

Illinois EE Stakeholder Advisory Group (SAG) Large Group Meeting (Q3)

Tuesday, July 22, 2025

1:00 – 3:00 pm

Teleconference

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Meeting Materials

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- [ComEd EE Portfolio Report-Out](#)
- [Ameren Illinois Presentation: 2025 EE Portfolio Report-Out](#)

Attendees

Name	Company or Organization
Celia Johnson	Facilitator (Celia Johnson Consulting)
Zoe Knaus	SAG Facilitation Support (Inova Energy Group)
Abigail Miner	IL Attorney General's Office
AJ Young	Greenlink
Alan Elliott	Opinion Dynamics
Amber Anderson	Walker-Miller Energy Services
Amy Jewel	Elevate
Andrea McKenna	Cascade Energy
Andrey Gribovich	DNV
Andy Vaughn	Leidos
Anna Lydia Marrero	CEDA
Babette Washington	Ameren Illinois
Billy Davis	Bronzeville Community Development Partnership
Carl Samuelson	Michaels Energy
Chris Neme	Energy Futures Group, representing NRDC
Chris Vaughn	Nicor Gas
Colin Santel	Ameren Illinois
Danish Murtaza	Peoples Gas & North Shore Gas
David Lemmon	Utility Energy Services
Deb Dynako	Slipstream
Dena Jefferson	Franklin Energy

Name	Company or Organization
Dylan Royalty	ScottMadden
Ebony Buchanan	CEDA
Elder Calderon	ComEd
Elizabeth Horne	ICC Staff
Eljona Fiorita	CLEAResult
Ellen Rubinstein	Resource Innovations
Elli Arzbaeher	Future Energy Enterprises
Erika Dominick	Walker-Miller Energy Services
Evan Tincknell	Opinion Dynamics
Fernando Morales	Ameren Illinois
Hannah Howard	Opinion Dynamics
Jaleesa Scott	ComEd
Jamey Neal	Ameren Illinois
Jason Fegley	Leidos
Jean Gibson	Peoples Gas & North Shore Gas
Jeff Carroll	DNV
Jill Rolstone	Franklin Energy
Jim O'Shaughnessy	Energy Infrastructure Partners
Joe Mays	Cascade Energy
Joel McManus	TRC Companies
John Carroll	Ameren Illinois
John DeRosa	Illinois EPA
John Lavallee	Ameren Illinois
John Mascarenhas	CLEAResult
Josh Schreck	The JPI Group
Kanchan Swaroop	Resource Innovations
Karen Lusson	National Consumer Law Center
Keely Hughes	The JPI Group
Kim Janas	IL Attorney General's Office
Kit White	MEEA
Lance Escue	Ameren Illinois
Larry Kotewa	Elevate
Lauren Bates	Opinion Dynamics
Lee Ringo	Energy Infrastructure Partners
Lisa Obear	Brightline Group
Mark Milby	Elevate
Matt Armstrong	Ameren Illinois
Matt Worms	ComEd
Mia Berrios	People for Community Recovery
Minya Coleman	ComEd
Nate Baer	i3 Energy
Nathan Perkins	Walker-Miller Energy Services

Name	Company or Organization
Neb Kistic	CLEAResult
Nelson May	Future Energy Enterprises
Nicholas Burstein	CMC Energy
Nicholas Crowder	Ameren Illinois
Nick Lovier	Ameren Illinois
Nick Warnecke	Ameren Illinois
Nicole Popejoy	IL Association of Community Action Agencies
Omayra Garcia	Peoples Gas & North Shore Gas
Parini Shah	Guidehouse
Pat Justis	Ameren Illinois
Patrice McFarlin	Encolor Consulting
Peter Pasholk	Future Energy Enterprises
Philip Halliburton	ComEd
Randy Opdyke	Nicor Gas
Rashaan Keeton	Center for Energy & Environment
Rose Williamson	Opinion Dynamics
Salina Colon	CEDA
Sam Stahl	Ameren Illinois
Sara Castleberry	Resource Innovations
Selena Worster Walde	Erthe Energy Solutions
Seth Craig-Snell	SCS Analytics
Shawn Haas	Peoples Gas & North Shore Gas
Shivana Shrestha	Walker-Miller Energy Services
Stephen Linkous	Bellawatt
Sushmitha Ramakrishnan	ComEd
Tammy Jackson	Ameren Illinois
Ted Weaver	Dunsky Climate Advisors, representing Nicor Gas
Tina Grebner	Ameren Illinois
Travis Hinck	GDS Associates
Valencia Roner	Energy Infrastructure Partners
Wade Morehead	Morehead Energy
Zach Obert	Franklin Energy
Zach Ross	Opinion Dynamics
Zuri Thompson	Walker-Miller Energy Services

Introduction to Q3 Large Group SAG Meeting

Celia Johnson, SAG Facilitator

Purpose of the July 22 meeting

1. For Ameren Illinois to report-out on EE Portfolio progress in 2025; and
2. For ComEd to report-out on EE portfolio progress in 2025.

Please note:

- Q1 2025 utility EE quarterly reports are posted on the SAG website (<https://www.ilsag.info/reports/utility-reports/>).
- Nicor Gas, Peoples Gas & North Shore Gas will each report-out at the November SAG meeting.

ComEd Presentation: 2025 EE Portfolio Report-Out

Elder Calderon and Daniel Gonzalez, ComEd

Agenda

- 2025 Portfolio Summary and Medium- and Long-term Outlook
- Business and Public Sector Highlights
- Residential & Income Eligible Highlights

Near, Medium and Long-Term ComEd Challenges

- The ComEd EE Portfolio has been tremendously successful since its inception in 2008, and we expect to continue to deliver huge benefits to our customers and the environment moving forward – however, we are looking out at a horizon of annual and cumulative goals that are increasingly difficult to achieve
- Wide range of factors we see impacting the Portfolio:
 - Economic and policy conditions resulting increase in \$/kWh
 - Increasing amounts of expiring savings
 - Significant drop-offs in low-cost savings opportunities (e.g. EISA, VO, and C&I lighting market saturation)
 - Ramp-up of Electrification and Market Transformation Efforts
- Benchmarking in 2024 confirmed that many other utilities have similar concerns.
- At the start of 2025, we were on track to just meet CPAS and AAIG and over the year we've seen significant impacts that have reduced our forecasted performance even further. The portfolio is hard at work trying to mitigate these impacts by:
 - Ramping down \$/kWh of programs that had significant increases in 2024, to address market conditions, collectively improving portfolio cost-effectiveness by ~\$0.03
 - Ramping up and pushing forward implementation of new low-cost offerings such as BEA and Market Transformation
 - While, staying on track to meet legislative/stipulation targets

2025 Portfolio Summary Through Q2

- ComEd on-track to meet 2025 CPAS and AAIG, with an estimated WAML of 13.4
- Residential & Income Eligible (IE) Programs
 - IE programs have achieved 50% of their combined 2025 savings forecast of 631,869 MWh, including the Whole Home Electric program, and excluding converted therms.
 - Customers have received over 3,180,000 incentives through Q2

- Over 11,500 homeowners & tenants – consisting of over 9,400 income eligible participants - have received products from assessments through Q2
- Market rate residential programs have achieved 44% of their combined 2025 savings forecast of 256,609 MWh, not including converted therms
- Private & Public Sector Programs – Private sector programs have achieved 44% of their combined 2025 savings forecast of 608,830 MWh; public sector programs have achieved 32% of their combined 2025 savings forecast of 130,915 MWh
- At the same time, we continue to explore ways to make electrification more affordable and serve more income eligible customers. This is a critical exercise as the portfolio ramps up electrification to a 10% cap in 2026 and must continue to meet a 25% IE Electrification minimum
- 2025 MWh Forecast = 1,834,780
- Actual Net MWh YTD = 44%
- Actual Spend YTD – 38% = \$169,826,212
- 2025 Budget = \$447,014,912

Medium-Term 2025-2026 Forecast

- Working with IEPA on braiding/coordination – specifically establishing data sharing pathways as offerings prepare to launch
- At the same time, we are trying to understand impacts of the OBBB. Specifically, the impact of losing Heat-pumps and Home Efficiency tax credits
- Tarriff impact has been immediately felt within midstream and retail offerings, allowing for early mitigation strategies. However, impacts on C&I are still being gauged as market slowly ramps down
- Programs continue to monitor market impacts, with daily updates and no sight of coming stability. As mentioned, we are forecasting to just meet energy savings goals, visibility is key to maintain balance in the portfolio, meet statutory energy savings goals and stipulated minimums.
- There are several start-up efforts as we go into 2026 and start of Plan 7.
 - Third Party RFP and Establishing an Energy Advising Network
 - Continued work with municipalities to establish stretch-code adoption timelines
 - Efforts to consolidate offerings to improve coordination and streamline services
 - Ramp-up Electrification to meet new savings caps

Karen Lusson (via chat): Can you discuss how, if at all, low-income programs have been impacted by these challenges? I would like to hear about any budget shifts.

- *Elder Calderon: We are seeing the largest impacts on midstream customers. We have not yet seen a large impact on our direct consumer programs because they are forecasted over longer periods of time. We will start seeing impacts on low-income projects in the coming years, but the data has not yet been developed for us to draw conclusions.*
- *Karen Lusson: I am specifically wondering if these challenges have triggered budget shifts in low-income weatherization programs, away from whole-building programs.*
- *Elder Calderon: No, our income-eligible budget targets have stayed on target. We are set to meet the minimum required spend and will not fall beneath it for home weatherization.*

Chris Neme: When you mention ramping down on \$/kWh, do you mean that you are ramping down more expensive programs, or finding ways to decrease program costs?

- *Elder Calderon: A combination of both. Several incentives increased in 2024, and we are now able to optimize the allocation of these incentives. We have identified the impact of our higher cost programs and are moving costs.*

- *Chris Neme: Thanks. When you mention you an estimated WAML of 13.4, is this a weighted average of technical lives, or a savings weighted average life? Some behavior programs show 100% of savings in the first year, then 80% in the second year, etc. Is this assuming a 10-year measure life?*
- *Elder Calderon: There is only one program with the savings curve you mentioned. 13.4 represents the estimated useful lifetime, so around a 10-year estimate.*
- *Chris Neme: There are many measures with dual baselines, like the one I described. They reflect higher savings in one year, followed by lower savings in future years.*
- *Elder Calderon: Yes, any measures with that kind of baseline are accounted for and calculated effectively in our reporting.*
- *Chris Neme: I would find it helpful going forward if the utilities could provide the average measure life based on measure savings and average technical lifetimes. I am also excited to hear about your work with municipalities on stretch codes.*

Business & Public Sector Highlights

- **Small Business (Private and Public)**
 - The ComEd Small Business program is seeing strong engagement in Select Communities, delivering 50% energy savings year-to-date with 37 GWh in net savings toward a 74 GWh annual goal, supported by \$16.13 million in incentives. The mid-year pipeline totals 112 GWh, based on \$46.2 million in projected incentives
 - SBO service providers are leveraging the 2025 Made In Illinois campaign, which promotes products at least 50% manufactured in Illinois.
 - As part of workforce development, an HVAC training session was held on May 16 at the College of Lake County's Tech Campus, attended by 26 service providers to enhance technical skills
- **Standard (Private and Public)**
 - The Standard Offering increased lighting incentives by \$0.05, raising LED Fixtures and Retrofits to \$0.80 and Networked Lighting to \$1.05, aiming to boost participation in cost-effective lighting measures
 - The offering is also performing well in Select Communities, with 19.9 net GWh in paid savings and \$5.6 million in incentives distributed. An additional 43.8 net GWh in the pipeline brings the 2025 total to 63.7 net GWh

Business & Public Sector Highlights (cont.)

- **Midstream/Upstream (Instant Discounts)** – The Instant Discounts offering has had sustained strong performance and is currently on track to exceed its original 2025 public savings goal by ~35%. Instant Discounts disbursed its first incentive for a new measure introduced in 2025: VRF heat pumps. The installed VRF heat pump netted savings of ~46,278 kwh, of which 41,000 are electrification kwh. This is a promising start for a new measure and has led to an increasing pipeline for VRF heat pumps
- **Commercial Food Service (CFS)** – The CFS team launched a new vendor payment platform, which improves the payment turnaround time to two business days resulting in a more streamlined vendor experience. The team added additional program support team members to support the growth of the offering to increase the efficiency and effectiveness of the program. In May, the CFS team attended the National Restaurant Association (NRA) Show where they networked with current and potential distributors. As a result, additional leads and contacts are being pursued.
- **Strategic Energy Management (SEM)**

- Through Q2 cohort recruitment remained strong, with growing interest from colleges and universities. The 2025 ComEd SEM Summit, held on June 10, welcomed 51 representatives and featured 12 breakout sessions, a customer panel with 5 participants, and 3 sessions led by author Mark Jewell on promoting energy efficiency to leadership/
- Seven cohort workshops were held, covering topics like wastewater blower optimization, employee engagement, DOE 50001 Ready, and Energy Scan overviews.
- SEM also hosted 12 “Residential Pop-up” events at 11 customer sites, educating employees on home energy efficiency programs. These were coordinated with Nicor Gas, where applicable, to support a holistic energy approach.

Chris Neme: You mentioned lighting network controls in small business highlights. Are these control measures being delivered through the Small Business Channel, or as standard incentives?

- *Elder Calderon: They are being delivered through the Small Business Channel, but they are also available in the standard program. Transitioning to advanced lighting has proven to be a strong measure in the standard program, so we are aiming to emphasize these measures for small businesses.*
- *Chris Neme: Do you have data on what fraction of lighting savings are coming from lighting controls upgrades via the Small Business or standard channels?*

Chris Neme: What does select communities refer to on slide 6?

- *Elder Calderon: This is a combination of different communities, including disadvantaged communities, income-eligible, underserved zip codes, equity investment eligible communities (EIECs), and others. It is an umbrella term we are using for this group.*
- *Chris Neme: Is this the same as the net-to-gross (NTG) small businesses definition, or do they overlap?*
- *Elder Calderon: Yes, the NTG agreement was serving 100% disadvantaged communities. This term encapsulates the EIEC communities and DAC zones as well.*
- *Chris Neme: Not exactly the same thing, but it overlaps.*
- *Celia Johnson: There is a Networked Lighting Controls Subcommittee meeting coming up on August 27, where ComEd will provide more information about NLC measures.*

Travis Hinck: Do you intend to claim savings from fuel switching on the commercial side?

- *Elder Calderon: Yes, we have ramped up this measure in 2025. There is more engagement in residential areas with heat pumps as well as other fuel switching measures. Commercial and Industrial areas show engagement with heat pumps as well.*

Residential & Income Eligible Highlights

- Home Energy Savings (HES) (Home Energy Assessment, Income Eligible Retrofits)
 - In Q2, the HES program distributed approximately \$4.7 million in incentives to support Income Eligible (IE) offerings, which include in-home energy assessments with direct install measures and deeper weatherization services like air sealing through the retrofits offering.
 - To date in 2025, the program has completed 6,274 projects, with 5,023 (80%) serving IE customers—demonstrating a strong commitment to households with the greatest need
 - The program also continues targeted outreach to customers using electric resistance heat (ERH), promoting heat pump upgrades.

- In Q2, 9 heat pumps were installed, up from 1 in Q1, highlighting growing engagement with ERH households.
- Additionally, a new service launched in Q2 offers smart thermostat installations to Market Rate (MR) customers for a fee, expanding energy-saving opportunities and reflecting the program's adaptability to evolving customer needs.
- See slide 10 for participation and net MWh YTD information.

Billy Davis (via chat): Are Whole Home Electrification and Green Homes Chicago the same program?

- *Elder Calderon: They are not the same program, but they do provide equivalent offerings. Whole-home electric is residential electrification on the ComEd side, Green Homes Chicago is a new electrification program just being implemented this year.*

Karen Lusson (via chat): Who implements the Green Home Chicago program? Who implements the Whole Home Electric program?

- *Elder Calderon: I am not sure who implements Green Home Chicago, but I can follow-up with that information. The Whole Home Electric Program is implemented by Resource Innovations.*
- *Rashaan Keeton (via chat): Green Homes Chicago is implemented by Elevate.*
- *Celia Johnson (via chat): Here is the website for the Green Homes Chicago program that Elder mentioned:*
<https://www.chicago.gov/city/en/depts/doh/provdrs/homeowners/svcs/green-homes-chicago.html>

Residential & Income Eligible Highlights (cont.)

- Retail (Market Rate and Income Eligible)
 - The Retail program saw strong performance in the income-eligible sector, with top measures including weatherization (spray foam and acrylic caulk), advanced power strips, and air purifiers. Lighting sales rose 8%, driven by increased purchases of nightlights and omni/A-line bulbs
- Heating and Cooling
 - Through Q2, the HH&C program processed 2,614 incentives, including 2,018 air source heat pumps, 574 mini-split heat pumps, and 22 geothermal units. In April, the program celebrated a milestone of 15,000 total heat pump installations
 - On June 2, 2025, the program announced two incentive updates effective July 1, 2025:
 - A \$200 increase in Tier 2 air source heat pump incentives
 - A \$75 incentive for ENERGY STAR® smart thermostats when installed with eligible heat pumps

Karen Lusson: Regarding the 4.7 million distributed incentives for home energy savings, what part of that represents whole-building weatherization?

- *Elder Calderon: I can figure that out and follow-up. It shouldn't be significant, but I will verify.*
- *Karen Lusson: Same for the number of projects. For the home energy savings income-eligible retrofits, is it safe to say the 2108 single-family buildings treated were derived from the income-eligible assessment?*
- *Elder Calderon: The correct number on the table is 1001, but yes, that is safe to say.*

- *Karen Lusson: From this table, it seems like only 25% of buildings move onto weatherization measures. Can you describe the barriers you see? Are they typically mold, roofing problems, etc.? What prevents homes from being treated?*
- *Elder Calderon: A number of homes are affected by the reasons you stated. A lot of them are affected by our eligibility criteria, which ensures the projects we select are the most impactful energy savings.*
- *Karen Lusson: Are you still operating under the criteria we explored a few years ago? Resource Innovations said that no building after 1970 can be operated on under those terms.*
- *Elder Calderon: Yes, the criteria has not changed since we presented to the stakeholders.*
- *Karen Lusson: Have you thought about revising that?*
- *Elder Calderon: We try to maintain a healthy pipeline throughout the year, and not first-come first-serve. We are on track to reach the whole-building treatment goals, but this is something we have under consideration.*

Chris Neme: Looking at the savings, it seems like there was about 1100 kWh/house saved from direct installation. Is this correct, how did all these savings come to be?

- *Elder Calderon: Yes, the primary reason for this is our eligibility requirements. We target those who will have the highest impact to energy savings. This maximizes impact of direct install savings. Savings are also attributed to lighting installation, HVAC measures, heat pumps, etc.*
- *Chris Neme: Are you replacing HVAC units during the retrofit stage?*
- *Elder Calderon: I will have to verify that, some methods vary. The savings we are discussing are deemed from lighting savings, shower heads, etc.*
- *Karen Lusson (via chat): My understanding is that the IE Assessments do not install major measures. It would be helpful during this call to list what measures are installed in the HEA program.*
- *Chris Neme: I am surprised the savings are so high, I did not know it included assessments. If it is possible to see a representation of the mix of savings, that would be great. Also, I understand there are challenges with smart thermostats and heat pumps, where a smart thermostat could put the heat pump into inefficient resistance heating mode. Have you looked into this?*
- *Elder Calderon: Yes, we are aware of these issues. We target eligible heat pumps and do not incentivize thermostats that require heat pumps.*
- *Chris Neme: I am not sure I would trust the manufacturers to tell you which heat pumps are not eligible for partnership with a smart thermostat. I am wondering if there is a good outcome for the customer or the grid at this point, we should dig into this later.*

Chris Neme (via chat): Appreciate the innovations you have called out on the SEM program. Just to make sure to offer positive feedback as well as questions.

EE – Financial Assistance Highlights

- Q2 Financial Assistance Highlights – Catch Up & Save
 - Through Q2 2025, 39 income-eligible customers enrolled in the Supplemental Arrearage Reduction Program (SARP) also received an energy savings kit through the Catch Up & Save initiative
 - This offering, coordinated by ComEd Energy Efficiency (EE) and Financial Assistance (FA), is designed to support customers facing payment challenges by

combining energy efficiency benefits with a payment plan—historically, limited to LIHEAP recipients— through a single enrollment process

- Each kit includes a product and installation guide to help customers install the items, enabling immediate energy savings and cost reductions

Karen Lusson: You are talking about LIHEAP customers, correct?

- *Elder Calderon: Yes, correct.*

Portfolio Diverse Spend

- Through Q2, ComEd diverse EE spend is ~\$41.8M, ~25% of total spend, excluding customer pass through incentives. However, we anticipate this percentage to go up significantly, as there's always a lag in diverse spend reporting vs. invoicing.
 - Tier 1 Spend is \$18.6M
 - Tier 2 Spend is \$23.2M
- Year to date, ComEd has utilized 26 diverse prime contractors (Tier 1) and 41 diverse sub-contractors and service providers (Tier 2)

Elder Calderon: I would be happy to have a separate conversation regarding stretch codes with our research team, as we did not have evaluation results to share today. We are hoping to share that data next year. Apologies for not including it, but happy to discuss at a later date.

- *Celia Johnson: Thank you, Elder. We can schedule a time to discuss.*

Karen Lusson: For the Tier 2 Diverse Category, is it correct that your primary implementers choose your Tier 2 implementers, ComEd is not making those decisions?

- *Elder Calderon: Yes, that is correct. Tier 1 implementers pick the Tier 2 implementers, but their decision is influenced by our diverse spend requirement and portfolio.*

Ameren Illinois Presentation: 2025 EE Portfolio Report-Out

Babette Washington, Jamey Neal, Nick Crowder and Nick Lovier, Ameren Illinois

Portfolio Overview

- Q1 Goal Achievement: Electric
 - Goal: 397,909 MWh
 - Achieved: 58,025 MWh
 - 15% of electric PY2025 implementation plan savings goal
- Q1 Goal Achievement: Gas
 - Goal: 2,579,569 Therms
 - Achieved: 576,900 Therms
 - 22% of gas PY2025 implementation plan savings goal
- Portfolio Overall Spend Achievement
 - PY2025 Electric and Gas Total Budget: \$138,078,612
 - PY2025 Electric and Gas Total Actual Spend: \$24,529,340
 - PY2025 Electric and Gas Income Qualified Actual Spend: \$10,300,430

Residential Program

- Offerings Overview
 - Achieved: 16,454 MWh
 - Goal: 139,817 MWh
 - 12% of electric PY2025 implementation plan savings goal
 - Achieved: 184,637 Therms
 - Goal: 1,144,656 Therms

- 16% of gas PY2025 implementation plan savings goal

Income-Qualified Initiative

- Customer Entry and Marketing Overview
 - Initiative could reach the customer through social media, email, community-based organization referrals, outreach, direct mail, AIC customer service, community action agency referrals, web search engine optimization, and AIC credit and collections.
- Income-Qualified Initiative
 - Community action agencies (CAAs) work with local contractors.
 - Single-family, joint utility, multifamily, electrification, manufactured homes, and healthier homes programs partner with program allies to implement programs and initiatives.
 - Retail products, community kits, and smart savers are customer entry points into the various Programs or Initiatives.
- Customer Journey
 - Home Efficiency Specialist handles the customer referrals and questions related to participation
 - Customer eligibility verification includes confirmation of income, home ownership and account status
 - Home assessment is scheduled with Field Energy Advisors
 - Program Allies assigned work based on geography of customer
 - Whole home retrofit and building envelope measures installed
 - QA/QC inspection of property by Program staff
- Measure Offerings
 - Direct Install Measures
 - Advanced Power Strips
 - LED lighting
 - Showerheads
 - Faucet Aerators
 - Pipe Wrap
 - Light Switch Plate Gasket Covers
 - Health and Safety
 - Moisture and Mold Remediation
 - Gas Line Repair
 - Knob and Tube
 - Proper Ventilation
 - Building Envelope
 - Insulation
 - Air Sealing
 - HVAC
 - Furnace
 - Central AC
 - Air Source Heat Pumps
- Single-Family Channel
 - See slide 9 for description of customer journey.
- Community Action Agencies (CAA) Braided Channel
 - Leads the Program via the Community Action Agency LIHEAP intake process
 - Assessment completed by agency staff
 - Project installed by local contractors or agency staff

- Measures installed according to DCEO guidelines
- Agencies apply braided funding to specific measures based on project need
- Program staff receive final paperwork and confirm measure eligibility

John Carroll (via chat): Please note that measure level qualifying criteria are included within the appendix of this slide deck.

Residential Program Highlights

- Market Effects
 - 2024 Savings Captured:
 - 1,597 MWh
 - Primarily through Air Source Heat Pumps and Ductless Heat Pumps.
 - 2025 Savings (YTD):
 - 0 MWh YTD
 - Market effects data follows a different timeline due to the distributors having to finalize their quarterly data internally before submitting it to us.
 - Data Processing Update:
 - In 2024, we contracted an implementer to process all the distributor market data.
 - As of April 2025, processing was moved in-house to allow for greater oversight and alignment.

Karen Lusson: Regarding customer entry points for income-eligible programs, I am wondering if Ameren takes advantage of low-income discount rates for marketing. I know you are marketing these customers for the braided programs, but when they are assigned tiers for a gas and electric discount, are these customers being reached out to for other income-qualified programs?

- *Jamey Neal: Yes, our service groups are responsible for partnering with agencies and recognizing income-qualified gas tier rates. This information is shared and marketing is developed.*
- *Karen Lusson: In those instances, the customers then do not have to fill out paperwork again, correct?*
- *Jamey Neal: Yes, that is correct.*

Chris Neme: The number of customers served annually by CAA is remaining steady, correct?

- *Jamey Neal: Yes, that is correct.*
- *Chris Neme: Do you assume this pattern upfront, or work with CAA with the expectation of mid-year calibration?*
- *Jamey Neal: Yes, Walker-Miller works with the agencies to do funding forecasting with their program staff. They are in constant conversation, conduct monthly travelling, and aim to encourage braining and eliminate barriers. Some calibration can happen quicker than mid-year.*
- *Chris Neme: In your program highlights, the number of participants in the residential HVAC initiative grew significantly from 2024, but dropped from Q4 to Q1. Why is that?*
- *Nick Warnecke: This is likely just an anomaly, we have steadily increased participation.*
- *Tammy Jackson: Q1 is always the hardest data set to get from the distributor, as they are trying to close out their previous year. The data sets usually increase over time, as distributors get the hang of the process and they add measures to their systems. They usually lag on their reporting.*

Karen Lusson: Related to heat pumps, on savings captured through ductless and air source heat pumps (ASHPs), are these primarily heat pumps replacing electric resistance heat, or complete electrification?

- *Matt Armstrong: These savings are not incentivized by the program – these are units that have been influenced by our program through educational efforts to be put on the market. Since these are mid-stream, replacement is not recorded.*
- *Karen Lusson: Do you record that kind of data for income qualified customers?*
- *Matt Armstrong: Yes, extensive reporting is required. We can connect offline with other questions.*

Chris Neme: Are the reported year-to-date (YTD) savings percentages normal for this time of year? How do they compare to last year?

- *Jamey Neal: This is typical.*
- *John Carrol: It can depend on the previous December. There have been times where projects roll over from year to year. In March 2024, we were at 21% of our electric goal and higher for our gas goal. This year, there was not much rollover, there have been headwinds from tariffs, etc.*

Business Program

- Offerings Overview
- Achieved: 26,537 MWh
- Goal: 197957 MWh
- 13% of electric PY2025 implementation plan savings goal
- Achieved: 392,263 Therms
- Goal: 1,434,913 Therms
- 27% of gas PY2025 implementation plan savings goal

Business Program Highlights

- **Small Business Direct Install**
 - Strategy
 - 15% incentive increase response to rising project costs
 - Analytics-driven outreach and engagement with targeted field visits
 - Segmented marketing outreach and support with intentional messaging for target audience
 - Channel Participation Trend
 - Increased production by over 6,000 MWh in Q2 compared to Q1
 - Over 550 MWh savings directly attributed to targeted field visits
 - Continued pipeline build with upward trends through Q2
- **Small Business Energy Performance**
 - Strategy
 - Standardized Weatherization Application
 - Wx Program Ally Network Development:
 - Exploring Program Incubator Allies and Residential Ally crossover
 - Focusing on Disadvantaged Community, K-12, and All-Electric Customers
 - Weatherization Participation Trend
 - 51% savings attributed to Public School participation
 - 24% savings within Disadvantaged Areas
- **Retro- and Monitoring Based Commissioning:**
 - Strategy

- 9 new Retrocommissioning Service Providers onboarded in the last year
 - Simplification of application and increased incentives
 - Targeting Hospitals and University Campuses
 - Great future pipeline driver
 - Channel Participation Trend
 - 6 new customers participating
 - 22 facility applications
 - **Virtual Commissioning**
 - Strategy
 - 33 projects for far in PY25
 - 22 Schools/Universities, 5 Retailers, 3 Municipalities, and others
 - Great future pipeline driver
 - Channel Participation Trend
 - Average Savings per Customer – 59 MWh
 - **Capital Project Insecurities**
 - **Large Project Pipeline Loss:**
 - 11 large projects voided in 2025 due to capital funding limits across:
 - Public Schools, Universities, Manufacturers, and Industrial Customers
 - HVAC and Manufacturing Processes
 - **Large Project Pipeline Trend:**
 - 10 large project applications that were expected to be submitted for 2025, but delayed due to capital funding limitations:
 - Manufacturing and automotive assembly industries
 - Impacts from federal tax credit freeze
 - Large Project Incentive Pipeline trend for 2026 is more expensive for large Custom and Standard projects compared to 2025: dollars shown are incentive only
 - Pipeline for 2025 as of July 2024 was at 72,000 MWh and \$5.3M
 - Pipeline for 2026 as of July 2025 is at 68,000 MWh and \$8.1M
 - 6% less savings for 53% more incentive dollars

Abigail Miner: Is the current virtual commissioning number typical for the midway point of the year?

- *Nicholas Crowder: Yes, it can depend. We see steady savings over the year.*

Chris Neme: Are all these numbers representative of Q1 or Q2? I thought all savings are Q1.

- *Nicholas Crowder: Some numbers are up to Q2, but no savings from Q2 are reported. None of these projects are completed.*
- *Chris Neme: I assume voided projects happen every year. Are these numbers abnormal compared to other years?*
- *Nicholas Crowder: There are always voided projects, these numbers are high. Dropoff is usually later, but it was clear from customers this year that they are not moving forward through their communications.*

Market Development Initiative (MDI)

- Community Based Organization Q1 2025 Successes
 - Inaugural CBO Quarterly Roundtable meeting held in Peoria
 - New CBO partnership developed to reach customers in Ameren's southern territory

- New CBO Partnership: Shawnee Development Council, Inc.
- 91 SFIQ Referrals – 44 completed projects
- 50 Events – 13,636 customers engaged
- 5 Business Referrals
- Workforce Development Q1-Q2 2025 Successes
 - 2025 Summer Internship kicked off with 14 interns and 14 employers.
 - 7 jobseekers have been placed into full-time energy efficiency jobs and 14 into training.
 - Reaching students at an earlier age by tapping into local tech schools.

Closing and Next Steps

Follow-up items from ComEd presentation:

1. NRDC requested that going forward, the utilities provide the average measure life based on measure savings and average technical lifetimes.
2. Do you have data on what fraction of lighting savings are coming from lighting controls upgrades via the Small Business or standard channels? SAG Facilitator will request ComEd will address this question for the upcoming SAG NLC Subcommittee meeting.
3. Under HEA there were about 4.7 million incentives and 6,274 projects, how much of that was made up of Whole Building Weatherization?
4. What is the mix of savings by measure for IE Assessments vs IE Retrofits (average mix of a home served)?
5. For heat pumps and (smart) thermostats, how are we avoiding operating issues? (Stakeholders called out in our last meeting that (smart) thermostats cycle heat pumps into backup heating mode.)

Follow-up items from Ameren Illinois presentation:

- No follow-up items.