



Energy Efficiency
PROGRAM

PY2026 Semi-Annual Report (January - June)

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.

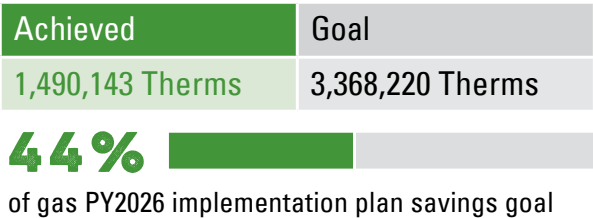
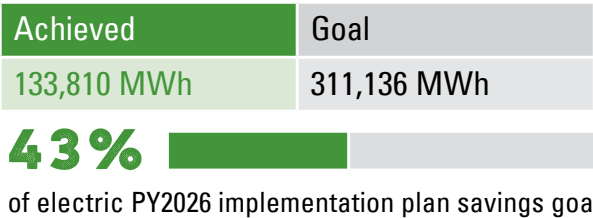
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Portfolio Summary

Ameren Illinois Company (AIC) d/b/a Ameren Illinois ("Ameren Illinois") provides this report pursuant to Section 6.5 of the Illinois Energy Efficiency Policy Manual Version 3.1 (effective January 1, 2026). 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 report may be based on preliminary results and will be assessed for revision, evaluation, and adjustment, with updates and changes being made on a semi-annual 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 Q2, the Overall Portfolio achieved 133,810 MWh or 43% of its electric PY2026 implementation plan savings goal of 311,136 MWh and 1,490,143 Therms or 44% of its gas PY2026 implementation plan savings goal of 3,368,220 Therms.

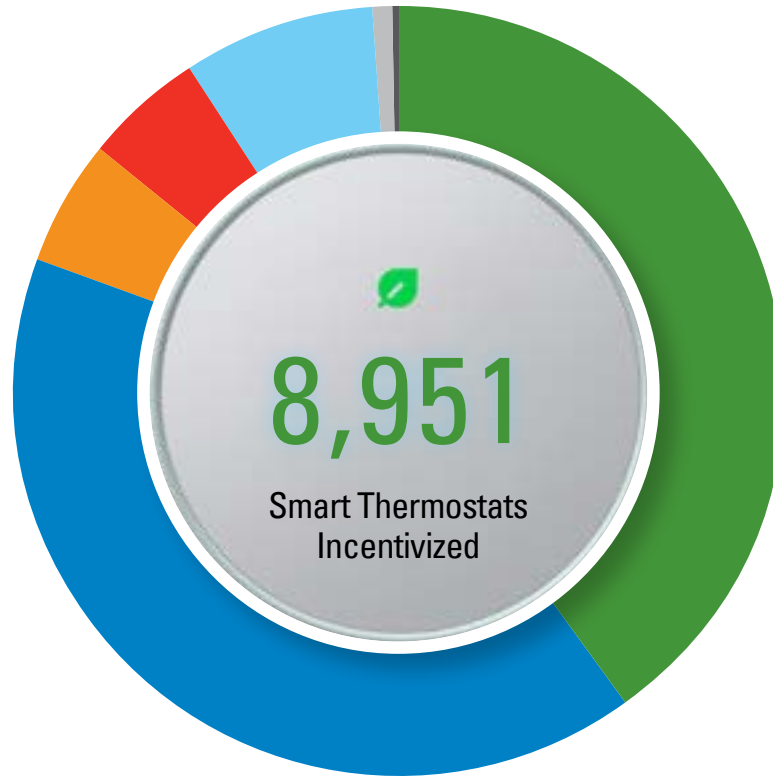


PORTFOLIO OVERALL SPEND ACHIEVEMENT		
PY2026 Electric and Gas Total Budget		\$152,092,425
PY2026 Electric and Gas Total Actual Spend		\$67,868,137
PY2026 Electric and Gas Income Qualified Actual Spend		\$26,285,266

US TRADE TARIFFS & EFFECT OF IRAN CONFLICT

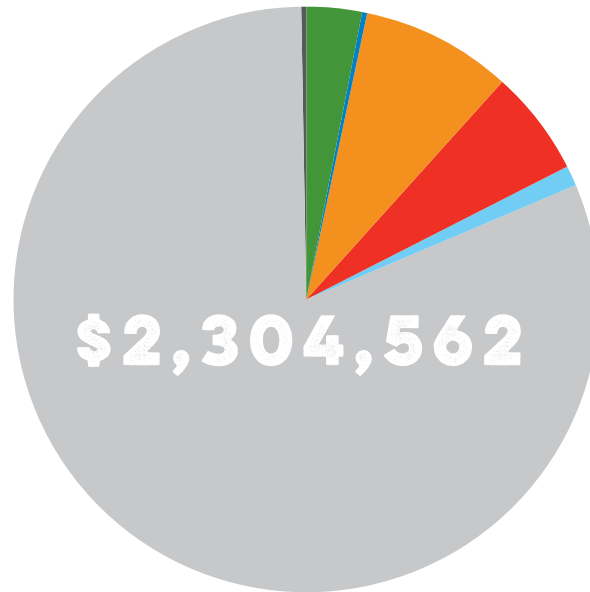
- As specified in Section IV.A.5. of the Ameren Illinois 2026 Plan stipulated agreement, this update is provided based on information available at this time.
 - Since the beginning of 2025, uncertainty around US tariffs has led to notable price increases in energy efficient technologies, with direct cost hikes ranging from 0% to 70% and an average increase of 14%. 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.
 - During the first half of 2026, there has been increased cost to petrochemical based insulation products such as spray foam and rigid board. Three major insulation manufacturers reported significant price increases. In turn, incentive rates were increased for several impacted weatherization measures.

Smart Thermostats Incentivized



TOTALS	
Retail Products	3,594
Income Qualified (IQ)	3,627
Market Rate Single Family	476
Market Rate Multifamily	449
Standard Business	717
Small Business	84
Public Housing	4
Total	8,951

PY2026 Health & Safety Spend



Classification	Spend Total
IQ - Community Action Agency (CAA)	\$76,062
IQ - Electrification	\$6,382
IQ - Healthier Homes	\$191,955
IQ - Mobile Homes	\$131,315
IQ - Multifamily (MFIQ)	\$24,057
IQ - Single Family (SFIQ including Joint Utility)	\$1,872,321
Public Housing	\$2,470
Total	\$2,304,562

** IQ = Income Qualified*

HEALTH & SAFETY

- Health & Safety expenditures within the Multifamily Channel are significantly below expectations due to customer decisions, including limited interest in moving forward with building envelope improvements, rather than Health & Safety requirements. However, despite challenges faced in the Multifamily Channel, other Income-Qualified Channels reveal Health & Safety support through small to comprehensive projects.

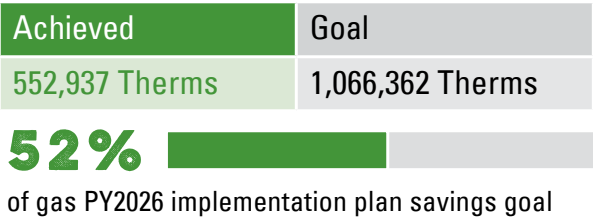
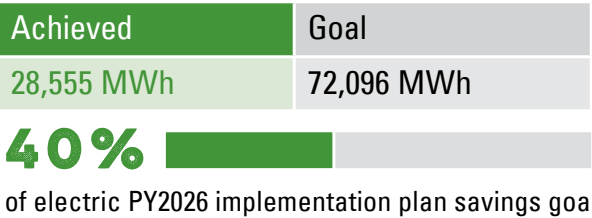


Residential

Residential Program Summary

The Residential Program consists of six initiatives, including Market Transformation which is discussed in the Other Portfolio Elements section of this report. The initiatives address key electric and natural gas end-uses in single family homes and multifamily properties containing three or more living units. The Residential Program offers a range of educational opportunities and incentives for customers to implement a series of energy efficiency improvements. Comprehensive weatherization services, targeted primarily to low and moderate-income customers, are designed to achieve reductions in energy consumption within a participant’s home or property. Included as part of the comprehensive building approach, the Program also addresses health and safety issues, budget permitting. Each initiative has a potential entry point for customers into the Program, which is structured to facilitate cross-promotion between initiatives.

- **Through Q2, the Residential Program has achieved 28,555 MWh or 40% of its electric PY2026 implementation plan savings goal of 72,096 MWh and 552,937 Therms or 52% of its gas PY2026 implementation plan savings goal of 1,066,362 Therms.**



Retail Products Initiative

- Program Staff provided over 700 smart thermostats to eligible customers at no cost during 3 Community Development Workshop events created for customer billing relief due to the recent energy supply price increase. In addition, 980 smart thermostats were distributed at other outreach events, where customers were educated on the benefits of optimizing energy use and reducing energy consumption without sacrificing comfort.
- This Initiative received high performance results in direct sales and rebate offers due to the robust variety of energy efficient products, as well as new products such as vent fans, through the 257 retail stores across the Ameren Illinois Service Territory.

Market Rate Single Family Initiative: Midstream HVAC Channel

- Program staff pivoted to reduce the Ground Source Heat Pump (GSHP) incentives by 20% to extend the incentives throughout the program year while maintaining customer participation.
- In partnership with the Energy Star Manufacturing Action Council, Heat Pump Water Heater (HPWH) Training webinars were held with distributors, program allies, and program staff to provide education, awareness, and boost adoption in the market.
- A large plumbing and HVAC distributor was enrolled into the Channel to expand customer support and strengthen engagement.

Market Rate Single Family Initiative: Home Efficiency Channel - 3rd Party

- The Channel successfully completed the transition to new data entry and payment portals for all participating program allies to improve consistency and speed of processing applications and payments, resulting in a better experience for the allies.

- A new innovation effort for a direct install measures (DIM) kit with energy efficiency education materials is well underway to being finalized for deployment by program allies to ensure customers receive support for products directly installed.
- Program staff enhanced Channel performance through project audit stipends awarded to program allies and dashboard improvements, including a locator feature that improves tracking for internal reporting.

Market Rate Multifamily Initiative

- Targeted outreach efforts increased customer engagement, contributing to a six percent growth in applications received and continued pipeline growth.
- Program staff designed a waitlist stage within the project tracking process to improve visibility into each project pending application approval or completion to strengthen overall project management and decrease operational delays.

Public Housing Initiative

- Despite reduced resources, this Initiative successfully achieved the target of direct installation measures in both individual units and common areas through the completion of 13 projects including 571 individual units.
- Program staff presented at the Illinois Association of Housing Authorities Conference to maintain communication and transparency regarding ongoing project successes and learning opportunities with the Public Housing Authorities. In addition, discussions led to ideas for increasing pipeline and participation with anticipation of new targets under Clean and Reliable Grid Affordability Act (CRGA).

Income Qualified (IQ) Initiative

IQ Initiative: Single Family (SFIQ) Channel (Including Joint Utility)

- After evaluating the assessment process and conducting a trial with selected program allies, program staff determined that allowing program allies to be responsible for assessments in a turn-key fashion would decrease turnaround time and improve productivity. This resulted in positive customer feedback as well, and full adoption for all program allies participating in the Channel.
- A hybrid heat pump measure was added to the Channel, and program staff included new training for program allies to support potential projects.
- Program staff leveraged health and safety support to help many customers needing significant home improvements including nearly 100 heat restoration projects and countless substantial repairs in order to move forward with project opportunities.

IQ Initiative: Community Action Agency (CAA) Channel

- Agencies increased their engagement due to housing material price increases and customer needs resulting in the completion of several projects through braiding efforts.
- Program staff held the first of four contractor recruitment events to aid in increasing partner activity by providing CAA and energy efficiency education. The resulted in two prospective contractors eager to learn more about participation opportunities.

IQ HOMES SERVED	
IQ CAA - Comprehensive Retrofits	161
IQ Community Kits (one per home)	1,334
IQ Direct Distribution - School Kits (one per home)	2,733
IQ Mobile Homes Weatherization and Air Sealing	100
IQ Multifamily - In Unit including Public Housing	2,243
IQ Single Family - Direct Install	1,406
IQ Single Family - Comprehensive Retrofits	544
IQ Single Family - Joint Utility Retrofits	0
IQ Smart Savers	586
Total IQ Homes Served	9,107

*Note: The total number of homes served may vary slightly due to a temporary overlap between Single Family Direct Install and Comprehensive Retrofit during the transition from direct install to the retrofit project.

IQ Initiative: Electrification Channel

- Despite the discovery of challenges presented during many projects, the Channel has continued to overcome and embrace learning opportunities in order to adjust and finalize projects.
- Program staff identified tactics to improve home assessments and testing for heat pump sizing with additional Program Ally training, resulting in increased customer satisfaction.

IQ Initiative: Multifamily (MFIQ) Channel

- Program staff concluded the Window Heat Pump Innovation Pilot that began last program year by installing the remaining 16 units. The pilot provided very valuable operational knowledge and customer insight for window mounted heat pump technologies and potential program measure expansion opportunities.
- 11 Program Allies were onboarded to the Channel after assessing the capacity of each Program Ally in order to strengthen coverage across the Ameren Illinois Service Territory and continue to enhance the customer experience.
- The Channel surpassed window insert installation expectations and also continued program staff engagement with customers during project assessment, helping to expand this measure into the program.

IQ Initiative: Smart Savers Channel

- 5 new Program Allies were onboarded, leading to coverage of all 241 eligible zip codes and continued growth in customer participation.
- Program staff collaborated on a new innovation effort to enroll targeted customers into the Peak Time Savings (PTS) Demand Response Program by providing education about PTS when installing smart thermostats.

IQ Initiative: Community Kits Channel

- Channel is meeting targets and providing impact as planned.

IQ Initiative: Direct Distribution (School Kits) Channel

- Channel is meeting targets and providing impact as planned.

IQ Initiative: Manufactured Homes Weatherization and Air Sealing Channel

- Program staff proactively adapted to several Channel adjustments and established momentum to ensure a continued strong performance from program allies and strengthen customer participation.
- 2 Program Allies were onboarded in an effort to expand coverage, increase capacity, and meet customer demand across the Ameren Illinois Service Territory. In addition, program staff began to prepare a Program Ally Training to grow energy efficiency knowledge and opportunities for mobile home projects.

IQ Initiative: Healthier Homes Channel

- Program staff established a partnership with the City of Champaign to further customer support, resulting in 11 homes in the community remediated for all health and safety concerns identified.
- In collaboration with the Southern Illinois Health Foundation, program staff expanded customer support into the East Saint Louis area which had experienced limited support previously, leading to four project assessments.

IQ Initiative: Accessibility Channel

- Customer satisfaction in the Channel remains high, with positive feedback from word-of-mouth referrals helping to drive participation despite limited marketing and outreach.
- Program staff researched and began a new innovation pilot called Smart Shades. The measure is a motorized cellular window blind that connects to a smart device and allows the blind to be controlled without the manual effort required for a standard blind.

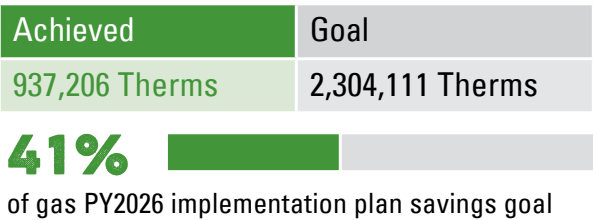
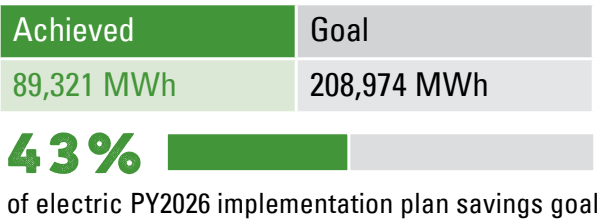


Business

Business Program Summary

The Business Program consists of six initiatives, including Market Transformation which is discussed in the Other Portfolio Elements section of this report. The initiatives provide incentive and services to non-residential customers, excluding exempt and opt-out customers, to achieve electric and natural gas energy savings. Financial incentives are the cornerstones of the program; they encourage customers to identify and complete energy efficiency projects that 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.

- **Through Q2, the Business Program achieved 89,321 MWh or 43% of its electric PY2026 implementation plan savings goal of 208,974 MWh and 937,206 Therms or 41% of its gas PY2026 implementation plan savings goal of 2,304,111 Therms.**



Standard Initiative

- Program staff developed a new digital application portal to streamline the process and increase overall user experience for both customers and program allies with testing underway to ensure a successful launch.
- As a result of expanding the program ally network through increased outreach efforts, this Initiative saw a rise in project potential with more applications received than expected.

Midstream Initiative: Lighting Channel

- Program staff improved and streamlined reporting by having customers and distributors submit information through an online portal which provides real-time validation of customer and equipment eligibility.
- Ultra-efficient LED lightbulbs were added to the Channel as a new measure offering to increase participation.
- A pre-approval process was implemented for linear LED lightbulbs in an effort to closely monitor the quantity incentivized due to the planned allowance for this program year.

Midstream Initiative: Statewide Food Service Channel

- Program staff increased the incentive amounts for some measures on the Qualified Products List (QPL) to generate more customer participation in the Channel.

Small Business Initiative

- Program staff reported the highest performance for non-lighting measure projects since inception of this Initiative, in part due to the targeted outreach and increased engagement with national convenience stores.

- At the beginning of the year, the Initiative increased incentive rates to boost customer participation in disadvantaged communities and public sector segments. However, customer activity significantly outpaced expectations, which resulted in pivoting back to standard incentive rates to ensure more customers are able to participate.
- Customer participation expanded through the combination of weatherization, HVAC, and electrical measures into one comprehensive Initiative, leading to the successful completion of multiple energy-efficiency projects.

Custom Initiative

- A new assessment effort launched, Campus Energy Assessment (CEA) to provide large universities with a more sophisticated energy usage data report and presentation to explain the patterns for energy saving opportunities.
- Program staff are working to develop a survey to identify potential customers and target opportunities for equipment upgrades and large retrofit projects related to compressed air.
- A Micro CHP Webinar for small and medium sized business customers attracted 36 attendees with 6 customers requesting more information.

Retro-Commissioning Initiative

- The Initiative received a boost in applications as a result of scheduled monthly program ally meetings, development of a check point process to streamline all projects, and targeted outreach.
- Program staff have onboarded five new program allies to expand customer participation and support throughout the Ameren Illinois Service Territory.

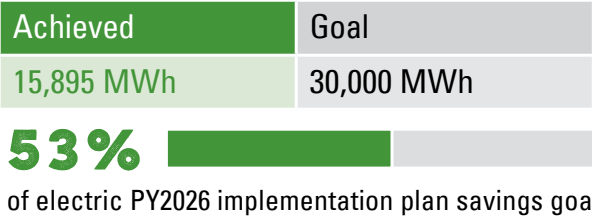


Voltage Optimization

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 approved multi-year integrated grid plan and 2026-2029 energy efficiency plan, Ameren Illinois plans to deploy VO to additional cost-effective circuits from 2026-2028 while using its best efforts to identify and prioritize circuits with low-income customers.

- **Through Q2, Voltage Optimization has achieved 15,895 MWh or 53% of its electric PY2026 implementation plan savings goal of 30,000 MWh.**





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.

PY2026 EE PLAN STIPULATION - MDI METRICS AND TRACKING

MDI Channel	Category	Metric	Reporting Frequency	2026 through Q2
Workforce Development	Training Participant Engagement	Number of jobseekers (broken out by diverse and non-diverse) placed in EE training opportunities	Bi-Annual	24 Total (8 Diverse & 16 Non-Diverse)
Workforce Development	Training Participant Engagement	Number of returning citizen jobseekers placed in EE training opportunities	Bi-Annual	3
Workforce Development	Training Participant Engagement	Number of internships (broken out by diverse and non-diverse) provided to jobseekers	Bi-Annual	18 Total (9 Diverse & 9 Non-Diverse)
Workforce Development	Training Participant Outcomes	Number of retained internships (broken out by diverse and non-diverse) jobseekers	Bi-Annual	Implementation in progress
Workforce Development	Training Participant Outcomes	Number of returning citizen jobseekers placed in EE jobs	Bi-Annual	3
Workforce Development	Training Participant Outcomes	Number of jobseekers (broken out by diverse and non-diverse) placed in EE jobs	Bi-Annual	11 Total (8 Diverse & 3 Non-Diverse)
Workforce Development	Program Ally Incubator Engagement	Number of Program Ally graduates	Bi-Annual	Implementation in progress
Workforce Development	Program Ally Incubator Outcomes	Total net Energy savings (kWh and Therms) achieved through Program Ally Incubator graduates	Bi-Annual	1,413,556 kWh 1,574 Therms
Workforce Development	Training Participant Outcomes	Assessment of participant readiness/workplace performance, retention rates and alumni career advancement	Once per four-year plan period	Reporting not applicable at this time
Diverse Vendor Procurement	Vendor Engagement	Total number of Diverse Business Enterprise (DBE) Vendors	Bi-Annual	Implementation tracking being refined
Diverse Vendor Procurement	Vendor Engagement	Total number of Procurement and RFP ready DBE Vendors	Bi-Annual	Implementation tracking being refined
Diverse Vendor Procurement	Vendor Engagement Outcomes	Total number of DBE utilized	Bi-Annual	Implementation tracking being refined
Community-Based Organization (CBO) Management	CBO Engagement	Number of customers engaged	Bi-Annual	62,788
Community-Based Organization (CBO) Management	CBO Engagement Outcomes	Number of partner referrals leading to a comprehensive project	Bi-Annual	91

Procurement Advancement and Transformation Hub (PATH) Channel

As part of MDI in furtherance of the state of Illinois workforce goals, the Procurement Advancement and Transformation Hub (PATH) Channel focuses on identifying businesses for engagement opportunities by increasing visibility across the Ameren Illinois Service Territory and supporting business growth.

- Program staff enhanced the vendor database by vetting recommended businesses for inclusion and communicating the potential for increased opportunities with each business, resulting in the addition of approximately 230 businesses within the Ameren Illinois Service Territory.

PROGRAM ALLY INCUBATOR AND ACCELERATOR

Program Ally Incubator and Accelerator supports MDI through the PATH Channel by assisting emerging and existing businesses through mentorship, technical assistance, certification support, business development services, and project lead development.

- Program staff received 17 applications through standard and accelerated pathways to advance energy efficiency efforts by preparing contractors and suppliers to deliver community-focused projects.
- Delivered four educational workshops and supported multiple businesses in earning Building Performance Institute (BPI) certifications, increasing industry awareness, technical expertise and portfolio awareness, and long-term business capacity among participating firms.

CONTRACTOR ACCESS TO CAPITAL (CAC)

CAC supports MDI through the PATH Channel with collaboration of program staff assisting contractors through grants, professional resources, and other opportunities to help build a stronger and long-term business capacity for contractors across the Ameren Illinois Service Territory.

- This is a newly launched MDI effort after much success and positive feedback received from contractors during the pilot phase. Program staff have established a foundation for ongoing program delivery to help participating contractors secure business financing, grants, critical business resources, and foster connections with various community personnel for growth opportunities.
- In another effort to boost opportunities, program staff connected participating contractors with leading community partners to educate the contractors on the Ameren Illinois Energy Efficiency Program and show how engaging in the Program may assist in increasing business pathways.

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.

- Program staff connected with over 62,700 customers through outreach, education, and community engagement efforts throughout the Ameren Illinois Service Territory to increase awareness of available energy efficiency resources.
- The Channel delivered 225 referrals to different areas of the Program through various networking events to best assist customers through the program opportunities.
- Expanded geographic and demographic reach by onboarding three new community partners and extending services into five food desert or underserved communities.
- Increased regional visibility and customer engagement by hosting the first Southern Illinois MDI Energy Efficiency community event, leveraging innovative educational approaches to improve program understanding and accessibility.

Grant Writing Assistance Channel

As part of MDI, the Grant Writing Assistance Channel focuses on providing grant writing workshops, technical assistance, and partnership cultivation through identifying funding opportunities, developing competitive proposals, and leveraging collaborative relationships to expand the impact of energy efficiency to Ameren Illinois customers.

- Program staff partnered with a state university to host an in-person grant writing workshop for 18 participants to expand access to grant resources, technical expertise, and funding opportunities while fostering new collaborations among community stakeholders.
- Increased organizational capacity through grant writing education, outreach, and one-on-one technical assistance while supporting partners in pursuing funding opportunities aligned with workforce development and community impact goals.
- Program staff developed a dedicated Grant Writing Webpage to provide support and solutions for businesses (small businesses, contractors, etc.) and organizations (nonprofits, community groups, etc.) to access federal, state, local and private funding opportunities related to the energy efficiency industry.

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 EE jobs board management.

INTERNSHIPS

Internships support MDI through the WFD Channel by connecting students with paid energy efficiency industry experience.

- This effort placed 18 interns with 18 employer partners, to provide hands-on experience in different businesses advancing energy efficiency, sustainability, workforce development, and community well-being.

SCHOLARSHIPS

Scholarships support MDI through the WFD Channel by increasing access to energy-related education and training opportunities to further the energy efficiency industry.

- 73 scholarships were awarded to students pursuing careers in fields supporting energy efficiency program delivery such as HVAC, construction management, electrical technology, engineering, automotive technology, welding, truck driving, industrial technology, and emerging energy-related disciplines.
- Expanded the scholarship network to 11 partner educational institutions, strengthening pathways into high-demand careers and increasing geographic reach throughout the Ameren Illinois Service Territory.
- Program staff developed MDI's first scholarship opportunity for graduating high school students through a partnership with a high school foundation, broadening access to workforce development support and creating earlier connections to career pathways.

JOB TRAINING AND PLACEMENT

Job Training and Placement supports MDI through the WFD Channel by providing training, certification, and potential employment opportunities through partner employers to extend the energy efficiency industry throughout the Ameren Illinois Service Territory.

- Conducted 33 workforce outreach and recruitment events reaching jobseekers, educational institutions, workforce organizations, and community partners across the Ameren Illinois Service Territory, expanding awareness of available career pathways and training opportunities.
- Program staff focused efforts on connecting participants with workforce development resources including certifications, career coaching, employer referrals, direct placement assistance, and wrap-around support services designed to reduce barriers to employment and improve long-term workforce retention, including building connections with the CEJA hubs in the Ameren Illinois Service Territory.

AMEREN ILLINOIS + NICOR JOINT UTILITY TRAINING PILOT

The Ameren Illinois + Nicor Joint Utility Training Pilot supports MDI through the WFD Channel through collaboration efforts designed to expand access to energy efficiency careers while creating a scalable model for cross-utility collaboration. The pilot combined classroom and on-the-job training, employer engagement, and job placement support to help participants transition into energy efficiency employment opportunities and help address industry workforce needs.

- This Pilot trained and certified 11 participants with 7 industry certifications through a joint utility energy efficiency workforce program that provided hands-on instructions and exposure to energy efficiency industry career pathways.
- Program staff supported the successful transition from training into employment, resulting in multiple participants securing positions with energy efficiency employers including contractors, implementation partners, and program service organizations.



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.

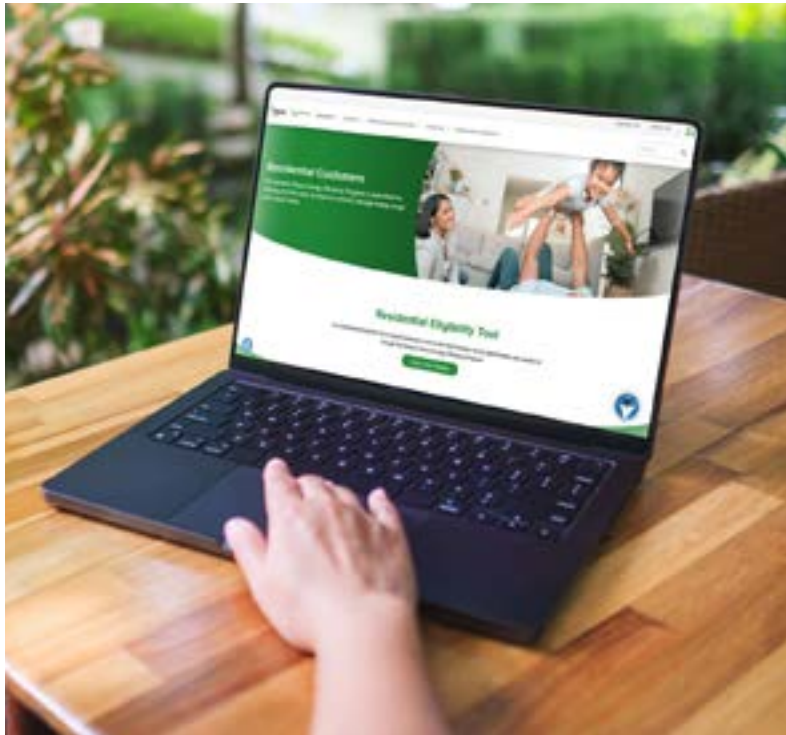
- Program staff collaborated with a partner to design and implement a Luminaire Level Lighting Controls (LLLC) Training to be hosted in four cities throughout the Ameren Illinois Service Territory to showcase the role lighting solutions have in driving energy efficiency and delivering value for business customers.
- Program staff are developing Market Transformation Business Plans for potential implementation of efficient rooftop units, ENERGY STAR® retail products platform, and high performance windows to increase adoption of innovative solutions.
- Efforts with other Illinois utilities continue on the high performance windows pilot to provide midstream incentives for qualifying equipment.

Customer Coordination Efforts

- Ameren Illinois continued expanded customer coordination efforts by partnering across internal departments and customer-facing teams to deliver coordinated outreach and messaging. This included targeted communications to Income Qualified customers promoting energy efficiency programs, energy-saving tips, payment assistance resources, discount rate options, and other available support to help customers manage energy costs and reduce energy burden.

Marketing Research Studies

- Please refer to the Illinois Stakeholder Advisory Group (SAG) website (<https://www.ilsag.info>) for Evaluation Plans that include research studies, as applicable for the program year.



Marketing, Education, & Outreach

Overall Portfolio

- Program staff collaborated with the Ameren Corporate Communications Team to align seasonal marketing messaging and tips to help customers become proactive in reducing energy usage before summer utility price increases came into effect.

Residential Program

- Program staff engaged with customers in 47 residential outreach events throughout the Ameren Illinois Service Territory to increase participation and program awareness.
- Program staff collaborated internally to create a solution on how best to support all customers given the anticipated energy price increases. The campaign targeted all residential customers through social media, email, direct mail, and bill messaging to highlight energy efficient product discounts, Ameren Illinois seasonal energy relief resources, general energy efficiency tips, and the new Residential Eligibility Tool designed to direct customers towards the best energy efficiency solution based on the information provided.

Market Development Initiative (MDI)

- Program staff collaborated to provide various marketing campaigns including the Summer Internship Program, Grant Writing Support, Community-Based Organizations (CBOs) and Workforce Development using tactics of emails, webinars, webpage creation, print collateral and promotional giveaways.
- Virtual Training Workshops were held to support the planning efforts for the Program Ally Incubator Program by explaining the overall program and application process, with a targeted email follow up.

Business Program

- Program staff participated in 46 business outreach events throughout the Ameren Illinois Service Territory to increase customer participation and program awareness.
- Multiple marketing tactics were utilized to promote awareness of new small business direct install weatherization and HVAC measures due to Business Program offerings being moved from the Midstream Initiative to the Standard Initiative.
- To generate interest with an easy and customer focused approach for the Small Business Initiative, program staff created the Small Business Energy Efficiency Toolkit to serve as a foundational outreach tool with a targeted postcard and landing page on the website to increase customer participation.

Appendix A: Program Initiative and Channel Descriptions

RESIDENTIAL INITIATIVES AND CHANNELS

- **RETAIL PRODUCTS INITIATIVE:** THE RETAIL PRODUCTS INITIATIVE ENCOURAGES RESIDENTIAL CUSTOMERS TO PURCHASE HIGH-EFFICIENCY PRODUCTS THROUGH THE RETAIL CHANNELS.
 - ▶ **POINT OF PURCHASE (POP) CHANNEL:** THE INITIATIVE WORKS THROUGH BRICK-AND-MORTAR RETAIL SITES AS WELL AS ONLINE SHOPPING SITES. CUSTOMERS RECEIVE INSTANT DISCOUNTS AND/OR MAIL-IN CASH REBATES AS AN INCENTIVE TO UPGRADE TO ENERGY STAR® AND OTHER QUALIFIED HIGH EFFICIENCY PRODUCTS (E.G., APPLIANCES, HEAT PUMP WATER HEATERS, THERMOSTATS). TO EXECUTE THIS INITIATIVE, THE PROGRAM IMPLEMENTATION TEAM WORKS WITH PARTICIPATING RETAILERS TO IDENTIFY AND PROMOTE ELIGIBLE PRODUCTS AND ASSOCIATED UTILITY INCENTIVE OR PRICE REDUCTIONS. IN ADDITION, THE PROGRAM IMPLEMENTATION TEAM PROVIDES RETAIL SALES ASSOCIATES WITH TRAINING AND OTHER COLLATERAL MATERIALS FOR USE IN EXPLAINING DETAILS RELATED TO THE RETAIL PRODUCTS INITIATIVE. SPECIAL PROMOTIONS ARE STAGED AT RETAIL STORE LOCATIONS WITHIN THE AMEREN ILLINOIS SERVICE AREA, INCLUDING PROMINENT PLACEMENTS OF QUALIFIED PRODUCTS WITH SIGNAGE THAT PROMOTES THE OFFER(S). IN ADDITION TO HOME IMPROVEMENT AND OTHER "BIG BOX" STORES, THE INITIATIVE ENGAGES "DISCOUNT" RETAILERS AND THRIFT STORES, WHICH HAVE HIGHER LIKELIHOOD OF SERVING AMEREN'S INCOME QUALIFIED CUSTOMERS.
 - ▶ **ONLINE MARKETPLACE CHANNEL:** THE ONLINE CHANNEL OFFERS AIC CUSTOMERS A CONVENIENT LOCATION FOR THE PURCHASE OF ENERGY EFFICIENT PRODUCTS WITH THE PROGRAM INCENTIVE INSTANTLY CALCULATED INTO THE PRICE OFFERING OF THE PRODUCT. PRODUCTS FEATURED INCLUDE: ADVANCED THERMOSTATS, SMALL APPLIANCES, WATER SAVING DEVICES, SMART HOME DEVICES, AND WEATHERIZATION MEASURES.
- **MARKET RATE SINGLE FAMILY INITIATIVE:** THE MARKET RATE SINGLE FAMILY INITIATIVE AIMS TO INCREASE ADOPTION OF ENERGY EFFICIENT PRODUCTS IN SINGLE FAMILY HOMES THAT DO NOT OTHERWISE QUALIFY FOR THE INCOME QUALIFIED INITIATIVE.
 - ▶ **MIDSTREAM HVAC CHANNEL:** ENGAGES WITH EQUIPMENT DISTRIBUTORS (E.G., HVAC AND PLUMBING) TO PROMOTE STOCKING AND PROMOTION OF HIGH-EFFICIENCY EQUIPMENT SUCH AS AIR SOURCE HEAT PUMPS, HEAT PUMP WATER HEATERS, DUCTLESS HEAT PUMP EQUIPMENT, ADVANCED THERMOSTATS, AND CENTRAL AIR CONDITIONING. DISCOUNTS ARE PASSED DOWN TO CONTRACTORS PURCHASING QUALIFYING EQUIPMENT FOR VERIFIED AMEREN ILLINOIS CUSTOMERS FROM THESE DISTRIBUTORS.
 - ▶ **HOME EFFICIENCY CHANNEL (THIRD PARTY):** CONNECTS RESIDENTIAL CUSTOMERS WITH REGISTERED PROGRAM ALLIES TO OFFER ENERGY EFFICIENCY MEASURES SUCH AS WEATHERIZATION, WINDOWS AND HVAC MECHANICALS. IN THIS PLAN PERIOD, INITIAL ASSESSMENTS ALONG WITH SOME DIRECT INSTALLATION MEASURES WILL BE COMPLETED BY AN ASSESSMENT IMPLEMENTATION CONTRACTOR. FOLLOW-UP VISITS FOR MAJOR MEASURE INSTALLATION WILL BE ASSIGNED AND COMPLETED BY CERTIFIED PROGRAM ALLIES. THE ASSESSMENT IMPLEMENTATION CONTRACTOR WILL MANAGE THE CUSTOMER RELATIONSHIP THROUGHOUT THE ENGAGEMENT.
- **MARKET RATE MULTIFAMILY INITIATIVE:** THE MARKET RATE MULTIFAMILY INITIATIVE AIMS TO INCREASE ADOPTION OF ENERGY EFFICIENCY MEASURES IN MULTIFAMILY BUILDINGS THAT DO NOT QUALIFY FOR THE INCOME QUALIFIED INITIATIVE.
 - ▶ **DIRECT INSTALL CHANNEL:** DURING INITIAL ASSESSMENTS CUSTOMERS RECEIVE DIRECT INSTALLATION OF FREE ENERGY SAVING MEASURES (E.G., ADVANCED THERMOSTATS, WEATHERSTRIPPING, FAUCET AERATORS) IN INDIVIDUAL LIVING UNITS AND COMMON AREAS. THE DIRECT

INSTALLATION SERVICE IS PROVIDED AT NO COST TO PROPERTY OWNERS AND TENANTS. EDUCATIONAL MATERIALS THAT EXPLAIN THE ENERGY AND MONEY SAVING BENEFITS ASSOCIATED WITH DIRECT INSTALLED PRODUCTS AND OTHER INITIATIVES THAT MAY BENEFIT RESIDENTS AND/OR PROPERTY OWNERS ARE LEFT BEHIND IN EACH UNIT.

- ▶ **HEAT PUMPS CHANNEL:** ADDITIONAL MEASURES BEYOND IN-UNIT INCENTIVES ARE ALSO IDENTIFIED DURING THE ASSESSMENT OF THE PROPERTY, SUCH AS HEAT PUMP INCENTIVES AND OTHER COMMERCIAL INCENTIVES. FOR SOME LARGER MEASURES, PROPERTY OWNERS OR MANAGERS MAY BE REQUIRED TO CONTRIBUTE A COPAY OF SOME PORTION OF THE PROJECT COST. IN THESE CASES, PROGRAM PARTICIPANTS WOULD ALSO QUALIFY FOR ON-BILL FINANCING IN ORDER TO FUND ANY COPAYS THAT MAY BE REQUIRED.
- ▶ **WHOLE BUILDING CHANNEL:** THROUGH ALL MULTIFAMILY CHANNELS, A “ONE STOP SHOP” APPROACH WILL BE OFFERED TO MULTIFAMILY PROPERTIES MANAGERS AND/OR IN-UNIT TENANTS. A COMPREHENSIVE AUDIT IS PROVIDED TO CUSTOMERS TO IDENTIFY ELIGIBLE MEASURES INCLUSIVE OF ALL AMEREN ILLINOIS OFFERINGS. FOLLOWING THAT DELIVERY, EACH PROPERTY HAS A SINGLE POINT OF CONTACT WITH WHOM THEY CAN FOLLOW UP TO COMPLETE OTHER ENERGY EFFICIENCY IMPROVEMENTS THROUGH AMEREN ILLINOIS 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 IQ MULTIFAMILY CHANNEL, CUSTOMERS RECEIVE A COMPREHENSIVE AUDIT TO IDENTIFY THE ELIGIBLE WEATHERIZATION SERVICES TO BE PROVIDED. LOW-COST ENERGY SAVING PRODUCTS WILL BE INSTALLED IN CONJUNCTION WITH THE AUDIT AT NO COST. WHOLE BUILDING WEATHERIZATION MEASURES MAY ALSO BE INCLUDED IN THE ENGAGEMENT.
- **INCOME QUALIFIED INITIATIVE:** THE INCOME QUALIFIED (IQ) INITIATIVE HELPS LOW- AND MODERATE-INCOME CUSTOMERS MANAGE THEIR ENERGY CONSUMPTION AND CREATE A COMFORTABLE HOME. THE INITIATIVE CAN ALSO ADDRESS HEALTH AND SAFETY CONCERNS THROUGH MULTIPLE OFFERINGS. THE INCOME QUALIFIED INITIATIVE INTERRELATES WITH THE RETAIL PRODUCTS INITIATIVE, DESCRIBED ABOVE, INCLUDING A FOCUS ON RETAIL PARTNERS, LOCATIONS AND PROMOTION STRATEGIES THAT DRIVE ENERGY EFFICIENT PRODUCT PURCHASES IN PORTIONS OF AMEREN’S SERVICE AREA THAT HAVE HIGHER PROPORTIONS OF LOW-INCOME HOUSEHOLDS.
 - ▶ **SINGLE FAMILY (SFIQ INCLUDING JOINT UTILITY) AND COMMUNITY ACTION AGENCY (CAA) CHANNELS:** SINGLE FAMILY HOMES WITH HOUSEHOLD INCOME OF UP TO 300% OF FEDERAL POVERTY LEVEL (FPL) ARE SERVED THROUGH BOTH COMMUNITY ACTION AGENCIES (CAA) AND PROGRAM ALLIES. CAAS SERVE HOUSEHOLDS LESS THAN 200% FPL AND AMEREN’S IQ SINGLE FAMILY CHANNEL SERVES HOUSEHOLDS LESS THAN 300% FPL, WITH A TIERED INCENTIVE APPROACH THAT ALLOWS LOW-TO-MODERATE INCOME CUSTOMERS TO RECEIVE SIMILAR SERVICES AS THOSE QUALIFYING FOR STATE WEATHERIZATION SERVICES. IN PARTNERSHIP WITH CAA, AND WITH SUPPORT FROM THE ILLINOIS DEPARTMENT OF COMMERCE AND ECONOMIC OPPORTUNITY (DCEO) FUNDING, ELIGIBLE CUSTOMERS ARE PROVIDED COMPREHENSIVE SINGLE FAMILY WHOLE HOUSE WEATHERIZATION SERVICES THAT MAY INCLUDE AN ENERGY AUDIT, BUILDING ENVELOPE MEASURES (E.G., AIR SEALING/INSULATION), HVAC MEASURES (E.G., FURNACES, FURNACE FANS, BOILERS, WINDOW AIR CONDITIONERS, HEAT PUMPS, DUCTLESS HEAT PUMPS, HEAT PUMP WATER HEATERS, GAS WATER HEATERS AND SMART THERMOSTATS) AND DIRECT INSTALL MEASURES (E.G., AERATORS, SHOWERHEADS, LEDS). AT THE TIME OF THE AUDIT, ANY HEALTH AND SAFETY ISSUES ARE IDENTIFIED AND MAY BE ADDRESSED AS PART OF THE COMPREHENSIVE WEATHERIZATION SERVICES. THIS INITIATIVE WILL ALSO OFFER AN INCOME IQ SINGLE FAMILY CHANNEL FOR QUALIFYING CUSTOMERS TO PARTICIPATE IN, WHO FOR A VARIETY OF REASONS MAY NOT BE ABLE TO BE SERVED BY THE CAA CHANNEL IMMEDIATELY OR DIRECTLY. THE UTILITY-SPONSORED IQ SINGLE FAMILY CHANNEL OFFERS SIMILAR MEASURES AND SERVICES FOR CUSTOMERS THAT QUALIFY AS LOW- OR MODERATE-INCOME.
 - ▶ **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.

- ▶ **MULTIFAMILY (MFIQ) CHANNEL:** MULTIFAMILY CUSTOMERS MAY ALSO BE ELIGIBLE FOR THE IQ INITIATIVE. AS DEFINED IN THE ILLINOIS POLICY MANUAL VERSION 3.0, QUALIFYING CUSTOMERS MAY RECEIVE A COMPREHENSIVE AUDIT, INCLUDING A HEALTH AND SAFETY EVALUATION, WHICH WILL IDENTIFY THE ELIGIBLE WEATHERIZATION SERVICES TO BE PROVIDED. THESE SERVICES WILL LARGELY MIRROR THOSE PROVIDED IN THE MARKET RATE MULTIFAMILY INITIATIVE (AS DESCRIBED ABOVE)—INCLUDING NO COST DIRECT INSTALL MEASURES AND EDUCATION. FURTHERMORE, QUALIFYING MULTIFAMILY PROPERTIES MAY BE PROVIDED WITH WHOLE BUILDING WEATHERIZATION MEASURES—including INSULATION, AIR SEALING, SMART THERMOSTATS, FURNACE, BOILER, WINDOW OR ROOM AIR CONDITIONERS, HEAT PUMP WATER HEATERS, AND HEAT PUMPS. ADDITIONAL HEALTH AND SAFETY ITEMS IDENTIFIED OVER THE COURSE OF THE ENGAGEMENT MAY ALSO BE ADDRESSED FOR THE HOME/PROPERTY.
- ▶ **SMART SAVERS CHANNEL:** THE SMART SAVERS CHANNEL OFFERS AN ENTRY POINT INTO THE INITIATIVE BY OFFERING A FREE SMART THERMOSTAT TO THOSE ELIGIBLE CUSTOMERS RESIDING IN QUALIFYING ZIP CODES. ELIGIBLE CUSTOMERS ARE IDENTIFIED THROUGH A SURVEY, WHICH VERIFIES THEIR HVAC EQUIPMENT MEETS REQUIREMENTS. ADDITIONAL EDUCATION IS PROVIDED BOTH AT THE TIME OF THE INSTALL AND VIA LEAVE-BEHIND MATERIALS.
- ▶ **COMMUNITY KITS CHANNEL:** COMMUNITY KITS SERVE AS AN ENTRY POINT FOR CUSTOMERS INTO ENERGY EFFICIENCY PROGRAMS BY ENGAGING A NUMBER OF COMMUNITY BASED ORGANIZATIONS (CBOS), LOCAL NON-PROFITS AND OTHER ORGANIZATIONS TO DISTRIBUTE KITS CONTAINING LOW-COST MEASURES THAT CAN PROVIDE CUSTOMERS WITH ENERGY EFFICIENCY SAVINGS.
- ▶ **DIRECT DISTRIBUTION EFFICIENT PRODUCTS CHANNEL:** DIRECT DISTRIBUTION EFFICIENT PRODUCTS PROVIDES ENERGY EDUCATION TO STUDENTS IS AN EFFECTIVE WAY TO INFLUENCE FAMILIES’ ENERGY BEHAVIORS. THE 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 “TAKEHOME” KIT THAT RAISES AWARENESS ABOUT HOW INDIVIDUAL ACTIONS AND LOW-COST MEASURES CAN PROVIDE REDUCTIONS IN ELECTRICITY, NATURAL GAS, AND WATER CONSUMPTION. THE TAKE-HOME KIT INCLUDES LOW-FLOW SHOWERHEAD, FAUCET AERATORS, SMART POWER STRIP, WATER HEATER TEMPERATURE SETBACK CARD, AND DOOR SWEEP.
- ▶ **MANUFACTURED HOMES WEATHERIZATION AND AIR SEALING CHANNEL:** 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:** 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.
- ▶ **ACCESSIBILITY CHANNEL:** THE ACCESSIBILITY CHANNEL PROVIDES SMART HOME TECHNOLOGY AND EFFICIENT DIRECT INSTALL MEASURES THAT CONTRIBUTE TO ENERGY SAVINGS AND A HIGHER LEVEL OF USABILITY FOR THE CUSTOMER, INCLUDING THOSE WITH DISABILITIES.

BUSINESS INITIATIVES AND CHANNELS

- **STANDARD INITIATIVE:** THE STANDARD INITIATIVE WILL INCENTIVIZE CUSTOMERS TO PURCHASE ENERGY EFFICIENCY MEASURES, WHICH HAVE PREDETERMINED SAVINGS VALUES CONSISTENT WITH THE ILLINOIS STATEWIDE TECHNICAL REFERENCE MANUAL AND/OR INDUSTRY-ACCEPTED SAVINGS CALCULATIONS. THE MEASURES WILL HAVE FIXED INCENTIVE LEVELS (THE VALUE OF WHICH MAY CHANGE AS PROGRAM BUDGETS, SAVINGS CALCULATIONS AND PERFORMANCE MAY BE UPDATED THROUGHOUT THE YEAR).
 - ▶ **PRESCRIPTIVE CHANNEL:** THE PRIMARY PURPOSE OF THE INITIATIVE IS TO STREAMLINE THE INCENTIVE APPLICATION PROCESS, INCREASING PARTICIPATION AMONG CUSTOMERS AND PROGRAM ALLIES. THE STANDARD INITIATIVE WILL TARGET DIVERSE BUSINESS SEGMENTS, INCLUDING INDUSTRIAL AND MANUFACTURING FACILITIES; WAREHOUSES, COMMERCIAL, RETAIL, HEALTHCARE FACILITIES, HOTELS AND MOTELS; AND AGRICULTURE, GROCERY / CONVENIENCE STORES AND NON-PROFIT ENTITIES. DIVERSE PROGRAM ALLY RECRUITMENT IS A KEY FOCUS, AND METRICS SUCH AS ENERGY SAVINGS, RECRUITMENT, EDUCATION, AND COMMUNICATION ARE MONITORED AND ENHANCED TO SUPPORT THE DIVERSE PROGRAM ALLY INCUBATOR EFFORT.
 - ▶ **PUBLIC CHANNEL:** THE STANDARD INITIATIVE WILL ALSO TARGET PUBLIC SECTOR ENTITIES WITH AN EMPHASIS ON MUNICIPAL AND EDUCATIONAL FACILITIES.
- **MIDSTREAM INITIATIVE:** THIS MIDSTREAM INITIATIVE RECRUITS DISTRIBUTORS AND WHOLESALERS OF LIGHTING, AND COMMERCIAL KITCHEN EQUIPMENT TO INCREASE THE ADOPTION OF HIGH EFFICIENCY MEASURES SUCH AS LED LIGHT FIXTURES AND CONTROLS, AND NEW ELECTRIC AND GAS KITCHEN APPLIANCES.
 - ▶ **LIGHTING CHANNEL:** THE MIDSTREAM LIGHTING CHANNEL FOCUSES ON PROVIDING INCENTIVES FOR LIGHTING UPSTREAM IN THE SUPPLY CHAIN.
 - ▶ **STATEWIDE FOOD SERVICE CHANNEL:** THE STATEWIDE MIDSTREAM FOOD SERVICE CHANNEL DELIVERS VALUE THROUGH COLLABORATION WITH OTHER UTILITIES TO ADVANCE COMMERCIAL FOOD SERVICE AND KITCHEN MEASURES VIA THE SUPPLY CHAIN (E.G., DISTRIBUTORS, PROGRAM ALLIES).
- **SMALL BUSINESS INITIATIVE:** THE SMALL BUSINESS INITIATIVE INCENTIVIZES SMALL BUSINESS (PRIMARILY ELECTRIC CUSTOMERS ON DS2 OR DS3 [400KW DEMAND OR LESS] RATES, AND NATURAL GAS CUSTOMERS ON GDS-2 RATES). IN THIS INITIATIVE, CUSTOMERS ARE ENCOURAGED TO INSTALL ENERGY EFFICIENT PRODUCTS AND PERFORM ENERGY SAVING RETROFITS. THE INITIATIVE IS DELIVERED BY A GROUP OF PROGRAM ALLIES, WHO ARE EXPERIENCED AND TRAINED TO ASSIST THESE CUSTOMERS WHO ARE TYPICALLY SMALL-BUSINESS, NON-PROFITS, SCHOOLS AND LOCAL GOVERNMENT. THE SMALL BUSINESS INITIATIVE WILL FOCUS ON DELIVERING WHOLE BUILDING ENERGY EFFICIENCY SOLUTIONS TO SMALL BUSINESS CUSTOMERS THROUGH ENERGY-EFFICIENT PRODUCTS AND THE EXECUTION OF ENERGY SAVINGS RETROFITS PERFORMED BY AN OPEN NETWORK OF PROGRAM ALLIES. PROGRAM ALLIES INSTALL LIGHTING, HVAC WEATHERIZATION AND OTHER APPLICABLE MEASURES AND SUBMIT THE CORRESPONDING APPLICATIONS FOR INCENTIVE PAYMENT. COLLABORATION WITH KEY PARTNERS IS CRITICAL, ALONG WITH UTILIZING THE ONE-STOP-SHOP APPROACH TO INTEGRATE WEATHERIZATION AND LIGHTING UPGRADES WITHIN THE COMMERCIAL SEGMENT OF MIXED-USE PRIVATE AND PUBLIC SECTOR FACILITIES.
 - ▶ **STANDARD CHANNEL:** BASE INCENTIVE LEVELS IN LINE WITH HISTORICAL OFFERINGS FOR THE SMALL BUSINESS.
 - ▶ **ENHANCED CHANNEL:** ENHANCES INCENTIVE LEVELS, INCREASED FROM THE BASE INCENTIVE LEVELS. OFFERED TO ELIGIBLE NON-PROFIT OR

PUBLIC SECTOR SMALL BUSINESS CUSTOMERS IN NON-DISADVANTAGED COMMUNITIES.

- ▶ **DISADVANTAGED COMMUNITIES CHANNEL:** ADVANCED INCENTIVES LEVELS, INCREASED FROM THE BASE INCENTIVE LEVELS. OFFERED TO ANY ELIGIBLE SMALL BUSINESS CUSTOMER LOCATED IN A DISADVANTAGED COMMUNITY.
- **CUSTOM INITIATIVE:** CUSTOM INITIATIVE PROJECTS MEET THE NEEDS OF CUSTOMERS LOOKING TO EXECUTE ON MORE ADVANCED ENERGY SAVINGS PROJECTS, INCLUDING NEW CONSTRUCTION AND BUILDING RENOVATION PROJECTS. CUSTOMER PROJECTS ALSO MAY INCLUDE FEASIBILITY STUDIES, METERING AND MONITORING DESIGN TEAM INCENTIVES, STAFFING GRANTS, ENHANCED ENERGY ASSESSMENTS, AND STRATEGIC ENERGY MANAGEMENT. THESE PROJECTS ARE TYPICALLY COMPLEX AND UNIQUE, REQUIRING SEPARATE INCENTIVE APPLICATIONS AND PLANS IN ORDER TO CALCULATE ESTIMATED AND VERIFY ACTUAL ENERGY SAVINGS. INCUBATOR OFFERINGS MAY ALSO BE PROPOSED IN ORDER TO OFFER INNOVATIVE SAVINGS APPROACHES FOR BUSINESS CUSTOMERS.
 - ▶ **PRIVATE CHANNEL:** ENERGY ADVISORS DETERMINE INDUSTRY BEST PRACTICES AND NEW TECHNOLOGY APPLICATIONS TO ACHIEVE SAVINGS. INDUSTRY LEVEL SAVINGS PARTICIPATION IS ANALYZED FOR OPPORTUNITIES TO DRIVE INDUSTRY WIDE ENERGY MANAGEMENT BEST PRACTICES FOR SOME INDUSTRY COHORTS OF CUSTOMERS. INNOVATIVE TECHNOLOGIES AND SAVINGS METHODOLOGIES THAT OFFER PIONEERING SAVINGS APPROACHES FOR BUSINESS CUSTOMERS ARE INVESTIGATED AND EVALUATED FOR TECHNICAL FEASIBILITY AND EFFECTIVENESS AS THEY ARE PRESENTED FOR IMPLEMENTATION. THE INITIATIVE USES A LONG-TERM STRATEGIC PLAN APPROACH FOR THE PIPELINE AND SAVINGS DELIVERY TO ESTABLISH A REALISTIC, ACHIEVABLE GOAL BASED ON THE CURRENT PIPELINE OF PROJECTS THAT WILL LIKELY COMPLETE THE CURRENT PROGRAM YEAR.
 - ▶ **PUBLIC CHANNEL:** THE PUBLIC CHANNEL FOLLOWS THE SAME DELIVERY STRATEGY AS THE PRIVATE CHANNEL. TARGET CUSTOMERS WITH DEDICATED ACCOUNT DEVELOPMENT EFFORTS INCLUDE SCHOOL AND LOCAL GOVERNMENT ORGANIZATIONS.
- **RETRO-COMMISSIONING INITIATIVE:** THE RETROCOMMISSIONING INITIATIVE IDENTIFIES AND IMPLEMENTS NO COST/LOW COST (ZERO-TO-ONE YEAR PAYBACK) ENERGY EFFICIENCY MEASURES, WHICH WILL OPTIMIZE THE OPERATION OF EXISTING SYSTEMS FOR BUILDING AUTOMATION, COMPRESSED AIR, INDUSTRIAL VENTILATION, INDUSTRIAL REFRIGERATION AND HEALTHCARE-RELATED SYSTEMS. EACH PROJECT RECEIVES AN IMPLEMENTATION PLAN, WHICH INCLUDES A ROADMAP OF CAPITAL PROJECTS (ONE-TO-10 YEAR PAYBACK), WHICH 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.
 - ▶ **PRIVATE CHANNEL:** THE ENERGY ADVISOR TEAM IS RESPONSIBLE FOR ACTIVELY PROMOTING THE INITIATIVE; HOWEVER, PARTICIPATION IS PRIMARILY DRIVEN BY THE OUTREACH OF A CORE GROUP OF SERVICE PROVIDERS. DUE TO THIS, THE IMPLEMENTATION TEAM CONTINUALLY IDENTIFIES, RECRUITS AND TRAINS QUALIFIED REGISTERED SERVICE PROVIDERS (RSPS) AND PROVIDES THEM WITH RESOURCES AND MATERIALS THAT ASSIST WITH AND ENHANCE THEIR OUTREACH EFFORTS FOR POTENTIAL PROJECTS.
 - ▶ **PUBLIC CHANNEL:** THE PUBLIC CHANNEL FOLLOWS THE SAME DELIVERY STRATEGY AS THE PRIVATE CHANNEL. TARGET CUSTOMERS WITH DEDICATED ACCOUNT DEVELOPMENT EFFORTS INCLUDE SCHOOL AND LOCAL GOVERNMENT ORGANIZATIONS.

Appendix B: New or Discontinued Measures

No New or Discontinued Measures

Appendix C: Implementation Partners

Initiative And/Or Channel	Implementation Partner	Key
Residential Program		Prime Implementation Contractor
Retail Products Initiative: Point of Purchase Channel	Leidos and Walker-Miller Energy Services	Implementation Subcontractor
Retail Products Initiative: Online Store Channel	Leidos and AM Conservation	
Market Rate Single Family Initiative: Midstream HVAC Channel	Leidos and CMC Energy Services and Energy Sciences	
Market Rate Single Family Initiative: Home Efficiency Channel – Third Party	Walker-Miller Energy Services	Diverse Partners denoted in bold .
Market Rate Multifamily Initiative	Leidos and CMC Energy Services	Non-Profit Partners denoted in <i>italics</i> .
Public Housing Initiative	Leidos and CMC Energy Services	
IQ Initiative: Single Family including Joint Utility	Leidos and Walker-Miller Energy Services and <i>Resource Innovations</i>	
IQ Initiative: Community Action Agency (CAA) Channel	Leidos and Walker-Miller Energy Services and Inova Energy Group	
IQ Initiative: Electrification Channel	Leidos and Walker-Miller Energy Services and Inova Energy Group	
IQ Initiative: Multifamily Channel	Leidos and CMC Energy Services	
IQ Initiative: Smart Savers Channel	Leidos and i3 Energy	
IQ Initiative: Community Kits Channel	Leidos and <i>Resource Innovations</i>	
IQ Initiative: DDEP (School Kits) Channel	Leidos and <i>National Energy Foundation</i>	
IQ Initiative: Manufactured Homes Weatherization and Air Sealing Channel	Leidos and Future Energy Enterprises	
IQ Initiative: Healthier Homes	Leidos and Energy Infrastructure Partners	
IQ Initiative: Accessibility Channel	Leidos and Solutions for Energy Efficient Logistics (SEEL)	
Market Transformation	Evergreen Energy, Fernhill Shopworks and <i>Resource Innovations</i>	
Business Program		
Standard Initiative	Leidos and <i>GDS & Associates, Midwest Energy Efficiency Alliance, Walker-Miller Energy Services</i> and AM Conservation	
Midstream Initiative: Lighting Channel	Leidos and CMC Energy Services and Energy Sciences	
Midstream Initiative: Food Service Channel	Leidos and <i>Frontier Energy</i>	
Small Business Initiative	Leidos and Diverse Power Solutions and i3 Energy	
Custom Initiative	Leidos and <i>GDS & Associates, VK Energy, Energy Sciences</i> and <i>Willdan Inc.</i>	
Retro-Commissioning Initiative	Leidos and <i>Power TakeOff</i> and <i>GDS & Associates</i>	
Market Transformation	Evergreen Energy and Fernhill Shopworks	
Market Development Initiative (MDI)		
Procurement Advancement and Transformation Hub (PATH) Channel	Walker-Miller Energy Services	
Community-Based Organization (CBO) Management Channel	<i>Resource Innovations</i>	
Grant Writing Assistance Channel	Solutions for Energy Efficient Logistics (SEEL)	
Workforce Development Channel	Solutions for Energy Efficient Logistics (SEEL)	

Appendix D: Annual IQ Multifamily Reporting

Annual metrics required pursuant to Illinois Energy Efficiency Policy Manual Version 3.1 Section 6.8 Income Qualified Multi-Family Reporting Principles are tracked throughout the year and reported in the Semi-Annual Narrative Report for Q4.

This report includes the following additional required reporting not previously reported for PY2025:

BUILDING TYPES TREATED							
Size	Housing Type	Number of Buildings			Number of Apartments		
		Central Heating System	Individual Heating System	Total	Central Heating System	Individual Heating System	Total
Buildings <20 Units	Public Housing	0	171	171	0	543	543
	Subsidized Housing	5	387	392	25	2,308	2,333
	Unsubsidized Housing	4	172	176	44	1,362	1,406
Buildings 20-49 Units	Public Housing	0	1	1	0	38	38
	Subsidized Housing	0	53	53	0	343	343
	Unsubsidized Housing	1	60	61	35	555	590
Buildings w/ 50+ Units	Public Housing	15	0	15	48	0	48
	Subsidized Housing	0	564	564	0	3,575	3,575
	Unsubsidized Housing	0	73	73	0	545	545

*Note: Central Heating System is estimated based on records identifying a Boiler as the Primary Heating Type. All other Primary Heating Types are assumed to be Individual Heating Systems.