66	5.90	12.62

[1875] EnergyPlus modeling performed by Lili Yu and Robert Hart, “2023-07-26 LBNL Modeling_NC-TOS_TMYx.xlsx”, “ 2023-08-04 LBNL Modeling_EREP_TMYx_Double Pane”, “2023-08-30 LBNL Modeling_EREP_TMYx_Single Pane,” Lawrence Berkeley National Laboratory. May 11, 2023. Yu and Hart's energy modeling incorporated the most commonly commercially available windows that meet or exceed the energy performance criteria relevant to each climate zone (CZ). Specifically, the analysts derived energy savings using these specifications for HPWs: 1) Northern CZ, NC: U=0.30/SHGC=0.30; 2) Northern CZ, TOS/EREP: U=0.22/SHGC=0.25; 3) North-Central CZ, NC: U=0.22/SGHC=0.25; 4) North-Central CZ TOS/EREP: average of savings from U=0.25/SHGC=0.20 and U=0.25/SHGC=0.28. Additional modeling of IECC 2024 provided in ‘LBNL Modeling IL_TRM_2024IECC.xls’

[1876] Ibid

[1877] Ibid

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \left(\frac{\Delta kWh_{cooling}}{FLH_{cooling}}\right) * CF$$

Where:

$\Delta kWh_{cooling}$ = Annual cooling-only electricity savings, based on climate zone and equipment type. See Tables 9-11

$FL_{cooling}$ = Full load hours of air conditioning

= dependent on location:[1878]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[1879]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1880]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1881]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1882]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

[1878] Full load hours for Chicago, Moline and Rockford are provided in “Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting”, p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1879] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1880] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1881] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC’s 2010 system peak; ‘Impact and Process Evaluation of Ameren Illinois Company’s Residential HVAC Program (PY5)’.

[1882] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

= 46.6%[1883]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1884]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

Table 9: Air Conditioner with Gas Furnace – cooling only electric savings per window area (kWh/ft^2)[1885]

IL Degree-Day Zone	NC (IECC 2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	EREP: Single Pane
1 – Rockford	0.35	0.35	0.32	0.60	1.24
2 – Chicago	0.35	0.36	0.33	0.53	1.13
3 – Springfield	0.39	0.44	0.40	0.61	1.37
4 – Belleville	0.40	0.56	0.12	0.60	1.38
5 – Marion	0.46	0.57	0.11	0.48	1.27

Table 10: Air Conditioner with Electric Resistance (Baseboard or Electric Furnace) Heat – cooling only electric savings per window area (kWh/ft^2)[1886]

IL Degree-Day Zone	NC (IECC 2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	EREP: Single Pane
1 – Rockford	0.31	0.36	0.32	0.48	2.17
2 – Chicago	0.36	0.33	0.33	0.47	1.97
3 – Springfield	0.35	0.44	0.40	0.43	1.65
4 – Belleville	0.39	0.55	0.17	0.36	1.67
5 – Marion	0.44	0.56	0.16	0.36	1.31

Table 11: Heat Pump – cooling only electric savings per window area (kWh/ft^2)[1887]

IL Degree-Day Zone	NC (IECC 2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	EREP: Single Pane
1 – Rockford	0.31	0.34	0.31	0.56	2.27
2 – Chicago	0.35	0.32	0.32	0.58	2.04
3 – Springfield	0.34	0.36	0.38	0.50	1.78
4 – Belleville	0.39	0.55	0.17	0.41	1.67
5 – Marion	0.43	0.56	0.15	0.39	1.41

[1883] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1884] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1885] EnergyPlus modeling performed by Lili Yu and Robert Hart, “2023-07-26 LBNL Modeling_NC-TOS_TMYx.xlsx”, “ 2023-08-04 LBNL Modeling_EREP_TMYx_Double Pane”, “2023-08-30 LBNL Modeling_EREP_TMYx_Single Pane,” Lawrence Berkeley National Laboratory. May 11, 2023. Yu and Hart's energy modeling incorporated the most commonly commercially available windows that meet or exceed the energy performance criteria relevant to each climate zone (CZ). Specifically, the analysts derived energy savings using these specifications for HPWs: 1) Northern CZ, NC: U=0.30/SHGC=0.30; 2) Northern CZ, TOS/EREP: U=0.22/SHGC=0.25; 3) North-Central CZ, NC: U=0.22/SGHC=0.25; 4) North-Central CZ TOS/EREP: average of savings from U=0.25/SHGC=0.20 and U=0.25/SHGC=0.28. Additional modeling of IECC 2024 provided in ‘LBNL Modeling IL_TRM_2024IECC.xls’

[1886] Ibid

[1887] Ibid

FOSSIL FUEL SAVINGS

$$\Delta Therms = HS_{cz} * Area_{window}$$

Where:

HS_{cz} = Annual heating savings per area of window by climate zone, see Table 12.

$Area_{window}$ = Total area of installed high performance windows. Use site specific value.

Table 12: Gas heating savings per window area by climate zone and baseline window condition (therm/ft^2)[1888]

IL Degree-Day Zone	NC (IECC2018)	NC (IECC 2021)	NC (IECC 2024)	TOS or EREP: Double Pane	TOS or EREP: Single Pane
1 – Rockford	0.12	0.09	0.07	0.22	1.27
2 – Chicago	0.09	0.12	0.06	0.21	1.12
3 – Springfield	0.16	0.08	0.05	0.17	0.91
4 – Belleville	0.17	0.07	0.04	0.16	0.89
5 – Marion	0.14	0.06	0.03	0.16	0.73

For example, a single family residence in Rockford with a gas furnace and air conditioner replaces 10 existing double pane windows with HPW. Each window is 12 square feet, so the total window area is 120 square feet.

1st 13 years savings calculation:

$$\Delta Therms = 0.22 * 120 = 26.4\ therms$$

$$\Delta kWh = 1.22 * 120 = 146.4\ kWh$$

$$\Delta kW_{PJM} = \left(\frac{146.4}{512}\right) * 0.466 = 0.13\ kW$$

Remaining 27 years savings calculation:

$$\Delta Therms = 0.12 * 120 = 14.4\ therms$$

$$\Delta kWh = 0.58 * 120 = 69.6\ kWh$$

$$\Delta kW_{PJM} = \left(\frac{69.6}{512}\right) * 0.466 = 0.063\ kW$$

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

[1888] EnergyPlus modeling performed by Lili Yu and Robert Hart, “2023-07-26 LBNL Modeling_NC-TOS_TMYx.xlsx”, “ 2023-08-04 LBNL Modeling_EREP_TMYx_Double Pane”, “2023-08-30 LBNL Modeling_EREP_TMYx_Single Pane,” Lawrence Berkeley National Laboratory. May 11, 2023. Yu and Hart's energy modeling incorporated the most commonly commercially available windows that meet or exceed the energy performance criteria relevant to each climate zone (CZ). Specifically, the analysts derived energy savings using these specifications for HPWs: 1) Northern CZ, NC: U=0.30/SHGC=0.30; 2) Northern CZ, TOS/EREP: U=0.22/SHGC=0.25; 3) North-Central CZ, NC: U=0.22/SGHC=0.25; 4) North-Central CZ TOS/EREP: average of savings from U=0.25/SHGC=0.20 and U=0.25/SHGC=0.28. Additional modeling of IECC 2024 provided in ‘LBNL Modeling IL_TRM_2024IECC.xls’

MEASURE CODE: RS-SHL-TTWI-V07-270101

REVIEW DEADLINE: 1/1/2028

5.6.9 Insulated Cellular Shades

DESCRIPTION

Insulating cellular shades greatly improve the thermal envelope performance compared to uncovered windows or conventional vinyl window coverings. These coverings have a honeycomb or cellular structure that can be operated manually or automated. Insulated cellular shades are considered to have the highest R-value among available blinds, shades, and other window coverings. They are designed with multiple layers of varying fabrics to trap air inside pockets that act as insulators and increase the R-value of the window covering and reduce the thermal heat transfer through windows.

The window's reduced heat loss has a significant impact on home energy savings as windows are often the weakest part of any building envelope. These products provide benefits for both heating and cooling seasons and for both natural gas and electric heated and cooled homes. They also have non-energy benefits such as, increased thermal comfort and decreased outside noise.

This measure was developed to be applicable to the following program types: TOS, NC. If applied to other program types, the measure savings should be verified

DEFINITION OF EFFICIENT EQUIPMENT

The efficient insulating cellular shades must be at least a double cell design installed on at least 75% of a home's windows. The Attachments Energy Rating Council (AERC) has a third party verified rating that has been developed for residential window attachments[1889]. If possible, utilizing the AERC rating system, eligible insulating cellular shades need to have a Cool Climate Rating greater or equal to 10 due to the Illinois climate.

DEFINITION OF BASELINE EQUIPMENT

The baseline for this measure is a home with uncovered windows or standard existing shades or blinds.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life is assumed to be 6 years[1890].

DEEMED MEASURE COST

The costs of window coverings vary greatly based on factors other than energy efficiency. The incremental cost of insulated cellular shades over standard window coverings is assumed to be $93 per shade or $1,397 per home[1891].

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1892]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes

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[1889] Attachments Energy Rating Council. May 01, 2022. www.https://aercenergyrating.org/

[1890] A review of online retailers, lifestyle and architectural blogs suggests that cellular (sometimes called honeycomb) shades have a slightly shorter lifespan on 5 to 7 years, this being due to their more complicated internal structure which quickly loses its insulating properties when damage is sustained

[1891] Review of leading internet retailers performed 7/18/2025 to determine average cost of single cellular window shade. Per home deemed measure cost assumes 15 windows per home.

[1892] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

(during system peak hour)

= 72%[1893]

$CF_{SSP, MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1894]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1895]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1896]

$CF_{PJM, MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = (\Delta kWh_{\_cooling} + \Delta kWh_{\_heatingElectric} + \Delta kWh_{\_heatingFurnace})$$

Where:

$\Delta kWh_{\_Cooling}$ = If central cooling, reduction in annual cooling requirement due to cellular window shades

= FLH_{cool} * Capacity_cooling * ((1/ηCool)/1000) * ESF_{cool}

FLH_{cool} = Full load cooling hours

= Dependent on location as below:[1897]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499

[1893] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1894] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1895] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1896] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1897] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

Climate Zone (City based upon)	Single Family	Multifamily
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[1898]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

Capacity_cooling = Size of new equipment in Btu/hr (note 1 ton = 12,000Btu/hr)

= Use actual when program delivery allows size of AC unit to be known. If unknown, assume 33,600 Btu/hr for single family homes, 28,000 Btu/hr for multifamily, or 24,000 Btu/hr for mobile homes.[1899] If building type is unknown, assume 31,864Btu/hr.[1900]

ηCool = the cooling equipment's Seasonal Energy Efficiency Ratio rating (kBtu/kWh) * Distribution Efficiency

= Use actual SEER2 rating where it is possible to measure or reasonably estimate (assuming 85% distribution efficiency if only equipment efficiency is available). If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time[1901]. If unknown, use the following assumption (do not derate further by age):

Cooling System	SEER2[1902]	ηCool (SEER2 * 0.85)
Air Source Heat Pump	11.4	9.7
Central AC		

ESF_{cool} = Insulating cellular shades cooling energy savings factor

= 0.05[1903]

[1898] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1899] Single family cooling capacity based on Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), October 19, 2010, ComEd, Navigant Consulting. Multifamily capacity based on weighted average of PY9 Ameren and ComEd MF cooling capacities. Mobile home capacity based on ENERGY STAR's Manufactured Home Cooling Equipment Sizing Guidelines which vary by climate zone and home size. The average size of a mobile home in the East North Central region (1,120 square feet) from the 2015 RECS data is used to calculated appropriate size.

[1900] Unknown is based on statewide weighted average of 69% single family and 31% multifamily, based on IL data from 2009 RECS Table HC2.9 Structural and Geographic Characteristics of Homes in Midwest Region, Divisions and States, 2009.

[1901] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1902] Estimate based upon Navigant, 2018 "EIA – Technology Forecast Updates – Residential and Commercial Building Technologies – Reference Case", converted to SEER2.

[1903] Average of HVAC savings for typical use compared to baseline conditions of no shades and common vinyl blinds. "Testing the Performance and Dynamic Control of Energy-Efficient Cellular Shades in the PNNL Lab Homes." PNNL. August 2018. Table 4.3 https://aercnet.org/wp-content/uploads/2018/10/Testing-the-Performance-and-Dynamic-Control-of-Energy-Efficient-Cellular-Shades-in-the-PNNL-Lab-Homes.pdf.

$\Delta kWh_{\text{Heating Electric}}$ = If electric heat (resistance baseboard, electric furnace or heat pump), reduction in annual electric heating due to cellular window shades

= FLH_{heat} * Capacity_heating * 1/(3,412 * ηHeat) * ESF_{heat}

FLHheat = Full load heating hours

= Dependent on location as below:[1904]

Climate Zone (City based upon)	FLH_heat
1 (Rockford)	1924
2 (Chicago)	1726
3 (Springfield)	1708
4 (Belleville)	1195
5 (Marion/Murphysboro)	1270
Weighted Average[1905]	
ComEd	1766
Ameren	1547
Statewide	1700

Capacity_heating = Heating output capacity (Btu/hr) of electric heat

= Actual

ηHeat = Efficiency of heating system

= Actual (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1906] or if not available refer to default table below.[1907] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
Heat Pump (if age unknown, assume 2006-2014)	Before 2006	5.8	1.44
	After 2006 -2014	6.5	1.62

[1904] Heating EFLH based on ENERGY STAR EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL. During update cycle for version v.12, applied percent change of HDD60, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[1905] Weighting for Ameren is based on electric heat accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1906] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1907] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency) (HSPF2/3.412)*0.85
	2015 on	7	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1
Unknown (for use in program evaluation only)	N/A	N/A	1.32

ESF_{heat} = Insulating cellular shades heating energy savings factor

= 0.02[1908]

$\Delta kWh_{\_Heating\ Furnace}$ = If furnace (fossil fueled or electric) heat, kWh savings for reduction in furnace fan run time

If fossil fueled furnace: $= \Delta Therms * \%FurnaceFossil * F_e * 29.3$

If electric furnace: $= \Delta kWh_{heatingElectric} * \%FurnaceElectric * F_e$

ΔTherms = (CAPInputPre ∗ EFLH ∗ (1/ Eff)*ESFheat)) / 100,000

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1909]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1910]

CAPInputPre = Gas Furnace input capacity (Btuh)

= Actual. If unknown, use the table below:

Eligibility Tier	Input Capacity[1911]
AFUE ≥ 95 (all furnaces, no tiers)	84,305

[1908] "Testing the Performance and Dynamic Control of Energy-Efficient Cellular Shades in the PNNL Lab Homes." PNNL. August 2018. https://aercnet.org/wp-content/uploads/2018/10/Testing-the-Performance-and-Dynamic-Control-of-Energy-Efficient-Cellular-Shades-in-the-PNNL-Lab-Homes.pdf.

[1909] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1910] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1911] Average Input Capacity for Northern Illinois, based on analysis of Nicor Gas 2019 Home Energy Efficiency Rebate Program

EFLH = Equivalent Full Load Hours for heating[1912]

Climate Zone (City based upon)	EFLH[534]
1 (Rockford)	998
2 (Chicago)	915
3 (Springfield)	814
4 (Belleville)	609
5 (Marion)	647
Weighted Average[1913]	
ComEd	932
Ameren	800
Statewide	883

Eff = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate).[1914] Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[1915] or if not available, use 72% for existing system efficiency (including distribution efficiency).[1916] If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available use 85% for central ducted systems.

F_e = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1917]

29.3 = kWh per therm

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participant tracking data, prepared by Guidehouse, Inc., based on 12,549 furnaces rebated at the 95 AFUE Tier, and 1,103 furnaces rebated at the 97 AFUE Tier. Approximately 10% of tracked input capacities were adjusted by Guidehouse based on verification of manufacturer model numbers. Values for Southern Illinois not available.

[1912] Heating EFLH based on ENERGY STAR EFLH for Rockford, Chicago, and Springfield and on NCDC/NOAA HDD for the other two cities. In all cases, the hours were adjusted based on average natural gas heating consumption in IL. During update cycle for version v.12, applied percent change of HDD60, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHheat values

[1913] Weighting for Ameren is based on gas accounts in each of the heating zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[1914] Ideally, the System Efficiency should be obtained either by recording the AFUE of the unit, or performing a steady state efficiency test. The Distribution Efficiency can be estimated via a visual inspection and by referring to a look up table such as that provided by the Building Performance Institute: (see 'BPI Distribution Efficiency Table') or by performing duct blaster testing.

[1915] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1916] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

[1917] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = Capacity\_cooling * ((1/EER2)/1000) * ESF_d * CF$$

Where:

EER2 = Energy Efficiency Ratio of existing cooling system (kBtu/hr / kW)

= Use actual EER (converted to EER2) rating where it is possible to measure or reasonably estimate. If EER2 unknown but SEER2 available convert using the equation:

$EER2 = (-0.02 * SEER2\_exist^2) + (1.12 * SEER2\_exist)$ [1918]

If SEER2 or EER2 rating unavailable, use:

Cooling System	EER2[1919]
Air Source Heat Pump	10.0
Central AC	

ESF_d = Insulating cellular shades heating energy savings factor

= 0.02[1920]

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[1921]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1922]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1923]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1924]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

[1918] From Wassmer, M. (2003). A Component-Based Model for Residential Air Conditioner and Heat Pump Energy Calculations. Masters Thesis, University of Colorado at Boulder.

[1919] Based on converting SEER2 assumption to EER2.

[1920] "Testing the Performance and Dynamic Control of Energy-Efficient Cellular Shades in the PNNL Lab Homes." PNNL. August 2018. https://aercnet.org/wp-content/uploads/2018/10/Testing-the-Performance-and-Dynamic-Control-of-Energy-Efficient-Cellular-Shades-in-the-PNNL-Lab-Homes.pdf.

[1921] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1922] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1923] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1924] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

= 46.6%[1925]

$CF_{PJM, MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-INCS-V05-270101

REVIEW DEADLINE: 1/1/2030

[1925] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

5.6.10 Multifamily Whole Building Aerosol Sealing

DESCRIPTION

Multifamily buildings have many of the same leakage paths as single-family homes, as well as additional paths hidden in shared walls or other cavities that are difficult to seal with conventional methods. Typically, shared walls between multifamily homes are difficult to air seal effectively, leading to issues when trying to meet code. This measure is the application of an aerosol sealant to a new or existing multifamily building. The aerosol envelope sealing technology uses an automated approach to produce extremely tight envelopes.

Air is blown into a multifamily unit while an aerosol sealant "fog" is released in the interior. As air escapes the building through leaks in the envelope, the sealant particles are carried to the leaks where they impact and stick to the edges of the leaks, eventually sealing them. A standard house or duct air leakage test fan is used to pressurize the building and provide real-time feedback and a permanent record of the sealing. The process is more effective and convenient than conventional sealing methods because it requires less time and effort, it can seal a larger portion of a leakage area more quickly, and can be used to meet more stringent compartmentalization requirements. It can be used to seal multiple units in a residential multi-family building in a cost-effective manner. Energy savings are estimated using EnergyPlus whole-building energy simulations.

This measure was developed to be applicable to the following program types: RF and NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Existing multifamily units which have been aerosol sealed that meet an air exchange rate of 3.0 ACH50 (air changes per hour) or lower. This meets the residential energy code tightness requirements[1926]. New multifamily units which have been aerosol sealed that meet an air exchange rate of 0.6 ACH50 (air changes per hour) or lower. This meets the Passive House tightness requirements.[1927]

DEFINITION OF BASELINE EQUIPMENT

Existing multifamily buildings that are undergoing a major envelope retrofit. The existing air leakage should be determined through approved and appropriate test methods using a blower door at 50 Pascals. Note that setting up a blower door is a required step in the aerosol sealing process.

The baseline for new construction buildings would be the applicable code for air exchange rate.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 20 years.[1928]

DEEMED MEASURE COST

The measure cost for this aerosol sealing technology is $0.50/sq.ft. of home size[1929].

LOADSHAPE

Loadshape R09 - Residential Electric Space Heat

Loadshape R10 - Residential Electric Heating and Cooling

[1926] ICC. 2018 International Energy Conservation Code, International Code Council, Inc

ICC. 2018 International Residential Code, International Code Council, Inc.

[1927] PHI (Passive House Institute). 2016. Passive House requirements (http://passiv.de/en/02_informations/02_passive-house-requirements/02_passive-house-requirements.htm). Information accessed on April 2022

[1928] Center for Energy and Environment. Demonstrating the Effectiveness of an Aerosol Sealant to Reduce Multi-Unit Dwelling Envelope Air Leakage. December 30, 2016. http://mn.gov/commerce-stat/pdfs/card-cee-aerosol.pdf#page=47&zoom=100,0,404

[1929] Ibid

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF ENERGY SAVINGS

Energy savings are estimated using EnergyPlus whole-building energy simulations.

It is important to note that the energy savings for multifamily whole-building sealing process cannot be estimated using a simple infiltration algorithm. This is because conversion of the measured building leakage (ACH50) to infiltration at natural conditions treats the entire building as a single zone and does not account for air movement between zones and housing units and also does not consider effects of mechanical ventilation. Therefore, whole building level energy modeling must be done to estimate energy savings.

Baseline and efficient energy models were developed in the referenced study for Minneapolis climate zone.[1930] The energy savings in this measure have been adjusted for the Illinois climate zones based on degree days.[1931] A multifamily building with six floors was modeled containing four housing units in each floor. Each modeled unit is 30 ft wide and 40 ft long with a floor area of 1,200 ft^2. The floor plan is the same for each of the six floors in the modeled building and is symmetric to minimize the effects of building orientation on the simulation results.

The heating system consists of a central boiler that served each apartment through terminal units. The boiler system is rated for 75% seasonal efficiency. Cooling is provided by window air conditioners. The independent variables include the building's physical characteristics and operating parameters of the ventilation systems. The dependent variables include building energy use, total outside air flow (e.g. infiltration and ventilation), and inter-zonal air flows (e.g. adjoining units and units to/from common spaces).

ELECTRIC ENERGY SAVINGS

There is minimal impact on the cooling energy savings.[1932] There is a slight increase in the cooling energy needed after sealing due to less infiltration to offset internal loads. Due to the relatively small impact on cooling, it is not considered to be significant.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

The natural gas space heating savings are dependent on the ventilation system and whether the multifamily unit is existing or new construction.

Four types of continuous ventilation schemes were modeled for the apartments.

a) Exhaust Only: Exhaust fan in each unit with no direct supply of outdoor air. Consists of a single fan connected to a centrally located, single exhaust point in the house.
b) Exhaust and Half Supply: Ventilation scheme having both exhaust and supply ventilation systems. Full capacity exhaust fan in each unit with supply ventilation to the unit that is approximately half the exhaust capacity.
c) Balanced: A balanced ventilation system that has two fans and two duct systems. They introduce and exhaust approximately equal quantities of fresh outside air and polluted inside air.
d) No Ventilation: No continuous or intermittent mechanical ventilation. This is the most common type of

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[1930] Center for Energy and Environment. Demonstrating the Effectiveness of an Aerosol Sealant to Reduce Multi-Unit Dwelling Envelope Air Leakage. December 30, 2016. http://mn.gov/commerce-stat/pdfs/card-cee-aerosol.pdf#page=47&zoom=100,0,404

[1931] "Whole Home Sealing HDD Adjustment Spreadsheet.xlsx"

[1932] "Whole Home Sealing HDD Adjustment Spreadsheet.xlsx". The cooling savings penalties are extremely small in the order of 1-3% of the heating savings and have been excluded from this analysis.

ventilation scheme in existing multifamily buildings.

Natural Gas savings for each ventilation type normalized per multifamily unit are listed in the below tables by climate zone. The air exchange rate baseline for the New Building energy simulations was 3.0ACH50 and the measure case was 0.6ACH50; whereas the baseline for the existing building energy simulations was 9.5ACH50 and the measure case was 3.0ACH50[1933].

Climate Zone (City based upon)	New Building Space Heating Savings (therms/unit)			
	Exhaust	Exhaust and half supply	Balanced	No ventilation
1 (Rockford)	10.3	14.6	23.2	22.3
2 (Chicago)	9.9	14.1	22.4	21.5
3 (Springfield)	8.6	12.2	19.4	18.7
4 (Belleville)	6.9	9.7	15.5	14.9
5 (Marion)	7.0	9.9	15.8	15.2

Climate Zone (City based upon)	Existing Building Space Heating Savings (therms/unit)			
	Exhaust	Exhaust and half supply	Balanced	No ventilation
1 (Rockford)	35.2	48.1	57.5	58.4
2 (Chicago)	34.0	46.4	55.5	56.3
3 (Springfield)	29.5	40.2	48.1	48.9
4 (Belleville)	23.5	32.1	38.3	38.9
5 (Marion)	24.0	32.8	39.2	39.8

$$\Delta Therms/unit = Therms_{ModeledSavings} \times Heating\ Efficiency_{Correction\ Factor} \times Volume_{Correction\ Factor}$$

Where:

$Therms_{ModeledSavings}$ = From above tables depending on the building vintage, climate zone and ventilation system

$HeatingEfficiency_{CorrectionFactor}$ = $HeatingEfficiency_{Modeled}/HeatingEfficiency_{Actual}$

Where:

$HeatingEfficiency_{Modeled}$ = 0.75

$HeatingEfficiency_{Actual}$ = the efficiency of the actual heating system. If unknown, use a correction factor of 1 for existing buildings and the applicable code baseline efficiency for new buildings.

$Volume_{CorrectionFactor}$ = $Volume_{Actual}/Volume_{Modeled}$

[1933] Center for Energy and Environment. Demonstrating the Effectiveness of an Aerosol Sealant to Reduce Multi-Unit Dwelling Envelope Air Leakage. pp 76, 79. December 30, 2016. http://mn.gov/commerce-stat/pdfs/card-cee-aerosol.pdf#page=47&zoom=100,0,404

Where:

$Volume_{Modeled}$ = 12,000 ft^3

$Volume_{Actual}$ = Volume of the actual unit. If unknown, use a correction factor of 1.

For example, An existing 1,000 sq.ft. multi-family unit with 10 ft. ceilings, 80% efficiency central boiler in a 6-unit building in Chicago with no dedicated ventilation is sealed using whole home aerosol sealing technique. The annual natural gas savings for the measure from the table would be -

ΔTherms = 56.3 x (0.75/0.80) x (10,000/12,000)

= 43.9 therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-AERO-V01-230101

REVIEW DEADLINE: 1/1/2028

5.6.11 Insulated Concrete Forms

DESCRIPTION

Insulated Concrete Forms (ICFs) are building assembly blocks that are used to construct walls of a building both above grade and below grade walls. They are made of lightweight, hollow foam blocks with reinforced steel bars that are filled with concrete. The foam blocks provide insulation, while the concrete provides strength and durability. ICFs are a popular construction method for energy-efficient and passive buildings because they provide excellent insulation, which can result in lower energy costs and a more comfortable living environment. They also have good soundproofing properties and can be used in areas with high wind and seismic activity. ICFs are easy to work with and can be assembled to fit the specific needs of a building. Additionally, ICFs are durable and long-lasting, and they require minimal maintenance over time.

Energy saving potential of ICFs walls when compared to traditional building wall construction assemblies, across residential building types is detailed in this measure. When considering a building material for both above grade and below grade (basement) walls, insulated concrete forms provide a high effective thermal resistance (R-value) and it eliminates the requirement of any additional insulation material. Heating and cooling energy reductions are derived from higher and continuous thermal resistance provided by ICFs walls leading to reduction in overall heating and cooling loads.

This measure was developed to be applicable to the following program types: NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

ICFs assembly consist of a system of expanded or extruded polystyrene rigid insulation blocks separated by plastic webbing. Reinforcement bars are placed in the openings between the forms and concrete is poured and sandwiched between two layers of insulation material. The assembly provides continuous insulation and thermal mass across the building envelope. Effective thermal resistance R-values of the ICFs walls assembly are manufacturer published values to be used as a part of the measure. ICFs walls to be considered in this measure should have assembly U-values that shall exceed minimum required assembly R-values as defined by International Energy Efficiency Code[1934], listed below. A heated basement condition shall be required to utilize measure savings in below grade applications.

ICF Above grade wall assembly R-value >22.2 (hr $ft^2 °\mathrm{F}/Btu$)

ICF Below grade wall assembly R-value > 20 (hr $ft^2 °\mathrm{F}/Btu$)

DEFINITION OF BASELINE EQUIPMENT

Widely prevalent traditional building wall construction types[1935] [1936] listed in table below are considered as baseline for this measure. Thermal resistance R-values corresponding to code required thermal transmittance U-value listed in 2021 and 2024 International energy conservation code. These values are to be used in prescriptive energy saving calculation methodology.

[1934] 2021/2024 International Energy Efficiency Code, Chapter 4 Residential energy efficiency, section R402, table R402.1.2. Minimum assembly R values are calculated from listed assembly maximum U values for wooden frame and basement walls.

[1935] U.S. Building Stock Characterization Study by National Renewable Energy Laboratory. US Building Typology Segmentation Residential | Tableau Public. Data shows that 84% of the single-family homes and 30-74% of Multifamily homes in Illinois are built with wood frame construction since the 1980s.

[1936] A technology report from Portland Cement Association briefs[1936], lists Concrete as the most common product of choice for basement construction with 98% of North American basements built of one of many available concrete wall systems. Concrete Basements| Concrete Construction Magazine

Wall Type	Type	Code	Zone	Assembly U-Value (Max.)	Corresponding Assembly R-Value (Min.)[1937]
Above grade wall	Wood Frame Wall	2021 IECC (Residential)	All	0.045	22.2
Below grade wall	Basement Wall		Zone 4	0.059	16.9
			Zone 5	0.05	20

Note: U Values and R values listed are in Imperial units. U-value: (Btu/hr ft^2°F), R-value: (hr ft^2°F/ Btu)

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life is assumed to be 50 years[1938].

DEEMED MEASURE COST

The actual capital cost for this measure should be used in screening. If unknown, use total measure cost listed in table below include the cost of ICF blocks, concrete, reinforcement materials and labor. Incremental costs are compared against a wood frame wall for above grade walls and a standard concrete wall for below grade walls. Manufacturer specified R-values of ICF block/panels and actual concrete type R values shall be used to calculate ICF assembly R-value.

ICF Core thickness[1939]	Total Measure cost[1940] ($/Square ft of wall area)	Incremental cost against above grade wood frame wall[1941] ($/Square ft of wall area)	Incremental cost against Basement concrete wall[1942] ($/Square ft of wall area)	ICF assembly R-Value [1943] [1944] (ft^2·°F·h /BTU)
4”	12.14	6.58	6.94	23.9
6”	13.20	7.64	5.85	27.1
8”	16.37	10.81	8.34	28.4

LOADSHAPE

Loadshape R08 - Residential Cooling

[1937] 2021/2024 International Energy conservation code (IECC) lists maximum allowable U-value for wood frame walls under residential energy efficiency section. Minimum required R-value is calculated as a reciprocal of the 2021/2024 IECC listed U- value for wood frame walls. U-values correspond to climate zones 5A and 4C for Illinois.

[1938] While manufacturers claim the lifetime of the foam exceeds 100 years, due to likely degradation and or changes to the building shell over that timeframe, the TAC proposed a measure life of 50 years.

[1939] Core thickness indicate the space in between the EPS panels in ICF assembly.

[1940] Total measure costs include ICF blocks, concrete, rebar and labor costs. ICF block pricing information from ICF manufacturer Build Block and Fox blocks. Concrete costs and labor costs are from RSMeans 2023 residential cost database.

[1941] Baseline above grade wood frame wall cost include wall framing cost and code minimum insulation (cavity insulation and continuous insulation). These costs are referenced from 2023 RSMeans residential cost database.

[1942] Baseline basement wall costs include concrete, labor and code minimum insulation. These costs are referenced from 2023 RSMeans residential cost database.

[1943] National Concrete Masonry Association listed R-Value per thickness for different Concrete densities is utilized to calculated ICF assembly R-Values. A concrete density of 105 lb/ft^3 is assumed for calculation purpose. Actual Concrete R-Value should be used in the measure. R-VALUES AND U-FACTORS OF SINGLE WYTHE CONCRETE MASONRY WALLS - NCMA

[1944] An R-value of 4.2 ft^2·°F·h /BTU-inch is used for calculating R-value of ICF blocks with a total thickness of 5.25”. ICF blocks from manufacturers Buildblock and Fox block are considered for this analysis.
https://buildblock.com/download/r-value-and-performance-of-buildblock-and-buildlock-knockdown-insulating-concrete-forms/?tmstv=1683660365
https://buildblock.com/technical-support/product-specifications/
https://www.foxblocks.com/resources?category=specifications-guides

Loadshape R09 - Residential Electric Space Heat

Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the average savings over the defined summer peak period and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1945]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1946]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1947]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[1948]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1949]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

[1945] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1946] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1947] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1948] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1949] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

Following engineering algorithms can be used to calculate electric energy savings due to ICFs.

$\Delta kWh = (\Delta kWh_{cooling} + \Delta kWh_{heatingElectric} + \Delta kWh_{heatingFurnace})$

Where:

$\Delta kWh_{Cooling}$ = If central cooling, reduction in annual cooling requirement due to ICF insulation

= ((((1/R _base AG – 1/R_ICF_AG) * A_wall AG) * 24 * CDD65 * DUA * LoadFactor) / (1000 * ηCool)) * $ADJ_{WallCool}$ * %Cool

R_base AG = Thermal resistance R-value of the baseline above grade exterior wall assembly in IP units $ft^2\cdot°F\cdot h/BTU$

= 22.2 $ft^2\cdot°F\cdot h$ /BTU[1950]

R_ICF_AG = R_ICF block + R_Concrete + R_ ICF inserts

R_ICF block = Rated R-value of the wall assembly as provided by the manufacturer. IP units $ft^2\cdot°F\cdot h/BTU$

= If unknown, Use R-Value per inch of ICF panel thickness[1951] of 4.2 h $ft^2\cdot°F$/BTU-inch

R_Concrete = Actual R-value of the concrete used in the ICF assembly

= R-Value per inch * Concrete thickness, If unknown, use table below[1952] [1953]

Concrete density lb/ft^3	R-Value per inch
85	0.3
95	0.25
105	0.20
115	0.17
125	0.14
135	0.11
145	0.075

R_ ICF inserts = R-value of any additional ICF inserts/panels in the actual assembly

A wall AG = Net area of the above grade exterior wall envelope in $ft^{2.}$

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).
= 0.90[1954]

[1950] Calculated based on maximum assembly U-value requirement for a wood frame wall from 2021 IECC, Rmin=1/Umax, CHAPTER 4 [RE] RESIDENTIAL ENERGY EFFICIENCY, 2021 International Energy Conservation Code (IECC) | ICC Digital Codes (iccsafe.org)

[1951] BB-R-value-and-Performance-of-BuildBlock-ICFs-2014.pdf

[1952] National Concrete Masonry Association, Thermal data Table 5, https://ncma.org/resource/rvalues-ufactors-of-single-wythe-concrete-masonry-walls/

[1953] https://www.concreteconstruction.net/_view-object?id=00000153-96ee-dbf3-a177-96ffa5500000

[1954] This factor utilizes data from a metering study: Pigg, Scott, D. Caultlet, and K. Koski, (2016): “Improving Installation and Maintenace Practices for Minnesota Residentail Furnaces, Air Conditioners and Heat Pumps”, prepared for Minnestora

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[1955]

1000 = Converts Btu to kBtu

CDD65 = Cooling Degree Days per year.

= Dependent on location:[1956]

Climate Zone (City based upon)	CDD 65
1 (Rockford)	877
2 (Chicago)	1047
3 (Springfield)	1183
4 (Belleville)	1641
5 (Marion/Murphysboro)	1450
Weighted Average[1957]	1098

ηCool = Seasonal Energy Efficiency Ratio of cooling system (kBtu/kWh) * Distribution Efficiency

= Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[1958] or if unknown assume the following.[1959] If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3

Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over 1/2 of the actual annual operating hours for the highest operating hours home in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.95 to account for the higher fraction of vacation homes in Minnesota compared to Illinois. See DUA_workbook_051525.xlsx for detailed data.

[1955] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

[1956] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F.

[1957] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

[1958] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[1959] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time mean that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Room AC[1960]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[1961]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

ADJ$_{WallCool}$ = Adjustment for cooling savings from wall insulation to account for inaccuracies in prescriptive engineering algorithms[1962]

= 75%

%Cool = Percent of homes that have cooling. Actual value shall be used.

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[1963]	98.9%	96.5%	99.8%	98.7%	98.6%

$\Delta kWh_{heatingElectric}$ = (((((1/R_base AG – 1/R_ICF_AG) * A_wall AG) +((1/R_base AG_basement – 1/R_ICF_AG_basement) *A_wall AG_basement) + ((1/R_base BG_basement – 1/R_ICF_BG_basement) *A_wall BG_basement)) * 24 * HDD60) / (3412 * ηHeat)) * ADJ$_{Wallheat}$ * %ElectricHeat

A_wall AG_basement = Net area of the above grade exterior basement wall envelope in ft^2

A_wall BG_basement = Net area of the below grade exterior basement wall envelope in ft^2

R_base AG_basement = R_basement wall

R_basement wall = Thermal resistance R-value of the baseline basement wall assembly in IP units ft^2·°F·h/BTU

= 16.9 ft^2·°F·h/BTU for a basement wall in Climate zone 4 20 ft^2·°F·h/BTU for a basement wall in Climate zone 5[1964]

[1960] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[1961] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1962] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo "Results for AIC PY6 HPwES Billing Analysis", dated February 20, 2015. TAC negotiated adjustment factor is 80%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals CDD65 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all cooling-related adjustment values.

[1963] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[1964] Calculated based on maximum assembly U-value requirement for a basement wall from 2021/2021 IECC, Rmin = 1/Umax, International energy conservation code 2021/2024, chapter 4 residential energy efficiency, table R402.1.4 equivalent U-factors.

R_ICF_AG_basement = R_ICF block + R_Concrete + R_ICF Inserts

R_base BG_basement = R_basement wall + R_earth average

R_earth average = Average R value of earth from table below

Below Grade R- Value[1965]									
Depth below grade (ft)	0	1	2	3	4	5	6	7	8
Average Earth R-value ($ft^2 \cdot °F \cdot h/BTU$)	2.44	3.47	4.41	5.41	6.42	7.46	8.46	9.53	10.69

R_ICF_BG_basement = R_ICF block + R_Concrete + R_ICF Inserts + R_earth average

HDD60 = Heating degree days as listed in table below

Climate Zone	HDD60
1(Rockford)	5230
2(Chicago)	4798
3(Springfield)	4266
4(Belleville)	3188
5(Marion)	3390
Weighted Average[1966]	4631

3412 = Conversion factor from Btu to kWh

ηHeat = Efficiency of heating system

= Actual value or if known, refer to table below

System Type	Age of Equipment	HSPF2 Estimate	ηHeat (Effective COP Estimate * Distribution Efficiency)= (HSPF2/3.412)*0.85
Heat Pump (if age unknown assume 2006-2014)	Before 2006	5.8	1.44
	2006 - 2014	6.5	1.62
	2015 on	7.0	1.74
Resistance (Baseboard or Electric Furnace)	N/A	N/A	1.00
Unknown (for use in program evaluation only)[1967]	N/A	N/A	1.32

$ADJ_{Wallheat}$ = Adjustment for heating savings to account for inaccuracies in prescriptive engineering

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[1965] Adapted from Table 1, page 24.4, of the 1977 ASHRAE Fundamentals Handbook.

[1966] Weighted based on number of occupied residential housing units in each zone.

[1967] Calculation assumes 35% Heat Pump and 65% Resistance, which is based upon data from Energy Information Administration, 2009 Residential Energy Consumption Survey, see “HC6.9 Space Heating in Midwest Region.xls”, using average for East North Central Region. Average efficiency of heat pump is based on assumption that 50% are units from before 2006 and 50% from 2006-2014. Program or evaluation data should be used to improve this assumption if available.

algorithms[1968]

=63%

%Electric Heat = Percent of homes that have electric space heating Actual value or Actual planned value during engineering design shall be used.

= 0 % for Natural Gas, 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump, Actual electric % value if both fuel sources are used.

= If unknown[1969], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[1970]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

$\Delta kWh_{heatingFurnace}$ = If furnace (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = ΔTherms * %FurnaceFossil * Fe * 29.3

If electric furnace: = $\Delta kWh_{heatingElectric}$ * %FurnaceElectric * F_e

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[1971]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

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[1968] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo "Results for AIC PY6 HPwES Billing Analysis", dated February 20, 2015. TAC negotiated adjustment factor is 60%. During update cycle for version v.12, applied the percent change of NCEI Annual Normals HDD60 from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) for all heating-related adjustment values.

[1969] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1970] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[1971] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[1972]

Fe = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[1973] [1974]

29.3 = kWh per therm

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (ΔkWh cooling / FLH cooling) * CF

Where:

FLH cooling = Full load hours of air conditioning

= Dependent on location:[1975]

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion/Murphysboro)	956	868
Weighted Average[1976] ComEd Ameren Statewide	676 875 731	603 791 655

Use Multifamily if the building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

[1972] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. See %Furnace tab of 'Res Baseline Study Workbook_2026.xls'.

[1973] Fe is not one of the AHRI certified ratings provided for residential furnaces but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300-record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% Fe. See "Programmable Thermostats Furnace Fan Analysis.xlsx" for reference.

[1974] 2022 Illinois Statewide Technical reference manual for energy efficiency version 11.0, volume 3: Residential measures, 5.6.2 Basement sidewall insulation.

[1975] Full load hours for Chicago, Moline and Rockford are provided in "Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting", p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. During update cycle for version v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[1976] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

= 68%[1977]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1978]

$CF_{SSP,\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

= 67%[1979]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[1980]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[1981]

$CF_{PJM,\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5%

FOSSIL FUEL SAVINGS

$$\Delta Therms = ((((1/R\_base\ AG - 1/R\_ICF\_AG) * A\ wall\ AG) + ((1/R\_base\ BG - 1/R\_ICF\_BG) * A\ wall\ BG) * 24 * HDD65) / (\eta Heat * 100{,}000\ Btu/therm)) * ADJ_{wallheat} * \%FossilHeat$$

Where:

ŋheat = Efficiency of the heating system

= Actual or if known use values from table below

Equipment type	Age of equipment	AFUE[1982]
Gas Furnaces	After 11/19/2015	80%
Gas fired hot water Boilers	After 1/15/2021	84%
	9/1/2012- 1/15/2021	82%
Gas fired steam Boilers	After 1/15/2021	82%
	9/1/2012- 1/15/2021	80%

$ADJ_{Wallheat}$ = Adjustment for heating savings to account for inaccuracies in prescriptive engineering algorithms[1983]

[1977] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1978] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[1979] Multifamily coincidence factors both from; *All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems*, Cadmus, October 2015

[1980] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1981] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[1982] Code of federal regulations, title 10, chapter ii, subchapter D, part 430, subpart C Energy and water conservation standards. eCFR :: 10 CFR Part 430 Subpart C -- Energy and Water Conservation Standards

[1983] As demonstrated in two years of metering evaluation by Opinion Dynamics, see Memo "Results for AIC PY6 HPwES Billing Analysis", dated February 20, 2015. TAC negotiated adjustment factor is 60%.

= 60%

%FossilHeat = Percent of homes that have gas space heating. Actual value or Actual planned value during engineering design shall be used.

= 100 % for Natural Gas, 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump, Actual gas % value if both fuel sources are used.

= If unknown[1984], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[1985]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

[1984] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[1985] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

For Example, a one-story single-family home in Chicago with above ground wall area of 1,500 square feet and basement 8 feet completely below ground with a wall area of 1000 square feet is built with ICF construction with R-33 ICF blocks with 6” core thickness and concrete R-value per inch of 0.2 ft^2·°F·h/BTU-inch. The home has a 13.4 SEER Central AC and 2.2 COP Heat pump.

ΔkWh Cooling = {[((1/R _base AG – 1/R_ICF_AG) * A_wall AG) * 24 * CDD65 * DUA] / (1000 * ηCool)} * $ADJ_{WallCool}$ * %Cool

ΔkWh Cooling ={[((1/22.2 - 1/(33+(6*0.2)))*1,500)*24*1047*0.95]/(1,000*13.2)}*0.75*1

= 30.46 kWh

ΔkWh heating ={[(((1/22.2 - 1/(33+(6*0.2)))*1,500)+ ((1/(20+10.69) - 1/(34.2+10.69)))*1000))*24*4798]/(3412*2.2)}*0.63*1

=328.74 kWh

ΔkWh Savings =30.46 + 328.74

= 359.2 kWh

Summer coincident peak demand savings during system peak hour

ΔkW_{SSP} =(30.46/709)*0.68

=0.029 kW

Summer coincident peak demand savings (Average during peak period)

ΔkW_{PJM} =(30.46/709)*0.466

=0.020 kW

For the same example with a Natural gas furnace with 80% efficiency for heating,

ΔTherms ={[(((1/22.2 - 1/(33+(6*0.2)))*1,500)+ ((1/(20+10.69) - 1/(34.2+10.69)))*1000))*24*4798]/(100,000*0.8)}*0.63*1

=30.85 Therms

ΔkWh heating Gas = 30.85*0.0314*29.3

=28.4 kWh

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-ICF-V04-270101

REVIEW DEADLINE: 1/1/2030

5.6.12 Energy Efficient Doors

DESCRIPTION

Energy efficient doors are designed to reduce heat transfer and air leakage in and out of buildings and contribute to the thermal performance of the building envelope.[1986] They employ materials and construction techniques that improve air sealing and insulation. For the purposes of this measure, a door is defined as an assembled unit consisting of door panel (with or without glazing), frame, sill, weatherstripping, corner pads, hinges, and trim, designed for a vertical installation in an external wall of a residential building. To be eligible, the door must serve as a barrier between conditioned and unconditioned space. When installed correctly, energy efficient doors help homes save energy and improve occupant comfort.

A conditioned space is defined as a space within the thermal envelope[1987] of the building that is intentionally heated or cooled for occupancy (bedrooms, living room, bathrooms, kitchen, etc.). A non-conditioned space is defined as a space outside of the thermal envelope of the building that is not intentionally heated or cooled for occupancy. A semi-conditioned space is defined as a space within the thermal envelope that is not intentionally heated or cooled for occupancy (unfinished basement).

This measure was developed for the following program types: New Construction (NC), Time of Sale (TOS), and Early Replacement (EREP). If applied to other program types, the measure savings should be verified.

This measure is applicable to the following door types:[1988]

- Swinging Exterior Doors, e.g. a home’s main entry door.
- Sliding Glass Doors, e.g. a patio door
- Garage Doors, i.e. overhead or swinging doors designed to provide ingress/egress for motor vehicles.

By default, any “standard” door replacement (i.e. replacing an existing exterior door of the same size with no structural changes to the building) should be considered TOS/EREP for savings purposes unless the local code is explicitly triggered, in which case NC savings values shall be used.

DEFINITION OF EFFICIENT EQUIPMENT

Performance criteria for Swinging Exterior Doors and Sliding Glass Doors are based on the amount of glazing and ratings certified by the National Fenestration Rating Council (NFRC). Energy efficient doors meet ENERGY STAR®[1989] version 7.0 performance specifications shown below:

Table 1: Product Criteria for Energy Efficient Doors

IL Degree-Day Zone	Energy Star Climate Zone	Glazing Level	U-Value	SHGC
All	All	Opaque	≤ 0.17	No Rating
All	All	≤ ½ Lite	≤ 0.23	≤ 0.23
1 - Rockford 2 - Chicago 3 - Springfield	Northern	> ½ Lite	≤ 0.26	≤ 0.40
4 - Belleville 5 - Marion	North Central			

Energy efficient doors achieve these performance specifications by incorporating improved materials such as

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[1986] Vivien L. Lu, Xi Chen, Jianheng Chen, Kai Jiao (Eds.), Toward Energy-Efficient Buildings, Elsevier, 2025, p.23

[1987] Thermal envelope refers to the shell of the building as a barrier to unwanted heat or mas transfer between the interior of the building and the outside conditions: IPCC, https://archive.ipcc.ch/publications_and_data/ar4/wg3/en/ch6s6-4-2.html

[1988] This list is based on the classification of door types in the National Fenestration Ratings Council list of rated products.

[1989] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

polyurethane foam core insulation, better seals and improved weather stripping, and multiple glass panes with low-e coatings and gas fills to improve thermal performance of the glazing elements.

Performance criteria for Garage Doors are based on ratings certified by either the Doors and Access Systems Manufacturers Association (DASMA) Thermal Performance Verification Program (TPVP)[1990], or the NFRC.

Table 2: Product Criteria for Energy Efficient Garage Doors

IL Degree-Day Zone	Energy Star Climate Zone	Glazing Level	U-Value	SHGC
All	All	<16%[1991]	≤ 0.30	No Rating

DEFINITION OF BASELINE EQUIPMENT

New Construction: Opaque doors and sliding glass doors must meet the maximum U-Factors specified by the applicable International Energy Conservation Code (IECC), as provided in the table below.

Table 3: Maximum U-factor for Door Assemblies

IL Degree-Day Zone	Energy Star Climate Zone	Glazing Level	U-Value
1 - Rockford 2 - Chicago 3 - Springfield	Northern (Zone 5)	All	0.30 (IECC 2021) 0.28 (IECC 2024)
4 - Belleville 5 - Marion	North Central (Zone 4)		0.3 (IECC 2021, 2024)

For Early Replacement and Time of Sale in existing homes, actual U-factor ratings of the existing door should be used. If actual ratings are not available, default ratings are provided in the tables below.

Table 4: Default U-Factors for Glass Doors[1992]

Frame Type	Energy Star Climate Zone	Glass Door	
		Single Pane	Double Pane
Metal	All	1.20	0.80
Metal with Thermal Break	All	1.10	0.65
Non-metal or Metal Clad	All	0.95	0.55
Glazed Block	All	0.60	

Table 5: Default U-Factors for Opaque Doors[1993]

Frame Type	Opaque U-Factor
Uninsulated Metal	1.20
Uninsulated Metal (Rolling)	0.90
Insulated Metal (Other)	0.60
Wood	0.50
Insulated, Non-metal edge, max 45% glazing (double pane)	0.35

[1990] Doors and Access Systems Manufacturers Association (DASMA) Thermal Performance Verification Program (TPVP), https://www.dasma.com/thermal/

[1991] DASMA Technical Data Sheet #196, p. 5, https://www.dasma.com/wp-content/uploads/2025/01/TDS-196.pdf

[1992] 2021/2024 International Energy Conservation Code (IECC), Table C303.1.3(1).

[1993] 2021/2024 International Energy Conservation Code (IECC), Table C303.1.3(2).

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The measure life for entry and sliding patio doors is 25 years; for overhead garage doors, measure life is 30 years.[1994] Remaining measure life for entry and sliding glass patio doors is 8 years and 10 years for garage doors.[1995]

DEEMED MEASURE COST

Measure Costs are provided in the table below. For New Construction (NC) and Time of Sale (TOS), use incremental cost, which reflects equipment cost above baseline. For Early Replacement (EREP), use actual equipment and labor costs for installation, less the present value of the assumed deferred replacement cost. If actual costs are unknown, assume the defaults provided in the table.

Efficient Door Measure Cost[1996]

Door Type	Incremental Cost $/sqft	Full Material Cost (EREP)	Deferred Baseline Replacement Cost
Entry Door	$14.68	$1,251	$867
Sliding Glass Door	$3.85	$1,288	$1,125
Garage Door	$5.38	$1,626	$1,230

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the average savings over the defined summer peak period, and is presented so that savings can be bid into PJM's Forward Capacity Market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central or Room A/C (during utility peak hour)

= 68%[1997]

$CF_{SSP\ SF}$ = Summer System Peak Coincidence Factor for Heat Pumps in single-family homes (during system peak hour)

= 72%[1998]

$CF_{SSP\ MF}$ = Summer System Peak Coincidence Factor for Heat Pumps in multi-family homes (during system peak hour)

[1994] U.S. Department of Housing and Urban Development, Estimated Useful Life Table for Capital Needs Assessments, p. 7, online at https://www.hud.gov/sites/documents/eul_for_cna_e_tool.pdf

[1995] Assumed to be one third of effective useful life. For future TRM versions, recommend RUL be informed from program research.

[1996] Cost information averaged from a range of common sizes, obtained from web-based cost calculators based on surveys of popular, stocked products available at home improvement retailers, online at https://www.homewyse.com/costs/ (last accessed 8/18/2025).

[1997] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[1998] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

= 67%[1999]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central or Room A/C (average during PJM peak period)

= 46.6%[2000]

$CF_{PJM\ SF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in single-family homes (average during PJM peak period)

= 46.6%[2001]

$CF_{PJM\ MF}$ = PJM Summer Peak Coincidence Factor for Heat Pumps in multi-family homes (average during peak period)

= 28.5% [2002]

Algorithm

CALCULATION OF ENERGY SAVINGS

The savings algorithm provided below uses U-Factor ratings differential to calculate energy savings from installing energy efficient doors. This method does not consider reductions in infiltration or solar heat gain. A modeled approach may be used to calculate savings inclusive of these factors.

This measure includes doors that separate conditioned space from outside air, as well as doors that separate conditioned space from space enclosed space within a dwelling that is not actively conditioned (e.g., a door that separates an unconditioned garage from a conditioned basement or other living area), and doors that separate outside air from interior space that is not actively conditioned (e.g. a door to an unheated garage, or a walk-out door for a semi-conditioned basement.

Energy savings calculations for doors separating conditioned space from outside air should use the CDD65 and HDD60 degree day values provided in the tables below. All other cases should use the CDD75 and HDD50 values. This accounts for the reduced (but not zero) heat transfer from semi-or nonconditioned enclosed spaces within a dwelling to outside air.

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = \Delta kWh_{cooling} + \Delta kWh_{heatingElectric} + \Delta kWh_{FurnaceFan}$$

$\Delta kWh_{cooling}$ = $(((U_{base} – U_{ee}) \times SF) / (\eta Cool * 1000)) * CDD * 24 * DUA * LoadFactor * \%Cool$

$\Delta kWh_{heatingElectric}$ = $(((U_{base} – U_{ee}) \times SF) / (\eta Heat * 1000)) * HDD * 24 * \%ElectricHeat$

$\Delta kWh_{FurnaceFan}$ = If *furnace* (fossil fueled or electric) heat, kWh savings for reduction in fan run time

If fossil fueled furnace: = $\Delta Therms * \%FurnaceFossil * F_e * 29.3$

If electric furnace: = $\Delta kWh_{heatingElectric} * \%FurnaceElectric * F_e$

Where

[1999] Multifamily coincidence factors both from; All-Electric Homes PY6 Metering Results: Multifamily HVAC Systems, Cadmus, October 2015

[2000] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

[2001] Ibid.

[2002] Ibid.

U_{base} = Baseline door U-Factor

= As provided above

U_{ee} = Efficient door U-Factor

= Actual

SF = Square footage of door

= Actual

ηCool = Seasonal Energy Efficiency Ratio of cooling system (kBtu/kWh) * Distribution Efficiency

Actual (where it is possible to measure or reasonably estimate, assuming 85% distribution efficiency for central cooling with ducts if only equipment efficiency is available). Note where new HVAC is installed in addition to door measures, the old HVAC unit efficiency should be used and the door measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[2003] or if unknown assume the following.[2004] If unknown value is used, it should not be derated by age.

Age of Equipment	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Before 2006	9.5	8.1
2006 - 2014	12.4	10.5
Central AC After 1/1/2015	12.4	10.5
Heat Pump After 1/1/2015	13.3	11.3
Room AC[2005]		
Non-IQ	10.9	10.9
IQ	9.7	9.7
Unknown (for use in program evaluation only)[2006]		
Single Family Non-IQ		10.6
Single Family IQ		10.3
Multi Family Non-IQ		10.3
Multi Family IQ		9.9
Unknown		10.3

CDD = Cooling Degree Days. Dependent on location and whether the door separates conditioned space from outside air or an enclosed space not actively conditioned:

IL Climate Zone	Conditioned CDD 65	Unconditioned CDD 75
1 (Rockford)	877	326

[2003] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[2004] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Central AC was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. Note all ratings have been converted to SEER2 equivalents – since the new rating better reflects the actual efficiency of the units.

[2005] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[2006] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

IL Climate Zone	Conditioned CDD 65	Unconditioned CDD 75
2 (Chicago)	1047	354
3 (Springfield)	1183	448
4 (Belleville)	1641	532
5 (Marion)	1450	516
Weighted Average[2007]	1098	380

DUA = Discretionary Use Adjustment (reflects the fact that people do not always operate their AC when conditions may call for it).
= 0.90[2008]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[2009]

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[2010]	98.9%	96.5%	99.8%	98.7%	98.6%

ηHeat = Efficiency of heating system, HSPF2

= Actual Heating Efficiency * Distribution Efficiency (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value (except for electric resistance) by 1% per year (maximum of 30 years) to account for degradation over time,[2011] or if not available refer to default table below.[2012] If unknown value is used, it should

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[2007] Weighted based on number of occupied residential housing units in each zone (US Census 2010)

[2008] This factor utilizes data from a metering study: Pigg, Scott, D. Cautley, and K. Koski, (2016). “Improving Installation and Maintenance Practices for Minnesota Residential Furnaces, Air Conditioners and Heat Pumps”, prepared for Minnesota Department of Commerce, Division of Energy. COMM-201305222-72623. To correct for the different climatological conditions in Minnesota and Illinois, the analysis includes 19 homes that have actual annual operating hours above 453 hrs/yr (over ½ of the actual annual operating hours for the highest operating hours homes in the study-905 hrs/yr). Additionally, the factor is adjusted from 0.87 to 0.90 to account for Illinois’ hotter climate and higher number of muggy days. See DUA_Workbook_051525.xlsx for detailed data.

[2009] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

[2010] Based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024.

[2011] Justification for degradation factors can be found on page 14 of ‘AIC HVAC Metering Study Memo FINAL 2_28_2018’. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[2012] These default system efficiencies are based on the applicable minimum Federal Standards. In 2006 the Federal Standard for Heat Pumps was adjusted. While one would expect the average system efficiency to be higher than this minimum, the likely degradation of efficiencies over time means that using the minimum standard is appropriate. An 85% distribution efficiency is not be derated by age. If actual Distribution Efficiency is not available, use 85% for heat pumps.

System Type	Age of Equipment	HSPF2 Estimate
Heat Pump	Before 2006	5.8
	2006-2014	6.5
	Since 2015	7
Resistance	N/A	3.412
Unknown (for use in program evaluation only)	N/A	5.3

HDD = Heating Degree Days. Dependent on location and whether the door separates conditioned space from outside air or an enclosed space not actively conditioned:

IL Climate Zone	Conditioned HDD 60	Unconditioned HDD 50
1 (Rockford)	5240	3233
2 (Chicago)	4798	2845
3 (Springfield)	4266	2456
4 (Belleville)	3188	1651
5 (Marion)	3390	1750
Weighted Average[2013]	4631	2732

%ElectricHeat = Percent of homes that have electric space heating

= 100% for Electric Resistance or Heat Pump

= 0% for Fossil fuel heating

= If unknown, [2014] use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[2015]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility

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then applied to account for duct losses for heat pumps. Note all ratings have been converted to HSPF2 equivalents – since the new rating better reflects the actual efficiency of the units.

[2013] Weighted based on number of occupied residential housing units in each zone (US Census 2010)

[2014] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[2015] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

above should be applied.

%FurnaceFossil = Percentage of fossil heated homes that use a furnace

Heating System Type	%FurnaceFossil
Furnace	100%
Other	0%
Unknown Fossil Heat	87%[2016]

%FurnaceElectric = Percentage of electric heated homes that use a furnace

Heating System Type	%FurnaceElectric
Furnace	100%
Other	0%
Unknown Electric Heat	36%[2017]

Fe = Furnace Fan energy consumption as a percentage of annual fuel consumption

= 3.14%[2018]

29.3 = kWh per therm

For example, a new 6 ft by 8 ft sliding glass patio door, with a U-Factor of 0.23, is installed in a Springfield single family home with a heat pump from 2014, replacing a single-pane metal framed glass patio door.

$$\Delta kWh = \Delta kWh_{cooling} + \Delta kWh_{heating} + \Delta kWh_{FurnaceFan}$$

$$\Delta kWh_{cooling} = (((1.20 – 0.23) \times 48) / (12.4 * 1000)) * 1183 * 24 * 0.75 * 100\%$$
$$= 80.0$$

$$\Delta kWh_{heating} = (((1.20 – 0.23) \times 48) / (6.5 * 1000)) * 4266 * 24 * 100\%$$
$$= 733.4$$

$$\Delta kWh_{FurnaceFan} = 0$$

$$\Delta kWh = 80.0 + 733.4 + 0$$
$$= 813.4 \text{ kWh}$$

[2016] Estimated by finding the statewide average percentage (weighting single v multi family) of fossil fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[2017] Estimated by finding the statewide average percentage (weighting single v multi family) of electric fuel heated homes that have a furnace, using data from GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. See %Furnace tab of ‘Res Baseline Study Workbook_2026.xls’.

[2018] F_e is not one of the AHRI certified ratings provided for residential furnaces, but can be reasonably estimated from a calculation based on the certified values for fuel energy (Ef in MMBtu/yr) and Eae (kWh/yr). An average of a 300 record sample (non-random) out of 1495 was 3.14%. This is, appropriately, ~50% greater than the ENERGY STAR version 3 criteria for 2% F_e. See “Programmable Thermostats Furnace Fan Analysis.xlsx” for reference.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = (ΔkWh_cooling / FLH_cooling) * CF

Where:

FLH_cooling = Full load hours of air conditioning

Dependent on location:

IL Climate Zone	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[2019]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

For example, a new 6 ft by 8 ft sliding glass patio door, with a U-Factor of 0.23, is installed in a Springfield single family home with a heat pump from 2014, replacing a single-pane metal framed glass patio door.

ΔkW = (80.0 /779) * 68%

= 0.070

FOSSIL FUEL SAVINGS

ΔTherms = (((U_{base} – U_{ee}) x SF) / (ηHeat * 100,000)) * HDD * 24 * %FossilHeat

Where

ηHeat = Efficiency of heating system

= Equipment efficiency * distribution efficiency

= Actual (where it is possible to measure or reasonably estimate). Note where new HVAC is installed in addition to shell measures, the old HVAC unit efficiency should be used and the shell measure savings calculated first, the HVAC measure then assuming the reduced heat/cooling loads. If using rated efficiencies, derate efficiency value by 1% per year (maximum of 30 years) to account for degradation over time,[2020] or if unknown assume 72% for existing system efficiency (including distribution efficiency)[2021]. If unknown value is used, it should not be derated by age. If actual Distribution Efficiency is not available, use 85%.

[2019] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[2020] Justification for degradation factors can be found on page 14 of 'AIC HVAC Metering Study Memo FINAL 2_28_2018'. Estimate efficiency as (Rated Efficiency * (1-0.01)^Equipment Age).

[2021] Based on average Nicor PY4 nameplate efficiencies derated by 15% for distribution losses.

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil Fuel heating

= 0 % for Electric Resistance or Heat Pump

= If unknown[2022], use the following table:

Utility	**Location**				
	Single Family	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[2023]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

Other factors as defined above.

For example, a new 6 ft by 8 ft sliding glass patio door, with a U-Factor of 0.23, is installed in a Springfield single family home with gas heat at unknown efficiency, replacing a single-pane metal framed glass patio door.

ΔTherms = (((1.20 – 0.23) x 48) / (0.72 * 100,000)) * 4266 * 24 * 100%

= 66.2 therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-SHL-EEDR-V02-270101

REVIEW DEADLINE: 1/1/2028

[2022] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[2023] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

5.7 Miscellaneous

5.7.1 High Efficiency Pool Pumps

DESCRIPTION

Residential outdoor pool pumps can be single speed, two/multi speed or variable speed. A federal standard (82 FR 5650) effective July 19, 2021 , which requires new pumps to be at least two speed.

Single speed pumps are often oversized, and run frequently at constant flow regardless of load. Single speed pool pumps require that the motor be sized for the task that requires the highest speed. As such, energy is wasted performing low speed tasks at high speed. Two speed and variable speed pool pumps reduce speed when less flow is required, such as when filtering is needed but not cleaning, and have timers that encourage programming for fewer on-hours. Variable speed pool pumps use advanced motor technologies to achieve efficiency ratings of 90% while the average single speed pump will have efficiency ratings between 30% and 70%.[2024]

This measure is the characterization of the purchasing and installing of a new ENERGY STAR[2025] or CEE T1 variable speed residential pool pump motor in place of a new baseline pump meeting the federal standard for Time of Sale and New Construction, or the early replacement of a standard single speed motor of equivalent horsepower.

This measure was developed to be applicable to the following program types: TOS, NC, RF.

If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

The high efficiency equipment is an ENERGY STAR or CEE Tier residential pool pump meeting the ENERGY STAR minimum qualifications for either in-ground or above ground pools. ENERGY STAR version 3.0 specification takes effect on July 19, 2021. Note that for in ground pools, the CEE T1 level is the same as the new Federal Standard, and Tier 2 is the same as ENERGY STAR V3 for the standard size pumps, so savings for CEE T1 is only provided for above ground pools where there is an increment in efficiency.

Pump Sub-Type	Size Class	ENERGY STAR Version 3.1 Energy Efficiency Level	CEE Tier 1	CEE Tier 2
Self-Priming (Inground) Pool Pumps	Extra Small (hhp ≤ 0.13)	WEF ≥ 13.40	N/A	N/A
	Small (hhp > 0.13 and < 0.711)	WEF ≥ -2.45 x ln (hhp) + 8.40	WEF ≥ -1.30 x ln (hhp) + 4.95	WEF ≥ -2.83 x ln (hhp) + 8.84
	Standard Size (hhp ≥ 0.711)	WEF ≥ -2.45 x ln (hhp) + 8.40	WEF ≥ -2.3 x ln (hhp) + 6.59	WEF ≥ -2.45 x ln (hhp) + 8.4
Non-Self Priming (Aboveground) Pool Pumps	Extra Small (hhp ≤ 0.13)	WEF ≥ 4.92	N/A	N/A
	Standard Size (hhp > 0.13)	WEF ≥ -1.00 x ln (hhp) + 3.85	WEF ≥ -1.60 x ln (hhp) + 9.10	N/A

DEFINITION OF BASELINE EQUIPMENT

For TOS and NC, the baseline equipment is a two speed residential pool pump meeting the Federal Standard, provided below:

[2024] U.S. DOE, 2012. Measure Guideline: Replacing Single-Speed Pool Pumps with Variable Speed Pumps for Energy Savings. Report No. DOE/GO-102012-3534.

[2025] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

Pump Sub-Type	Size Class	Baseline
Self-Priming (Inground) Pool Pumps	Extra Small (hhp ≤ 0.13)	WEF ≥ 5.55
	Small (hhp > 0.13 and < 0.711)	WEF ≥ -1.30 x ln (hhp) + 2.90
	Standard Size (hhp ≥ 0.711)	WEF ≥ -2.30 x ln (hhp) + 6.59
Non-Self Priming (Aboveground) Pool Pumps	Extra Small (hhp ≤ 0.13)	WEF ≥ 4.60
	Standard Size (hhp > 0.13)	WEF ≥ -0.85 x ln (hhp) + 2.87

For early replacement, the baseline equipment is the existing single speed residential pool pump.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The estimated useful life for a two speed or variable speed pool pump is 7 years.[2026]

DEEMED MEASURE COST

For TOS and NC, the incremental costs for ENERGY STAR in-ground pool pumps are estimated as $314[2027] and for above ground pool pumps are estimated as $930.[2028]

For early replacement, the full replacement costs shall be used. A deferred new baseline cost (after 4 years) of replacing the existing equipment should also be included.

LOADSHAPE

Loadshape R15 – Residential Pool Pumps

COINCIDENCE FACTOR

The coincidence factor for this measure is assumed to be 0.831.[2029]

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS[2030]

For TOS and NC:

$\Delta kWh = (Gallons * Turnovers * (1/WEF_{base} - 1/WEF_{ESTAR}) * Days) / 1000$

For Early Replacement:

$\Delta kWh = (Gallons * Turnovers * (1/EF_{Exist} - 1/WEF_{ESTAR}) * Days) / 1000$

Where:

Gallons = Capacity of the pool

[2026] As recommended in Navigant 'ComEd Effective Useful Life Research Report', May 2018.

[2027] ENERGY STAR Pool Pump Calculator and represent the difference between the two/multi speed incremental cost and the variable speed incremental cost.

[2028] CEE Efficient Residential Swimming Pool Initiative, December 2012, page 18 and represent the difference between the two/multi speed incremental cost and the variable speed incremental cost.

[2029] Based on assumptions of daily load pattern through pool season. Assumption was developed for Efficiency Vermont but is considered a reasonable estimate for Illinois.

[2030] The methodology followed is consistent with the most recent version of the 2020 ENERGY STAR calculator (Pool_Pump_Calculator_2020.05.05_FINAL.xls), however this has not been updated to account for the new federal standard.

= Actual. If unknown assume:

Pool Type	Gallons
In ground	22,000[2031]
Above ground	7,540[2032]

Turnovers = Desired number of pool water turnovers per day

= 2[2033]

WEF_{base} = Weighted Energy Factor of baseline pump (gal/Wh) [2034]

Pool Type	WEF_{Base}
In ground	4.78
Above ground	2.55

WEF_{ESTAR} = Weighted Energy Factor of ENERGY STAR pump (gal/Wh) [2035]

Pool Type	WEF_{EE}	
	ENERGY STAR	CEE Tier 1
In ground	6.47	N/A
Above ground	3.48	8.51

EF_{Exist} = Energy Factor of existing single speed pump (gal/Wh)

= 2.3[2036]

Days = Number of days per year that the swimming pool is operational

= 122[2037]

1,000 = Conversion factor from Wh to kWh

Based on the defaults provided above, the annual energy savings (ΔkWh) are detailed in the table below:

Pool Type	ΔkWh			
	TOS/NC		Retrofit	
	ENERGY STAR	CEE T1	ENERGY STAR	CEE T1
In ground	293.3	N/A	1504.2	N/A
Above ground	192.8	505.3	271.2	583.7

[2031] Consistent with assumption in the 2020 ENERGY STAR calculator.

[2032] Based on typical pool sizes from "Evaluation of Potential Best Management Practices - Pools, Spas, and Fountains, The California Urban Water Conservation Council", 2010.

[2033] Consistent with assumption in the 2020 ENERGY STAR calculator.

[2034] Based on applying the federal standard specifications to the average Curve-C rated hydraulic horsepower (hhp) from the ENERGY STAR Qualified Products List, accessed 4/21/2026.

[2035] Based on applying the ENERGY STAR and CEE Tier 1 specifications to the average Curve-C rated hydraulic horsepower (hhp) from the ENERGY STAR Qualified Products List, accessed 4/21/2026.

[2036] Consistent with assumption in the 2020 ENERGY STAR calculator, assuming 1.5 HP pump.

[2037] Consistent with assumption in the 2020 ENERGY STAR calculator.

SUMMER COINCIDENT PEAK DEMAND SAVINGS

For TOS and NC:

$\Delta kW = ((kWh/day_{base})/(Hrs/day_{base}) – (kWh/day_{ESTAR})/(Hr/day_{ESTAR})) * CF$

For Early Replacement:

$\Delta kW = ((kWh/day_{Exist})/(Hrs/day_{Exist}) – (kWh/day_{ESTAR})/(Hr/day_{ESTAR})) * CF$

Where:

kWh/day = daily energy consumption of pool pump, as defined above.

= Actual, defaults provided below:

	ΔkWh/day			
Pool Type	**Base**	**ENERGY STAR**	**CEE T1**	**Exist**
In ground	9.2	6.8	N/A	19.4
Above ground	5.9	4.3	1.8	6.6

Hrs/day_{base} = daily run hours of pool pump

= (Gallons * Turnover) / GPM

		Weighted Average GPM[2038]	**Hours/Day**
In ground	Base	43.6	16.8
	Efficient	32.2	22.8
	Exist	78	9.4
Above ground	Base	44.7	5.6
	Efficient	27.3	9.2
	Exist	78.1	3.2

CF = Summer Peak Coincidence Factor for measure

= 0.831[2039]

Based on defaults provided above:

	ΔkW			
Pool Type	**TOS/NC**		**Retrofit**	
	ENERGY STAR	**CEE T1**	**ENERGY STAR**	**CEE T1**
In ground	0.2066	N/A	1.4449	N/A
Above ground	0.4829	0.7141	1.3019	1.5331

Mid-Life Baseline Adjustment

For early replacement measures, to account for the fact that the existing pump would have needed to be replaced

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[2038] The 2013 ENERGY STAR calculator provided high and low flow and hour assumptions for multi and variable speed pumps. This is used to estimate a weighted average GPM assumption, see 'IL TRM_Pool Pump Calculator_2026.xls'.

[2039] Based on assumptions of daily load pattern through pool season. Assumption was developed for Efficiency Vermont but is considered a reasonable estimate for Illinois.

within the lifetime of the measure, a mid-life adjustment should be applied. This is calculated as the savings from the federal standard to the ESTAR pump divided by the savings from the existing pump. This should be applied after 4 years.

Based on defaults provided above:

Pool Type	Adjustment Factor applied to Annual kWh Savings	
	ENERGY STAR	CEE T1
In ground	20%	N/A
Above ground	71%	87%

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-MSC-RPLP-V06-270101

REVIEW DEADLINE: 1/1/2030

5.7.2 Low Flow Toilets

DESCRIPTION

The first federal standards dealing with water consumption for toilets was the Energy Policy Act of 1992. It specified a gallon per flush (gpf) standard for both fixtures. These standards are used to define the baseline equipment for this measure. The Subsequent U.S. EPA WaterSense program in 2009 set even tighter standards for plumbing fixtures, including toilets. These standards are used to define the efficient equipment for this measure.

DEFINITION OF EFFICIENT EQUIPMENT

The high efficiency equipment is a U.S. EPA WaterSense certified residential toilet fixture.

DEFINITION OF BASELINE EQUIPMENT

The baseline equipment is a toilet that has a maximum gallons per flush outlined by the Energy Policy Act of 1992.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The estimated useful life for this measure is assumed to be 25 years.[2040]

DEEMED MEASURE COST

The incremental costs for both are $0.[2041]

LOADSHAPE

Loadshape R03 - Residential Electric DHW

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

The following savings should be included in the total savings for this measure, but should not be included in TRC tests to avoid double counting the economic benefit of water savings.

$$\Delta kWh = \Delta Water / 1{,}000{,}000 * Ewater\ total$$

Ewater = IL Total Water Energy Factor (kWh/Million Gallons)

= 5,010[2042]

[2040] http://www.metrohome.us/information_kit_files/life.pdf and ATD Home Inspection: http://www.atdhomeinspection.com/advice/average-product-life/ is 50 years. 25 years is used to be conservative.

[2041] Measure cost assumption from City of Fort Collins, "Green Building Practice Summary," March 21, 2011, page 2. The document states "Information from the EPA WaterSense web site: WaterSense® labeled toilets are not more expensive than regular toilets. MaP testing results have shown no correlation between price and performance. Prices for toilets can range from less than $100 to more than $1,000. Much of the variability in price is due to style, not functional design."

[2042] This factor includes 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

Toilet Calculation

For example, a low flow toilet is installed in a single family home with unknown occupancy.

ΔkWh = 1495 / 1,000,000 * 5,010

= 7.5 kWh/year

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

N/A

WATER IMPACT DESCRIPTIONS AND CALCULATION

$$\Delta Water = (GPF_{Base} - GPF_{Eff}) * NFPD * Household * ADPY$$

Where:

GPF_{Base} = Baseline equipment gallons per flush

= 1.6 for toilets[2043]

GPF_{Eff} = Efficient equipment gallons per flush

= 1.28 for toilets[2044]

NFPD = Number of flushes per day per occupant

= 5 [2045]

Household = Number of people in the houshold.

= Actual. If unknown assume average number of people per household:

Household Unit Type	Household[2046]		
	IQ Participants	Non-IQ Participants	All Participants
Single-Family - Deemed	2.76	2.62	2.67
Multifamily - Deemed	2.3	2.09	2.18
Household type unknown			2.46[2047]
Custom	Actual Occupancy or Number of Bedrooms[2048]		

Use Multifamily if: Building meets utility's definition for multifamily

ADPY = Annual days per year

= 365 for residential

[2043] U. S. EPA WaterSense. "Water Efficiency Management Guide – Bathroom Suite" (EPA 832-F-17-016d), Nov 2017.

[2044] U. S. EPA WaterSense. "Water Efficiency Management Guide – Bathroom Suite" (EPA 832-F-17-016d), Nov 2017.

[2045] U.S. EPA WaterSense, "Water Specification for Flushing Urinals Supporting Statement." Appendix B: References for Calculation Assumptions.

[2046] Assumptions are taken from the draft unadjusted 2024 Baseline Study evaluation data provided in 07/2024 by GDS Associates.

[2047] "Unknown" is based on statewide weighted average of 57% single family and 43% multifamily, based on IL data from 2020 RECS "Highlights of Structural Characteristics of U.S. Homes by State", IL data shows 57% of homes are single family detached.

[2048] Bedrooms are suitable proxies for household occupancy, and may be preferable to actual occupancy due to turnover rates in residency and non-adult population impacts.

Toilet Calculation

For example, a low flow toilet is installed in a single family IQ home with unknown occupancy.

$$\Delta Water = (1.6 – 1.28) * 5 * 2.76 * 365$$

$$= 1612 \text{ gal/year}$$

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-MSC-LFTU-V03-260101

REVIEW DEADLINE: 1/1/2029

5.7.3 Level 2 Electric Vehicle Charger

DESCRIPTION

The measure is for the purchase of a Level 2 electric vehicle charger consistent with the ENERGY STAR[2049] specification for Electric Vehicle Supply Equipment (EVSE) installed for residential household use. Networked chargers enable access to online energy management tools through an EVSE network. Non-networked chargers are standalone units that are not connected to other units through an EVSE network.

This measure was developed to be applicable to the following program types: TOS. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

An ENERGY STAR qualified networked or non-networked level 2 electric vehicle charger.

DEFINITION OF BASELINE EQUIPMENT

A non-ENERGY STAR networked or non-networked level 2 electric vehicle charger.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected measure life for the EV charger is assumed to be 10 years.[2050]

DEEMED MEASURE COST

The incremental cost for the EV charger is assumed to be \$84 for a non-networked charger and \$47 for a networked charger.[2051]

LOADSHAPE

Loadshape R19 - Residential Electric Vehicle Charger

COINCIDENCE FACTOR

Coincidence factor is embedded in deemed demand reduction savings estimate, so the coincidence factor is assumed to be 1.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\Delta kWh = (((Hours\_PS + Hours\_US) * SP\_base) - (Hours\_PS * SP\_EEp + Hours\_US * SP\_EEu))/ 1000)$$

Where:

Hours_C = Annual Active Charging Hours

= 278 hours[2052]

[2049] In the event that the ENERGY STAR program is ended, the last effective ENERGY STAR specification should continue to be used through the effective period of this TRM.

[2050] Based on Northwest Power and Conservation Council, Regional Technical Forum updated workbook for Level 2 Electric Vehicle Charger version 3.1. See 'Lvl2EVChrgrsv2_3.xls'.

[2051] Based on Northwest Power and Conservation Council, Regional Technical Forum updated workbook for Level 2 Electric Vehicle Charger version 3.1. See 'Lvl2EVChrgrsv2_3.xls'.

[2052] Based on Northwest Power and Conservation Council, Regional Technical Forum updated workbook for Level 2 Electric Vehicle Charger version 3.1. See 'Lvl2EVChrgrsv2_3.xls'.

Hours_P = Total Annual Hours Plugged In

= 3,511hours[2053]

Hours_PS = Annual Standby Hours Plugged In

= Hours_P - Hours_C

= 3,233 hours

Hours_US = Annual Standby Hours Unplugged

= 8760 - Hours_P

= 5,249 hours

SP_base = Baseline Average Standby Power (W)

= 3.7 for non-networked, 9.9 for networked[2054]

SP_EEp = Efficient Average Standby Power (W) with vehicle plugged in

= 3.5 for non-networked, 3.2 for networked[2055]

SP_EEu = Efficient Average Standby Power (W) in no vehicle mode

= 2.1 for non-networked, 2.5 for networked[2056]

ΔkWh per non-networked charger = (((3,233 + 5,249) * 3.7) - (3,233 * 3.5 + 5,249 * 2.1))/ 1000)

= 9.0 kWh

ΔkWh per networked charger = (((3,233 + 5,249) * 9.9) - (3,233 * 3.2 + 5,249 * 2.5))/ 1000)

= 60.5 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

ΔkW = AveragekW * CF

Where:

AveragekW = Average electric demand during standby.

Non-networked = (((3.7-3.5) * 3233/8482) + ((3.7-2.1) * 5249/8482))/1000

= 0.00107 kW

Networked = (((9.9-3.2) * 3233/8482) + ((9.9-2.5) * 5249/8482))/1000

[2053] Based on Northwest Power and Conservation Council, Regional Technical Forum updated workbook for Level 2 Electric Vehicle Charger version 3.1. See ‘Lvl2EVChrgrsv2_3.xls’.

[2054] INL charger testing https://avt.inl.gov/evse-type/ac-level-2 and ENERGY STAR Market and Industry Scoping Report Electric Vehicle Supply Equipment (EVSE) September 2013 (source data is from INL).

[2055] 2021 ENERGY STAR QPL of Residential EVSE. Averaged Partial On Mode Input Power (W) and Idle Mode Input Power (W). See Northwest Power and Conservation Council, Regional Technical Forum updated workbook for Level 2 Electric Vehicle Charger version 3.1. See ‘Lvl2EVChrgrsv2_3.xls’.

[2056] 2021 ENERGY STAR QPL of Residential EVSE. See Northwest Power and Conservation Council, Regional Technical Forum updated workbook for Level 2 Electric Vehicle Charger version 3.1. See ‘Lvl2EVChrgrsv2_3.xls’.

= 0.00713 kW

CF = Summer peak coincidence factor

= 1

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-MSC-L2CH-V04-260101

REVIEW DEADLINE: 1/1/2029

5.7.4 Heat Pump Swimming Pool Heater

DESCRIPTION

This measure is applicable to electric heat pump pool heaters in residential applications. Heat pumps capture heat and move it from one place to another. The saving equations presented herein comprise three aspects of pool heating: convective heat loss via pool surface area due to water and air temperature differential, initial heat of full pool volume for seasonal pool use and reheat of pool refill on year round pools, and the heating of added pool water to offset water loss through evaporation.[2057] This measure applies to replacing either a gas-fired pool heater or a an electric resistance pool heater. If baseline equipment is a gas-fired pool heater, electric energy impacts result in additional electrical usage, but lower overall site energy usage.

This measure is only applicable to inground or outdoor single family home pools and is not applicable to spas. This measure is not applicable to community pools in multifamily housing complexes.[2058]

This measure was developed to be applicable to the following program types: TOS, NC, EREP.

DEFINITION OF EFFICIENT EQUIPMENT

The efficient equipment is defined as a heat pump that is more efficient than Illinois energy code. This type of heat pump is designed to heat pool water for residential sized pools. Compliance condition of the equipment is that it is an AHRI-certified heat pump pool heater.

DEFINITION OF BASELINE EQUIPMENT

The baseline reflects the existing pool water heater which could be natural gas, electric resistance or a less electric efficient heat pump water heater. The baseline equipment must be less efficient than that new equipment.

Heating Type	Heat Pump Efficiency
Natural Gas	82% Thermal Efficiency[2059]
Electric Resistance	100%
Heat Pump	3.5 COP

The California Appliance Efficiency Regulations (Title 20) requires a minimum coefficient of performance (COP) of 3.5 for heat pump pool heaters and a minimum thermal efficiency (TE) of 82% for all natural residential pool water heaters.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

15 years.[2060]

DEEMED MEASURE COST

Estimated gross and incremental installation costs are listed below.[2061] Costs include material cost of heat pump, infrastructure for installation, and labor.

[2057] ASHRAE Handbook: HVAC Applications, 2019, pg 51.25. ASHRAE states that except in aboveground pools and rare cases where cold groundwater flows past the pool walls, conductive losses through pool walls are small and can be ignored. ASRHAE additionally indicates that radiation losses that occur due to sky temperature differentials at night may be offset by solar heat gains of an unshaded pool during the day.

[2058] New York Standard Approach for Estimating Energy Savings from Energy Efficiency Programs – Residential, Multi-family, and Commercial/Industrial Measures Version 9

[2059] Department of Energy. "10 CFR 430.32 - Energy and water conservation standards and their effective dates." Section (k) (2).

[2060] Database for Energy Efficient Resources (DEER). "2014 DEER Update Study." July 17, 2013. http://www.deeresources.com/files/home/download/DEER2014UpdatePlan-July2013-v1.pdf

[2061] California Technical Reference Manual for Energy Efficiency. Southern California Edison (SCE). 2021. "SWRE005-01 Cost Analysis.xlsm."

Equipment Type	Gross Cost	Incremental Cost
Gas Heater	$5,158	N/A
Heat Pump Heater	$7,074	$1,916

LOADSHAPE

Loadshape R15 - Residential Pool Pumps

COINCIDENCE FACTOR

The prescribed value for the coincidence factor is 0 for outdoor pools and is 0.8 for indoor pools.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

Non fuel switch measures:

Net site energy consumed at the site is calculated below:

$$\Delta kWh = \frac{\left(BTU_{Surface} + BTU_{Reheat} + BTU_{Evap}\right)}{3{,}412} * \left(\frac{1}{COP_{baseline}} - \frac{1}{COP_{ee}}\right)$$

Fuel switch measures:

Fuel switch measures must produce positive total lifecycle energy savings (i.e., reduction in Btus at the premises) in order to qualify. This is determined as follows:

SiteEnergySavings (MMBTUs) = [FossilHeatReplaced] – [ElectricHeatAdded]

FossilHeatReplaced $= \frac{\left(BTU_{Surface}+BTU_{Reheat}+BTU_{Evap}\right)}{1{,}000{,}000 * E_{t,baseline}}$

ElectricHeatAdded $= \frac{\left(BTU_{Surface}+BTU_{Reheat}+BTU_{Evap}\right)}{1{,}000{,}000 * COP_{ee}}$

If SiteEnergySavings calculated above is positive, the measure is eligible.

The appropriate savings claim is dependent on which utilities are supporting the measure as provided in a table below:

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Electric utility only	SiteEnergySavings * 1,000,000/3,412	N/A
Electric and gas utility (Note utilities may make alternative agreements to how savings are allocated as long as total MMBtu savings remains the same).	%IncentiveElectric * SiteEnergySavings * 1,000,000/3,412	%IncentiveGas * SiteEnergySavings * 10

Measure supported by:	Electric Utility claims (kWh):	Gas Utility claims (therms):
Gas utility only	N/A	SiteEnergySavings * 10

Where:

$BTU_{Surface}$[2062] = Annual heating energy load contributed by convection/radiation heat losses via pool surface

$$= (T_{pool} - T_{amb}) * A_{pool} * U * [hrs - \ (hrs_{cover} - ESF_{cover,surface})]$$

BTU_{Reheat}[2063] = Annual heating energy load contributed by heating the full volume of pool water

$$= V_{pool} * 8.33 * (T_{pool} - T_{main}) * F_{Reheat}$$

BTU_{Evap}[2064] = Annual heating energy load contributed by evaporation

$$= 0.1 * AF * A_{pool} * (P_{\omega} - P_{dp}) * (T_{pool} - T_{main}) * [hrs - (hrs_{cover} * ESF_{cover,evap})]$$

$COP_{baseline}$ = Coefficient of performance, ratio of output energy/input energy of baseline electric resistance pool heater, if present.

= 1.0 if heater is electric resistance; 3.5 if heater is a heat pump

COP_{ee} = Coefficient of performance, ratio of output energy/input energy of heat pump pool heater.

= Actual

$E_{t,baseline}$ = Thermal efficiency of baseline fossil fuel-fired pool heater, if present.

= 0.82 if unknown

T_{pool} = Pool temperature set point, (°F).

= Actual

T_{amb} = Average temperature of surrounding ambient air, (°F). If pool is indoors, this is the indoor temperature of room with pool from application. For outdoor pools, see "Ambient Air Temperature and Pressure (T_{amb} and P_{dp})" table below.

T_{main} = Supply water temperature in water main, (°F). See "Cold Water Inlet Temperature (T_{main})" table below.

A_{pool} = Surface area of pool, (ft^2). From application. Assistance in determining the area of common pool shapes as follows:[2065]

Elliptical: 3.14 x short radius x long radius

Kidney Shaped: 0.45 x length x (width at one end x width at other end)

Oval: 3.14 x $radius^2$ + (length of straight sides x width)

Rectangular: length x width

[2062] ASHRAE Handbook: HVAC Applications, 2019, Ch 51 Service Water Heating, Swimming Pools/Health Clubs.

[2063] Ibid, eqn. 14

[2064] ASHRAE Handbook: HVAC Applications, 2019, Ch 6 Indoor Swimming Pools, eqn. 3, multiplied by required heating temperature difference

[2065] Guidance for determining surface area of common pool shapes can be found at ASHRAE Handbook: HVAC Applications, 2019.

V_{pool} = Volume of pool water, (gallons)

= ActualFrom application.

F_{Reheat} = Factor capturing annual number of times full pool volume is heated to the desired temperature, whether as the result of refill or heating of pool water from ground water temperature at start of season. From application.

= 0 if pool is filled by delivery service providing preheated water

= 1 if otherwise[2066]

U = Surface heat loss coefficient, (BTU/hr ft^2 °F)[2067]

= 3.9 for indoor pool

= 5.3 for outdoor pool, sheltered

= 6.6 for outdoor pool, unsheltered

AF = Activity Factor, consideration of activity within pool, allowing for splashing and a limited area of wetted deck.[2068]

= 0.5

P_{ω} = Saturation vapor pressure taken at surface water temperature, (in. Hg). See "Saturation Vapor Pressure (P_{ω})" table below based on pool water temperature.

P_{dp} = Saturation pressure at dew point, (in. Hg). See "Ambient Air Temperature and Pressure (T_{amb} and P_{dp})" table below.

hrs = Total annual swimming season hours. From application. Hours shall reflect the total annual hours through the swimming season (number of days between season opening and season closing x 24).

hrs_{cover} = Total annual hours pool covered during the swimming season. From application. Hours shall reflect the total hours pool covered during the swimming season. Set equal to 0 if pool is left uncovered throughout swimming season.

$ESF_{cover,surface}$ = Energy Savings Factor of pool cover to insulate from convective and radiation heat losses

= 0.80[2069]

$ESF_{cover,evap}$ = Energy Savings Factor of pool cover to insulate from evaporative heat loss

= 0.95[2070]

0.1 = Simplified empirically derived evaporation factor considering latent heat and air

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[2066] The water temperature of an undrained pool between swim seasons is assumed to have reached the water main temperature by the beginning of the next swim season. If the pool remains open throughout the year, it is assumed the pool undergoes one effective full pool volume reheat from water main temperature for cleaning and other maintenance (CDC, Healthy Swimming, Operating Public Swimming Pools).

[2067] ASHRAE Handbook: HVAC Applications, 2019, Ch 51, eqn. 15. Surface heat loss coefficient adjusted from ASHRAE Handbook rolled up surface heat transfer conservations by discounting contribution of evaporation (50-60%) and applying the following assumption for wind velocity: Indoor pools experience average wind speeds less than 3.5 mph (10.5x0.5x0.75), outdoor sheltered pools experience wind speeds between 3.5 and 5 mph (10.5x0.5), and outdoor unsheltered pools experience wind speeds above 5 mph (10.5x0.5x1.25).

[2068] ASHRAE Handbook, Applications, 2019, Ch 6, Table 1

[2069] U.S. D.O.E., Swimming Pool Covers.

[2070] National Plasterers Council, Effectiveness of Pool Covers to Reduce Evaporation from Swimming Pools, prepared by California Polytechnic State University, January 2016.

flow.[2071] Assumes 1,000 BTU/lb of latent heat required to change water to vapor at surface water temperature and air velocity over water surface ranging from 10 to 30 fpm, (lb/hr ft^2 in. hg)

8.33 = Energy required (BTU) to heat one gallon of water by one degree Fahrenheit

3,412 = Conversion factor, one kWh equals 3,412 BTU

Cold Water Inlet Temperature (T_{main})

Supply water main temperatures vary according to climate, and are approximately equal to the annual average outdoor temperature plus 6°F.[2072] Supply main temperatures based on the annual outdoor temperature are shown below.

Climate Zone	Annual Average Outdoor Temperature (°F)[2073]	T_{main} (°F)
1 (Rockford)	49.2	55.2
2 (Chicago)	51.4	57.4
3 (Springfield)	53.0	59.0
4 (Belleville)	57.3	63.3
5 (Marion)	56.5	62.5

Saturation Vapor Pressure (P_ω)

Lookup saturation vapor pressure taken at surface water temperature for indoor and outdoor pools from the table below, based on pool temperature.[2074]

Pool Temperature, T_{pool} (°F)	P_ω (in. Hg)
72	0.79
74	0.85
76	0.91
78	0.97
80	1.03
82	1.10
84	1.18

Ambient Air Temperature and Pressure (T_{amb} and P_{dp})

Indoor pools shall apply ambient air temperature from application based on facility set point temperature. Lookup saturation vapor pressure based on facility set point temperature and relative humidity (RH) from the table below, based on psychrometric analysis. Interpolation may be performed for indoor pool ambient temperatures not listed.

[2071] Simplified constant presented in ASHRAE Handbook: HVAC Application 2019 Ch 6 based on empirically derived eqn (2) constants and ASHRAE's variable assumptions

[2072] Burch, Jay and Christensen, Craig, "Towards Development of an Algorithm for Mains Water Temperature." National Renewable Energy Laboratory, January 2007

[2073] Average annual outdoor temperatures taken from NCDC 1981-2010 climate normals. https://www.ncdc.noaa.gov/cdo-web/datatools/normals

[2074] ASHRAE Handbook: Fundamentals 2017, Ch 1 Psychrometrics, Table 3 Thermodynamic Properties of Water at Saturation

Indoor Pool Temperature, T_{amb} (°F)	Indoor Pool, P_{dp} (in. Hg)		
	RH 50%	RH 55%	RH 60%
72	0.40	0.44	0.47
74	0.42	0.47	0.51
76	0.45	0.50	0.54
78	0.48	0.53	0.58
80	0.52	0.56	0.62
82	0.55	0.61	0.66
84	0.59	0.65	0.71
86	0.63	0.69	0.75

For outdoor pools, lookup T_{amb} and P_{dp} from the table below based on location. Ambient temperature averages for outdoor pools apply a 4-month swimming season.

Climate Zone	Outdoor Pool Temperature T_{amb} (°F)[2075]	Outdoor Pool P_{dp} (in. Hg)[2076]
1 (Rockford)	69.6	0.52
2 (Chicago)	73.4	0.53
3 (Springfield)	72.9	0.58
4 (Belleville)	73.9	0.60
5 (Marion)	74.8	0.62

Fuel Switch Example

A gas pool heater is replaced with a heat pump pool heater at a single family home located near Chicago. The swimming season spans 4 months (2,904 hours) per year and the pool is left uncovered at night. The pool is 15 ft by 30 ft and has a volume of 17,600 gallons, and is sheltered from winds by the house and backyard trees. The pool temperature is maintained at 80°F. The replaced gas pool heater has an efficiency of 82% and the heat pump pool heater has an efficiency of 5.0 COP. Annual Electric Energy Savings, Summer Peak Coincident Demand Savings and Annual Fossil Fuel Energy Savings are calculated as below.

$$\text{SiteEnergySavings (MMBTUs)} = [\text{FossilHeatReplaced}] - [\text{ElectricHeatAdded}]$$

$$\text{FossilHeatReplaced} = \frac{(BTU_{Surface}+BTU_{Reheat}+BTU_{Evap})}{1{,}000{,}000 * E_{t,baseline}}$$

$$\text{ElectricHeatAdded} = \frac{(BTU_{Surface}+BTU_{Reheat}+BTU_{Evap})}{1{,}000{,}000 * COP_{ee}}$$

where:

$BTUSurface=(Tpool-Tamb)\times Apool\times U\times[hrs-(hrscover\times ESFcover,surface)]$

$BTUReheat=Vpool\times 8.33\times(Tpool-Tmain)\times FReheat$

[2075] DOE Weather Data, TMY3 (Typical Meteorological Year), developed by NREL. Adjusted to apply to outside air temperature from June 1 to September 30 in each climate zone.

[2076] DOE Weather Data, TMY3 (Typical Meteorological Year), developed by NREL. Saturation pressure at dew point calculated as a function of dew point and atmospheric pressure. Values averaged from June 1 to September 30 in each climate zone.

$BTUEvap$=0.1×AF×$Apool$×($P\omega$–Pdp)×($Tpool$–$Tmain$)×[hrs–($hrscover$×$ESFcover,evap$)]

Tpool = 80, from application

Tamb = 73.4, from Ambient Air Temperature and Pressure section based on location from application

Apool = width x length = 15’ x 30’ = 450 square feet

Width and length from application

U = 5.3, from Summary of Variables and Data Sources table based on conditions from application

hrs = 2,904, from 121 day season or application

hrscover = 0, from application

ESFcover,surface = 0.8, from Summary of Variables and Data Sources table

Vpool = 17,600, from application

Tmain = 57.4, from Cold Water Inlet Temperature table based on location from application

FReheat = 1, from Summary of Variables and Data Sources table

AF = 0.5, from Summary of Variables and Data Sources table

Pω = 1.03, from Saturation Vapor Pressure section based on pool temperature from application

Pdp = 0.53, from Ambient Air Temperature and Pressure section based on location from application

ESFcover,evap = 0.95, from Summary of Variables and Data Sources table

Felec,baseline = 0, from Summary of Variables and Data Sources table based on application

COPee = 5.0, from application

CF = 0, from Summary of Variables and Data Sources table based on application

Ffuel,baseline = 1, from Summary of Variables and Data Sources table based on application

Et,baseline = 0.82, from application

$BTUSurface$=(80–73.4)×450×5.3×[2,904–(0)]=45,711,864 Btu

$BTUReheat$=17,600×8.33×(80–57.4)×1=3,313,341 Btu

$BTUEvap$=0.1×0.5×450×(1.03–0.53)×(80–57.4)×[2,904–(0)]=738,342 Btu

ElectricHeatAdded =(45,711,864+3,313,341+738,342)/(1,000,000×5) = 10.0 MMBtu

FossilHeatReplaced =(45,711,864+3,313,341+738,342)/1,000,000×0.82 =60.7 MMBtu

Δ$MMBtu$ Site Energy Savings is = 60.7 $MMBtu$ – 10.0 $MMBtu$ = 50.7 $MMBtu$

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = \frac{\left(BTU_{Surface} + BTU_{Reheat} + BTU_{Evap}\right)}{3{,}412} * \left(\frac{F_{elec,baseline}}{COP_{baseline}} - \frac{1}{COP_{ee}}\right) * \frac{CF}{hrs}$$

Where CF value depends on location of pool

CF = 0 for outdoor pools

CF = 0.8 for indoor pools

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

N/A

DEEMED O&M COST ADJUSTMENT CALCULATION

N/A

MEASURE CODE: RS-MSC-HPPH-V02-260101

REVIEW DEADLINE: 1/1/2028

5.7.5 Tree Planting

DESCRIPTION

This measure describes savings from a program where utility sponsored staff work with homeowners or building operators to determine the appropriate location and ultimately plant trees to maximize HVAC savings.

How measure saves energy:

1. Trees when in full foliage block direct sunlight onto exterior surfaces of residences, and in the cooling season reduce energy use. Primary effects are reduced insulation into residences through windows. Secondary effects are reduced wall and roof temperatures which reduce conduction through walls and roofs into residences.
2. Trees when in full foliage block winds and associated infiltration into residences. This saves both heating and cooling energy since outdoor air is generally either hotter or colder than the desired indoor temperature.
3. Because trees have differential winter impacts, based on whether they are leaf-retaining (Coniferous) or leaf-shedding (Deciduous), there are significantly differential effects of tree types for each facing wall of a residence. Therefore, eligibility requirements for types of trees planted on specific residence wall faces have been set to maximize savings and minimize losses due to trees.
4. Trees must provide shading to at least the 3rd story of a home in the cooling season and eligibility therefore requires trees to be a minimum of 30 feet tall when fully mature.

Markets measure serves:

This measure provides benefits to single-family residences as well as multi-family residences. It provides benefits for all types of homes, from 1 story to 3 story residences. Trees must be planted within 30 feet of the walls of homes so that they provide shading during summer days when the sun is at a high angle.

Limitations to measure applicability:

This measure is inapplicable to residences that currently have trees shading the face where the trees are proposed to be added (that is, the face of the existing residence where the tree is proposed must currently be unshaded). Coniferous trees are ineligible on the East and South faces of residences because these trees block beneficial sunlight in the heating season, which reduces annual savings severely. Similarly, Deciduous trees are ineligible on North faces of residences because they lose their leaves in winter and therefore have a minimal wind-blocking effect on infiltration during prevailing NW and W winter winds; in addition, because they are on the North face, they provide attenuated benefits for summer cooling energy use.

This measure was developed to be applicable to the following program types: RF, NC. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Trees must be horticulturally defined as either leaf-retaining (e.g., Coniferous) or leaf-shedding (e.g., Deciduous). The eligibility of tree types are dependent on the orientation of the wall of the residence being shaded as follows:

1. On North-facing walls, only Coniferous trees (i.e., trees that retain leaves all year) are eligible.
2. On East- and South-facing walls, only Deciduous trees (i.e., trees that lose all leaves in Fall) are eligible.
3. On West-facing walls, both deciduous and coniferous trees are eligible.
4. Trees must be minimum 30 ft tall when fully mature and have a lifetime of at least 20 years in Midwest climate.
5. Trees must be planted within 30 feet of the wall that they are shading and no closer than 20 feet apart.

DEFINITION OF BASELINE EQUIPMENT

Residence wall where trees are proposed to be planted currently must be fully or partially unshaded OR currently be planted with “ineligible” trees that will be removed and replaced with “eligible” trees. If the residence wall currently is partially shaded, the proposed tree must be planted in front of the currently unshaded portion of the wall.

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

Savings from tree planting take a number of years to be realized as significant growth is required before the shading makes a significant impact. The length of time before savings are fully achieved will be dependent on a number of factors including size of tree when planted, proximity to building and the speed of growth. This measure has been designed based on the assumption that savings would not be achieved for the first five years and would then be realized from year 6 and for a further 20 years.

However, in order to simplify the implementation of this measure, a reduced savings is claimed from year 1 and for an assumed measure life of 25 years, which results in an equivalent present value of lifetime savings. This results in a 76% multiplier[2077] applied to the calculated annual savings for the measure.

If there is reason to believe that the length of time before savings are achieved is significantly different to the 5 years assumed, an alternative multiplier can be applied.

DEEMED MEASURE COST

Use actual installed cost per tree planted.

LOADSHAPE

Loadshape R08 - Residential Cooling
Loadshape R09 - Residential Electric Space Heat
Loadshape R10 - Residential Electric Heating and Cooling

COINCIDENCE FACTOR

The summer peak coincidence factor for cooling is provided in two different ways below. The first is used to estimate peak savings during the utility peak hour and is most indicative of actual peak benefits, and the second represents the *average* savings over the defined summer peak period, and is presented so that savings can be bid into PJM's capacity market.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during utility peak hour)

= 68%[2078]

CF_{SSP} = Summer System Peak Coincidence Factor for Heat Pumps (during system peak hour)

= 72%[2079]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during PJM peak period)

= 46.6%[2080]

[2077] Assuming Real Discount Rate of 2.0%.

[2078] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[2079] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[2080] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

Algorithm

CALCULATION OF ENERGY SAVINGS

ELECTRIC ENERGY SAVINGS

$$\text{Total } \Delta kWh = (\Delta kWh_{HeatingDirectSolar} + \Delta kWh_{CoolingDirectSolar} + \Delta kWh_{HeatingInfiltration} + \Delta kWh_{CoolingInfiltration}) * (1- LMR) * NPVDiscount$$

Where:

$\Delta kWh_{HeatingDirectSolar}$ = Annual heating savings due to reduction in Direct Solar Gain

= #Trees * ThermsHeatingIncrease/Tree * 100,000 / 3,412 / ηHeat * %ElectricHeat

#_Trees = total number of eligible trees planted

= actual number of eligible trees planted on any face of the residence

ThermsHeatingIncrease/Tree = net annual therms of heating increase per tree due to shading, based on the average annual savings of eligible trees planted on all faces of the residence

= - 3.2 Therms/tree [2081]

100,000 = conversion of Therms to BTUs

3,412 = conversion BTUs to kWh

ηHeat = Efficiency of heating system

= In order to account for the long-term aspect of this measure and the likely replacement of existing heating and cooling equipment during the lifetime of this measure, the following system efficiency assumptions should be used:

Efficiency Assumption	System Type	New Baseline Efficiency
ηHeat	Electric Resistance (Baseboard or Electric Furnace)	1.0 COP
	Heat Pump (7.0HSPF2/3.412)*0.85	1.74 COP
	Furnace 80% AFUE * 0.85	68% AFUE
	Boiler	84% AFUE

%ElectricHeat = Percent of homes that have electric space heating

= 100 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= 0 % for Natural Gas

[2081] Savings are based upon a modeling spreadsheet provided by Leidos – see 'Shade Tree Energy Savings – REVISED.xlsx'. This analysis includes a large number of assumptions and therefore resultant savings were trued up against TRM assumptions of full cooling energy consumption to result in a percentage savings that was consistent with a number of reviewed studies (namely: Home Energy Magazine: "Shade Trees as a Demand-Side Resource", Energy and Buildings: "Peak power and cooling energy savings of shade trees", and Ecological Economics: "Energy Savings from tree shade". These references can be found in the reference folder.)

= If unknown[2082], use the following table:

Utility	Location				
	Single Family	Single Family Low Income	Multi Family	Multi Family Low Income	Unknown
Ameren	14.0%	13.7%	37.2%	56.3%	19.5%
ComEd	14.0%	21.5%	43.0%	48.4%	32.9%
PGL	1.0%	1.5%	4.0%	2.8%	2.2%
NSG	1.3%	0.8%	32.5%	1.2%	3.3%
Nicor	1.6%	3.8%	13.5%	21.6%	4.7%
All DUs[2083]					24.6%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

$\Delta kWh_{CoolingDirectSolar}$ = Annual cooling savings due to reduction in Direct Solar Gain

= #Trees * Ton-hrCoolingSaved/Tree * LoadFactor * 12,000 / (1,000 * ηCool) * %Cool

Ton-hrCoolingSaved/Tree = Net annual Ton-hours of cooling saved per tree due to shading, based on the average annual savings of eligible trees planted on all faces of the residence

= 137.3 ton-hrs/year/tree[2084]

LoadFactor = Factor to reflect expected relative load (and therefore savings) or homes with Room AC v Central AC.

= 1.0 for homes with central AC, 0.41 for homes with Room AC[2085]

12,000 = conversion of ton-hours to BTUs

ηCool = Efficiency (SEER2 or CEER) of Air Conditioning equipment (kBtu/kWh) * Distribution Efficiency

= In order to account for the long-term aspect of this measure and the likely replacement of existing heating and cooling equipment during the lifetime of this measure, the following system efficiency assumptions should be used:

[2082] Ameren and Nicor values are based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024. ComEd values based on 2019 Baseline Survey and People's Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[2083] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore electric only homes. Ameren is total customers minus Nicor.

[2084] Savings are based upon a modeling spreadsheet provided by Leidos – see 'Shade Tree Energy Savings – REVISED.xlsx'. This analysis includes a large number of assumptions and therefore resultant savings were trued up against TRM assumptions of full cooling energy consumption to result in a percentage savings that was consistent with a number of reviewed studies (namely: Home Energy Magazine: "Shade Trees as a Demand-Side Resource", Energy and Buildings: "Peak power and cooling energy savings of shade trees", and Ecological Economics: "Energy Savings from tree shade". These references can be found in the reference folder.)

[2085] Based upon review of 102 room AC replacement projects completed in 2023 and 2024 for an Illinois multifamily energy efficiency program, the average room AC capacity installed was 11.41 MBh per living unit. From Section 5.3.3 for Central Air Conditioning, default central A/C capacity is 28 MBh. This results in a capacity scale factor of 11.41 / 28 = 0.41 when using room air conditioner cooling.

System Type	SEER2/CEER Estimate	ηCool (SEER2 * 0.85)
Central AC	12.4	10.5
Heat Pump	13.3	11.3
Room AC[2086]	10.9	10.9
Unknown (for use in program evaluation only)[2087]		
Single Family Non-IQ		10.6
Single Family IQ		10.6
Multi Family Non-IQ		10.3
Multi Family IQ		10.4
Unknown		10.5

%Cool = Percent of homes that have cooling

Cooling (Central or Room AC)	%Cool (By Market Segment)				
	Single Family Non-IQ	Single Family IQ	Multi Family Non-IQ	Multi Family IQ	Unknown
Yes	100%				
No	0%				
Unknown (for use in program evaluation only)[2088]	98.9%	96.5%	99.8%	98.7%	98.6%

$\Delta kWh_{HeatingInfiltration}$ = Annual heating savings due to reduction in infiltration

= #Trees * CFM50/sqft * Area/ N_Heat * %Reduction_HeatingInfiltration/Tree * 60 * 24 * HDD60 * 0.018 / (COPHeating * 3,412) * %ElectricHeat

CFM50/sqft = Average CFM of infiltration per square foot of residence floor area based on 50 pascal pressure differential (This is a Customer Input of degree of leakage rate of house; Assumes the CFM50 leakage rates in the following table; assumes CFM50 leakage rates were based on a typical 2,250 sq. ft. residence.)

Shade Tree ECM Constants	CFM50/sqft	CFM50	Source
Leaky/Low Insulation	2.22	5,000 CFM at 50 pascal	Estimate for Leaky 2,250 sqft dwelling
Average/Average Insulation Or if Unknown	1.51	3,400 CFM at 50 pascal	Estimate for Average 2,250 sqft dwelling
Tight/High Insulation	1.00	2,250 CFM at 50 pascal	Estimate for Tight 2,250 sqft dwelling

Area = floor area of residence

= actual

%Reduction_HeatingInfiltration/Tree = Average infiltration reduction per tree during heating season due to tree blocking wind, based on average annual savings of eligible trees planted on all faces of the residence.

[2086] For non-IQ participants, this is based on the minimum Federal Standard for the most common room AC type (8000-13,999 capacity range without reverse cycle and with louvered sides) from 6/1/2014 to 5/26/2026 and for IQ participants the Federal Standard for the same unit type prior to 6/1/2014 (9.8EER is converted to 9.7CEER by dividing by 1.01).

[2087] Efficiencies presented above are weighted as per data provided by GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

[2088] Based on GDS Associates Inc., "2023-2024 Illinois Baseline Study: Residential Baseline Study Results", Oct 31 2024.

= 0.47% infiltration reduction per tree [2089]

N_heat = Conversion factor from leakage at 50 Pascal to leakage at natural conditions

= Based on climate zone, building height and exposure level:[2090]

Climate Zone (City based upon)	N_heat (by # of stories)			
	1	1.5	2	3
1 (Rockford)	23.8	21.1	19.3	17.1
2 (Chicago)	23.9	21.1	19.4	17.2
3 (Springfield)	24.2	21.5	19.7	17.4
4 (St Louis, MO)	25.4	22.5	20.7	18.3
5 (Paducah, KY)	27.8	24.6	22.6	20.0

60 = conversion of ton-hours cooling to BTUs

24 = conversion of Watts to kWh

HDD = Heating Degree Days

= Dependent on location:[2091]

Climate Zone (City based upon)	HDD 60
1 (Rockford)	5230
2 (Chicago)	4798
3 (Springfield)	4266
4 (Belleville)	3188
5 (Marion)	3390
Weighted Average[2092]	4631

0.018 = Specific Heat capacity of Air (BTU/Cu.Ft./F)

$\Delta kWh_{CoolingInfiltration}$ = Annual cooling savings due to reduction in infiltration

= #Trees * CFM50/sqft * Area / N_Cool * %_ ReductionCoolingInfiltration/Tree * 60 * 24 * CDD65 * LM * 0.018 / (ηCool * 1000) * %Cool

---

[2089] Savings are based upon a modeling spreadsheet provided by Leidos – see ‘Shade Tree Energy Savings – REVISED.xlsx’. This analysis includes a large number of assumptions and therefore resultant savings were trued up against TRM assumptions of full cooling energy consumption to result in a percentage savings that was consistent with a number of reviewed studies (namely: Home Energy Magazine: “Shade Trees as a Demand-Side Resource”, Energy and Buildings: “Peak power and cooling energy savings of shade trees”, and Ecological Economics: “Energy Savings from tree shade”. These references can be found in the reference folder.)

[2090] N-factor is used to convert 50-pascal blower door air flows to natural air flows and is dependent on geographic location and # of stories. These were developed by applying the LBNL infiltration model (see LBNL paper 21040, *Exegisis of Proposed ASHRAE Standard 119: Air Leakage Performance for Detached Single-Family Residential Buildings*; Sherman, 1986; page v-vi, Appendix page 7-9) to the reported wind speeds and outdoor temperatures provided by the NRDC 30 year climate normals. For more information see Bruce Harley, CLEAResult “Infiltration Factor Calculations Methodology.doc”.

[2091] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 60°F, consistent with the findings of Belzer and Cort, Pacific Northwest National Laboratory in “Statistical Analysis of Historical State-Level Residential Energy Consumption Trends,” 2004. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[2092] Weighted based on number of occupied residential housing units in each zone.

N_cool = Conversion factor from leakage at 50 Pascal to leakage at natural conditions

=Dependent on location and number of stories:[2093]

Climate Zone (City based upon)	N_cool (by # of stories)			
	1	1.5	2	3
1 (Rockford)	39.5	35.0	32.1	28.4
2 (Chicago)	38.9	34.4	31.6	28.0
3 (Springfield)	41.2	36.5	33.4	29.6
4 (St Louis, MO)	40.4	35.8	32.9	29.1
5 (Paducah, KY)	43.6	38.6	35.4	31.3

%Reduction_CoolingInfiltration/Tree = Average infiltration reduction per tree during cooling season due to tree blocking wind, based on average annual savings of eligible trees planted on all faces of the residence.

= 2.26% infiltration reduction per tree [2094]

CDD = Cooling Degree Days

= Dependent on location:[2095]

Climate Zone (City based upon)	CDD 65
1 (Rockford)	877
2 (Chicago)	1047
3 (Springfield)	1183
4 (Belleville)	1641
5 (Marion)	1450
Weighted Average[2096]	1098

LM = Latent Multiplier

= Multiplies the CDD dry bulb temperature difference by a factor that accounts for the additional energy needed to dehumidify air when in cooling mode

Climate Zone (City based upon)	LM
1 (Rockford)	3.3
2 (Chicago)	3.2

[2093] N-factor is used to convert 50-pascal blower door air flows to natural air flows and is dependent on geographic location and # of stories. These were developed by applying the LBNL infiltration model (see LBNL paper 21040, *Exegisis of Proposed ASHRAE Standard 119: Air Leakage Performance for Detached Single-Family Residential Buildings*; Sherman, 1986; page v-vi, Appendix page 7-9) to the reported wind speeds and outdoor temperatures provided by the NRDC 30 year climate normals. For more information see Bruce Harley, CLEAResult "Infiltration Factor Calculations Methodology.doc".

[2094] Savings are based upon a modeling spreadsheet provided by Leidos – see 'Shade Tree Energy Savings – REVISED.xlsx'. This analysis includes a large number of assumptions and therefore resultant savings were trued up against TRM assumptions of full cooling energy consumption to result in a percentage savings that was consistent with a number of reviewed studies (namely: Home Energy Magazine: "Shade Trees as a Demand-Side Resource", Energy and Buildings: "Peak power and cooling energy savings of shade trees", and Ecological Economics: "Energy Savings from tree shade". These references can be found in the reference folder.)

[2095] National Centers for Environmental Information (NCEI) Annual Normals, from 2006 - 2020, calculated with a base temp of 65°F. There is a county mapping table Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois.

[2096] Weighted based on number of occupied residential housing units in each zone (US Census 2010).

Climate Zone (City based upon)	LM
3 (Springfield)	3.7
4 (St Louis, MO)	3.6
5 (Paducah, KY)	3.7

LMR = Lifetime Mortality Rate – i.e. assumed percentage of trees that do not go on to provide the savings characterized in this measure.

= 18% for single family and 39% for multi family[2097]

NPVDiscount = Multiplier to reduce annual savings claimed from year 1 to account for assumed length of time before savings are realized.

= 76%[2098]

[2097] Assumption based on McPherson, "Energy-Saving Potential of Trees in Chicago", page 24.

[2098] Based on assumption that savings would not be realized for first 5 years and then continue for 20 years. Applying this multiplier and claiming savings from year one and for a measure life of 25 years results in equivalent NPV of lifetime savings, applying a Real Discount Rate of 2.0%. If reason to believe savings will be realized after a significantly different length of time, and alternative multiplier can be calculated.

For example: Assuming 5 eligible trees are planted around home with average leakage and Insulation Levels; 2,500 Sq. Ft. floor area in a 2 story Single Family Residence in Springfield with an Air Source Heat Pump with unknown efficiency.

$\Delta kWh = (\Delta kWh_{HeatingDirectSolar} + \Delta kWh_{CoolingDirectSolar} + \Delta kWh_{HeatingInfiltration} + \Delta kWh_{CoolingInfiltration}) * (1 – LMR) * NPVDiscount$

$\Delta kWh_{HeatingDirectSolar}$ = #Trees * ThermsHeatingIncreased/Tree * 100,000 / 3,412 / ηHeat * %ElectricHeat

= 5 * -3.2 * 100,000 / 3,412 / 2.04 * 100%

= -230 kWh

$\Delta kWh_{CoolingDirectSolar}$ = #Trees * Ton-hrCoolingSaved/Tree * 12,000 / (1,000 * ηCool) * %Cool

= 5 * 137.3 * 12,000 / (1,000 * 14) * 100%

= 588 kWh

$\Delta kWh_{HeatingInfiltration}$ = #Trees * CFM50/sqft * Area/ N_Heat * %Reduction_HeatingInfiltration/Tree * 60 * 24 * HDD60 * 0.018 / (COPHeating * 3,412) * %ElectricHeat

= 5 * 1.51 * 2,500/19.7 * 0.47% * 60 * 24 * 4,266 * 0.018 / (2.04 * 3,412) * 100%

= 72 kWh

$\Delta kWh_{CoolingInfiltration}$ = #Trees * CFM50/sqft * Area / N_Cool * %_ ReductionCoolingInfiltration/Tree * 60 * 24 * CDD65 * LM * 0.018 / (ηCool * 1000) * %Cool

= 5 * 1.51 * 2,500/33.4 * 2.26% * 60 * 24 * 1,183 * 3.7 * 0.018 / (14 * 1,000) * 100%

= 104 kWh

ΔkWh = (-230 + 588 + 72 + 104) * (1 – 0.18) * 0.76

= 333 kWh (67 kWh per tree)

SUMMER COINCIDENT PEAK DEMAND SAVINGS

$$\Delta kW = kWh_{Cool} / FLH\_Cooling * CF * (1-LMR) * NPVDiscount$$

Where:

kWh_{Cool} = Total cooling kWh savings from measure

= $\Delta kWh_{CoolingDirectSolar} + \Delta kWh_{CoolingInfiltration}$

FLH_cooling = Full load hours of air conditioning

= Dependent on location:[2099]

[2099] Full load hours for Chicago, Moline and Rockford are provided in “Final Evaluation Report: Central Air Conditioning Efficiency Services (CACES), 2010, Navigant Consulting”, p.33. An average FLH/Cooling Degree Day (from NCDC) ratio was calculated for these locations and applied to the CDD of the other locations in order to estimate FLH. There is a county mapping table in Volume 1, Section 3.7 providing the appropriate city to use for each county of Illinois. During update cycle for version

Climate Zone (City based upon)	Single Family	Multifamily
1 (Rockford)	547	499
2 (Chicago)	709	629
3 (Springfield)	779	707
4 (Belleville)	1082	982
5 (Marion)	956	868
Weighted Average[2100]		
ComEd	676	603
Ameren	875	791
Statewide	731	655

Use Multifamily if: Building meets utility's definition for multifamily and HVAC system serves single unit. For residential sized systems serving 2 or more units, assume single family hours.

CF_{SSP} = Summer System Peak Coincidence Factor for Central A/C (during system peak hour)

= 68%[2101]

CF_{SSP} = Summer System Peak Coincidence Factor for Heat Pumps (during system peak hour)

= 72% [2102]

CF_{PJM} = PJM Summer Peak Coincidence Factor for Central A/C (average during peak period)

= 46.6% [2103]

For example, using example from above and CF_{SSP} for heat pumps:

ΔkW = kWh_{Cool} / FLH_Cooling * CF * (1 – LMR) * NPVDiscount

kWh_{Cool} = 588 + 104

= 692

ΔkW = 692 / 711 * 0.72 * (1-0.18) * 0.76

= 0.437

FOSSIL FUEL SAVINGS

$$\Delta Therms = (\Delta Therms_{HeatingDirectSolar} + \Delta Therms_{HeatingInfiltration}) * (1- LMR) * NPVDiscount$$

Where:

$\Delta Therms_{HeatingDirectSolar}$ = Annual therm savings due to reduction in direct solar gain

= #_Trees * ThermsHeatingIncreased/Tree / ηHeat * %FossilHeat

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v.12, applied percent change of CDD65, NCEI Annual Normals from 30 yr data set (1981-2010) to more recent 15 yr data (2006-2020) to all FLHcool values.

[2100] Weighting for Ameren is based on electric accounts in each of the cooling zones. Weighting for ComEd and Statewide average is based on number of occupied residential housing units in each zone. ComEd is weighted average of Zones 1-2. Alternative program-weighted assumptions can be used if appropriate.

[2101] Based on metering of 24 homes with central AC during PY4 and PY5 in Ameren Illinois service territory.

[2102] Based on analysis of metering results from 24 heat pumps in Ameren Illinois service territory in PY5 coincident with AIC's 2010 system peak; 'Impact and Process Evaluation of Ameren Illinois Company's Residential HVAC Program (PY5)'.

[2103] Based on analysis of Itron eShape data for Missouri, calibrated to Illinois loads, supplied by Ameren. The average AC load over the PJM peak period (1-5pm, M-F, June through August) is divided by the maximum AC load during the year.

ThermsHeatingIncreased/Tree = Net annual therms of heating saved per tree due to shading and infiltration effects, based on the average annual savings of eligible trees planted on all faces of the residence.

= -3.2 Therms/Tree

ηHeat = as defined above

%FossilHeat = Percent of homes that have fossil fuel space heating

= 100 % for Fossil fuel

= 0 % for Electric Resistance (Baseboard or Electric Furnace) or Heat Pump

= If unknown[2104], use the following table:

Utility	**Location**				
	Single Family	**Single Family Low Income**	**Multi Family**	**Multi Family Low Income**	**Unknown**
Ameren	86.0%	86.3%	62.8%	43.7%	80.5%
ComEd	86.0%	78.5%	57.0%	51.6%	67.1%
PGL	99.0%	98.5%	96.0%	97.2%	97.8%
NSG	98.7%	99.2%	67.5%	98.8%	96.7%
Nicor	98.4%	96.2%	86.5%	78.4%	95.3%
All DUs[2105]					75.4%

Note: If a measure is supported by a gas and electric utility through a joint program, and it is unknown whether the participant has a gas supply, the electric utility values in the table above should be used. If it is known that the participant has a gas supply, the values from the gas utility above should be applied.

$\Delta Therms_{HeatingInfiltration}$ = Annual therm savings due to reduction in infiltration

= #Trees * CFM50/SqFt * Area/ N_Heat * %_ ReductionHeatingInfiltration/Tree * 60 * 24 * HDD60 * 0.018 / (ηHeat * 100,000)

[2104] Ameren and Nicor values are based on GDS Associates Inc., “2023-2024 Illinois Baseline Study: Residential Baseline Study Results”, Oct 31 2024. ComEd values based on 2019 Baseline Survey and People’s Gas and Northshore Gas values are based on implementation contractors data for PY2022-2023.

[2105] For the weighted average calculations, please see the Analysis file. PGL, NSG, Nicor & gas customers were assumed to follow the provided split. ComEd total customers, minus overlap with PGL,NSG & Nicor, therefore gas only homes. Ameren is total customers minus Nicor.

For example: Assuming 5 eligible trees are planted around home with average leakage and Insulation Levels; 2,500 Sq. Ft. floor area in a 2 story Single Family Residence in Springfield with furnace with system efficiency of 68%.

$$\Delta Therms = (\Delta Therms_{HeatingDirectSolar} + \Delta Therms_{HeatingInfiltration}) * (1 – LMR) * NPVDiscount$$

$\Delta Therms_{HeatingDirectSolar}$ = #Trees * ThermsHeatingIncreased/Tree / ηHeat * %FossilHeat

= 5 * -3.2/0.68 * 100%

= -23.5 Therms

$\Delta Therms_{HeatingInfiltration}$ = #Trees * CFM50/SqFt * Area/ N_Heat * %_ ReductionHeatingInfiltration/Tree * 60 * 24 * HDD60 * 0.018 / (ηHeat * 100,000)

= 5 * 1.51 * 2,500/19.7 * 0.47% * 60 * 24 * 4,266 * 0.018 / (0.68 * 100,000) * 100%

= 7.3 Therms

ΔTherms = (-23.5 + 7.3) * (1 – 0.18) * 0.76

= - 10.1 Therms

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

n/a

DEEMED O&M COST ADJUSTMENT CALCULATION

n/a

MEASURE CODE: RS-MSC-TREE-V02-260101

REVIEW DEADLINE: 1/1/2029

5.7.6 Smart Irrigation Controls

DESCRIPTION

Irrigation systems are commonly found on commercial properties, educational institutions, public parks, golf courses, and other facilities with landscaped grounds. They are typically operated on timers, applying the irrigation water in the early morning or after dusk. The timing and duration of irrigation application are determined by the user, along with the location and density of sprinklers. The irrigation water gets applied according to the control schedule, regardless of whether the landscape actually needs the irrigation water at that time.

The new measure involves the installation of a control system technology that reduces or eliminates irrigation during times of precipitation or when there is already sufficient soil moisture.

This measure applies to landscape irrigation systems for residential properties only. This measure was developed to be applicable to the following program types: TOS, RF. If applied to other program types, the measure savings should be verified.

DEFINITION OF EFFICIENT EQUIPMENT

Smart Irrigation Controls utilize sensors, gauges, or local weather forecasts to regulate the application of irrigation water to lawn or landscape vegetation. There are two main technologies used for this purpose: 1) Precipitation based smart irrigation controllers, and 2) Soil-moisture based smart irrigation controllers. Precipitation Based Smart Irrigation Controllers This type of system utilizes either an on-site rain gauge or a local weather service to determine if there is sufficient precipitation to allow shut-off of the irrigation water. Soil Moisture Based Smart Irrigation Controllers This type of system utilizes soil moisture sensors, buried in the root zone, to determine if irrigation water is needed. A "suspended cycle irrigation system" uses the soil moisture sensors to determine whether a regularly scheduled irrigation application is necessary. If there is sufficient soil moisture, then the next scheduled irrigation cycle gets interrupted. A "water-on-demand irrigation system" applies irrigation water when the moisture sensor reaches its lower limit and shuts off when the moisture sensor reaches its upper limit. There is no regularly scheduled irrigation with the water on demand system. For the purposes of this measure characterization, the assumed rolling 24-hour threshold for shutting off the irrigation is 6 mm (0.24"). The Savings Factor is based on the percentage of time that the rolling 24-hour average of precipitation meets or exceed the 6 mm threshold.

DEFINITION OF BASELINE EQUIPMENT

The baseline irrigation system applies irrigation water to the lawn or landscape on a regularly scheduled timer. The timing and duration of irrigation application are determined by the user, along with the location and density of sprinklers. The irrigation water gets applied according to the control schedule, regardless of whether the landscape actually needs the irrigation water at that time. Sprinkler head nozzles have a variety of configurations that affect the distribution of the irrigation water. The water can come in the form of a spray, a rotating plume, a bubbler, or a drip. Typical baseline irrigation systems provide 1 inch of irrigation to the entire lawn. This is equivalent to 0.623 gallons per square foot of lawn per week.[2106]

DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected useful life for Irrigation Control Measures is assumed to be 15 years.

DEEMED MEASURE COST

The measure cost for a multi-zone smart irrigation control system is $500.[2107]

[2106] Today's Homeowner with Danny Lipford. "How to Calculate Lawn Irrigation Water Usage and Costs."

[2107] Material pricing taken from Google shopping search on "smart irrigation control system". The Rain Bird Smart LNK WiFi Irrigation System Indoor Controller (4 Pack) sells for $316 from online retailer Wish.com. Installation labor pricing taken from online retailer Home Advisor – Lawn and Garden, Repair a Sprinkler, which stated $45 to $200 per hour for a plumber.

LOADSHAPE

N/A

COINCIDENCE FACTOR

N/A

Algorithm

CALCULATION OF ENERGY SAVINGS

Energy savings from Irrigation Control Measures are the result of reduced water consumption. There are indirect electric energy savings from reduced potable water treatment.

ELECTRIC ENERGY SAVINGS

The electric energy savings are based indirectly on the reduced electricity usage used to provide the potable water and treat the wastewater. By applying an "Energy Factor", the water savings (in gallons/year) can be converted to electricity savings (in kWh/year). This "Energy Factor" considers the electric energy requirements of potable water treatment plants and potable water distribution. Since the "wasted" irrigation water in the baseline case will likely be absorbed into the soil or will runoff into surface water bodies, electricity savings from a reduction in wastewater treatment load would not apply. The methodology for quantifying the water savings involves a direct comparison of the baseline equipment to the efficient equipment. In order to calculate the baseline water usage of an irrigation system, the number of sprinklers and their sizing need to be determined. The static pressure and sizing of the water service, along with the sprinkler head orifice sizing will ultimately determine the flow rate of water. The electricity savings for this measure can be calculated by applying an energy factor to the calculated water savings.

$$\Delta kWhwater = \frac{\Delta Water}{1{,}000{,}000} * Ewater$$

Where:

Ewater = Illinois Total Water Energy Factor (kWh/Million Gallons)

=2,571[2108]

The total water savings for this measure can be calculated as follows:

$$\Delta Water = BSFL - ESFL$$

Where:

ΔWater = Total Water Savings (gallon/season)

The baseline volumetric flow rate for the entire system can be calculated as follows:

$$BSFL = NOS * SFL * DOI * NAY$$

Where:

BSFL = Baseline System Flow Rate (gallon/year)

NOS = Number of Sprinklers, the total number of sprinklers at the property

= Actual SFL = Sprinkler Flow Rate (gallon/minute)

= Actual, site-specific irrigation system specifications should be consulted to determine

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[2108] This factor include 2571 kWh/MG for water supply based on Illinois energy intensity data from a 2012 ISAWWA study and 2439 kWh/MG for wastewater treatment based on national energy intensity use estimates. For more information please review Elevate Energy's 'IL TRM: Energy per Gallon Factor, May 2018 paper'.

the property's sprinkler flow rate

DOI = Duration of Irrigation (minutes/application)

= Actual, the baseline scheduling controls should be used to determine the irrigation season

NAY = Number of Applications per Year (application/year)

= Actual

The efficient volumetric flow rate can be calculated as follows:

$$ESFL = BSFL * (1 - SF)$$

Where:

ESFL = Efficient System Flow Rate (gallon/season)

BSFL = Baseline System Flow Rate (gallon/season)

SF = Savings Factor

The volumetric flow rate for the entire efficient system is based on applying a Savings Factor (SF) to the BSFL. The SF is determined by calculating the number of weeks in the irrigation season (April 25 through October 13) when there is sufficient precipitation to allow the shutoff of the irrigation system. Typical Meteorological Year (TMY-3) data gives precipitation depth in millimeters for each hour of the typical year. By consulting the TMY-3 data for the closest applicable weather station, the SF can be determined.

One source recommends a rain sensor shut-off threshold of 6 mm of precipitation for twice or thrice weekly irrigation schedule or 13 mm of precipitation for once weekly irrigation schedule.[2109]

The State Climatologist Office for Illinois produced a map of the Illinois Growing Season days per year for different parts of the state.[2110]

By analyzing the TMY-3 precipitation data, the number of weeks during the "irrigation season" that the rolling 24-hour precipitation levels greater than 6 mm can be determined, along with the Savings Factors:

Chicago:	SF= 0.265
Midway:	SF = 0.241
Rockford:	SF = 0.268
Peoria:	SF = 0.227
Springfield:	SF = 0.186

[2109] Michael D. Dukes. "Smart Irrigation Controllers: What Makes an Irrigation Controller Smart". University of Florida, Institute for Food & Agricultural Sciences.

[2110] State Climatologist Office for Illinois, Illinois State Water Survey, 2003. Based on 1971 – 2000 data, assessing the number of days between the last spring drop below 32 degrees and the firest fall drop below 32 degrees.

For example, an irrigation system in Rockford with 10 sprinklers running at 5 gallons per minute, 20 minutes per sprinkle with 100 sprinkles per year would save:

ΔkWh = ΔWater / 1,000,000 * Ewater

ΔWater = BSFL – ESFL

BSFL = NOS * SFL * DOI * NAY

= 10 * 5 * 20 * 100

= 100,000

ESFL = BSFL * (1 – SF)

= 100,000 * (1 – 0.268)

= 73,200

ΔWater = 100,000 – 73,200

= 26,800

ΔkWh = 26,800 / 1,000,000 * 2571

= 68.9 kWh

SUMMER COINCIDENT PEAK DEMAND SAVINGS

N/A

FOSSIL FUEL SAVINGS

N/A

WATER AND OTHER NON-ENERGY IMPACT DESCRIPTIONS AND CALCULATION

The water savings inherent in the efficient irrigation control technology will help preserve water supplies and extend the life of water treatment and wastewater treatment equipment. By reducing irrigation during periods of precipitation, unnecessary storm runoff and puddling can be avoided. For more details on calculating water savings, please see the 'Algorithm' section of this characterization.

DEEMED O&M COST ADJUSTMENT CALCULATION

Maintaining an Efficient Irrigation Control system will require periodic cleaning and calibration of the sensors. Any wiring or wireless communication devices will also need to be maintained. Costs for these activities is $196.[2111]

MEASURE CODE: RS-MSC-IRGN-V01-260101

REVIEW DEADLINE: 1/1/2029

[2111] Based on data provided on Home Advisor website, Lawn and Garden, Repair a Sprinkler System.