

Q3 PY2024
Quarterly Report
Jan. – Sept.



Artwork by Alexander Martin, member of the Peoria Guild of Black Artists



ENERGY EFFICIENCY PROGRAM

Q3 PY2024 Ameren Illinois Energy Efficiency Program Quarterly Report

JAN. – SEPT.

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

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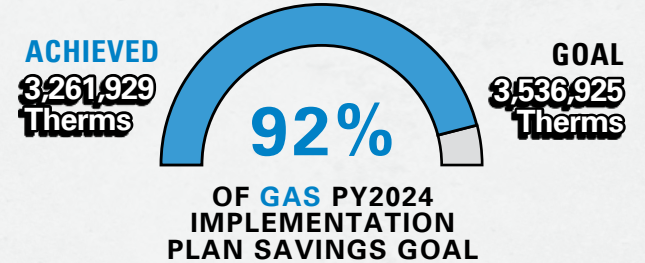
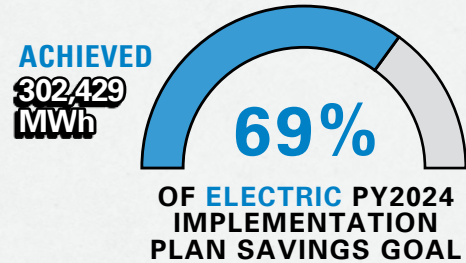
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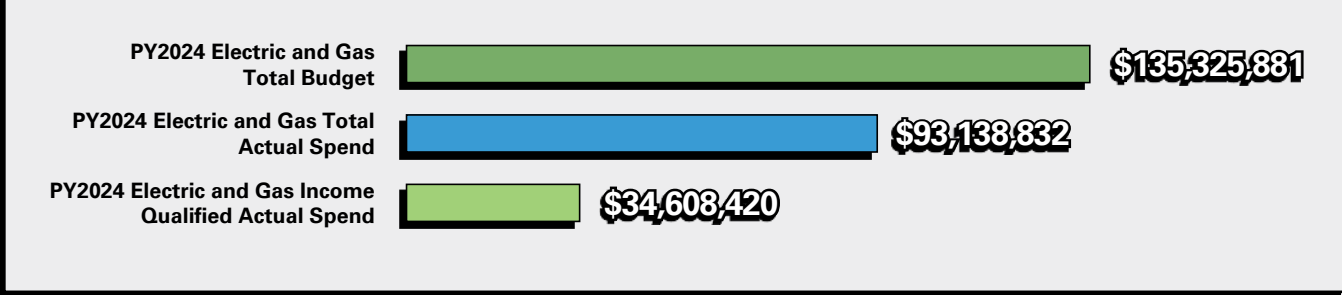
PORTFOLIO SUMMARY

Ameren Illinois Company (AIC) d/b/a Ameren Illinois (“Ameren Illinois”) provides this quarterly report for the period of January – September 2024 pursuant to Section 6.5 of the Illinois Energy Efficiency Policy Manual Version 3.0 (effective January 1, 2024). Consistent with Section 6.5, Ameren Illinois provides this report using a common template developed in collaboration with other Illinois utilities and stakeholders and designed to provide the categories of information set forth in Section 6.5. The information in this quarterly report may be based on preliminary results and will be assessed for revision, evaluation, and adjustment, with updates and changes being made on a quarterly basis. As set forth in Section 6.5, interested stakeholders should raise any questions regarding the programs addressed in this report through the Illinois Stakeholder Advisory Group process or with Ameren Illinois directly, including to identify any updates or changes made since prior reports. As has been done previously, AIC will address questions, when practicable, through the appropriate channels, including updates to this report.

- Through Q3, the Overall Portfolio has achieved 302,429 MWh or 69% of its electric PY2024 implementation plan savings goal of 437,545 MWh and 3,261,929 Therms or 92% of its gas PY2024 implementation plan savings goal of 3,536,925 Therms.

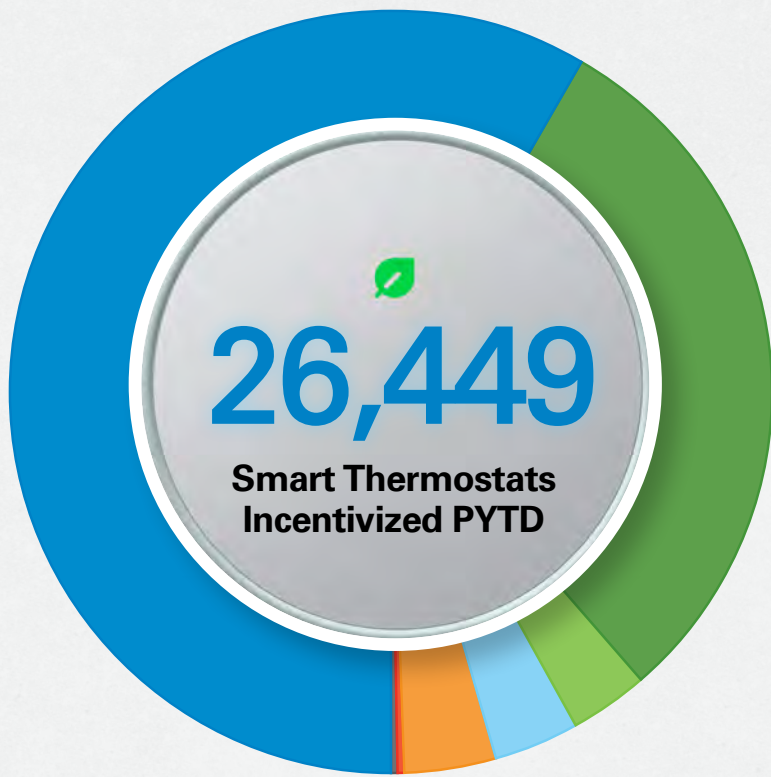


PORTFOLIO OVERALL SPEND ACHIEVEMENT





SMART THERMOSTATS INCENTIVIZED

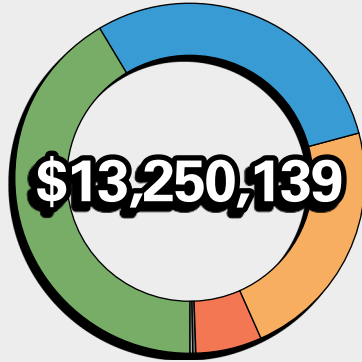


TOTALS:

■ RETAIL PRODUCTS	15,495
■ INCOME QUALIFIED	7,994
■ MARKET RATE MULTIFAMILY	841
■ MARKET RATE SINGLE FAMILY	1,006
■ BUSINESS STANDARD	986
■ PUBLIC HOUSING	74
■ BUSINESS MIDSTREAM	53

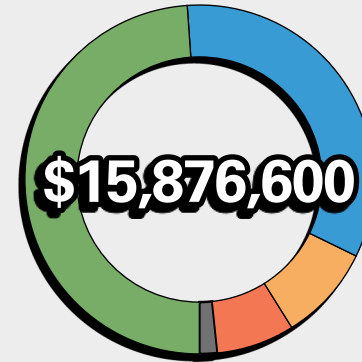
DIVERSE SPEND METRICS

DIVERSE PROGRAM ALLY SPEND



CLASSIFICATION	SPEND TOTAL	NUMBER OF PROGRAM ALLIES
Woman-Owned	\$5,479,355	37
Minority-Owned	\$3,907,279	24
Minority-Owned & Woman-Owned	\$2,963,365	7
Veteran-Owned	\$806,978	12
Veteran-Owned & Minority-Owned	\$46,726	4
Veteran-Owned & Woman-Owned	\$24,322	2
Total Spend	\$13,250,139	88

DIVERSE SUPPLIER SPEND



CLASSIFICATION	SPEND TOTAL	NUMBER OF SUPPLIERS	TIER 1	TIER 2
Minority-Owned & Woman-Owned	\$7,786,231	4	2	2
Woman-Owned	\$5,298,033	15	3	12
Veteran-Owned & Minority-Owned	\$1,400,207	1	0	1
Minority-Owned	\$1,133,885	5	1	4
Veteran-Owned	\$258,244	3	1	2
Total Spend	\$15,876,600	28	7	21

DIVERSE SPEND METRICS

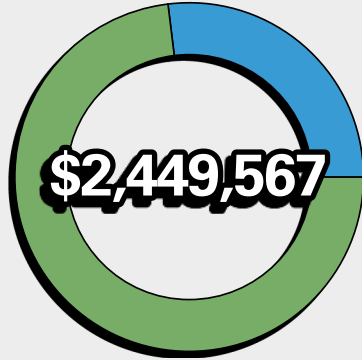
PROGRAM ALLY TRADE SPECIALTY

PRIMARY SPECIALTY	TOTAL PARTICIPATING TRADE ALLIES	DIVERSE TRADE ALLIES (SUBSET OF TOTAL)	DIVERSE TRADE ALLIES WITH PRIMARY BUSINESS LOCATION IN EDC (*)	DIVERSE TRADE ALLIES WITH PRIMARY BUSINESS LOCATION IN EDC (%)
Architecture	2	2	0	0%
Compressed Air	7	1	0	0%
Electrical	119	38	9	24%
Energy Audits	14	2	0	0%
Engineering (Mechanical and Building)	10	1	0	0%
Home Construction	7	5	4	80%
HVAC	107	30	5	17%
Lighting	83	21	3	14%
Plumbing	10	1	1	100%
Remediation (Mold, Asbestos)	5	1	0	0%
Weatherization or Building Insulation	20	6	2	33%
Total Spend	384	108	24	22%

(*) Economically Disadvantaged Community

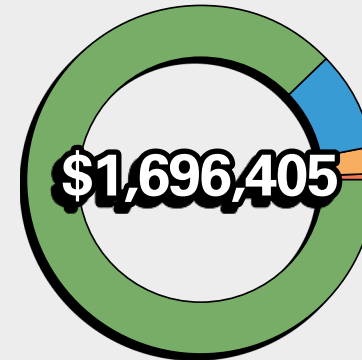
PORTFOLIO SPEND METRICS





NON-PROFIT SPEND



DESCRIPTION	SPEND TOTAL
 Time & Materials Spend	\$1,790,387
 Incentive Spend	\$659,180
Total Spend	\$2,449,567

HEALTH & SAFETY SPEND

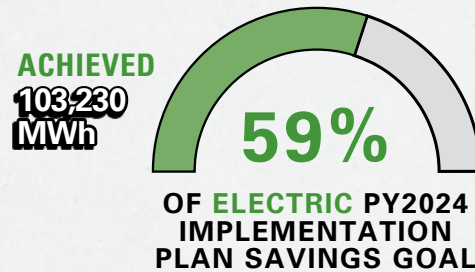


CHANNEL	SPEND TOTAL
 Income Qualified Single Family (SFIQ)	\$1,489,811
 Income Qualified Community Action Agency (CAA)	\$158,827
 Income Qualified Mobile Homes	\$40,345
 Income Qualified Multifamily (MFIQ)	\$7,422
Total Spend	\$1,696,405

RESIDENTIAL PROGRAM SUMMARY

The Residential Program includes six initiatives that address key electric and natural gas end-uses in single-family homes and multifamily properties. The Residential Program offers a range of educational opportunities and incentives for consumers to implement a series of energy efficiency improvements. Direct installation initiatives, targeted primarily to low- to moderate-income customers, are designed to achieve reductions in energy consumption within participants' homes, followed by comprehensive weatherization services. Each initiative is a potential entry point for consumers into the Program, which is structured to facilitate cross-promotion between initiatives and maximize participation. There is a significant focus on assisting low- to moderate-income customers to reduce their energy costs, with much of that focus within the Income Qualified (IQ) Initiative. Ameren Illinois' large geographic service territory encompasses over 43,700 square miles and serves more than one million residential customers of which over 640,000 receive both electric and gas service.

- Through Q3, the Residential Program has achieved 103,230 MWh or 59% of its electric PY2024 implementation plan savings goal of 173,865 MWh and 1,775,654 Therms or 122% of its gas PY2024 implementation plan savings goal of 1,460,938 Therms.



Note: SAG (Stakeholder Advisory Group) reporting template has Residential initiatives separated by Non-IQ, IQ and a BTU Conversion component; however, some Residential initiatives categorized as non-IQ in the template include components that are low to moderate income focused.

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RETAIL PRODUCTS INITIATIVE

- The Google Blitz Campaign fully launched in Q3 offering eligible Ameren Illinois customers a Google Smart Thermostat. In partnership with Google, the campaign also promoted a no-cost NEST Smart Thermostat and a \$10 NEST Learning Smart Thermostat.

MARKET RATE SINGLE FAMILY INITIATIVE: MIDSTREAM HVAC CHANNEL – 3RD PARTY

- Program staff distributed communication in Q3 notifying all distributors that incentives for furnaces would no longer be available. This retirement was due to participation significantly higher than forecasted and gas budget limitations.
- The Energy Star heat pump water heater (HPWH) Installer Finder received a new request to add a contractor due to the HPWH installer training that occurred the previous quarter. This additional contractor will assist with increasing participation and sales in the Channel.
- 49 distributors have enrolled in direct deposit, PYTD with 10 distributors registered during Q3. Direct deposit is critical to this Channel as it results in faster payment times to customers.

MARKET RATE SINGLE FAMILY INITIATIVE: HOME EFFICIENCY CHANNEL

- A third marketing campaign was launched targeting electric-only customers and specific regions within the service territory. The campaign featured a postcard that provided comprehensive information and highlighted the advantages of the available IRA tax rebates.

- Program Ally participation grew from 12 to 15 enrolled contractors during Q3. This growth can be attributed to the ongoing commitment to actively engage Program Allies through targeted outreach and marketing efforts.

MARKET RATE MULTIFAMILY INITIATIVE

- The Initiative achieved its yearly target during Q3, by installing 8,321 in-unit and common area measures, along with 50 heat pumps, across 1,051 units. Additional funding was provided for electric-only in-unit and common area installations which allowed the initiative to remain active and aided in the completion of 14 additional projects that were in the pipeline and impacted 232 units.
- Program staff continued outreach and engagement efforts throughout Q3 to maintain momentum and create a pipeline for the next program year.

PUBLIC HOUSING INITIATIVE

- Program staff expanded their outreach efforts to Public Housing Authorities (PHAs) during Q3, which included participating in a tenant health fair and sponsoring the annual Illinois Association of Housing Authorities Directors Conference. Program staff also hosted a specialized meeting with directors and maintenance staff from the state’s largest public housing agency to discuss their unique needs, foster stronger relationships and tailor support for future projects.

- Program staff engaged with three additional public housing agencies during Q3, with potential to reach over 1,200 units. In-unit and common area installations were completed in 524 units, with assessments for over 900 units delayed due to maintenance staff shortages.
- Building envelope projects and pre-tests continued during Q3 for a large public housing agency. This impacted 199 units across six counties receiving insulation and air sealing upgrades.

DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: SCHOOL KITS CHANNEL – 3RD PARTY

- Fall semester recruitment began in Q3, with the Channel 99% subscribed by the end of the quarter. This exceeded participation expectations with 4,813 kits reserved among 73 schools, involving 193 teachers, and benefiting 4,620 students. This participation represents the continued demand and interest of incorporating energy-saving practices into educational curriculums, fostering the culture of sustainability in the younger generation.

DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: JOINT-UTILITY SCHOOL KITS CHANNEL

- Joint Utility School Kits recruitment began during Q3 and concluded the quarter with 425 kits reserved among nine schools, involving 15 teachers, and benefiting 410 students. The 1,500 kit Channel target did experience a shortfall; however, there are still 12 remaining schools that have not reported participation.

DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: HIGH SCHOOL INNOVATION CHANNEL – 3RD PARTY

- Fall semester recruitment began in Q3, with the Channel reaching over 100% subscribed with a waitlist created for the next program year. Participation impact was comprised of 1,326 kits reserved among 15 schools, involving 25 teachers, and benefiting 1,301 students.
- The Channel held a four-day Science, Technology, Engineering and Mathematics (STEM) camp at a high school in Peoria during Q3. The day camp focused on workforce development and careers in energy efficiency in partnership with the Market Development Initiative, providing 72 students with insight and hands-on experiences related to the energy efficiency industry.



INCOME QUALIFIED (IQ) INITIATIVE

ELECTRIC INCOME QUALIFIED SPEND		
CHANNEL	2024 ACTUALS (PYTD)	2024 PLAN BUDGET (FOR THE YEAR)
IQ New Construction	\$18,097	\$183,407
IQ CAA	\$2,757,115	\$4,499,696
IQ Community Kits	\$473,239	\$500,647
IQ Electrification	\$443,385	\$4,004,434
IQ Healthier Homes	\$483,596	\$949,992
IQ Mobile Homes	\$987,723	\$1,712,574
IQ Multi Family	\$5,746,153	\$7,653,746
IQ Multifamily Joint Utility	\$36,372	\$117,596
IQ Retail Products	\$5,769,006	\$8,222,195
IQ Single Family	\$12,538,941	\$16,920,980
IQ Single Family Joint Utility	\$232,430	\$409,251
IQ Smart Savers	\$517,532	\$1,250,723
Total Electric	\$30,003,590	\$46,425,241

IQ HOMES SERVED (PYTD)	
Single Family Channel - Direct Install	1,763
Single Family Channel - Comprehensive Retrofits	611
Single Family Channel - Joint Utility Retrofits	58
Single Family Channel - Joint Utility Kits	128
CAA Channel - Comprehensive Retrofits	222
Multifamily Channel - In-Unit (including Public Housing)	10,076
Smart Savers Channel	535
Mobile Homes Weatherization and Air Sealing Channel	61
Community Kits Channel	3,000
School Kits	5,852
Total IQ Homes Served	22,306

IQ INITIATIVE: SINGLE FAMILY (SFIQ) CHANNEL

- The Channel completed 174 projects during Q3, which was lower than the previous two quarters. Adjustments were made during Q3 to create an enhanced customer journey emphasis to support a growing pipeline of projects with anticipation to end the year with a high number of project completions.
- As a result of Q2 pivots for additional electric savings, 18 Air Source Heat Pump projects and 31 High Need CAC units were established in the pipeline in Q3. Program Allies actively contributed to marketing efforts and lead referrals to bolster these two key focus areas.
- To boost health and safety participation along with expanding the project pipeline, the channel is targeting 50 additional projects related to knob and tube electrical systems to start prior to the end of the program year.
- To enhance the overall customer journey for comprehensive whole-home projects, the process for integrating accessibility projects into the Channel was streamlined to ensure customers were served quickly and efficiently.

IQ INITIATIVE: SINGLE FAMILY & MULTIFAMILY CHANNEL (JOINT UTILITY OFFERING)

- 200 all-electric kits were distributed to single-family customers during Q3 to support target achievement. This distribution not only contributed to meeting the current targets, but also helped establish a pipeline of single-family customers for retrofits in the next program year.
- In Q3, 63 multifamily units were served, with 33 units receiving fully comprehensive projects. This allowed for the multifamily component of this Offering to fully achieve its goals.

IQ INITIATIVE: ELECTRIFICATION CHANNEL

- In Q3, a targeted electrification mailing was sent to all eligible customers. The response has improved over previous results, with over 20 customer applications submitted, along with numerous inbound calls expressing interest. This marks the highest increase in Channel engagement, PYTD.
- 2 projects were successfully completed during Q3, with four projects completed, PYTD. Participation continued to rise with 13 projects awaiting approval, and a total of 32 projects in the pipeline. This project pipeline increased over 60% compared to the previous program year.

IQ INITIATIVE: SINGLE FAMILY CHANNEL (ACCESSIBILITY OFFERING)

- There were 26 completed projects during Q3, with 41 customers served with smart home accessibility devices, PYTD. Interest was so high in this Offering during Q3, that an additional 25 customers were approved, increasing the yearly target to 75 homes served. This increased participation was a direct result of expanded outreach engagement and partnership management.
- Customer testimonial videos were developed, filmed, and edited during Q3. These videos are a great representation of the impact that the Offering provides and will be distributed in the next quarter.
- In Q3, efforts to extend service outreach continued with a Community Action Agency (CAA) and a Community Based Organization (CBO) invited to observe customer installations and receive orientation. This collaboration will enable the Channel to more effectively serve Southern Illinois.

IQ INITIATIVE: SINGLE FAMILY CHANNEL (COMMUNITY ENERGY AMBASSADOR PILOT)

- Community Energy Ambassadors (CEAs) were assigned to focus on three specific geographic areas within the service territory through Q3 which included Carbondale, Decatur, and East St. Louis.
- CEAs generated 48 customer referrals for the Single-Family Income Qualified Channel during Q3, with 7 of the referrals successfully converting into projects. This was lower than the participation expected,

even with the engagement of local organizations from the community.

IQ INITIATIVE: COMMUNITY ACTION AGENCY (CAA) CHANNEL

- The Channel target for customers served was reduced by 25 during Q3 due to the delayed implementation of the DCEO IWx energy audit system. As a result of this delay, agencies were not able to braid projects, bringing participation to a halt. Program staff will continue to be in constant communication regarding system updates and will provide support whenever possible.
- Program staff participated in two local high school career fairs in Peoria during Q3 to educate and recruit for future positions within the Channel.
- In Q3, program staff hosted the 2025 CAA Kick-Off with 82% of agencies participating. Feedback from these roundtable sessions will be reviewed with suggestions implemented to prepare for the next program year.

IQ INITIATIVE: MULTIFAMILY (MFIQ) CHANNEL

- During Q3, the Channel successfully installed 12 window inserts across four units at the second property involved in this new effort. These projects play a crucial role in evaluating the feasibility of integrating this measure for the next program year, broadening the array of energy efficiency solutions available within the Channel.
- Building envelope measures scheduled for this year at a large air force base are postponed to the next program year due to limited gas funding. Additionally, challenges related to staffing and maintenance at the site further delayed the commencement of this project.
- The Channel collaborated with the Market Development Initiative (MDI) Diverse Program Ally Incubator program, engaging four diverse Program Ally cohorts to complete the installation of 101 heat pumps during Q3. This engagement resulted in 54 units completed, with the remaining 46 scheduled for completion by the end of the program year. This partnership between the channel and MDI leverages portfolio resources and coordination, resulting in a broader reach across income qualified properties.



IQ INITIATIVE: SMART SAVERS CHANNEL – 3RD PARTY

- 5 new Program Allies were enrolled in the Channel during Q3, with 37 enrolled, PYTD. This recruitment resulted in all 241 Channel zip codes having service coverage.
- 272 new applications were received during Q3, with 579 received, PYTD. This participation is still under target; however, program staff are working on a new strategy to serve renters of single-family homes, two-flats, and three-flats. We anticipate updates to the Smart Savers flow being completed in Q4 and anticipate this strategy will provide a boost to production.

IQ INITIATIVE: COMMUNITY KITS CHANNEL – 3RD PARTY

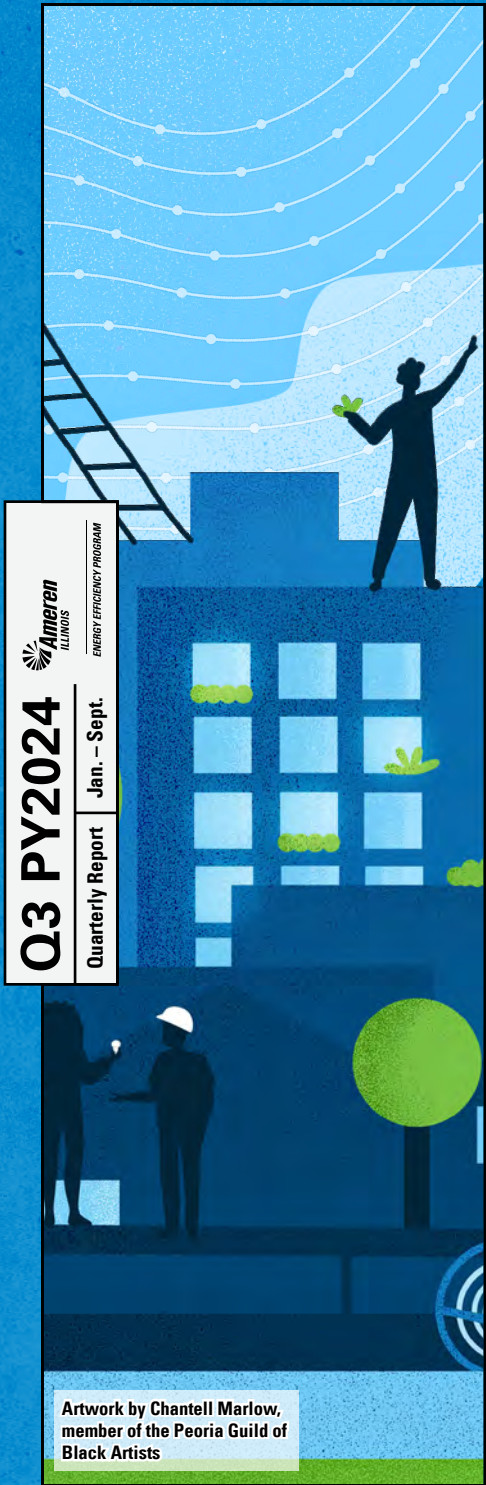
- Partners completed 3,000 community kit referrals through Q3, representing 100% of the 3,000-kit goal for the year, a whole quarter earlier than forecasted.

IQ INITIATIVE: MOBILE HOMES WEATHERIZATION AND AIR SEALING CHANNEL – 3RD PARTY

- Program staff modified current Air Source Heat Pump (ASHP) requirements during Q3 due to the unique sizing characteristics of Mobile Homes. These changes will increase the number of Electrification and Weatherization projects that can be completed and will reduce walk-aways.

IQ INITIATIVE: HEALTHIER HOMES CHANNEL – 3RD PARTY

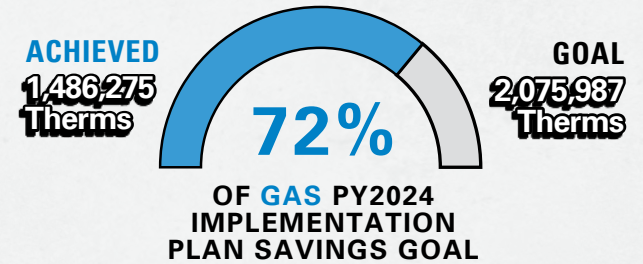
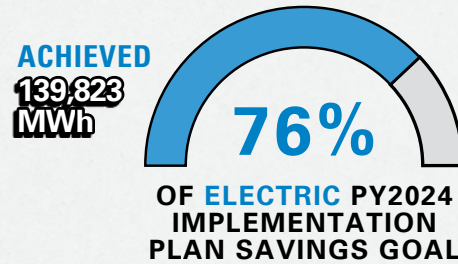
- The first project was completed in early Q3, from one of the first three assessments performed under the Channel. Indoor air quality data has been tracked throughout the project and was collected in late Q3 with strong early indications of air quality improvement.
- Outreach events continued to prove their importance to the Channel through Q3 with the following completed:
 1. Four outreach events during Q2 resulted in 13 customers receiving assessments in Q3 with six eligible projects in progress.
 2. Two additional outreach events with community health organizations were hosted in the Peoria area during Q3 and yielded four customers receiving assessments with three eligible projects to pursue.
- 5 Program Allies of various trades and services actively worked on projects during Q3 in both Decatur and Peoria, with two of these Program Allies being participants in the Diverse Program Ally Incubator.



BUSINESS PROGRAM SUMMARY

The Business Program is comprised of six core initiatives that provide incentives and services to non-residential customers, excluding exempt and self-direct customers, to achieve electric and natural gas energy savings. The core initiatives for the Business Program are Standard, Small Business, Custom, Midstream, Retro-commissioning (RCx), and Streetlighting. Financial incentives to customers are the cornerstone of the program, to drive them to identify and complete energy efficiency projects and reduce their energy usage. Other aspects include education and training for customers and market professionals, energy efficiency marketing, and advancement of energy management, monitoring, and building control systems beyond standard industry practices. There are 160,000 business customers spanning the 43,700 square mile Ameren Illinois service territory.

- Through Q3, the Business Program has achieved 139,823 MWh or 76% of its electric PY2024 implementation plan savings goal of 184,046 MWh and 1,486,275 Therms or 72% of its gas PY2024 implementation plan savings goal of 2,075,987 Therms.



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BUSINESS STANDARD INITIATIVE

- 73 applications were received in Q3, with 49 of the applications within disadvantaged communities.
- 9 Building Operator Certification (BOC) classes were completed by customers during Q3, with program staff working with the Midwest Energy Efficiency Alliance (MEEA) to identify additional customers who are interested in completing their certifications this year and participating in the initiative.
- An electric incentive bonus was launched during Q3 to maximize savings and increase participation for new and existing pre-approved projects.

BUSINESS MIDSTREAM INITIATIVE: LIGHTING CHANNEL – 3RD PARTY

- Program staff continued efforts throughout Q3 to re-engage inactive distributors. Refresher training was provided to two distributors with one of the distributors re-enrolling during Q3.
- Planning occurred during Q3 to increase incentives for multiple measures in response to lower than forecasted participation. A marketing flyer surrounding the increases was developed to distribute shortly after the increase takes effect.

BUSINESS MIDSTREAM INITIATIVE: HVAC CHANNEL – 3RD PARTY

- New incentives for packaged terminal air conditioners (PTAC) and terminal heat pumps (PTHP) were launched during Q3, with an email notification provided to distributors. These measures were incorporated into this Channel to increase participation and expand the breadth of the Channel's offerings.
- Program staff met with a popular advisory group

during Q3 to discuss benefits, pain points and offerings within the Channel related to their dealers and contractors. Feedback was provided by the group to help program staff better serve the partners.

- Distributors were notified in Q3 that incentives for furnaces would no longer be available after mid-quarter. This was due to continued strong performance and gas budget limitations.
- Distributor roundtable meetings were planned during Q3 to discuss continuous process improvement, and any barriers faced during the program year.
- The Energy Star Heat Pump Water Heater (HPWH) Installer Finder received a new request to add a contractor because of the heat pump water heater installer training that occurred the previous quarter. This additional contractor will assist with increasing participation and sales in the Channel.
- 49 distributors have enrolled in direct deposit, PYTD with 10 distributors registered during Q3. Direct deposit is critical to this Channel as it allows faster payment times to the customers.

BUSINESS MIDSTREAM INITIATIVE: FOOD SERVICE CHANNEL

- Processes for submitting transactions were streamlined during Q3 to enable customers to be paid faster. This adjustment will be included in the next program year's participation agreements and is necessary as the Channel continues to expand its offerings.
- A bonus program was developed during Q3 to incentivize distributors with outstanding claims to submit them by mid-quarter.

SMALL BUSINESS INITIATIVE: DIRECT INSTALL (SBDI) CHANNEL

- During Q3, the Channel introduced incentive increases based on a thorough evaluation of cost coverage and past co-pay support. Outreach was also conducted with Program Allies at Ally roundtables to share this information and gather feedback on any other potential issues.
- Co-pay assistance for disadvantaged communities was introduced during Q3 in partnership with the Market Development Initiative (MDI). This assistance not only offers substantial savings and incentives but also plays a vital role in supporting small businesses and customers in underserved areas.
- Program staff implemented a focused and improved strategy to re-engage Program Allies by utilizing various engagement tactics and approaches tailored to their needs. Program Allies who had not completed a project this year were contacted during Q3 regarding their participation.

SMALL BUSINESS INITIATIVE: ENERGY PERFORMANCE CHANNEL

- Due to restrictions in the gas budget, Channel outreach and project development efforts were redirected toward all-electric customers for the remainder of the program year. This group included former participants identified as all-electric customers utilizing electric resistance heat, with the goal of maximizing savings and incentives. Program staff have forecasted at least 20 additional projects because of this effort.

BUSINESS CUSTOM INITIATIVE

- Program staff hosted the Compressed Air Challenge Fundamentals Course during Q3, with 16 industrial customers in attendance. This all-day training focused on compressed air systems energy optimization and was part of the continuing education effort to assist customers with identifying participation opportunities.
- 2 Process Energy Assessments were conducted at industrial customer

facilities, uncovering potential savings opportunities to bring future projects into the pipeline. This offering is instrumental for increasing participation within the Custom Initiative through the development of projects while the assessments are performed at the facility.

- Staffing Grants at multiple customer locations helped devote staff specifically to energy efficiency. The Custom Initiative because of these grants, was able to achieve an additional 600 MWh and 76,000 therms through Q3.

BUSINESS RETRO-COMMISSIONING INITIATIVE



- A large application was submitted by a major healthcare system customer during Q3, with additional opportunities being assessed at other customer sites.
- Engagement efforts with a new registered service provider (RSP) took place during Q3 to drive participation in the Initiative. To build on this enhanced engagement, program staff also held meetings with non-participating engineering firms to gather feedback on the Initiative and understand their specific needs.
- Innovative solutions, such as virtual commissioning and virtual strategic energy management, continued to increase the Initiative's momentum during Q3.

BUSINESS STREETLIGHTING INITIATIVE: MUNICIPAL-OWNED CHANNEL

- A community lighting project impacting 69 streetlights was underway during Q3. This project is being completed in a Disadvantaged Area Municipality, because of the energy efficiency team's outreach efforts.

BUSINESS STREETLIGHTING INITIATIVE: AMEREN-OWNED CHANNEL

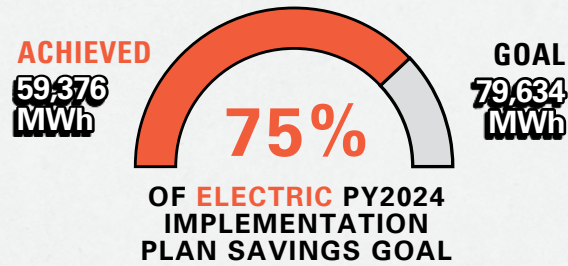
- Participation in this Channel saw an increase during Q3 with 3,128 streetlights upgraded for early replacements impacting 47 communities. This significant achievement brought the total number of upgraded early replacement streetlights to 4,034 in 86 communities, PYTD.



VOLTAGE OPTIMIZATION

Voltage Optimization (“VO”) is the use of automation on distribution voltage control devices (switched capacitor banks, voltage metering, voltage regulators and Load Tap Changers LTC’s) to reduce the reactive power (VAR) flows on a circuit and lower the voltage within regulatory limits to reduce end-use customer energy consumption and utility distribution system losses. As part of its portfolio, Ameren Illinois plans to deploy VO to an estimated 1,047 cost-effective circuits from 2019-2025 while using its best efforts to identify and prioritize circuits with low-income customers.

- Through Q3, Voltage Optimization has achieved 59,376 MWh or 75% of its electric PY2024 implementation plan savings goal of 79,634 MWh.





Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

MARKET DEVELOPMENT INITIATIVE

As a part of the overall goal, Ameren Illinois uses approved Market Development Initiative (MDI) funding to provide access to customers that have not yet participated, increase the number of local and diverse candidates filling energy efficiency jobs, and expand existing or launch new local and diverse businesses in the energy efficiency field.

DIVERSE VENDOR PROCUREMENT (DVP) CHANNEL

As part of MDI, the Diverse Vendor Procurement (DVP) Channel focuses on identifying and preparing diverse owned businesses for utility procurement opportunities.

- Program staff identified 187 new diverse-owned fuel stations within the Ameren Illinois service territory during Q3. This comprehensive list addresses a significant need expressed by Portfolio Implementation Partners and will have a positive impact on the diverse businesses that are utilized.
- In Q3, program staff engaged 50 attendees at the Illinois State Black Chamber of Commerce Annual Procurement Conference with an invitation for diverse business enterprises to partner with the program. These new partnerships will expand opportunities for diverse businesses and help Ameren Illinois build a stronger base of diverse suppliers throughout the service territory.

COMMUNITY-BASED ORGANIZATION (CBO) MANAGEMENT CHANNEL

As part of MDI, the Community Based Organization (CBO) Management Channel focuses on cultivating partnerships with organizations within the Ameren Illinois service territory to perform outreach through referrals and provide energy efficiency measures to Ameren Illinois customers.

The Channel has engaged **82,437** customers and...

distributed **3,000** community kits, PYTD.

- During Q3, one new CBO partner was enrolled, increasing the total number of CBO partners to 27, PYTD. Each new partner brings numerous opportunities for outreach, community engagement, and support for the Portfolio. This latest partner will specifically focus on the Healthier Homes Channel.
- CBO partners delivered 664 customer referrals to the Income Qualified Single-Family Channel through Q3, surpassing the forecasted estimates for the third quarter. This achievement brought the channel to 95% of the 700-referral target with 172 of those referrals successfully converted into projects. Referrals and conversions play a crucial role in customer participation and highlight the effectiveness of the CBO partner network in facilitating MDI integration within the Portfolio.

WORKFORCE DEVELOPMENT (WFD) CHANNEL

As part of MDI, the Workforce Development (WFD) Channel focuses on identifying and preparing energy efficiency (EE) jobseekers for open EE positions as well as connecting qualified jobseekers with employers. This Channel also includes internships, scholarships, and Energy Efficiency jobs board management.

- Program staff collaborated with a Community Action Agency (CAA) to co-host a training and hiring event in the Ameren Illinois service territory during Q3. This event offered returning citizens and diverse job seekers the chance to receive training in Building Science Principles (BSP), as well as participate in interviews for available positions on the agency's weatherization team.
- A total of 133 job seekers were served by the end of Q3, with 88 individuals placed in hands-on training programs. There was also a continued focus on connecting job seekers with classroom training opportunities on topics such as financial literacy and building science principles.
- The Summer Internship Program concluded during Q3 with a wrap-up event in Jacksonville, IL. Out of the 12 interns that participated in the program, a total of nine interns were hired by their employers.

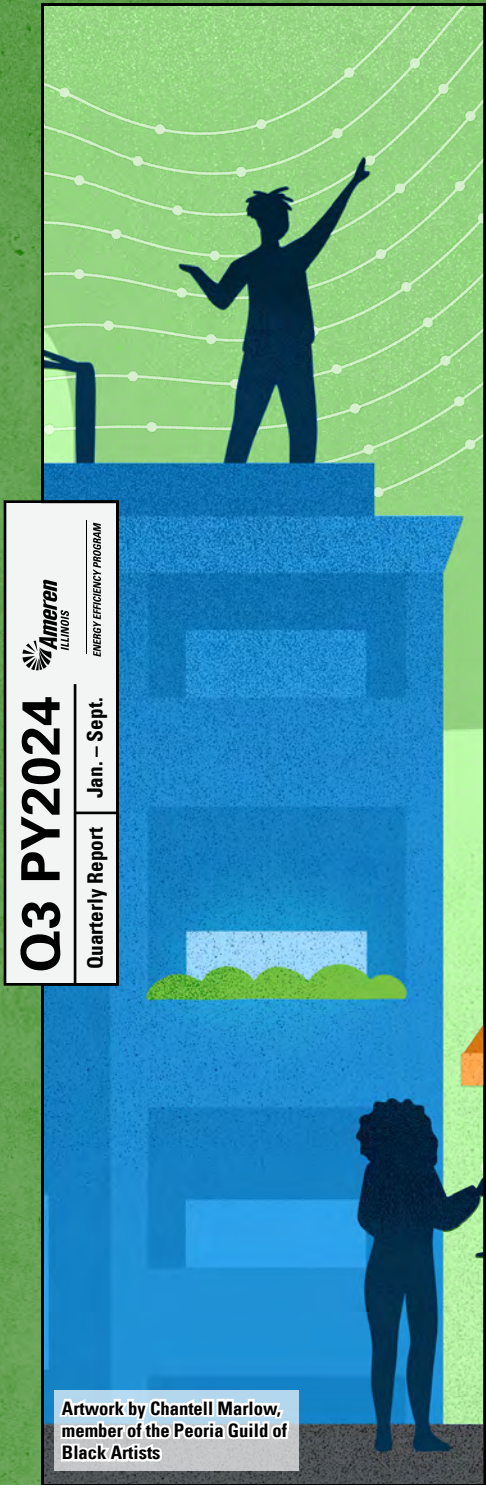
MARKET DEVELOPMENT ACTION PLAN

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

- MDI program staff recorded and tracked 129 total MDAP commitments made by the prime implementer

of the Ameren Illinois Energy Efficiency Program, to infuse equity across all Initiatives and Channels of the Program. 47 commitments were completed by the end of Q3. Examples of commitments completed during Q3 include the following:

- ▶ The IQ Initiative Joint Utility Offering utilized partnerships with new CBOs to connect customers in underserved communities with energy efficiency offerings.
- ▶ Business Marketing demonstrated Market Development integration through the promotion of MDI copay assistance in monthly newsletters sent to Business customers.
- MDI program staff recorded and tracked 99 total MDAP commitments made by Implementation Partners intended to further the MDI goals. 28 commitments were completed by the end of Q3. Examples of the commitments completed during Q3 include the following.
 - ▶ The Summer Internship Program wrap-up event was hosted at a diverse owned venue in a disadvantaged community. The venue and location were selected to support the MDI goal of supporting new and growing diverse owned businesses.



OTHER PORTFOLIO ELEMENTS

MARKET TRANSFORMATION

Market transformation is the strategic process of intervening in a market to create lasting change in market behavior by removing identified barriers or exploiting opportunities to accelerate the adoption of cost-effective energy efficiency as a matter of standard practice. The intent is to transform markets, meaning changes in the market structure or function, so that efficient products, services, and practices are adopted within specific target markets on an accelerated, sustained, and permanent basis.

- Luminaire Level Lighting Controls (LLLC):
 - Ameren selected a vendor to provide NXT Level online training for EE Program Staff and market actors (e.g. distributors, contractors, engineers, architects, facility managers) in the territory.
 - Training was completed for field staff using NXT Level trainers and local lighting equipment sales representatives.
 - Five in person training and education events were scheduled for customers and Program Allies which will include LLLC commissioning with hands-on demonstration boards and NXT Level course content.
- High Performance Windows (HPW):
 - Program staff incorporated feedback from the evaluator into the final logic model, market progress indicators, and natural market baseline. Feedback was presented to the Stakeholder Advisory Group (SAG) with no comments received.

LOW INCOME ENERGY EFFICIENCY ACCOUNTABILITY COMMITTEE (LIEEAC)

- The Leadership Team participated in several meetings focused on the 2026-2029 Ameren Illinois plan including an all-day “in person” planning session held September 13th. The team also participated in a joint meeting where Karen Lusson, National Consumer Law Center, presented Key Policy Issues facing IQ customers.
- The following Subcommittee Activity occurred during the quarter:
 - **AC/High Heat Pilot:** Further explored elements of a high heat pilot
 - **Diverse Contractors:** Reviewed takeaways from completed interviews with Diverse Contractors that will result in a list of core recommendations
 - **Returning Citizens:** Identified takeaways from completed interviews with Organizations hiring Returning Citizens and completed a visit to Danville Correction Center to inform the final report

CUSTOMER COORDINATION EFFORTS

- The Ameren Customer Experience team received information regarding energy efficiency during their annual training on strategies to assist customers in managing their winter utility bills.
- Energy Efficiency partnered with the Ameren Credit and Collection department to promote energy efficiency programs to customers residing in the top 20 zip codes characterized by high bills.

Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

MARKETING, EDUCATION AND OUTREACH

OVERALL PORTFOLIO

- A survey was distributed to all Program Allies during Q3 requesting self-diverse identification and their primary and secondary specialties. The feedback received from this survey will be utilized to perform targeted outreach to these Program Allies for their services and will also identify the trades that the program can help expand with training and education.

RESIDENTIAL PROGRAM

- Bill inserts were distributed each month of Q3 to promote rebates and discounts and energy-efficient products, smart thermostat offerings, and provide summer energy efficiency tips and Program offerings for customers.
- Print mail campaigns launched in Q3 focusing on the Single-Family Income Qualified Channel, Home Efficiency Channel and Electrification Channel, with customized messaging to increase participation.

MARKET DEVELOPMENT INITIATIVE

- Program staff developed the Community-Based Organizations (CBO) Partner Google Blitz Flyer to help promote smart thermostats. This flyer will provide information to customers and includes a QR code that takes them directly to the Online Marketplace.

BUSINESS PROGRAM

- Monthly bill inserts and messaging for business customers promoted Business Symposium registration and Google Nest Thermostats during Q3. These campaigns were executed to assist in increasing the participation related to these efforts. The segmented Business Insider monthly newsletter, one postcard and additional targeted emails helped drive a 39.8% increase in customer registrants for Business Symposium compared to PY2023.
- Increased marketing collateral and promotion of MDI co-pay assistance was deployed during Q3 and sent to all Business customers.



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ENERGY EFFICIENCY PROGRAM

APPENDIX A: PROGRAM INITIATIVE AND CHANNEL OVERVIEWS

RESIDENTIAL

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

MARKET RATE SINGLE FAMILY INITIATIVE: The Market Rate Single-Family Initiative includes a home weatherization channel for single family customers that do not qualify for the Income Qualified Initiative. This channel is promoted under the name Home Efficiency. The Market Rate Single Family Initiative also includes a Midstream HVAC channel to promote high efficiency equipment.

MIDSTREAM HVAC CHANNEL – 3RD PARTY: Midstream HVAC collaborates with manufacturers, wholesalers, and distributors, leveraging their relationships and existing communication channels with installation contractors to distribute information/incentives to increase the number of high- efficiency systems being sold and installed.

HOME EFFICIENCY CHANNEL: Home Efficiency partners with Building Envelope Program Ally contractors to offer incentives to homeowners for multiple insulation and air sealing measures, covering a portion of the cost for projects completed by a Program Ally.

MARKET RATE MULTIFAMILY INITIATIVE: The Market Rate Multifamily Initiative achieves electric and natural gas energy savings in multifamily buildings that do not qualify under the criteria for the Income Qualified Initiative. Property owners, managers, and tenants can still qualify for similar services, including the direct installation of free low-cost energy saving measures in individual living units and common areas. The direct installation service is provided at no cost to eligible property owners and tenants, with educational materials provided in each unit that explain the energy and money saving benefits associated with installed products and other Ameren Illinois Initiatives that may be of benefit. Additional measures beyond in unit incentives are also identified during the assessment of the property. Through all multifamily channels, a one stop shop approach is offered to multifamily properties managers/in unit tenants. A comprehensive audit is provided to customers to identify eligible measures inclusive of all Residential, Small Business, and Commercial offerings.

PUBLIC HOUSING INITIATIVE: The Public Housing Initiative targets public sector housing owned by government entities including federal, state, and municipal housing authorities. Multifamily living units and properties of three or more units are eligible for incentives. Similar to the Income Qualified Multifamily Channel, customers receive a comprehensive audit to identify the eligible weatherization services to be provided. Low-cost energy saving products are also installed in conjunction with the audit at no cost.

DIRECT DISTRIBUTION OF EFFICIENT PRODUCTS INITIATIVE: The Direct Distribution Initiative targets students and schools located within zip codes with high percentages of low- and moderate-income households. Teachers receive energy education curriculum and training by a qualified professional. Students are provided with a “take-home” kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas, and water consumption.

SCHOOL KITS CHANNEL – 3RD PARTY: The School Kits Channel primarily targets students in 5th grade, providing energy efficiency and conservation awareness to families in the Ameren Illinois service territory. Participating classes receive an energy education presentation and measures directly installed by qualified professionals. Students are provided with a ‘take-home’ kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas and water consumption.

JOINT-UTILITY SCHOOL KITS CHANNEL: The Joint-Utility School Kits Channel primarily targets students in 5th grade, providing energy efficiency and conservation awareness to families in the Ameren Illinois electric service territory and Nicor Gas service territory. Participating classes receive an energy education presentation and measures directly installed by qualified professionals. Students are provided with a ‘take-home’ kit that raises awareness about how individual actions and low-cost measures can provide reductions in electricity, natural gas and water consumption.

HIGH SCHOOL INNOVATION CHANNEL – 3RD PARTY: The High School Innovation Channel primarily targets students in grades 9 through 12. In conjunction with providing energy efficiency and conservation awareness through energy efficiency kits, the Channel offers an afterschool innovation camp designed to support long-term development of energy workforce professionals.

INCOME QUALIFIED INITIATIVE: The Income Qualified (IQ) Initiative helps low- and moderate-income customers manage their energy consumption, create a comfortable home, and can address health and safety concerns through multiple offerings. Ameren Illinois will also target electrification efforts towards low- and moderate-income homes and multifamily buildings using propane as their heating and/or water heating source. There are nine channels in the Income Qualified (IQ) Initiative.

SINGLE FAMILY CHANNEL: The IQ-Single Family Channel provides comprehensive home efficiency upgrades and weatherization to single family homes.

JOINT UTILITY OFFERING: The Jointly delivered Utility Offering coordinates with Nicor Gas to deliver single family and multifamily energy efficiency retrofits when customers are both Ameren Illinois Electric and Nicor Gas customers, utilizing the successful Community Based Organization customer outreach delivery model. A single vendor implements the channel for both utilities, providing the customer a single point of contact. The point of contact assists customers when filling out the minimum number of applications necessary to meet program requirements for each utility.

ELECTRIFICATION CHANNEL: The Electrification Channel provides income qualified customers whole home projects that feature the displacement of propane-fired appliances and mechanicals in favor of high-efficiency electric appliances and mechanicals.

ACCESSIBILITY OFFERING: The Accessibility Offering provides smart home technology and efficient direct install measures that contribute to energy savings and a higher level of usability for the homeowner.

COMMUNITY ENERGY AMBASSADOR PILOT: The Community Energy Ambassador Pilot compensates community members to act as community energy savings ambassadors who connect residents with the EE Program, starting with the Income Qualified Single-Family Channel.

COMMUNITY ACTION AGENCY CHANNEL: The IQ-Community Action Agency (CAA) Channel partners with CAA’s located in Ameren Illinois’ service territory providing comprehensive home efficiency upgrades and weatherization to low-income single-family homes.

MULTIFAMILY CHANNEL: The IQ- Multifamily Channel targets low-income, multifamily properties and uses a diverse vendor in its outreach to facility managers.

SMART SAVERS CHANNEL – 3RD PARTY: The IQ-Smart Savers Channel offers an entry point into energy efficiency by providing low-income residential customers the ability to acquire a smart thermostat at no cost.

COMMUNITY KITS CHANNEL – 3RD PARTY: The Community Kits Channel primarily distributes kits through community-based partners and other outreach efforts.

MOBILE HOMES WEATHERIZATION AND AIR SEALING CHANNEL – 3RD PARTY: The Mobile Homes Weatherization and Air Sealing Channel targets energy-efficient building envelope and heating system improvements in the unique residential dwelling type of mobile homes for low-income Ameren Illinois Electric and Gas customers.

HEALTHIER HOMES CHANNEL – 3RD PARTY: The Healthier Homes Channel assists low-to-moderate income customers by completing comprehensive home health assessments during a standard energy assessment. During the assessment, key variables are examined to determine overall air quality and identify any trouble spots.

BUSINESS

STANDARD INITIATIVE: The Standard Initiative provides incentives to customers that purchase energy efficient products. Measures included within this initiative will have predetermined savings values consistent with the Illinois Statewide Technical Reference Manual or industry-accepted savings calculations and have fixed incentive levels. Applications are filled out and delivered to program staff via participating Program Allies (e.g., contractors and trade allies) and/or directly by participating customers. Applications can be submitted a variety of ways, including the program website at **AmerenIllinoisSavings.com**. Various measures may require a simple calculation to identify measure savings, but the measure level incentives will remain fixed regardless of individual project characteristics.

MIDSTREAM INITIATIVE: The Midstream Initiative provides simple access to incentives for business customers via a network of distributors supplying equipment to the trade allies. The Initiative also recruits distributors and wholesalers of lighting and incentivized HVAC and commercial kitchen equipment to increase the adoption of high efficiency measures such as HVAC equipment, heat pump water heaters, and new electric and gas kitchen appliances.

LIGHTING CHANNEL – 3RD PARTY: The Lighting Channel provides incentives for energy-efficient lighting to customers at the point of sale. Ameren Illinois customers can visit the **AmerenIllinoisSavings.com** website to find a list of enrolled distributors offering incentives on lighting products such as linear TLED, high lumen screw-in lights and other common commercial lighting fixtures.

HVAC CHANNEL – 3RD PARTY: The HVAC Channel provides incentives for energy-efficient HVAC equipment to customers at the point of sale (POS). Ameren Illinois customers can visit the **AmerenIllinoisSavings.com** website to find a list of enrolled distributors offering incentives on HVAC equipment such as central air conditioners, air source heat pumps, smart thermostats, heat pump water heaters and notched V-belts.

FOOD SERVICE CHANNEL: The Food Service Channel provides incentives for energy-efficient HVAC equipment to customers at the POS. Ameren Illinois customers can visit the **AmerenIllinoisSavings.com** website to find a list of enrolled distributors offering incentives on HVAC equipment such as central air conditioners, air source heat pumps, smart thermostats, heat pump water heaters and notched V-belts.

SMALL BUSINESS INITIATIVE: The Small Business Initiative incentivizes customers to install energy efficient products and perform energy savings retrofits. Small Business Direct Install (SBDI) and Small Business Energy Performance measures are marketed and installed by a group of Program Allies experienced and trained to assist small business, non-profits, schools, and local government in becoming more energy efficient. Customer eligibility is primarily based upon delivery service rates DS-2 and DS-3A (400 kW demand or less) for electric and GDS-2 for natural gas. In all Small Business channels, measures are heavily incentivized to increase participation and ensure a high degree of trade ally interest and focus in serving these customers.

DIRECT INSTALL CHANNEL: The Direct Install Channel incentivizes small non-residential customers that receive lighting and refrigeration upgrades through this Channel.

ENERGY PERFORMANCE CHANNEL: The Energy Performance Channel incentivizes small non-residential customers that receive HVAC and weatherization upgrades through this Channel.

CUSTOM INITIATIVE: The Custom Initiative applies to measures in compressed air, lighting, HVAC, refrigeration, motors/drives, waste/water treatment, and process upgrades that do not fall into the Standard or Streetlighting Initiatives. Complex and large-scale new construction and building renovation projects also qualify under the Custom Initiative. These projects normally are complex and unique, requiring separate incentive applications and measurement and verification plans in place to calculate estimated energy savings.

RETRO-COMMISSIONING INITIATIVE: The Retro-Commissioning Initiative identifies and implements no cost/low cost (zero- to one-year payback) energy efficiency measures to optimize the operation of existing systems for building automation, compressed air, industrial ventilation, industrial refrigeration, and healthcare-related systems. The plan developed for each project provides a roadmap of capital projects that may be implemented and incentivized under the Custom and Standard Initiatives. The energy efficiency measures in this Initiative are generally beyond what is offered by the Standard Initiative. Healthcare and compressed air studies also work together with recommending Standard incentives where applicable.

STREETLIGHTING INITIATIVE: For the Street Lighting Initiative, the Municipal-Owned Channel incentivizes municipal customers to upgrade their streetlight fixtures to LED technology. Ameren-Owned streetlights are incentivized via the Ameren-Owned Channel and include both early replacement and replace on failure retrofits.

MUNICIPAL-OWNED CHANNEL: The Municipal-Owned Channel incentivizes municipal customers to upgrade their streetlight fixtures to LED technology.

AMEREN-OWNED CHANNEL: The Ameren-Owned Streetlights are incentivized and include both early replacement and replace on failure retrofits.

APPENDIX B: BUDGET SHIFTS

ELECTRIC BUDGET

Program	Initiative	Implementation Plan 2024 Rev00	Implementation Plan 2024 Rev01	Variance
Residential	Market Rate Single Family	\$4,470,454	\$4,342,796	(\$127,658)
Residential	Market Rate Multifamily	\$624,899	\$655,555	\$30,656
Residential	Direct Distribution Efficient Products	\$957,763	\$1,034,863	\$77,100
Residential	Retail Products	\$5,266,018	\$4,811,991	(\$454,027)
Residential	Residential Market Transformation	\$54,664	\$54,664	\$0
Residential	Income Qualified	\$46,425,240	\$45,961,656	(\$463,585)
Residential	Public Housing	\$1,690,873	\$1,983,963	\$293,089
Residential	Subtotal	\$59,489,911	\$58,845,487	(\$644,424)
Business	Standard	\$11,695,972	\$12,594,453	\$898,481
Business	Small Business	\$17,568,149	\$16,139,588	(\$1,428,561)
Business	Midstream	\$5,114,889	\$4,846,079	(\$268,810)
Business	Custom	\$10,015,406	\$11,519,311	\$1,503,905
Business	Retro-Commissioning	\$1,442,328	\$1,467,395	\$25,067
Business	Streetlighting	\$1,337,613	\$1,330,761	(\$6,853)
Business	Business Market Transformation	\$518,207	\$291,013	(\$227,194)
Business	Subtotal	\$47,692,564	\$48,188,599	\$496,035
Below the Line	Portfolio Administration	\$7,444,092	\$7,491,868	\$47,776
Below the Line	Evaluation	\$3,189,673	\$3,189,673	\$0
Below the Line	Marketing	\$3,337,601	\$3,438,214	\$100,614
Below the Line	MDI	\$3,561,030	\$3,561,030	\$0
Below the Line	Subtotal	\$17,532,396	\$17,680,785	\$148,390
Portfolio	Total	\$124,714,871	\$124,714,871	\$0

APPENDIX B: BUDGET SHIFTS

ELECTRIC SAVINGS (MWh)

Program	Initiative	Implementation Plan 2024 Rev00	Implementation Plan 2024 Rev01	Variance
Residential	Market Rate Single Family	7,456	7,592	136
Residential	Market Rate Multifamily	1,156	1,867	711
Residential	Direct Distribution Efficient Products	6,022	5,754	(268)
Residential	Retail Products	19,169	19,552	383
Residential	Residential Market Transformation	0	0	0
Residential	Income Qualified	110,867	111,841	974
Residential	Public Housing	1,569	2,078	509
Residential	Subtotal	146,239	148,684	2,445
Business	Standard	42,785	49,712	6,927
Business	Small Business	48,525	42,494	(6,031)
Business	Midstream	25,762	25,258	(504)
Business	Custom	32,003	37,067	5,064
Business	Retro-Commissioning	6,039	6,039	0
Business	Streetlighting	14,130	14,130	0
Business	Business Market Transformation	0	0	0
Business	Subtotal	169,244	174,700	5,456
Below the Line	Gas Conversions (Residential)	27,626	7,312	(20,314)
Below the Line	Gas Conversions (Business)	14,802	35,116	20,314
Below the Line	Voltage Optimization	79,634	79,634	0
Below the Line	Subtotal	122,062	122,062	0
Portfolio	Total	437,545	445,446	7,901

APPENDIX B: BUDGET SHIFTS

GAS BUDGET

Program	Initiative	Implementation Plan 2024 Rev00	Implementation Plan 2024 Rev01	Variance
Residential	Market Rate Single Family	\$653,577	\$960,121	\$306,543
Residential	Market Rate Multifamily	\$58,461	\$46,163	(\$12,298)
Residential	Direct Distribution Efficient Products	\$161,799	\$178,284	\$16,485
Residential	Retail Products	\$1,140,505	\$2,536,718	\$1,396,213
Residential	Residential Market Transformation	\$7,454	\$7,454	\$0
Residential	Income Qualified	\$6,622,355	\$6,808,716	\$186,361
Residential	Public Housing	\$232,260	\$161,085	(\$71,175)
Residential	Subtotal	\$8,876,411	\$10,698,541	\$1,822,130
Business	Standard	\$2,702,468	\$2,821,874	\$119,407
Business	Small Business	\$727,523	\$618,360	(\$109,163)
Business	Midstream	\$175,719	\$254,492	\$78,773
Business	Custom	\$2,083,606	\$1,534,391	(\$549,216)
Business	Retro-Commissioning	\$166,209	\$78,933	(\$87,277)
Business	Business Market Transformation	\$70,665	\$41,132	(\$29,533)
Business	Subtotal	\$5,926,190	\$5,349,182	(\$577,008)
Below the Line	Portfolio Administration	\$868,341	\$897,951	\$29,610
Below the Line	Evaluation	\$498,800	\$498,800	\$0
Below the Line	Marketing	\$455,127	\$468,847	\$13,720
Below the Line	MDI	\$0	\$0	\$0
Below the Line	Subtotal	\$1,822,268	\$1,865,598	\$43,330
Portfolio	Total	\$16,624,870	\$17,913,322	\$1,288,452

APPENDIX B: BUDGET SHIFTS

GAS SAVINGS (THERMS)

Program	Initiative	Implementation Plan 2024 Rev00	Implementation Plan 2024 Rev01	Variance
Residential	Market Rate Single Family	178,151	318,007	139,856
Residential	Market Rate Multifamily	26,828	15,519	(11,309)
Residential	Direct Distribution Efficient Products	122,950	135,350	12,400
Residential	Retail Products	453,602	829,528	375,926
Residential	Residential Market Transformation	0	0	0
Residential	Income Qualified	631,075	793,593	162,518
Residential	Public Housing	48,332	27,483	(20,849)
Residential	Subtotal	1,460,938	2,119,480	658,542
Business	Standard	845,484	1,050,123	204,639
Business	Small Business	90,361	70,367	(19,994)
Business	Midstream	47,989	99,868	51,879
Business	Custom	1,037,566	793,093	(244,473)
Business	Retro-Commissioning	54,587	20,605	(33,982)
Business	Business Market Transformation	0	0	0
Business	Subtotal	2,075,987	2,034,056	(41,931)
Below the Line	Breakthrough Equipment & Devices	0	0	0
Below the Line	MDI	0	0	0
Below the Line	Subtotal	0	0	0
Portfolio	Total	3,536,925	4,153,536	616,611

APPENDIX C: NEW OR DISCONTINUED MEASURES

Residential Midstream Gas Furnace measure was discontinued.

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ENERGY EFFICIENCY PROGRAM

APPENDIX D: MULTIFAMILY REPORTING

a. Percent of buildings/projects (and number of apartments within those buildings) served YTD that received whole building assessments.



b. Percent of buildings/projects and apartments served YTD that received only Direct Install measures (either in-unit or common area).

Projects	Buildings	Units
88.3%	94.3%	94.7%

c. Percent of buildings/projects and apartments YTD that only received in-unit (Direct Install) measures.

Projects	Buildings	Units
68.0%	30.3%	48.9%

d. Percent of buildings/project and apartments YTD that received only common-area measures.

Projects	Buildings	Units
20.3%	64.0%	45.8%

IQ - MULTIFAMILY MEASURE TYPES

End Use	Measure	Measure Type
Building Shell	Air Sealing	Major
Building Shell	Ceiling/Attic Insulation	Major
Consumer Electronics	Advanced Power Strip	Direct Install
HVAC	Advanced Thermostat	Direct Install
HVAC	Air Source Heat Pump	Major
HVAC	Duct Insulation and Sealing	Major
HVAC	Ductless Heat Pump	Major
Lighting	Commercial LED Exit Sign	Direct Install
Lighting	LED Specialty Lamp, Candelabra Base	Direct Install
Lighting	2 LED Specialty Lamp, Directional	Direct Install
Lighting	LED Specialty Lamp, Globe	Direct Install
Miscellaneous	Health and Safety	Direct Install
Water Heating	Domestic Hot Water Pipe Insulation	Direct Install
Water Heating	Low-Flow Faucet Aerator	Direct Install
Water Heating	Low-Flow Showerhead	Direct Install

APPENDIX D: MULTIFAMILY REPORTING

(A) Number of IQ MF buildings in which efficiency measures were installed and number of apartments in those treated buildings, by zip code;

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units	Disadvantaged Community	Incentive Total Spend
60936	6	9	74	Yes	\$181,780.04
60938	1	6	12	No	\$90,000.00
60942	6	19	124	Yes	\$241,832.97
60952	1	1	6	No	\$137.62
60957	1	1	24	Yes	\$180,000.00
60970	2	21	42	Yes	\$315,000.00
61350	2	8	48	No	\$621.32
61462	1	8	32	No	\$1,367.83
61491	1	4	16	No	\$590.32
61517	1	1	3	No	\$49.13
61523	2	4	52	No	\$773.91
61525	1	2	20	No	\$3,458.04
61554	3	5	42	No	\$1,173.26
61571	6	7	41	No	\$2,881.26
61602	2	2	168	Yes	\$4,161.74
61603	3	5	31	Yes	\$2,062.80
61604	5	8	102	No	\$1,827.56
61605	8	64	918	Yes	\$10,246.79
61607	3	3	17	No	\$1,030.36
61611	6	11	55	No	\$1,968.66
61614	1	8	88	No	\$3,154.79
61615	1	1	12	No	\$1,775.67
61616	1	2	24	No	\$1,063.68
61756	3	11	60	No	\$150,546.22
61761	1	2	20	No	\$3,083.11
61801	4	4	33	Yes	\$12,463.97
61802	2	3	28	No	\$1,874.94
61820	9	58	699	Yes	\$44,573.49
61821	1	4	40	No	\$2,319.84
61832	4	12	364	Yes	\$13,809.71
61920	8	25	124	Yes	\$4,648.73
61938	5	5	20	No	\$2,671.68
61944	1	6	24	No	\$566.18
62024	1	1	9	Yes	\$485.26
62025	4	35	390	No	\$24,088.28

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units	Disadvantaged Community	Incentive Total Spend
62040	6	28	174	Yes	\$8,711.35
62049	2	12	48	No	\$1,018.83
62060	1	1	3	Yes	\$661.28
62207	2	68	292	Yes	\$20,020.76
62208	2	7	41	No	\$2,917.28
62220	6	8	80	No	\$3,071.73
62221	4	12	115	No	\$2,387.96
62223	7	22	140	No	\$657,902.67
62225	3	868	1908	No	\$2,450.00
62226	11	26	241	Yes	\$133,682.07
62234	1	1	4	No	\$605.51
62246	2	10	84	Yes	\$7,210.32
62274	2	2	90	No	\$1,133.99
62294	2	6	32	No	\$532.85
62301	7	22	190	No	\$121,655.78
62305	3	20	184	No	\$240,872.02
62636	1	4	16	Yes	\$573.99
62401	10	49	412	No	\$17,313.94
62471	2	10	84	Yes	\$4,097.34
62501	3	7	36	No	\$90,347.06
62522	1	1	54	Yes	\$39,874.85
62526	8	32	629	No	\$436,625.06
62550	4	17	64	No	\$241,013.05
62557	3	15	75	No	\$1,436.13
62568	2	4	24	No	\$2,326.28
62618	1	3	12	No	\$397.21
62644	2	8	32	No	\$472.12
62656	4	9	64	No	\$4,030.36
62664	1	1	6	No	\$162.16
62665	1	12	28	No	\$210,000.00
62668	1	6	12	No	\$90,000.00
62864	1	1	4	No	\$77.48
62901	6	67	753	Yes	\$17,220.40
62903	1	1	49	No	\$936.60
62966	2	2	15	No	\$600.72
Total	222	1728	9726		\$3,652,428.28

APPENDIX D: MULTIFAMILY REPORTING

(B) Number of IQ MF buildings in which major measures (building envelop and/or HVAC mechanicals) were installed and number of apartments in those treated buildings, by zip code;

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units	Disadvantaged Community	Incentive Total Spend
60936	1	1	24	Yes	\$180,000.00
60938	1	6	12	No	\$90,000.00
60942	1	2	32	Yes	\$240,000.00
60957	1	1	24	Yes	\$180,000.00
60970	2	21	42	Yes	\$315,000.00
61756	1	3	20	No	\$150,000.00
61801	1	1	12	Yes	\$11,504.00
62223	5	16	92	No	\$654,000.00
62226	1	2	16	Yes	\$120,000.00
62301	1	6	18	No	\$117,000.00
62305	1	4	32	No	\$240,000.00
62501	1	3	12	No	\$90,000.00
62522	1	1	54	Yes	\$39,874.85
62526	4	4	57	No	\$427,500.00
62550	2	10	32	No	\$240,000.00
62665	1	12	28	No	\$210,000.00
62668	1	6	12	No	\$90,000.00
Total	26	99	519		\$3,394,878.85

APPENDIX E: LIEEAC BUDGET REPORT

	Facilitation Labor	Unallocated (1)	Leadership Team Stipends or Grants	Committee Participation Stipends	Education and Outreach Grants	Total	
Contract Total	\$168,502.87	\$145,064.25	\$26,250.00	\$27,000.00	\$40,000.00	\$406,817.12	
Year to Date	\$168,502.87	\$36,227.12	\$11,012.50	\$5,850.00	\$ -	\$221,592.49	Comments
January	\$27,743.00	\$ -	\$ -	\$ -	\$ -	\$27,743.00	
February	\$14,164.50	\$ -	\$525.00	\$ -	\$ -	\$14,689.50	
March	\$25,939.50	\$ -	\$787.50	\$750.00	\$ -	\$27,477.00	
April	\$29,069.00	\$ -	\$2,537.50	\$1,162.50	\$ -	\$32,769.00	
May	\$23,536.84	\$ -	\$350.00	\$225.00	\$ -	\$24,111.84	
June	\$15,607.78	\$ -	\$875.00	\$825.00	\$ -	\$17,307.78	
July	\$19,265.00	\$ -	\$862.50	\$1,312.50	\$ -	\$21,440.00	
August	\$13,177.25	\$5,011.25	\$525.00	\$975.00	\$ -	\$19,688.50	
September	\$ -	\$31,215.87	\$4,550.00	\$600.00	\$ -	\$36,365.87	
October						\$ -	
November						\$ -	
December						\$ -	

(1) Note that the Contract Total for Unallocated increased by \$110,064.60 per the October 2nd Rollover Amendment 02. The new Unallocated Contract Total is \$145,064.25.

APPENDIX F: INCOME QUALIFIED LIGHTING STORE LIST

ADDITIONS TO FULL LIST PREVIOUSLY PROVIDED

Location Type	Store Name	Address	City	ZIP
DOLLAR	Dollar Tree	750 West Walnut	Jacksonville	62650