

Illinois EE Stakeholder Advisory Group (SAG) Large Group Meeting

Tuesday, March 17
9:00 am – 11:30 am
Teleconference

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Meeting Materials

- [March 17, 2026 Large Group SAG Agenda](#)
- [SAG Facilitator Introduction to March 17 Meeting](#)
- ICC Staff and ICC Office of General Counsel Feedback to Ameren Illinois (no presentation)
- [Illinois Office of the Attorney General Feedback to Ameren Illinois](#)
- [National Consumer Law Center \(NCLC\) Feedback to Ameren Illinois](#)
- [Natural Resources Defense Council \(NRDC\) Feedback to Ameren Illinois](#)
- [Peoples Gas and North Shore Gas Presentation: Revised Draft EE Plan for 2027-2029](#)
- [Next Steps](#)

Attendees

Name	Company or Organization
Celia Johnson	Facilitator (Celia Johnson Consulting)
Zoe Knaus	SAG Facilitation Support (Inova Energy Group)
Abigail Miner	IL Office of the Attorney General
Adam Roche	Cascade Energy
Amy Jewel	Elevate
Andrew Braatz	Franklin Energy
Andrew Cottrell	ScottMadden
Andrey Gribovich	DNV
Andy Vaughn	Leidos
Anthony Albano	Resource Innovations
Arvind Singh	DNV
Ashley Bukowski	ICC Office of General Counsel (OGC)

Name	Company or Organization
Ashley Palladino	Inova Energy Group
Babette Washington	Ameren Illinois
Bobbi Fey	ICF
Brad Fortson	ICF
Bruce Liu	Nicor Gas
Cameron Seeley	Walker-Miller Energy Services
Carmen Best	Recurve
Cassidy Kraimer	Community Investment Corporation
Channel Turbides	ComEd
Charles Ampong	Guidehouse
Chris Neme	Energy Futures Group, representing NRDC
Chris Reilly	National Energy Foundation
Chris Vaughn	Nicor Gas
Chyanne Husar	HUSARCH
Colin Lamb	Rrecurve
Colin Santel	Ameren Illinois
Dan Merchant	CLEAResult
Darleen DeRosa	Bigely
David Salmonson	CLEAResult
Deb Dynako	Energy Infrastructure Partners
Derrick Meeking	Walker-Miller Energy Services
Diana Dorman	Energy Solutions
Dylan Royalty	ScottMadden
Elder Calderon	ComEd
Elizabeth Horne	ICC Staff
Elli Arzbaecher	Future Energy Enterprises (IQ South Committee Facilitation Team)
Emily Pauli	ComEd
Erika Dominick	Walker-Miller Energy Services
Erin Kempster	Power TakeOff
Fernando Morales	Ameren Illinois
Fletcher Kirke	Walker-Miller Energy Services
Frank, Christina	Peoples Gas and North Shore Gas
Garcia, Omayra	Peoples Gas and North Shore Gas
Gary Swan, NEF	National Energy Foundation
Gordon Fon	Walker-Miller Energy Services
Jaleesa Scott	ComEd
Jared Policicchio	City of Chicago
Jarred Nordhus	Peoples Gas and North Shore Gas
Jason Fegley	Leidos
Jean Gibson	Peoples Gas and North Shore Gas
Jeffrey Carroll	DNV

Name	Company or Organization
Jenae Batt	Center for Energy & Environment
Jim Heffron	Walker-Miller Energy Services
Joel Freehling	APTIM
Joel McManus	TRC Companies
John Carroll	Ameren Illinois
Jon Sheridan	No Organization Identified
Jonathan Kleinman	47N Energy, representing Ameren Illinois
Jonathan Skarzynski	Nicor Gas
Joshua Asiyambi	Nicor Gas
Joshua Ramos	Nicor Gas
Julia Friedman	Opower
Julie Elzanati	Celia Johnson Consulting
Julie Hollensbe	Walker-Miller Energy Services
Kara Jonas	ComEd
Karen Lusson	National Consumer Law Center
Kari Ross	NRDC
Kate Battle	Walker-Miller Energy Services
Keely Hughes	The JPI Group
Kegan Daugherty	Resource Innovations
Kelly Almond	Frontier Energy
Kelly Klopp	Peoples Gas and North Shore Gas
Kelly Mulder	Equinox Creative
Kevin Grabner	Skytop Consulting
Kim Swan	ComEd
Kit White	Midwest Energy Efficiency Alliance (MEEA)
Koby Bailey	Peoples Gas and North Shore Gas
Kristen Kalaman	Resource Innovations
Lance Escue	Ameren Illinois
Laura Agapay-Read	Guidehouse
Lauren Bates	Opinion Dynamics
Lawrence Kotewa	Elevate
Lee Ringo	Energy Infrastructure Partners
Lilieric FlorezMonroy	Peoples Gas and North Shore Gas
Maddie Wazowicz	MEEA
Mark Milby	Elevate
Mark Szczygiel	Nicor Gas
Matt Armstrong	Ameren Illinois
Matt Clark	CLEAResult
Michele McSwain	SEEDS
Mike King	Nicor Gas
Mindy Browning	Embarras River Basin Agency
Minya Coleman	ComEd

Name	Company or Organization
Monique Leonard	Ameren Illinois
Nayan Patel	Nicor Gas
Neb Kistic	Erthe Energy Solutions
Nic Crowder	Ameren Illinois
Nick Burstein	CMC Energy Services
Nick Warnecke	Ameren Illinois
Nikki Pacific	Walker-Miller Energy Services
Odette Hyatt-Watson	East Central Illinois Community Action Agency
Pastor Vance	Elevate
Pat Justis	Ameren Illinois
Patrice McFarlin	Encolor Consulting
Randy Opdyke	Nicor Gas
Rashaan Keeton	Center for Energy & Environment
Rob Kelter	Environmental Law & Policy Center
Rose Williamson	Opinion Dynamics
Sarah Amspacher	Resource Innovations
Scott Eckel	Benesch Law, representing Nicor Gas
Scott Mallory	Brubaker & Associates, representing Illinois Industrial Energy Consumers (IIEC)
Selena Worster Walde	Erthe Energy Solutions
Shawn Haas	Peoples Gas and North Shore Gas
Stu Slote	Skytop Consulting
Ted Thomas	Energize Strategies
Ted Weaver	Dunsky Climate + Energy Advisors, representing Nicor Gas
Theodora Okiro Quarles	EcoHealth Strategies
Theresa Collins	Senior Services Plus
Thomas Ketchum	The South Suburban Action Conference
Thomas Manjarres	Peoples Gas and North Shore Gas
Tina Grebner	Ameren Illinois
Tyler Sellner	Opinion Dynamics
Victoria Nielsen	ScottMadden
Wade Morehead	Morehead Energy, representing Ameren Illinois
Yesha Lester	Walker-Miller Energy Services
Zach Ross	Opinion Dynamics
Zachary Froio	ICF

Meeting Notes

See **red text** for follow-up items.

Introduction to March 17 Meeting

Celia Johnson, SAG Facilitator

Purpose of March 17 Meeting:

1. For interested SAG participants to present feedback on the draft Ameren Illinois 2027-2029 revised draft EE Plan presented to SAG on March 4
 - a. Ameren Illinois presented an updated draft EE Plan to SAG due to the new Clean ND Reliable Grid Affordability (CRGA) Act
 - b. All SAG participants had an opportunity to request time on the agenda to present feedback
 - c. The following SAG participants are presenting initial feedback*:
 - i. ICC Staff and the ICC Office of the Attorney General Counsel
 - ii. Illinois Office of the Attorney General
 - iii. Natural Resources Defense Council (NRDC)
 - iv. National Consumer Law Center (NCLC)
 - v. *IQ South EE Committee may present feedback during a future SAG meeting*
2. For Peoples Gas and North Shore Gas to present the revised draft 2027-2029 EE Plan.
 - a. Peoples Gas and North Shore Gas is presenting an updated draft EE Plan to SAG due to the new Clean and Reliable Grid Affordability (CRGA) Act
 - b. SAG participants had an opportunity to submit questions for Peoples Gas and North Shore Gas to consider – due February 24
 - c. Submitted questions are posted on the March 17 meeting page:
 - i. Questions Submitted to Inform the Peoples Gas and North Shore s Draft EE Plan Presentation to SAG
 - ii. Peoples Gas and North Shore Gas will not respond in writing: questions are intended to inform the presentation.

Next Steps for Peoples Gas and North Shore Gas EE Plan

- Opportunity for SAG Participants to Present Feedback to Peoples Gas and North Shore Gas
- Large Group SAG meeting on **Tuesday, March 24 (1:30 – 3:30pm)**. Topics include:
 - Interested SAG participants present feedback to Peoples Gas and North Shore Gas
 - Nicor Gas presented the revised draft 2027-2029 EE Plan
- Notify the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) by **Friday, March 20** if you plan to present feedback to Peoples Gas and North Shore Gas during the March 24 SAG meeting

Peoples Gas and North Shore Gas EE Plan Negotiations

- Participating in EE Plan Negotiations with Peoples Gas and North Shore Gas
 - Before Peoples Gas and North Shore Gas files the updated 2027-2029 EE Plan with the ICC for approval, there will be negotiations with non-financially interested stakeholders
 - The goal is to reach consensus before the updated EE Plan is filed with the ICC
 - If consensus is reached, it will be documented in a stipulated agreement

- If you are a non-financially interested stakeholder interested in participating in confidential EE Plan negotiations with Peoples Gas and North Shore Gas, please email the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) **by Friday, March 20**
 - Please review the SAG Financial Conflict of Interest Policy, excerpted from the [SAG Process Guidance document](#), for the definition of “financially interested party”: [SAG Financial Conflict of Interest Policy – 2024 Update \(clean final\)](#).
 - Peoples Gas and North Shore Gas legal will review negotiation participation requests
 - Negotiations with Peoples Gas and North Shore Gas begin in April, and require signing a Non-Disclosure Agreement (NDA).

ICC Staff and ICC Office of General Counsel Feedback to Ameren Illinois

Elizabeth Horne, ICC Staff

Elizabeth Horne: In your presentation, on slide 13, how were the income-qualified goals calculated?

- *Matt Armstrong: We will follow-up.*

Elizabeth Horne: On slide 12, what season or day do your peak demand goals apply to?

- *Matt Armstrong: The summer season, as the intent is to focus on the peak demand day of the year.*

Elizabeth Horne: On slide 12, can you define whole-building weatherization for gas programs? What are the measures and their budget?

- *Matt Armstrong: These are not direct install measures, but include air sealing, insulation, and HVAC.*
- *Elizabeth Horne: Will we receive a longer list?*
- *Matt Armstrong: Yes, once we identify non-financially interested stakeholders, we can discuss. We have previously decided on those measures for whole programs.*

Elizabeth Horne: On slide 12, what are the restrictions on average measure lives?

- *Matt Armstrong: Statutory requirements of an average shelf life of 12 years coupled with a certain percent of measures with a shelf life of 5 years.*

Office of the Illinois Attorney General Feedback to Ameren Illinois

Abigail Miner, Office of the Illinois Attorney General

AG Priorities for Ameren’s 2027-29 Plan

1. Do not increase portfolio-level budget or individual components of portfolio-level budget (EM&V, administration, MDI) beyond what the Company originally budgeted for 2026-29.
2. Focus on measures with greatest customer bill impacts. Exclusively allocate additional budget to incentive spending (customer-facing programs), prioritizing programs and specific measures with greatest customer bill impacts.
3. Include total number of participating customers, including the deduplicated number of unique participants and estimates of number of participants in programs with unknown customers, in quarterly spreadsheet and annual reports.

AG Priority for 2027-29 Negotiation with Ameren

- Parties agree that negotiations are exclusively to make conforming changes with CRGA and not to re-negotiate elements of initial 2026-29 Plan unaffected by CRGA. Recognize that conforming changes for Ameren are significant.

More information needed, specifically:

- All information presented in comparison to approved 2026-29 Plan
 - Redline copies of 2026-19 stipulation and plan preferred. March 4 presentation already included some comparisons. Thank you, this is helpful.
- Explanation and calculation of anticipated savings
 - Impact of IQ commitment on savings? Peak demand goal?
- More budget detail
 - Explain allocation and use of additional budget, including more detail on Market Rate Behavioral program and proposed new pilot programs.
 - Identify total proposed portfolio-level budget and components thereof.
- More detail of C&I programs compared to past negotiations

Matt Armstrong: To your question about the portfolio budget, are you referring to a percent relative to the total budget or dollar values?

- *Abigail Miner: The dollar amount, but we understand changes are significant.*
- *Matt Armstrong: Thank you, we need more marketing and administration to get engagement from customers and evaluate our programs.*
- *Abigail Miner: We understand and look forward to discussing.*

National Consumer Law Center Feedback to Ameren Illinois

Karen Lusson, National Consumer Law Center

Income Eligible Budget Changes

NEW DRAFT PLAN	2027 (Combined E&G)	2028 (Combined E&G)	2029 (Combined E&G)	PRIOR PLAN	2027 (Electric)	2028 (Electric)	2029 (Electric)
IQ Single-Family	\$33.9M	\$41.6M	\$45.2M		\$21.6M	\$20.8M	\$20.8M
IQ Multifamily	\$14.1M	\$18.6M	\$20.8M		\$14.1M	\$14.1M	\$14.1M
Electrification	\$.95M	\$1.0M	\$1.4M		\$1.2M	\$1.2M	\$1.2M

- Electric annual budget increased \$126.1M to \$218.7 (on average annually) over 2027-2029, a 73% increase.
- Glad to see the increase in SF whole-building weatherization programs, proportional to budget on average.
- Need better understanding of the basis for the comparatively low MF numbers. (budget does not match proportional increase in SF weatherization or overall increase in total portfolio budget.)
- Need more information about amounts coming from gas utilities given they are joint programs.
- Why the decrease in electrification spending (propane to electric) given increased overall budget?

- Still need to compare Manufactured Housing budgets (Does average annual spend match percentage increase in overall portfolio budget?)

Braided Community Action Agency Budgets

NEW DRAFT PLAN	2027 (Combined E&G)	2028 (Combined E&G)	2029 (Combined E&G)	PRIOR PLAN	2027 (Electric)	2028 (Electric)	2029 (Electric)
CAA Braided Program	\$3.8M	\$3.7M	\$3.7M		\$3.3M	\$3.3M	\$3.3M

- Why the small increase in CAA Braided budgets?
- Need understanding of Ameren Gas contribution amounts

Other Observations

- Glad to see holding of the line on Kits spending
- Why return to spending on Behavioral programs (OPower letters?)
- We should not be starting negotiations “from scratch”
 - Much time spent in 2024-2025 negotiating program protocols and other details that should not change here;
 - Stakeholders’ goal in negotiating those provisions has been about achieving best practices in the delivery of EE programs;
 - In particular, negotiations relative to IQ whole building program comprehensiveness is critical to NCLC/COFI;
 - Stakeholders can identify provisions that need to remain in 2026-2029 Stipulation for the Company’s review
- When explaining bill impacts to customers for electrification, incorporate low-income discount rates in calculations where applicable.

Are IQ Customers Given a Choice of Weatherization programs (IHWAP or Ameren’s?)

- Please elaborate on how the SF and MF weatherization programs operate. (Are customers whose income falls between 0 and 200% of FPL given the opportunity to participate in Ameren’s programs?)
- Particularly given the low budgets for the CAA-braided program, for projects funded exclusively by Ameren, customers with household incomes between 0% and 200% of the Federal Poverty Level (FPL) who are eligible for a retrofit (weatherization) can and should be given the option to participate in the utility only funded (Ameren) retrofit offering or be referred to a participating agency for service through IHWAP. These customers should be provided with information about the differences between the utility-only retrofit offering and the IHWAP program, including available appliance, weatherization, and health and safety measures in each program, as well as the status of IHWAP waiting lists and prioritization criteria, to assist them in choosing which programs works best for their needs.

Bottom Line Takeaways/Questions

- Increase in IE spending (25% minimum) now required under law.
- Can you increase IE whole building (MF and SF) weatherization even more and still hit savings targets?

- Need more information on gas spending for joint weatherization programs
- How do we increase budget allocated to the braided weatherization program? (If you build it, they will come in terms of capacity?)
- If ComEd prevails in ICC proceeding proposing solar ad EE TRM measure, what is the impact on Ameren's portfolio?

Matt Armstrong: Income-qualified customers are always accepted to our program if they are eligible. We recognize that the CAAs do have waiting lists.

- *Karen Lusson: This has been an issue for other utilities. It is important for customers to be given a choice between Ameren's program and the CAAs.*
- *Matt Armstrong: We have received 1700 IQ applications this year and do highlight the CAA route. Zero this year have taken that route.*
- *Karen Lusson: Can you share the information you share with customers regarding the differences between the programs?*
- *Matt Armstrong: Yes. Regarding your CAA braided program question, I want to remind stakeholders that we spent a lot of time talking about the CAA channel, its constraints, and Ameren's efforts to build capacity. After a lot of time and investment, we did not see a significant increase in CAA capacity.*
- *Pastor Vance: I hear the frustration about the CAA efforts. Can we pivot and find other solutions?*
- *Matt Armstrong: We are open to ideas. We have tried augmented staffing, equipment grants, and administration assistance. We have also received pressure from other stakeholders to reduce effort in that channel.*
- *Pastor Vance: No response is more concerning than a minimal response.*

SAG Feedback on Ameren's revised 2027-29 EE Plan presentation from 3/4/26

Kari Ross, Natural Resources Defense Council (NRDC)

Relationship to Approved Plans

- Per the Approved 2026-2029 Plan Stipulation (language below), NRDC feels it is imperative to retain portfolio provisions agreed to in the stipulation unless they are directly changed by statute updates under Public Act 104-0458.
 - V. B. To the extent that there are changes in applicable law or regulation that materially impact, rights, obligations or the implementation of the 2026 Plan or provisions of this Stipulation, the Parties agree to work expeditiously and collaboratively with the goal of reaching consensus on the related impacts **and the need - if any – for adjustments to, or amendment or replacement of, the Stipulation** or the 2026 Plan.
- These provisions include, but are not limited to, weatherization protocols, MDI metrics, equipment replacement criteria, etc.

Program Overview

- Please list the weighted average measure life for each year under electric and gas.
- Please explain the rationale for electric portfolio costs that equate to 19.4% of total budgets in each of the three years: from \$34.6M in 2027 to \$43.1M in 2028 and then \$49.7M in 2029.
- Electric IQ budgets are robust. More questions to come.
- Please explain why gas budgets ramp up over the three years for Market Rate Residential, but they ramp down in IQ and business.

Karen Lusson (via chat): In your calculations, does the 19.4% figure include the separate allowance for evaluations costs?

- Kari Ross: No, I do not think so. I took portfolio cost figures and did a simple calculation compared to total program spending on slide 13, it may not be exact.
- Karen Lusson: That is helpful, the 19.4% seems high even when excluding evaluation. Evaluation costs should not be used as a basis as it is a separate budget.
- Kari Ross: The companies can provide the calculation. The budgets are as follows:
 - 2026: \$178,050,020
 - 2027: \$222,033,873
 - 2028: \$256,290,528.
- Matt Armstrong: It does include evaluation. Portfolio costs are based on the same percents that we agreed to in the 2026 Plan, which is 2.8% of the costs. We have added breakthrough equipment and pilots in our portfolio, which is an increase from the 2026 plan. We need to find new and innovative ways to achieve savings.
- Kari Ross: The evaluation percentage is 2.8%, correct?
- Matt Armstrong: Yes.
- Kari Ross: Can you share the initial spending on pilots?
- Abigail Miner (via chat): The AG would also like more information on pilots.

Business

- New law removes certain barriers to commercial & industrial electrification program spend. NRDC strongly encourages AIC to offer a channel – particularly for industrial electrification – to start making investments in that market.
- Encourage a Small Business New Construction offering.

Market Rate Residential

- NRDC would like to see more investment within the Market Rate Multi Family channel, particularly within inefficient electrically heated units.

Income-Qualified

- AIC had verbally noted they plan to spend 32% of their budget on IQ (<80% AMI) and 3% on moderate-income (80% AMI-300% FPL) for a total of 35% annual spend.
 - Please break out that spending pre-program channel on the two offerings.
 - Please share a breakdown of how the Company plans to certify income for program qualification for moderate-income programs.
 - NRDC prioritizes a robust moderate-income portfolio and, pending what dollar amounts AIC has in mind, will most likely prefer that segment to be increased within whole-home weatherization programs.
- For whole-building weatherization, separately for single-family and multifamily – as well as IQ and moderate-income – please share what fraction of spending and savings are from:
 - Weatherization of already electrically heated buildings
 - Weatherization of buildings that are also electrified under EE
 - Weatherization of gas-heated buildings through joint delivery with Nicor Gas
 - Weatherization of gas-heated buildings by Ameren alone
- Encourage a New Construction offering
- Electrification levels are very low compared to other programs.
 - How much of this channel is planned for full vs partial electrification?
 - NRDC would like to see budgets increased.

- Please explain the CAA channel budget stagnation from the Approved Plan to this plan, Seems low.

Ameren Gas

- Not clear from March 4 presentation what's changing from Approved Plan 6.
- Does the Company plan to maximize the new 15% Health & Safety spend? If not, why? NRDC feels strongly about maximizing this investment in pre-weatherization.
- Through what channels does AIC plan to meet the statutory requirement of 80% of IQ spend on whole-building programs?
- What is the estimated impact from new large customer opt-outs under Section 8-104 (m-1)?:
 - (m-1) For utilities that file an amended plan for the period covering calendar years 2027 through 2029, and for all utilities for all calendar years covered by a multi-year plan commencing on or after January 1, 2030, subsections (a) through (k) of this Section do not apply to eligible customers of a natural gas utility that have chosen to opt out of multi-year plans.
- Similar to the electric side, regarding AIC's verbal mention of the desire to "remove the market rate furnace 'prohibition' after 2027" – which was negotiated and agreed to in Approved Plan 6 – the revised stipulation should only concentrate on provisions affected by the change in statute.

Matt Armstrong: To clarify, CRGA eliminated requirements on weighted average measure lives, correct? It is solely the 12-year average requirement in the statute?

- *Kari Ross: That is correct.*
- *Matt Armstrong: Thanks. Regarding gas budgets ramping up, those are gas conversions that are happening.*
- *Kari Ross: For residential, is the budget also ramping up? You are not relying on gas therm conversions on the electric side, but the same is true for business. Within the savings we see, is there more reliance on gas therm conversions?*
- *Matt Armstrong: As electric budgets increase, more gas is converted.*
- *Kari Ross: Can you break down the budgets by program channel, and highlight which channels you plan to gain gas therm conversions from? Also, I believe AIC, on the gas side, you can claim electric savings in territories that do not overlap with electric IOUs. Is AIC planning on using those savings?*

Pastor Vance: How can you break down this information to share at the grassroots level?

- *Matt Armstrong: You can highlight the value. The SAG website and quarterly reports have a good level of detail regarding the investment in our communities, challenges, and how our portfolio shifts the market.*

Peoples Gas and North Shore Gas 2027-2029 CRGA Optional Revision to Approved Energy Efficiency Plan

Christina Frank, Jean Gibson, and Jarred Nordhus, Peoples Gas and North Shore Gas; Zach Froio, ICF

Approved vs GRGA Revision (3 yr total)

Peoples Gas Energy Efficiency Program	2026	2027	2028	2029	3-Year Total (2027–2029)
Approved Plan 5 Budget	\$34,484,681	\$34,484,681	\$34,484,681	\$34,484,681	\$103,454,043
CRGA Optional Budget Increase	N/A	\$15,010,103	\$15,429,666	\$15,776,926	\$46,216,694
CRGA Optional Revised Budget	N/A	\$49,494,784	\$49,914,347	\$50,261,607	\$149,670,737
Budget % of Revenue	2.0%	2.9%	2.9%	2.9%	2.9%
Approved Plan 5 Therm Savings	7,793,316	7,694,130	7,608,907	7,544,598	22,847,635
CRGA Optional Therm Savings Increase	N/A	5,479,134	5,556,325	5,573,675	16,609,135
CRGA Optional Revised Therm Savings	N/A	13,173,264	13,165,233	13,118,274	39,456,770

North Shore Gas Energy Efficiency Program	2026	2027	2028	2029	3-Year Total (2027–2029)
Approved Plan 5 Budget	\$5,021,136	\$5,021,136	\$5,021,136	\$5,021,136	\$15,063,408
CRGA Optional Budget Increase	N/A	\$1,482,115	\$1,499,475	\$1,619,548	\$4,601,138
CRGA Optional Revised Budget	N/A	\$6,503,251	\$6,520,611	\$6,640,684	\$19,664,546
Budget % of Revenue	2.0%	2.6%	2.6%	2.6%	2.6%
Approved Plan 5 Therm Savings	1,593,386	1,584,289	1,576,862	1,482,778	4,643,929
CRGA Optional Therm Savings Increase	N/A	702,347	707,171	822,684	2,232,202
CRGA Optional Revised Therm Savings	N/A	2,286,636	2,284,032	2,305,462	6,876,131

Abigail Miner (via chat): The side-by-side comparisons are helpful. Thank you.

Odette Hyatt-Watson: How many of the dollars being committed provide savings for low-income households or alleviate energy burden?

- *Jean Gibson: Our IQ programs are high priority. We have dedicated slides ahead dedicated to our IQ service and support.*
- *Odette Hyatt-Watson: Thank you.*

Pastor Vance: Thanks for the clarification. We cannot leave any resources on the table, we need them to be accessible.

- *Jean Gibson: Thanks, Pastor Vance.*
- *Karen Lusson (via chat): Agreed.*

CRGA Key Changes

- *“A natural gas utility may propose, as part of its submission of a multi-year plan, to increase the amount of energy efficiency implemented in any multi-year planning period above the level that can be achieved under the spending cap set forth in subsection (d) of this Section.” [220 ILCS 5/8-104 (e-20)]*
- *Public Sector: Spend at 30% of non-residential program spending (30% of Business Program)*
- *IQ Health & Safety: Maximum of 15% of IQ spend*
- *IQ Minimum Spend: 25% of total budget for PGL & 15% of total budget for NSG*
- *IQ Whole-Building Weatherization Spend: 80% of IQ spend*
- *Therm Savings Requirement (Increase from Approved Plan)*

- Income Qualified (IQ) as defined in policy manual and legislation.

CRGA Revision Increase by Program – Peoples Gas

Peoples Gas Energy Efficiency Program	2027–2029 Average (\$)		
	Approved Plan 5	CRGA Plan Revision	Total Change
Income Eligible (IE)	\$14,446,343	\$17,474,743	\$3,028,400
Market Rate Residential	\$4,089,892	\$6,094,636	\$2,004,744
Business	\$5,365,776	\$11,392,757	\$6,026,981
Public Sector	\$2,873,956	\$6,142,585	\$3,268,630
Market Development Initiative	\$700,000	\$870,000	\$170,000

- Key Increases
 - IE remains largest portion of budget
 - Health & Safety (H&S)
 - Market Rate weatherization
 - Business & Public Sector to drive cost-effective savings

CRGA Revision Increase by Program – North Shore Gas

North Shore Gas Energy Efficiency Program	2027–2029 Average (\$)		
	Approved Plan 5	CRGA Plan Revision	Total Change
Income Eligible	\$696,112	\$986,332	\$290,219
Market Rate Residential	\$1,343,089	\$1,449,318	\$106,229
Business	\$1,156,214	\$1,841,250	\$685,036
Public Sector	\$506,015	\$790,707	\$284,693
Market Development Initiative	\$100,000	\$130,000	\$30,000

- Key Increases
 - IE remains priority
 - Health & Safety (H&S)
 - Market Rate weatherization
 - Business & Public Sector to drive cost-effective savings

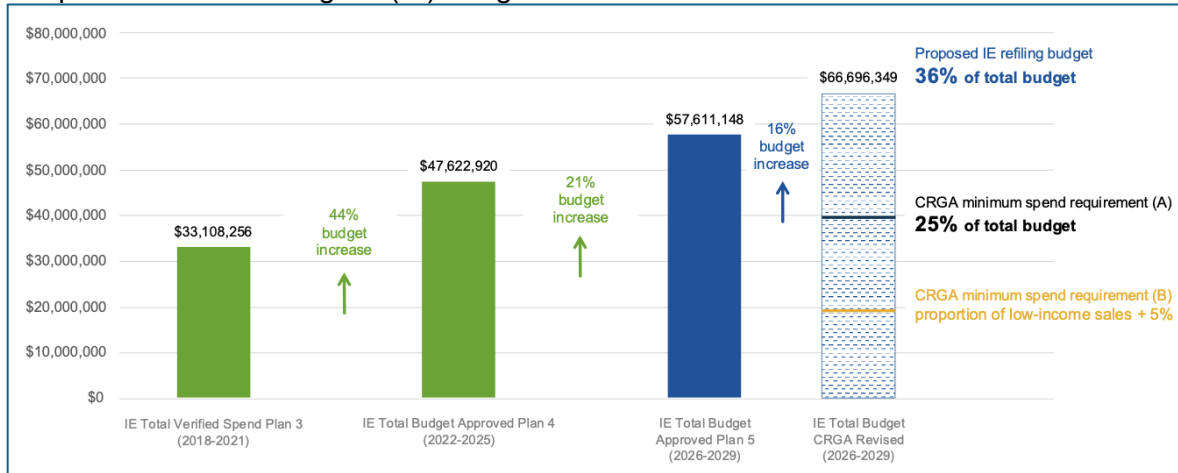
Abigail Miner (via chat): Again, the side-by-side comparisons are really helpful. Thank you for laying the info out this way.

Kari Ross (via chat): Updates to 8-104 (e-20): (1) For gas utilities with greater than 300,000 customers, the portion of the entire budget for efficiency programs that is spent on efficiency programs for low-income households shall be no less than the greater of (A) 25% or (B) five percentage points more than the proportion of total annual gas sales to non-opt-out retail customers that are consumed by low-income households. For gas utilities with 300,000 or fewer customers, the portion of the entire budget for efficiency programs that is spent on efficiency programs for low-income households shall be no less than the greater of (A) 15% or (B) five percentage points more than the proportion of total annual gas sales to non-opt-out retail customers that are consumed by low-income households.

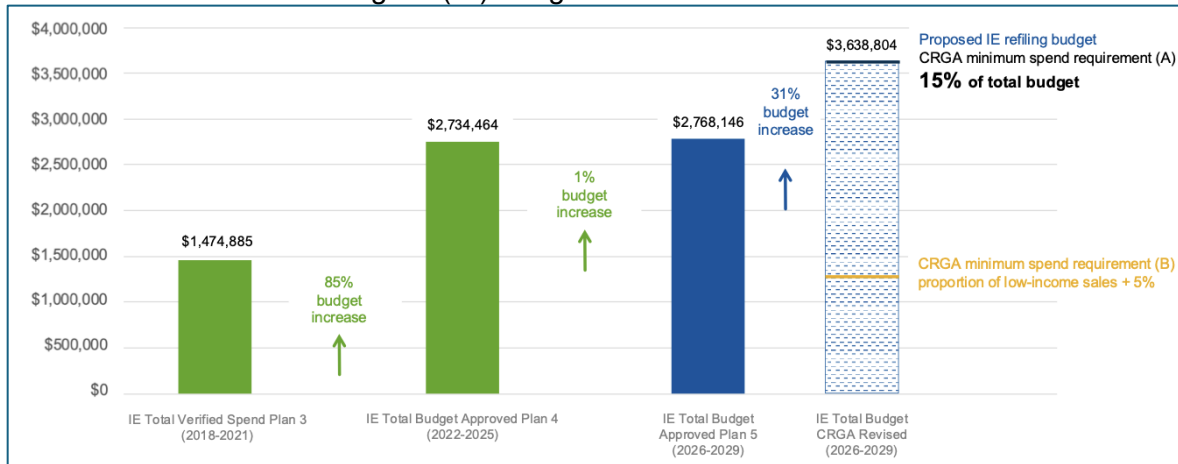
Kari Ross (via chat): In the updates to 8-104 (e-20), the calculation for low-income budgets should be the greater of 25% or 5% more than the proportion of total annual gas sales to non-opt out retail customers that are consumed by low-income households. This is the same for North Shore Gas, but the greater of 15% instead. I assume these figures have this analysis included.

- Jean Gibson: Yes, we will explain in the upcoming slides.

Peoples Gas Income Eligible (IE) Budget Increases



North Shore Gas Income Eligible (IE) Budget Increases

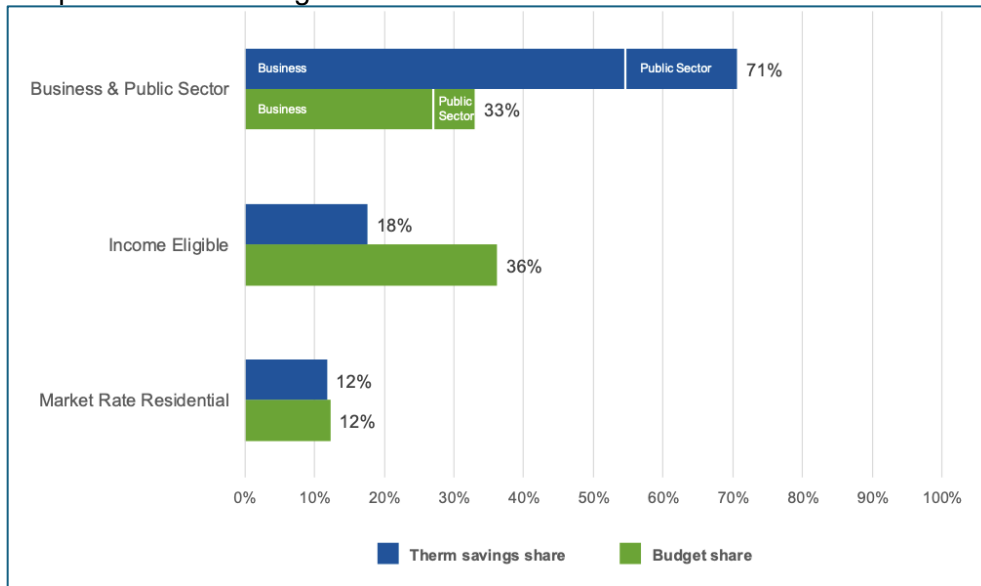


Kari Ross (via chat): Helpful breakdown – thanks Jean.

Karen Lusson: These are three-year budgets for PGNSG, not annual. Income-eligible spending dropped to 36%, as the previously approved plan had 45.3% of the total budget. Given the significant percentage of income-eligible customers in your service territory, this concerns me.

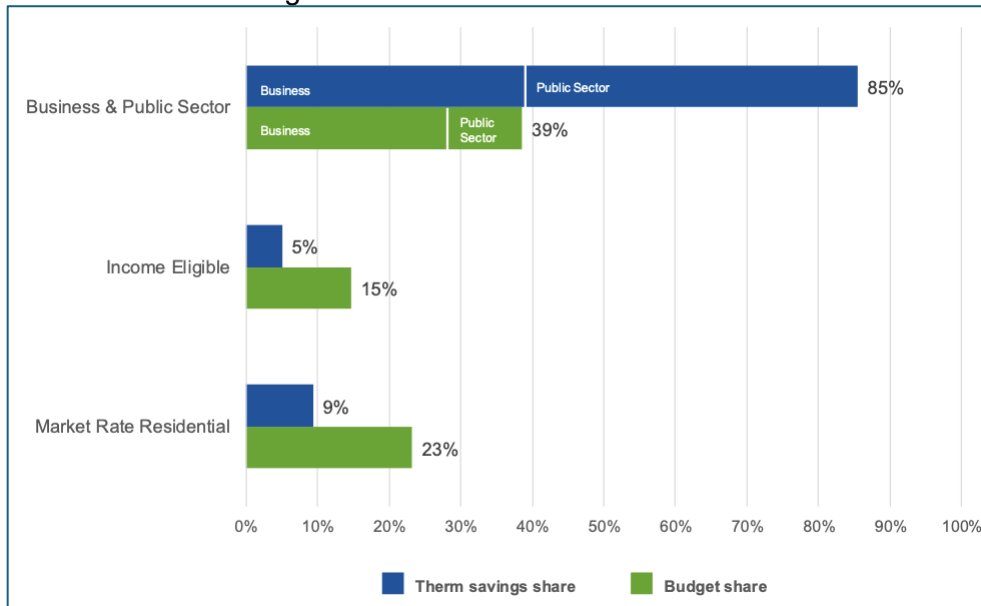
- Jean Gibson: We are driving more investment in income-eligible customers and looking to serve multiple goals. We want to deliver more to customers, including income qualified. The next slides will highlight how we continue to support the customers within our territory, make progress in our customer segments, and capture environmental benefits.

Peoples Gas Balancing Portfolio Goals



- Key Highlights
 - Increased investment in Business and Public Sector delivers cost-effective savings
 - Increased investment supporting our income eligible customers
 - Drives portfolio impacts for both customers and the environment

North Shore Balancing Portfolio Goals



- Key Highlights
 - Increased investment in Business and Public Sector delivers cost-effective therm savings
 - Drives portfolio impacts for both customers and environment


Overview of Income Eligible Programs

- Income Eligible
 - Home Energy Savings
 - Retrofits
 - Home Energy Assessments
 - IHWAP
 - Kits
 - Elementary Education Kits
 - Community Kits
 - Multi-Family Energy Savings
 - Retrofits
 - Public Housing
 - IHWAP

Income Eligible Program Details

Peoples Gas Energy Efficiency Program	2027–2029 Average (\$)		
	Approved Plan 5	CRGA Plan Revision	Total Change
Home Energy Savings	\$4,353,142	\$6,367,498	\$2,014,356
Multi-Family Energy Savings	\$9,137,400	\$9,807,813	\$670,413
<i>Comprehensive subtotal</i>	<i>\$13,490,542</i>	<i>\$16,175,311</i>	<i>\$2,684,769</i>
Kits	\$955,801	\$1,299,432	\$343,632
Total	\$14,446,343	\$17,474,743	\$3,028,400

North Shore Gas Energy Efficiency Program	2027–2029 Average (\$)		
	Approved Plan 5	CRGA Plan Revision	Total Change
Home Energy Savings	\$154,240	\$400,444	\$246,204
Multi-Family Energy Savings	\$454,661	\$455,593	\$932
<i>Comprehensive subtotal</i>	<i>\$608,902</i>	<i>\$856,038</i>	<i>\$247,136</i>
Kits	\$87,211	\$130,294	\$43,083
Total	\$696,112	\$986,332	\$290,219

 Comprehensive Programs

Karen Lusson: It is disappointing to see minimal additions to income-eligible whole-home electrification and weatherization programs. We are seeing a significant jump in the market rate programs versus income eligible. There is a significant amount of income eligible PGNSG customers.

- *Jean Gibson: We are managing multiple priorities.*
- *Karen Lusson: What priorities have changed since CRGA?*
- *Jean Gibson: We are prioritizing serving our IQ customers. We want to make sure we are serving market-rate customers as well and providing them pathways to weatherization and additional funding. The previous 2% cap limited us to choosing between income eligible and business customers. We are now expanding to balance our portfolio and serve more customer segments. The largest percent of our budget is going to income eligible customers.*

- *Karen Lusson: Relative to the approved plan, the budget decreased from 45% to 36%. Also, for multifamily, is it correct that energy savings only serve income eligible public housing? What about affordable housing or naturally-occurring housing that is not officially HUD or public housing?*
- *Jarred Nordhus: Are you referring to multifamily customers that receive vouchers and housing assistance?*
- *Karen Lusson: Yes, public housing or naturally occurring with vouchers.*
- *Jarred Nordhus: If the building is not publicly owned but there is public assistance, we will serve those customers through the multifamily energy savings program.*

Cassidy Kraimer (via chat): On Karen's question, are buildings that participate in the joint MFES program with ComEd eligible for the IQ retrofit program? Those buildings can qualify via IQ census and do not require federal, state, or local subsidy to qualify, correct?

- *Jarred Nordhus: Yes, those customers get audits where they can identify what they qualify for. If they happen to live in a building outside the IQ census, we can qualify them through other means such as vouchers.*

Chris Neme: The market rate budget increase is about two million dollars. 35% is weatherization, 35% is for kits, where is the other increase?

- *Jarred Nordhus: Increase in the measure mix and serving additional customers.*
- *Chris Neme: What kinds of measures?*
- *Jarred Nordhus: Prescriptive trade ally programs such as HVAC, insulation, steam traps, and other common measures.*
- *Chris Neme: There is no behavioral. The kits budget is quadrupled, what is driving that?*
- *Jarred Nordhus: Elementary education kits. A portion are gas-only kits. We have seen success with that program, and it is a way to get customers in the door. *
- *Chris Neme: That increase in kits is very large, I worry about spending a million dollars to get people's foot in the door with minimal weatherization money.*
- *Jean Gibson: Thanks, we have this noted.*
- *Kari Ross: I see the elementary kit is being proposed. The elementary kit was negotiated to be eliminated in 2026-2029. I think on top of echoing Chris' concerns, doing so in a program that was eliminated feels problematic.*
- *Jean Gibson: When we negotiated, there was a 2% cap to support other priorities with funding. This program has shown to educate students and households and drive outreach. We can have more conversations.*

Kari Ross (via chat): Is "Prescriptive" direct install?

- *Jarred Nordhus: No, it offers opportunities for all measures, such as building shell, weatherization, HVAC upgrades to be delivered to customers through a trade ally.*
- *Jean Gibson: Prescriptive has a set menu of options versus custom projects with the potential for more therm savings.*

Karen Lusson (via chat): What are Epic Savers?

- *Jarred Nordhus: A kit designed for high-use households introducing them to EE and providing tools that have high impact on energy usage and immediate savings.*
- *Karen Lusson: There are differences in smart thermostats?*
- *Jarred Nordhus: Yes, and there are other options.*
- *Jean Gibson: We can share a description as a follow-up.*

- *Abigail Miner (via chat): The Epic Saves kits have shown success since January 1, 2026?*

Karen Lusson (via chat): Please note that a critical issue for NCLC/COFI will be ensuring that customers who are eligible for IE weatherization are given a choice between participating in the joint weatherization program and IHWAP. These customers are paying for the program and are locked out from participating, even if there are long waitlists in IHWAP. Customers should be provided with specific information about the differences in the two programs in terms of H&S measures, HVAC, insulation, etc. Referring to folks who qualify for IHWAP (household income between 0% and 200% of FPL).

- *Jean Gibson: Thanks, Karen. We are happy to have that conversation. We need and want to do this with the northern utilities and with DCEO.*

Cassidy Kraimer (via chat): For the kits, is success measures by customers who then take up further retrofits offered by the utilities?

- *Jean Gibson: We will follow-up.*

Karen Lusson (via chat): What percentage of the Home Energy Savings weatherization program will be allocated to "major measures"?

- *Jean Gibson: That is information we are happy to share in negotiations.*

Overview of Market Rate Residential Programs

- Market Rate Residential
 - Market Rate Single Family
 - Home Energy Assessment
 - Smart Thermostat
 - Home Energy Rebate
 - Kits
 - Elementary Education Kits
 - Epic Savers
 - Market Rate Multi-Family
 - Multi-Family Energy Assessment
 - Multi-Family Prescriptive, Custom, PTA

Market Rate Residential Program Details

Peoples Gas Energy Efficiency Program	2027–2029 Average (\$)		
	Approved Plan 5	CRGA Plan Revision	Total Change
Market Rate Single Family	\$2,183,597	\$2,726,880	\$543,282
Market Rate Multi-Family	\$1,636,305	\$2,354,654	\$718,349
<i>Market Rate Weatherization Subset</i>	<i>\$758,474</i>	<i>\$1,526,891</i>	<i>\$768,417</i>
Kits	\$269,990	\$1,013,103	\$743,113
Total	\$4,089,892	\$6,094,636	\$2,004,744

North Shore Gas Energy Efficiency Program	2027–2029 Average (\$)		
	Approved Plan 5	CRGA Plan Revision	Total Change
Market Rate Single Family	\$992,562	\$1,003,263	\$10,702
Market Rate Multi-Family	\$80,538	\$90,484	\$9,946
<i>Market Rate Weatherization Subset</i>	<i>\$421,591</i>	<i>\$655,626</i>	<i>\$234,035</i>
Kits	\$269,990	\$355,571	\$85,581
Total	\$1,343,089	\$1,449,318	\$106,229

Next Steps

- March 20, 2026: Stakeholder feedback due
- March 24, 2026: Large Group SAG meeting – stakeholder feedback presentations
- March 25, 2026: Stakeholder non-disclosure agreement signatures due
- April 21, 2026: Negotiation meeting #1
- May 4, 2026: Negotiation meeting #2
- May 15, 2026: Stakeholder comments on draft plan + signed stipulation deadline
- June 1, 2026: Plan filing deadline

Abigail Miner: When can we see batch files?

- *Jean Gibson: We will provide them [to negotiating stakeholders] by April 9.*

Closing and Next Steps

Celia Johnson, SAG Facilitator

Next Steps for Ameren Illinois Revised EE Plan

- IQ South EE Committee is preparing feedback on Ameren’s plan and may present it at an upcoming SAG meeting
- Confidential negotiations between non-financially interested stakeholders and Ameren begin week of March 23
- Statutory filing deadline is June 1, 2026

Feedback on Peoples Gas and North Shore Gas Revised EE Plan

- Notify the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) **by Friday, March 20** if you plan to present feedback on the Peoples Gas and North Shore Gas draft EE Plan
- Feedback will be presented at the **Tuesday, March 24** Large Group SAG Meeting

Participating in Peoples Gas and North Shore Gas Negotiations

- If you are a non-financially interested stakeholder interested in participating in confidential EE Plan negotiations with Peoples Gas and North Shore Gas, please email the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) **by Friday, March 20**

- Please review the SAG Financial Conflict of Interest Policy, excerpted from the SAG Process Guidance document, for the definition of “financially interested party”: SAG Financial Conflict of Interest Policy – 2024 Update (clean final)
- Peoples Gas and North Shore Gas legal will review negotiation participation requests
- Negotiations begin in mid-April, and require signing a Non-Disclosure Agreement (NDA)

Follow-up items for Ameren Illinois¹:

1. IL AG requested Ameren provide all information presented in comparison to the approved 2026-2029 Plan, including redline copies of the 2026-2029 stipulation and plan.
2. IL AG requested an explanation and calculation of anticipated savings. Impact of IQ commitment on savings? Peak demand goal?
3. IL AG requested additional budget details.
 - a. Explain allocation and use of additional budget, including more detail on Market Rate Behavioral program and proposed new pilot programs.
 - b. Identify total proposed portfolio-level budget and components thereof.
4. IL AG requested more detail of C&I programs compared to past negotiations.
5. NCLC requested a better understanding of the basis for the comparatively low MF numbers. (Budget does not match proportional increase in SF weatherization or overall increase in total portfolio budget.)
6. NCLC requested more information about amounts coming from gas utilities given they are joint programs
7. NCLC: Why the decrease in electrification spending (propane to electric) given increased overall budget?
8. NCLC: Still need to compare Manufactured Housing budgets (Does average annual spend match percentage increase in overall portfolio budget?)
9. NCLC: Why the small increase in CAA braided budgets? Need an understanding of Ameren Gas contribution amounts.
10. NCLC: Why return to spending on behavioral programs (Opower letters)?
11. NCLC: Please elaborate on how the SF and MF weatherization programs operate. (Are customers whose income falls between 0 and 200% of FPL given the opportunity to participate in Ameren programs?)
 - a. Exactly what information is provided to customers (IHWAP or Ameren weatherization program?)
12. NCLC: Can Ameren increase IE whole building (MF and SF) weatherization even more and still hit savings targets?
13. NCLC: Need more information on gas spending for joint weatherization programs.
14. NCLC: How do we increase budget allocated to the braided weatherization program? (If you build it, they will come in terms of capacity?)
15. NCLC: If ComEd prevails in ICC proceeding proposing solar as EE TRM measure, what is the impact on Ameren’s portfolio?
16. NRDC: Please list the weighted average measure life for each year under electric and gas.
17. NRDC: Please explain the rationale for electric portfolio costs that equate to 19.4% of total budgets in each of the three years: from \$34.6M in 2027 to \$43.1M in 2028 and then \$49.7M in 2029.

¹ Ameren will respond to these follow-up items during negotiations. SAG Facilitator will check on whether any responses will be shared with SAG.

18. NRDC: Electric IQ budgets are robust. More questions to come.
19. NRDC: Please explain why gas budgets ramp up over the three years for Market Rate Residential, but they ramp down in IQ and Business.
20. NRDC Questions on Income Qualified Budget: AIC had verbally noted they plan to spend 32% of their budget on IQ (< 80% AMI) and 3% on moderate-income (80% AMI-300% FPL) for a total of 35% annual spend."
 - a. Please break out that spending per program channel on the two offerings.
 - b. Please share a breakdown of how the Company plans to verify income for program qualification for moderate income programs.
21. NRDC Questions on Whole Building Weatherization:
 - a. For whole-building weatherization, separately for single-family and multifamily – as well as IQ and moderate-income – please share what fraction of spending and savings are from:
 - i. Weatherization of already electrically heated buildings
 - ii. Weatherization of buildings that are also electrified under EE
 - iii. Weatherization of gas-heated buildings through joint delivery with Nicor Gas
 - iv. Weatherization of gas-heated buildings by Ameren alone
22. NRDC: Electrification levels are very low compared to other programs. How much of this channel is planned for full vs partial electrification? NRDC would like to see budgets increased.
23. NRDC: Please explain the CAA channel budget stagnation from the Approved Plan to this plan; it seems low.
24. NRDC Question on Ameren Gas: It's not clear from the March 4 presentation what is changing from approved Plan 6.
 - a. Does the Company plan to maximize the new 15% Health & Safety spend? If not, why? NRDC feels strongly about maximizing this investment in pre-weatherization.
 - b. Through what channels does AIC plan to meet the new statutory requirement of 80% of IQ spend on whole-building programs?
 - c. What is the estimated impact from new large customer opt-outs under Section 8-104 (m-1)?
25. NRDC requested additional information about pilots; this question was echoed by IL AG.
26. NRDC requested Ameren breakout by program channel, which channels the company is expecting to claim gas therm conversion savings under, on the electric side.

Follow-up items for Peoples Gas and North Shore Gas²:

1. NCLC: What percentage of the Home Energy Savings weatherization program will be allocated to "major measures"?
2. Community Investment Corp.: For the kits, is success measured by customers who then take up further retrofits?
3. NCLC: Requested an explanation of "Epic Savers". PGL/NSG to provide a description.
4. Community Investment Corp. Question Sent by Email: Can PG-NSG outline in more detail how increasing IQ spending impacts program implementation in practice. For example, will this allow for deeper retrofits/more measures available, more parity in cost sharing for joint programs which may lead to serving more customers (or perhaps a combination of both!).

² Peoples Gas and North Shore Gas will respond to these follow-up items during negotiations. SAG Facilitator will check on whether any responses will be shared with SAG.