



**Energy Efficiency**  
PROGRAM

# Q3 **PY2025** QUARTERLY REPORT

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

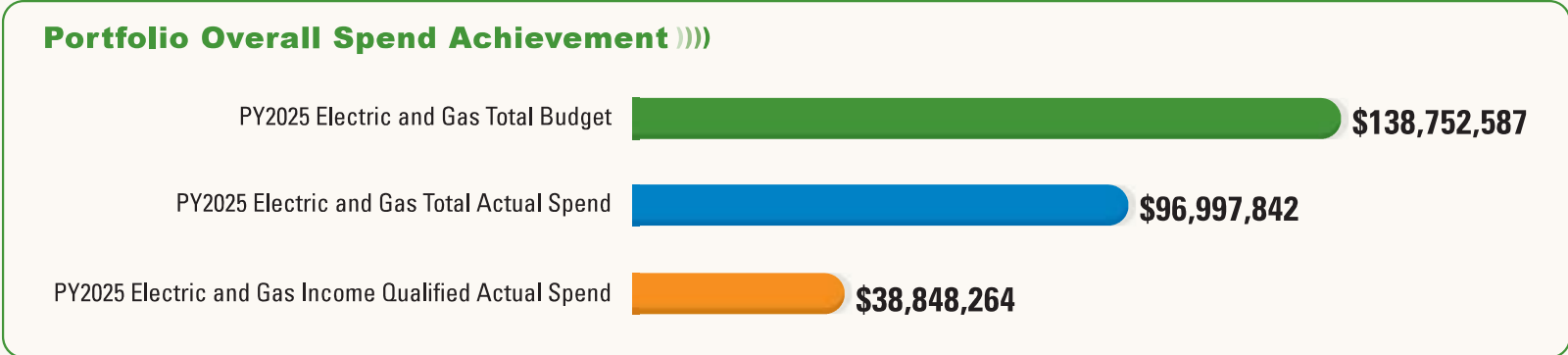
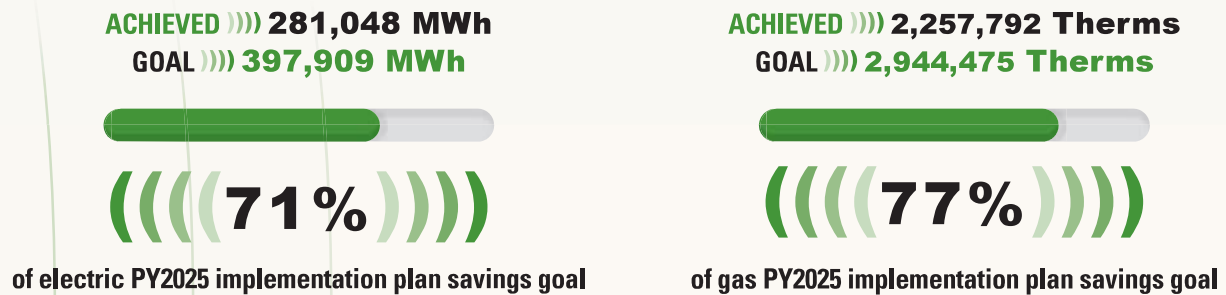
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# PORTFOLIO SUMMARY

Ameren Illinois Company (AIC) d/b/a Ameren Illinois ("Ameren Illinois") provides this quarterly report 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 281,048 MWh or 71% of its electric PY2025 implementation plan savings goal of 397,909 MWh and 2,257,792 Therms or 77% of its gas PY2025 implementation plan savings goal of 2,944,475 Therms.

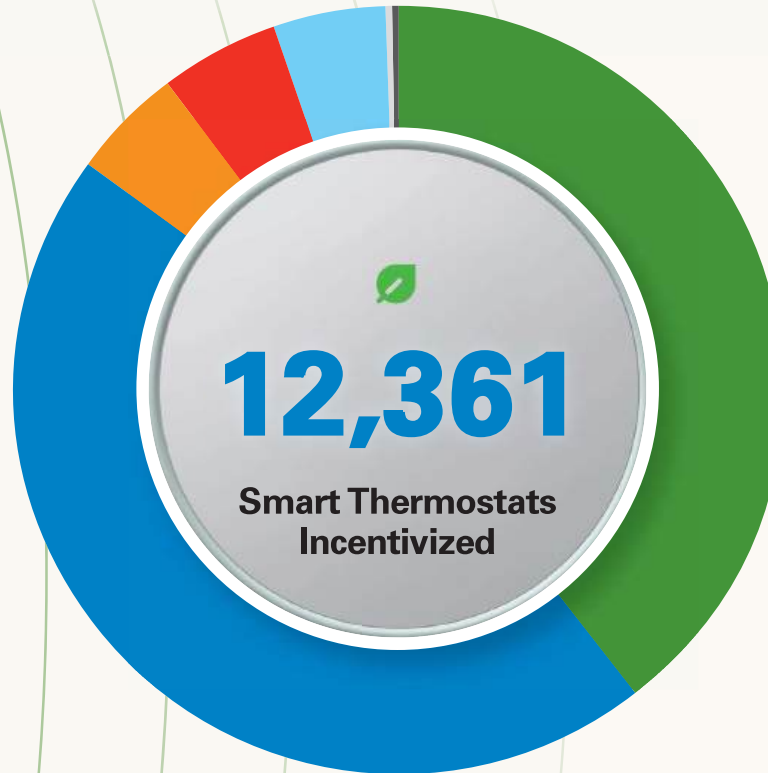


## US Trade Tariffs

- As specified in Section IV.A.5. of the Ameren Illinois 2026 Plan stipulated agreement, this update is provided based on available information at this time.
- Since the beginning of 2025, uncertainty around US tariffs has led to notable price increases in energy efficient technologies, with direct cost hikes ranging from 0% to 70% and an average increase of 14%<sup>1</sup>. This has prompted some projects to be fast-tracked to avoid further price rises, while other efforts have been delayed due to equipment shipping hold-ups. The unpredictable pricing climate has caused businesses to postpone non-essential projects, and the larger customers, facing market struggles, have reduced capital project investments.

<sup>1</sup> Information collected from 9 vendors/manufacturers within the Ameren Illinois program on a total of 225 models.

# SMART THERMOSTATS INCENTIVIZED

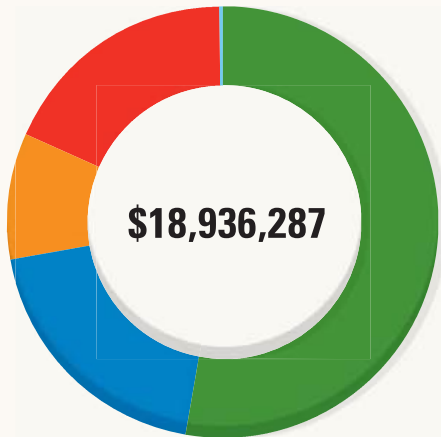


## Totals ))))

● Retail Products	4,894
● Income Qualified	5,638
● Market Rate Single Family	578
● Business Standard	603
● Market Rate Multifamily	586
● Business Midstream	50
● Public Housing	12
<b>Total</b>	<b>12,361</b>

# INCLUSIVE ENGAGEMENT IMPACT METRICS\*

## Program Ally Spend ))))



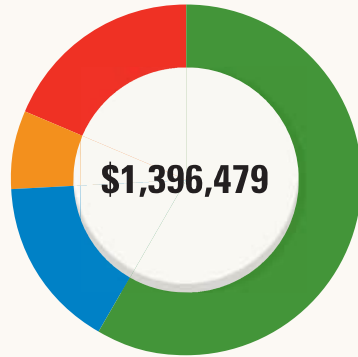
Classification	Spend Total	Number Of Program Allies
● Woman-Owned	\$10,039,085	30
● Minority-Owned	\$3,650,939	25
● Veteran-Owned	\$1,783,562	14
● Minority-Owned & Woman-Owned	\$3,433,980	10
● Veteran-Owned & Minority-Owned	\$10,990	4
● Veteran-Owned & Woman-Owned	\$1,200	1
● Veteran-Owned, Minority-Owned, Woman-Owned	\$16,531	2
<b>Total Spend</b>	<b>\$18,936,287</b>	<b>86</b>

**Note:** \*Note: 3 Program Allies serve in both Residential and Business programs.

\*Ameren Illinois has compiled and is providing this information as required by Illinois law, pursuant to 220 ILCS 5/8-103B.

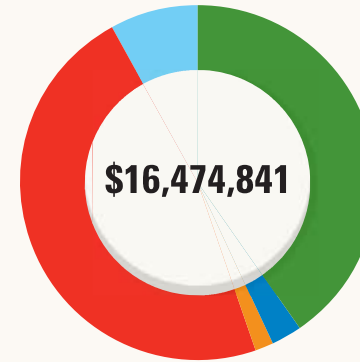
# INCLUSIVE ENGAGEMENT IMPACT METRICS CONTINUED\*

## Supplier Spend - Tier 1 ))))



Classification	Spend Total	Number Of Suppliers
Woman-Owned	\$817,702	4
Minority-Owned	\$218,725	3
Veteran-Owned	\$102,414	1
Minority-Owned & Woman-Owned	\$257,639	1
Veteran-Owned & Minority-Owned	\$0	0
Veteran-Owned & Woman-Owned	\$0	0
Veteran-Owned, Minority-Owned & Woman-Owned	\$0	0
<b>Total Spend</b>	<b>\$1,396,479</b>	<b>9</b>

## Supplier Spend - Tier 2 ))))

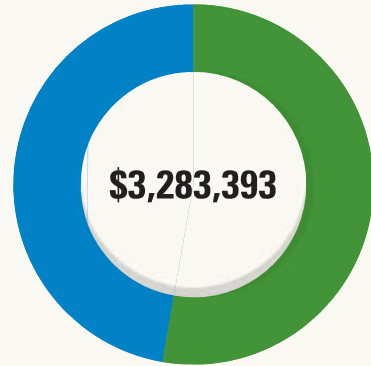


Classification	Spend Total	Number Of Suppliers
Woman-Owned	\$6,670,175	14
Minority-Owned	\$440,607	5
Veteran-Owned	\$261,920	2
Minority-Owned & Woman-Owned	\$7,799,404	2
Veteran-Owned & Minority-Owned	\$1,302,734	1
Veteran-Owned & Woman-Owned	\$0	0
Veteran-Owned, Minority-Owned & Woman-Owned	\$0	0
<b>Total Spend</b>	<b>\$16,474,841</b>	<b>24</b>

\*Ameren Illinois has compiled and is providing this information as required by Illinois law, pursuant to 220 ILCS 5/8-103B.

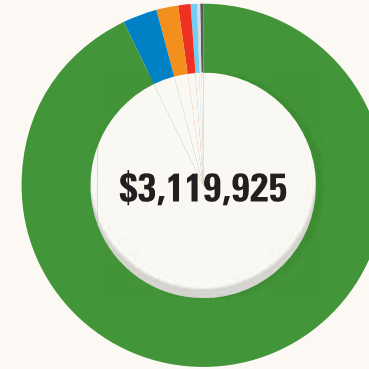
# PORTFOLIO SUMMARY METRICS

## Non-Profit Spend ( ( ( ( ) ) ) )



Classification	Spend Total
Time and Materials Spend	\$1,734,933
Incentive Spend	\$1,548,460
<b>Total Spend</b>	<b>\$3,283,393</b>

## Health & Safety Spend ( ( ( ( ) ) ) )



Classification	Spend Total
Income Qualified Single Family (SFIQ) (Includes Joint Utility)	\$2,902,566
Income Qualified Community Action Agency (CAA)	\$89,991
Income Qualified Mobile Homes	\$62,317
Multifamily Income Qualified	\$36,987
Electrification	\$13,737
Public Housing	\$13,110
Joint Utility	\$1,217
<b>Total Spend</b>	<b>\$3,119,925</b>

## Health & Safety

- Program staff observed an increase in health and safety needs throughout Q3, primarily driven by a boost in applications resulting from focused efforts to support customers with comprehensive projects. The largest impacts towards health and safety spend were remediation projects including knob and tube, mold and asbestos.



# Residential ))))

## 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 86,195 MWh or 62% of its electric PY2025 implementation plan savings goal of 138,888 MWh and 856,219 Therms or 59% of its gas PY2025 implementation plan savings goal of 1,457,164 Therms.**

**ACHIEVED** )))) 86,195 MWh  
**GOAL** )))) 138,888 MWh



((( (62% )))

of electric PY2025 implementation  
plan savings goal

**ACHIEVED** )))) 856,219 Therms  
**GOAL** )))) 1,457,164 Therms



((( (59% )))

of gas PY2025 implementation  
plan savings goal

***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.*

## Retail Products Initiative

- In response to continued manufacturer shifts, an improved strategy to incentivize non-Energy Star lighting products was developed to ensure customers will still receive a trusted quality energy efficiency product to meet their needs.
- A smart thermostat was provided to eligible customers along with energy efficiency education during several outreach events located at retail stores in the Ameren Illinois Service Territory.
- Program staff collaborated with a partner to launch a targeted quarterly promotion spotlighting two Sensi smart thermostat models which led to exceeding performance during Q3.

## Market Rate Single Family Initiative: Midstream HVAC Channel - 3rd Party

- The eligibility requirements for smart thermostats were proactively updated to allow for additional models to qualify for incentives and a new measure, Energy Recovery Ventilators (ERVs), was promoted with partners.
- An email was distributed to residential electric and propane customers providing information on the benefits of switching to a heat pump water heater (HPWH) as an energy efficiency marketing campaign.

## Market Rate Single Family Initiative: Home Efficiency Channel

- A continued steady growth in activity due to a marketing campaign launched earlier is still proving effective with 85 new project applications submitted during Q3.
- Program staff leveraged the Marketing Development Initiative (MDI) Program Ally Incubator Program to enroll four new program allies into the Channel. These new program allies are training with program staff to gain knowledge about processing projects while in the field to accommodate increased project volume and support customers.

## Market Rate Multifamily Initiative

- Programs staff pivoted to increase the heat pump incentive to improve project feasibility, resulting in reactivating several previously delayed projects, with 3 properties totaling 48 units now approved to complete installations.

## Public Housing Initiative

- A large building envelope project was completed totaling 130 units which led to exceeding the gas therm savings target by 73%.
- Program staff actively engaged in a key industry conference to strengthen relationships with housing authority representatives, yielding 35 direct connections and 3 assessments with a potential of 900 total units.

## Direct Distribution of Efficient Products (DDEP) Initiative: School Kits Channel - 3rd Party

- Program staff distributed 2,952 reserved kits across 42 schools throughout the fall semester. The ongoing interest of incorporating energy efficiency practices into the educational curriculum guided program staff in reserving another 2,042 kits for students and teachers for the rest of the fall semester.
- In the joint utility areas within the Ameren Illinois Service Territory, program staff distributed 294 kits to 14 elementary teachers and their students across 5 elementary schools. In addition, another 345 kits have been reserved for fall semester distribution.

## Direct Distribution of Efficient Products (DDEP) Initiative: High School Innovation Channel - 3rd Party

- 707 energy innovation kits were provided to students and school facility members across 11 high schools throughout the fall semester. Program staff is continuing fall recruitment and have already reserved another 837 kits to be distributed by the end of the fall semester.

## Income Qualified (IQ) Initiative

### IQ Initiative: Single Family (SFIQ) Channel

- Program staff reviewed and refined the current emergency heat restoration process to adopt a more customer-centric approach, aimed at expediting both heat restoration for customers and project assessment timelines. This streamlined method helps to reduce the need for additional visits, resulting in improved customer satisfaction.
- To enhance user experience and customer outcomes, program staff created an additional step in the assessment process to identify any accessibility or health needs related to indoor air quality early in development.
- Electric Direct Install Measure Kits were designed and distributed to boost electric savings and create more pathways for customers to participate and engage with more energy efficient products.

### IQ Initiative: Single Family Channel (Joint Utility Offering)

- Through coordinated efforts among program staff working with the Accessibility Offering, a total of three projects were completed, and seven referrals were assessed to support customers whose journey started in another area of the Ameren Illinois Energy Efficiency Program.

### IQ Initiative: Electrification Channel

- Following the first smart electric panel installation during Q3, program staff gathered critical feedback from both the contractor and customer, turning lessons learned into actionable best practices to drive customer satisfaction and increase participation.
- Program staff focused on providing customers with electrification education and resources during in-person outreach events to help overcome challenges related to the summer utility rate increases.

Electric Income Qualified Spend ))))		
Channel	2025 Actuals (PYTD)	2025 Plan Budget (for the year)
IQ New Construction	\$5,889	\$273,434
IQ CAA	\$2,201,027	\$2,765,571
IQ Community Kits	\$578,009	\$504,733
IQ Electrification	\$605,481	\$946,550
IQ Healthier Homes	\$757,360	\$1,392,652
IQ Mobile Homes	\$1,008,515	\$2,005,964
IQ Multifamily	\$4,858,053	\$8,189,038
IQ Multifamily Joint Utility	\$0	\$0
IQ Retail Products	\$5,813,424	\$8,056,634
IQ Single Family	\$16,038,983	\$20,652,419
IQ Single Family Joint Utility	\$195,814	\$355,192
IQ Smart Savers	\$743,928	\$1,381,120
<b>Total Spend</b>	<b>\$32,806,483</b>	<b>\$46,523,307</b>

IQ Homes Served (PYTD) ))))	
Single Family Channel - Direct Install	1,933
Single Family Channel - Comprehensive Retrofits	818
Single Family Channel - Joint Utility Retrofits	12
CAA Channel - Comprehensive Retrofits	282
Multifamily Channel - In-Unit (including Public Housing)	7,513
Smart Savers Channel	1,512
Mobile Homes Weatherization and Air Sealing Channel	64
Community Kits Channel	3,353
School Kits	6,685
<b>Total IQ Homes Served</b>	<b>22,172</b>

### **IQ Initiative: Single Family Channel (Accessibility Offering)**

- 31 customers were transitioned successfully into other areas of the Portfolio to best serve each customer with energy efficient solutions.
- In collaboration with the Market Development Initiative (MDI) Internship Program, participating program allies offered employment opportunities to two interns due to the skillset they developed during the program.

### **IQ Initiative: Community Action Agency (CAA) Channel**

- Despite ongoing IWx System complications throughout the year, the agencies remain actively engaged and continue to braid projects, resulting in an uptick of 173 projects submitted with a total of 278 PYTD.

### **IQ Initiative: Multifamily (MFIQ) Channel**

- Program staff led coordination efforts to complete a large multi program year building envelope project totaling 103 units. Although this project began in the MFIQ Channel, savings attainment shifted to the Single-Family (SFIQ) Channel due to the building type being duplexes.
- Program staff clarified health and safety guidance in the Building Envelope Workbook to ensure program ally alignment with updated requirements and removed the per-unit cost cap in the Workbook to increase completion rates.

### **IQ Initiative: Smart Savers Channel - 3rd Party**

- 3 new program allies were enrolled in the Channel to further support customers across the Ameren Illinois Service Territory.

### **IQ Initiative: Community Kits Channel - 3rd Party**

- The target increased by an additional 1,500 units during Q3 due to the continued interest of customers receiving community kits with energy efficient direct install measures. Community-Based Organization (CBO) partners have distributed a total of 3,448 community kits through Q3.

### **IQ Initiative: Mobile Homes Weatherization and Air Sealing Channel - 3rd Party**

- The Channel gained momentum leading to doubling the number of projects completed during Q3 with a total of 62 completed PYTD. Structural issues continue to present challenges, leading to 13 walkaway projects following the completed assessments.
- 6 new program allies enrolled in the Channel after completing the Mobile Homes Program Ally Training which will help expand customer support in several regions of the Ameren Illinois service territory.

### **IQ Initiative: Healthier Homes Channel - 3rd Party**

- Program staff continued targeted outreach efforts given the successful results from the previous quarter to increase more opportunities for community partners, resulting in 16 new leads generated.



# Business >>>>

## 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 148,371 MWh or 75% of its electric PY2025 implementation plan savings goal of 198,886 MWh and 1,401,573 Therms or 94% of its gas PY2025 implementation plan savings goal of 1,487,311 Therms.

**ACHIEVED >>> 148,371 MWh**  
**GOAL >>> 198,886 MWh**



**<<< 75% >>>>**

of electric PY2025 implementation  
plan savings goal

**ACHIEVED >>> 1,401,573 Therms**  
**GOAL >>> 1,487,311 Therms**



**<<< 94% >>>>**

of gas PY2025 implementation  
plan savings goal

## **Business Standard Initiative**

- Program staff noticed a large uptick in projects completed in several educational facilities throughout the Ameren Illinois Service Territory with 1 district alone completing 10 projects of the 63 total finalized in Q3. These completed projects were the result of referrals from the Public School Carbon Free Assessment (PSCFA) Program.
- Over 60 consultation requests were received from a marketing campaign letter sent to business customers in an effort to help grow participation.

## **Business Midstream Initiative: Lighting Channel - 3rd Party**

- The eligibility requirements for wall pack lighting fixtures were adjusted to allow more fixtures to qualify for incentives in an effort to expand participation in the Channel.
- Due to the continued effects of tariffs and inflation related to lighting equipment costs, program staff continued to analyze distributor concerns to better understand the impacts on Channel performance and how best to address participation.
- Program staff focused on discussing lighting opportunities with contractors and distributors who attended one of the four Luminaire Level Lighting Control (LLLC) trainings to help increase participation.

## **Business Midstream Initiative: HVAC Channel - 3rd Party**

- To increase participation, program staff reviewed eligibility requirements for smart thermostats to allow additional models to qualify for incentives.
- Program staff targeted communication with distributors to boost participation while incentives are still available, with this Channel ending at the end of this program year.

## **Business Midstream Initiative: Food Service Channel**

- Program staff launched a savings bonus program in Q3 to encourage participation through upselling and promoting energy efficient equipment with impactful incentives and high energy savings to increase overall customer engagement.

## **Small Business Initiative: Direct Install (SBDI) Channel**

- The Channel gained momentum during Q3 with a noticeable increase in achieved savings due to the persistent effort of outreach to potential customers. In addition to consistent communication, program staff received roughly 540 consultation requests from a marketing campaign letter sent to business customers.
- Program staff collaborated with the Market Development Initiative (MDI) to assist in providing additional opportunities for incentives that helped to move 28 projects forward for various types of businesses.

## **Small Business Initiative: Energy Performance Channel**

- Program staff collaborated with MDI to receive around 60 consultation requests to provide more support to customers across the Ameren Illinois Service Territory.

## Business Custom Initiative

- Program staff completed the 90-day EM&V (Evaluation, Measurement & Verification) analysis of a large CHP project finalized earlier in the year.
- A Compressed Air Challenge (CAC) Fundamentals Training was conducted during Q3 for 16 industrial customers to learn about compressed air energy efficiency best practices.

## Business Retro-Commissioning Initiative

- Increased incentives led to an uptick in Monitoring Based Commissioning Projects (MBCx) during Q3 with six incentives provided across several different projects including three large projects. A university and two healthcare projects were completed quickly after receiving the application last quarter.

## Business Streetlighting Initiative: Municipal-Owned Channel

- No update.

## Business Streetlighting Initiative: Ameren-Owned Channel

- Program staff identified opportunities mostly in small, rural towns across the Ameren Illinois Service Territory for the early replacement program, leading to the replacement of 1,416 fixtures.
- The replacement on failure program shows steady growth towards target with 1,837 fixtures replaced.



# Voltage Optimization

## 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 46,482 MWh or 77% of its electric PY2025 implementation plan savings goal of 60,135 MWh.

**ACHIEVED ))) 46,482 MWh**  
**GOAL ))) 60,135 MWh**



**((( (77%) )))**

**of electric PY2025 implementation  
plan savings goal**



# Market Development Initiative

## MARKET DEVELOPMENT INITIATIVE SUMMARY

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

### Local Area Vendor Advancement Channel

As part of MDI in furtherance of the state of Illinois workforce goals, the Local Area Vendor Advancement Channel focuses on identifying and preparing local businesses for utility procurement opportunities.

- Program staff attended a supply chain conference, resulting in new connections with the Hispanic Chamber of Commerce of Metro St. Louis and a business that can provide virtual sign language services.

### 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 National Association for the Advancement of Colored People (NAACP) and Springfield Urban League (SUL) participated in the Illinois State Fair, distributing marketing materials and encouraging customers to apply for the Residential Program. The SUL recorded over 100 smart thermostat referrals from eligible customers applying to the Residential Program.
- 2 new Community Based Organizations (CBOs) were onboarded with the assistance of a one-time grant to support program needs through year-end.

- 114 of 165 referrals were converted into program projects through collaboration efforts between CBO partners and the Single-Family Income Qualified (SFIQ) Channel. Despite the total number of referrals being below target, the project conversion rate of 59% exceeds target performance.

### 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 expanded outreach through job and college fairs, engaging students and job seekers in energy sector opportunities. Presentations at CEJA hubs highlighted workforce development and career pathways, fostering new connections and inspiring interest in energy careers.
- A Building Performance Institute (BPI) Training session was conducted during Q3 to provide participants with professional development and certification opportunities.
- The Market Development Summer Internship Program concluded with an event to recognize the interns completing the program, which resulted in 10 of 14 interns receiving full-time employment opportunities.

## 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 EE 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.

- Program staff recorded and tracked a total of 95 MDAP commitments made by the prime implementer to create impact throughout all Initiatives and Channels of the Ameren Illinois Energy Efficiency Program. Twelve commitments were completed during Q3, and an example is included below:
  - ▶ The Small Business Energy Performance Channel registered 60 new Program Allies, exceeding the target by 3 times.
- Program staff recorded and tracked 89 MDAP commitments made by implementation partners furthering the impact of MDI. Five commitments were completed in Q3, with an example below:
  - ▶ The implementation partner for the Direct Distribution of Efficient Products Initiatives collaborated with program staff to create marketing materials in Spanish to help customers receiving the energy efficiency kits understand the educational materials.

## 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 Control (LLLC) training events consisted of 257 attendees including 75 program allies reflecting roughly 18% of the total Business program ally network .
- Program staff focused on the High Performance Window Project Plan engaging with a new partner to assist with this Initiative.

### Low Income Energy Efficiency Accountability Committee (LIEEAC)\*

- **Leadership Team Meetings:** Held seven meetings between July 1 and September 30. Topics included follow-up on Ameren data requests and review of initial contractor participation results; strategies to improve engagement of CAAs and CBOs across Ameren’s energy efficiency portfolio; and planning for the next Four-Year Portfolio Plan and renewal of the IQ-S facilitation contract. The LT also discussed rising summer electricity rates and disconnection impacts, including affordability issues and solutions. The quarter also included the launch of a facilitation feedback survey for the LT and Ameren to inform next-phase planning and LT expansion.
- **Subcommittees:** Held two subcommittee meetings for the Supporting Residential Program Allies (PAs) Subcommittee and three for the Justice-Involved (JI) Employment Support Subcommittee. Activities for the Supporting PAs Subcommittee

included conducting online and phone surveys of Ameren IL PAs, data analysis of contractor participation across the income-qualified (IQ) energy efficiency (EE) portfolio, and development of a contractor feedback loop. JI Subcommittee activities included conducting best practice research interviews, toolkit development and subcommittee review, and compiling/mapping clean energy training and re-entry resources. Planning for the 2026 Air Conditioning Pilot commenced.

- **Marketing & Outreach RFP 25-01:** Monthly check-in meetings were held with each grantee (Embarrass River Basin Agency, Senior Services Plus, and Veterans Maintenance Solutions). An IQ-S lead-tracking portal was designed and launched to support the tracking of key grant metrics. Mid-cycle reports were submitted in early August, prompting the release of the second round of funding (\$7,500 per grantee).

\*Ameren Illinois is reporting these results in accordance with the 2022-2025 Energy Efficiency Plan Stipulation Agreement with stakeholders

### Customer Coordination Efforts

- Program staff provided monthly updates to the Customer Service Department on energy efficiency promotions, campaigns, and energy-saving tips to enhance customer support.
- Energy Efficiency Staff collaborated with Customer Service and Credit & Collections Teams to share energy efficiency opportunities with Fresh Start participants.
- Program staff also supported four community development workshops by providing smart-thermostats and energy efficient solutions to customers.

# MARKETING, EDUCATION AND OUTREACH

## Overall Portfolio

- Program staff collaborated with Ameren Corporate Communications to provide marketing information on energy efficiency tips and education to assist customers in lowering energy usage and support overall customer satisfaction.
- A new marketing campaign for the Sensi Smart Thermostat launched as a promotional tactic through social media and emails resulting in a boost of 2,390 units distributed to customers.

## Residential Program

- Program staff participated in 36 residential outreach events throughout the Ameren Illinois Service Territory to increase customer participation and program awareness.
- Monthly bill inserts were distributed to customers to highlight general summer energy efficiency tips, energy-efficient product discounts, smart thermostats, and opportunities to participate through the Single-Family Income Qualified (SFIQ) Channel.
- A mailing campaign targeted mobile home customers in an effort to grow participation in the Mobile Home Initiative by providing ways to participate in the program.
- Propane customers received a mailer that provided education on the Ameren Illinois Energy Efficiency Program and to promote the energy benefits of switching from propane to electric.

## Market Development Initiative

- The quarterly newsletter continues to be provided to the 25 Community Based Organization (CBO) partners to share information about the Ameren Illinois Energy Efficiency Program including any updates and resources.

## Business Program

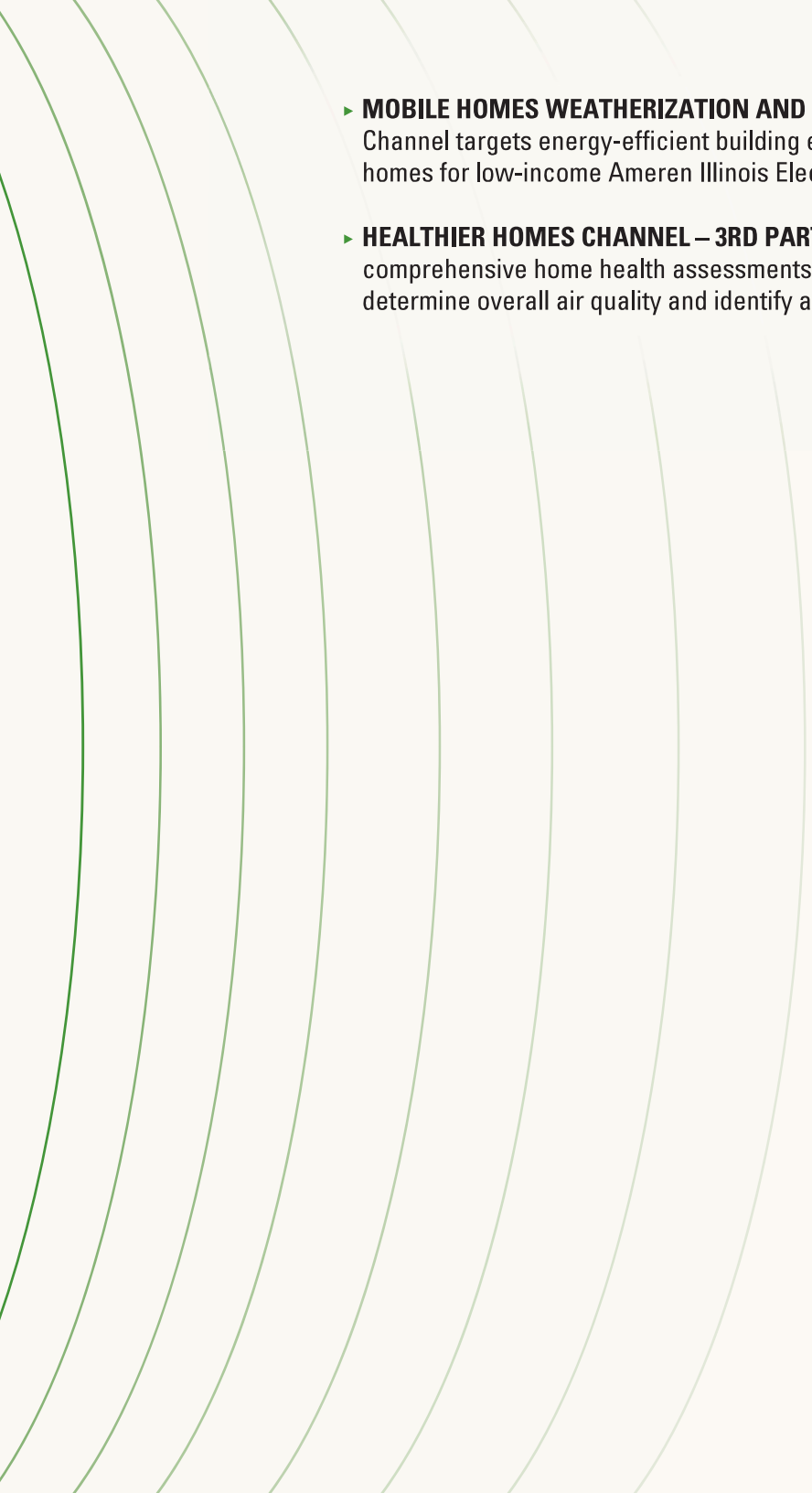
- A letter was distributed to target business customers who have not completed a lighting project in the last two years, which led to a substantial increase in consultation requests, call center traffic and Small Business Direct Install (SBDI) project applications received.
- Multiple marketing tactics were used to promote the annual Business Symposium event including postcards, emails, bill inserts and bill messages to help boost event attendance.
- Program staff attended 12 outreach events throughout the Ameren Illinois Service Territory to promote Business Program offerings for business owners and public sector organizations.

# APPENDIX A: INITIATIVE AND CHANNEL SUMMARIES

## 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 3 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.
- ▶ **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 9 channels in the income qualified initiative.
  - ▶ **SINGLE FAMILY CHANNEL:** The IQ-Single Family (SFIQ) 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.
    - **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.
  - ▶ **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.
  - ▶ **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 (MFIQ) Channel targets low-income, multifamily properties and uses a 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.

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- ▶ **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](http://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](http://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](http://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](http://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:** Small non-residential customers receive HVAC and weatherization upgrades through this Channel.

- **CUSTOM INITIATIVE:** The Business 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 (RCx) 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 & Gas Budget**

No Budget Updates.

## **APPENDIX C: NEW OR DISCONTINUED MEASURES**

### **New Measures:**

No new or discontinued measures

## APPENDIX D: MULTIFAMILY REPORTING

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

**100%**

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

Projects	Buildings	Units
58.7%	77.0%	86.4%

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

Projects	Buildings	Units
49.8%	56.3%	58.7%

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

Projects	Buildings	Units
8.8%	20.8%	27.7%

### 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 CONTINUED

(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	ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units	ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units
61329	2	2	12	62060	2	3	12	62946	1	2	40
61341	3	3	20	62208	1	6	40	62952	1	2	14
61354	2	20	220	62215	1	1	4	62987	1	1	4
61362	1	1	3	62220	5	52	84	62998	1	3	10
61434	2	4	96	62221	6	77	791	<b>Total</b>	<b>283</b>	<b>1214</b>	<b>7942</b>
61520	2	2	22	62223	12	26	201				
61523	1	1	8	62226	17	68	380				
61525	1	2	72	62231	1	1	3				
61533	1	2	6	62234	5	6	24				
61554	2	2	14	62237	1	1	5				
61571	1	1	10	62246	1	4	23				
61603	3	8	92	62254	1	13	24				
61604	1	1	8	62274	2	2	45				
61605	3	43	292	62294	1	5	48				
61606	1	1	11	62301	2	7	66				
61607	1	1	12	62401	11	11	68				
61610	2	2	18	62433	1	2	6				
61611	4	10	43	62450	1	3	16				
61614	1	1	22	62454	1	2	8				
61616	1	1	3	62462	2	6	8				
61701	5	5	180	62468	1	1	12				
61756	2	6	40	62471	2	6	48				
61818	3	5	44	62526	7	7	94				
61820	6	7	424	62550	2	10	32				
61821	5	30	583	62558	2	10	38				
61846	1	6	18	62568	5	33	104				
61856	1	1	12	62618	2	6	24				
61870	1	2	18	62650	8	339	1292				
61920	11	11	136	62681	7	7	30				
61924	1	3	12	62690	1	4	16				
61929	1	1	8	62801	37	110	299				
61932	1	2	6	62812	21	28	41				
61938	3	4	24	62832	4	4	172				
61943	1	3	12	62844	2	6	48				
61944	2	8	56	62890	1	1	4				
61956	1	6	23	62896	1	1	4				
62002	4	4	222	62901	5	141	1358				
62012	1	3	24	62920	1	3	12				
62035	2	30	200	62926	1	4	12				
62040	3	36	224	62930	2	3	18				

## APPENDIX D: MULTIFAMILY REPORTING CONTINUED

**(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
61554	1	1	8
61606	1	1	11
61610	1	1	9
61616	2	2	24
61756	1	3	20
61820	1	1	15
61856	1	1	4
61920	14	14	137
61938	1	1	4
62060	2	2	8
62208	1	8	8
62220	3	3	28
62221	10	45	132
62223	1	2	16
62226	5	9	62
62234	2	2	8
62274	2	2	45
62401	2	2	10
62462	2	6	8
62471	1	2	16
62526	7	7	84
62550	4	5	32
62568	1	2	11
62650	1	15	48

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units
62681	1	1	4
62801	34	95	183
62812	1	8	6
<b>Total</b>	<b>117</b>	<b>279</b>	<b>1080</b>

# APPENDIX E: LIEEAC BUDGET REPORT

	Facilitation Labor	Unallocated	Leadership Team Stipends or Grants	Committee Participation Stipends	Education and Outreach Grants	Total
<b>Contract Total</b>	<b>\$168,502.87</b>	<b>\$232,727.28</b>	<b>\$32,806.41</b>	<b>\$49,200.00</b>	<b>\$80,000.00</b>	<b>\$563,236.56</b>
<b>Year to Date</b>	<b>\$168,502.87</b>	<b>\$167,106.52</b>	<b>\$32,806.41</b>	<b>\$131.25</b>	<b>\$52,500.00</b>	<b>\$421,047.05</b>
January	\$16,464.00	\$ -	\$ -	\$ -	\$ -	\$16,464.00
February	\$24,216.25	\$ -	\$ -	\$ -	\$ -	\$24,216.25
March	\$24,740.75	\$27,943.59	\$32,806.41	\$ -	\$ -	\$85,490.75
April	\$39,965.75	\$ -	\$ -	\$ -	\$ -	\$39,965.75
May	\$31,305.25	\$ -	\$ -	\$ -	\$30,000.00	\$61,305.25
June	\$31,810.87	\$7,265.98	\$ -	\$131.25	\$ -	\$39,208.10
July	\$ -	\$42,951.05	\$ -	\$ -	\$ -	\$42,951.05
August	\$ -	\$47,860.75	\$ -	\$ -	\$22,500.00	\$70,360.75
September	\$ -	\$41,085.15	\$ -	\$ -	\$ -	\$41,085.15
October						
November						
December						

# APPENDIX F: INCOME QUALIFIED LIGHTING STORE LIST

No New Stores