

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

Wednesday, March 4
2:00pm – 4:00pm
Teleconference

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- [March 4, 2026 Large Group SAG Agenda](#)
- [SAG Facilitator Introduction to March 4 Meeting](#)
- [Ameren Illinois Presentation: 2027-2029 Draft EE Plan](#)
- [Next Steps](#)

Attendees

Name	Company or Organization
Celia Johnson	Facilitator (Celia Johnson Consulting)
Zoe Knaus	SAG Facilitation Support (Inova Energy Group)
Abigail Miner	Illinois Office of the Attorney General
Adam Roche	Cascade Energy
Amy Jewel	Elevate
Andrew Cottrell	ScottMadden
Andrey Gribovich	DNV
Andy Vaughn	Ameren Illinois
Anthony Albano	Resource Innovations
Babette Washington	Ameren Illinois
Ben Campbell	Energy Resources Center, UIC
Blaine Fox	CMC Energy Services
Bobbi Fey	ICF
Brad Fortson	ICF
Brad Nevois	Ameren Illinois
Brandon Koyanagi	CMC Energy Services
Brent Nakayama	Leidos
Cameron Seeley	Walker-Miller Energy Services
Cassidy Kraimer	Community Investment Corp.
Channel Turbides	ComEd

Name	Company or Organization
Charles Ampong	Guidehouse
Chris Reilly	National Energy Foundation
Chris Baker	VEIC
Chris Vaughn	Nicor Gas
Christina Frank	Peoples Gas and North Shore Gas
Chyanne Husar	HUSARCH
Colin Santel	Leidos
Danish Murtaza	Peoples Gas and North Shore Gas
Darleen DeRosa	Bidgely
Deb Dynako	Energy Infrastructure Partners
Denise Munoz	DMT Consulting
Diana Dorman	Energy Solutions
Dylan Royalty	ScottMadden
Elder Calderon	ComEd
Elizabeth Horne	ICC Staff
Elli Arzbaecher	Future Energy Enterprises (IQ South Committee Facilitation Team)
Erin Kempster	Power TakeOff
Fernando Morales	Ameren Illinois
Francisco Lopez Zavala	Illinois Environmental Council (IEC)
Gary Swan	National Energy Foundation
Ishita Kekare	Resource Innovations
Jaleesa Scott	ComEd
Jamey Neal	Ameren Illinois
Jarred Nordhus	Peoples Gas and North Shore Gas
Jason Fegley	Leidos
Jean Gibson	Peoples Gas and North Shore Gas
Jill Rolstone	Franklin Energy
Jim Heffron	Walker-Miller Energy Services
Joe Mays	Cascade Energy
Joel McManus	TRC Companies
John Carroll	Ameren Illinois
John Lavallee	Ameren Illinois
Jon Sheridan	JS Consulting
Jonathan Haas	ICF
Jonathan Kleinman	47N / CAMI
Jonathan Skarzynski	Nicor Gas
Julia Friedman	Oracle
Karen Lusson	National Consumer Law Center
Kari McCue	Nicor Gas
Kari Ross	NRDC
Kate Agasie	Cook County DES

Name	Company or Organization
Kate Battle	Walker-Miller Energy Services
Keely Hughes	The JPI Group
Kegan Daugherty	Resource Innovations
Kelvin Sakyi	CMC Energy Services
Keyla Ward	Ameren Illinois
Kim Swan	ComEd
Kit White	Midwest Energy Efficiency Alliance (MEEA)
Kristen Kalaman	Resource Innovations
Kristol Simms	Ameren Illinois
Lance Escue	Ameren Illinois
Laura Agapay-Read	Guidehouse
Lauren Bates	Opinion Dynamics
Lee Ringo	Energy Infrastructure Partners
Maddie Wazowicz	MEEA
Mark Szczygiel	Nicor Gas
Matt Armstrong	Ameren Illinois
Michael Ozeh	CMC Energy Services
Mike King	Nicor Gas
Mindy Browning	Embarras River Basin Agency
Miritza Thorpe	Leidos
Monique Leonard	Ameren Illinois
Nate Baer	i3 Energy
Nic Crowder	Ameren Illinois
Nick Burstein	CMC Energy Services
Nick Lovier	Ameren Illinois
Nick Warnecke	Ameren Illinois
Nicole Popejoy	IL Association of Community Action Agencies (IACAA)
Nikki Pacific	Walker-Miller Energy Services
Nora Fitton	ICC Office of General Counsel
Odette Hyatt-Watson	East Central Illinois Community Action Agency
Omayra Garcia	Peoples Gas and North Shore Gas
Pastor Vance	Elevate
Pat Justis	Ameren Illinois
Patrice McFarlin	Encolor Consulting
Randy Opdyke	Nicor Gas
Rashaan Keeton	Center for Energy and Environment
Ron Siddle	CMC Energy Services
Rose Williamson	Opinion Dynamics
Ryan Kroll	Driftless Energy
Salina Colon	CEDA
Sam Stahl	Ameren Illinois

Name	Company or Organization
Sanjyot Varade	Resource Innovations
Scott Mallory	Brubaker & Associates, representing IIEC
Selena Worster Walde	ERTHE Energy Solutions
Shawn Haas	Peoples Gas and North Shore Gas
Shelby Smith	Illinois Office of the Attorney General
Stephen Linkous	Bellawatt
Ted Weaver	Dunsky Climate + Energy Advisors, representing Nicor Gas
Travis Crocker	Walker-Miller Energy Services
Travis Hinch	GDS Associates
Victoria Nielsen	ScottMadden
Wade Morehead	Morehead Energy, representing Ameren Illinois
Will Wilson	Leidos
Zach Ross	Opinion Dynamics
Zachary Froio	ICF

Meeting Notes

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

Introduction to Large Group SAG Meeting

Celia Johnson, SAG Facilitator

Purpose and Background

- **Purpose of March 4 Meeting:** For Ameren Illinois to present the revised draft 2027-2029 EE Plan.
- **Background:** Ameren Illinois is presenting an updated EE Plan for 2027-2029 due to the passage of the Clean and Reliable Grid Affordability (CRGA) Act in October 2025
 - CRGA was enacted in January 2026
 - CRGA is effective June 1, 2026
 - The statutory filing deadline for revised 2027-2029 EE Plans is June 1, 2026

Next Steps for Ameren Illinois EE Plan

- Opportunity for SAG Participants to Present Feedback to Ameren Illinois
 - Large Group SAG meeting on Tuesday, March 17 (9:00 – 12:30). Topics include:
 - Interested SAG participants present feedback to Ameren Illinois
 - Peoples Gas & North Shore Gas Draft Revised EE Plan Presentation
 - Nicor Gas Draft Revised EE Plan Presentation (tentative)
 - Notify the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) by Friday, March 13 if you plan to present feedback on Ameren's draft EE Plan.

Ameren Illinois EE Plan Negotiations

- Participating in EE Plan Negotiations with Ameren Illinois
 - Before Ameren files the updated 2027-2029 EE Plan with the ICC for approval, there will be negotiations between Ameren and non-financially interested stakeholders

- The goal is to reach consensus before Ameren files is updated EE Plan with the ICC
 - If consensus is reached, it will be document in a stipulated agreement
- If you are a non-financially interested stakeholder interested in participating in confidential EE Plan negotiations with Ameren, please email the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) **by Friday, March 13**
 - 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 \(clean final\)](#)
 - Ameren legal will review negotiation participation requests
 - Negotiations with Ameren begin the last week of March, and require signing a Non-Disclosure Agreement (NDA)

Ameren Illinois 2027-2029 Revised Draft EE Plan

Pat Justis, Matt Armstrong, and Fernando Morales, Ameren Illinois

Meeting Objectives

- Portfolio Vision and Objectives
 - Communicate Portfolio Vision and Objectives.
- Identify CRGA Impacts
 - Highlight changes to EE landscape and pivots needed to deliver higher savings achievement.
- Draft Portfolio Overview
 - Highlight program elements and changes driving budget and savings.
- Ameren is continuing to collect feedback from the IQ South Advisory Committee on the revised EE Plan. Today’s presentation does not yet incorporate that feedback.

Agenda

- Portfolio Context
 - Vision & Objectives
 - MDI Highlight
- CRGA Overview
 - High level summary
 - CRGA Targets
- Draft Portfolio Overview
 - High Level Draft Portfolio Model Results
 - High Level Draft Program Model Results
- Draft Program Overview
 - Business Program
 - Residential Program
 - Income Qualified
- Market Development Initiative (MDI)
 - Diverse Spend
 - MDI Deep Dive
- Wrap Up and Next Steps

2022-2025 Highlights

- Income-qualified customers received \$127 million in incentives
- 17,674 Small Business projects completed

- Electric and Gas energy efficiency savings equivalent to powering 166,858 homes for one year
- 3,550 Business Projects completed across 83 Disadvantaged Community zip codes
- \$14.6 million invested in industry-leading workforce development efforts
- 149,000 income-qualified homes served
- Exceeded regulatory electric savings goals by 8% on average

Draft Portfolio Objectives

- Strong Community Investment
 - Continued Strong IQ Investment for Residential Customers
 - Range of \$70-96 million annual total IQ commitment
 - Electric IQ budget – 35% of Total Electric Budget
 - Emphasis on serving small business in Disadvantaged Communities
- Maximize Energy Savings
 - Shifting savings opportunity landscape requires new approaches
 - Strong commitment to maximizing all opportunities to meet statutory savings goals
 - Fresh start to the portfolio to broaden customer reach and accelerate energy savings performance
- Diversify Offerings
 - Increased investment in Market Rate Single Family offerings
 - Including new measures and offerings
 - Windows and doors
 - Appliance recycling
 - Behavioral
 - Reinvestment in pilots to bring innovative solutions to customers
- Workforce Growth
 - Continued investment in MDI and Program Ally Support
 - MDI supports program ally growth and building the workforce
 - Program Ally Support more focused on training and development of existing allies
 - Workforce is essential to performance-because portfolio ambition only works if delivery capacity can match participation

Abigail Miner (via chat): Are the window, door, and appliance recycling measures already in the TRM?

- *Matt Armstrong: Yes.*

Karen Lusson (via chat): Can you remind us of the total budget increase CRGA requires?

- *Fernando Morales (via chat): I will be covering that shortly. The electric budget increases about 41% from the previously approved plan (2026).*
- *Karen Lusson (via chat): Thanks, Fernando. Is it correct that you are not increasing gas EE budget?*
- *Fernando Morales (via chat): Yes.*

The following video was played from slide 9:

<https://vimeo.com/1164493131/19fbd884d1?fl=pl&fe=cm>

Karen Lusson (via chat): Great work on the MDI.

CRGA Overview

- The Clean and Reliable Grid Affordability Act (CRGA) is an evolution of IL state energy policy that substantially changes the energy efficiency landscape. Specifically, the elements of CRGA impact Ameren Illinois in different ways than the other utilities.
- Legislative Process
 - Throughout 2025, AIC was engaged with stakeholders in exploring legislative options
 - Each option significantly expanded the investment and goals for EE
 - Final package included stakeholder priorities such as significant higher electric savings goals, including increased electrification, higher utility budgets, higher standards for gas comprehensiveness, and (most importantly) higher spending requirements for IQ
- Impact for Planning
 - AIC to refile a new expanded plan to meet the CRGA established budgets and goals, and IQ spend.

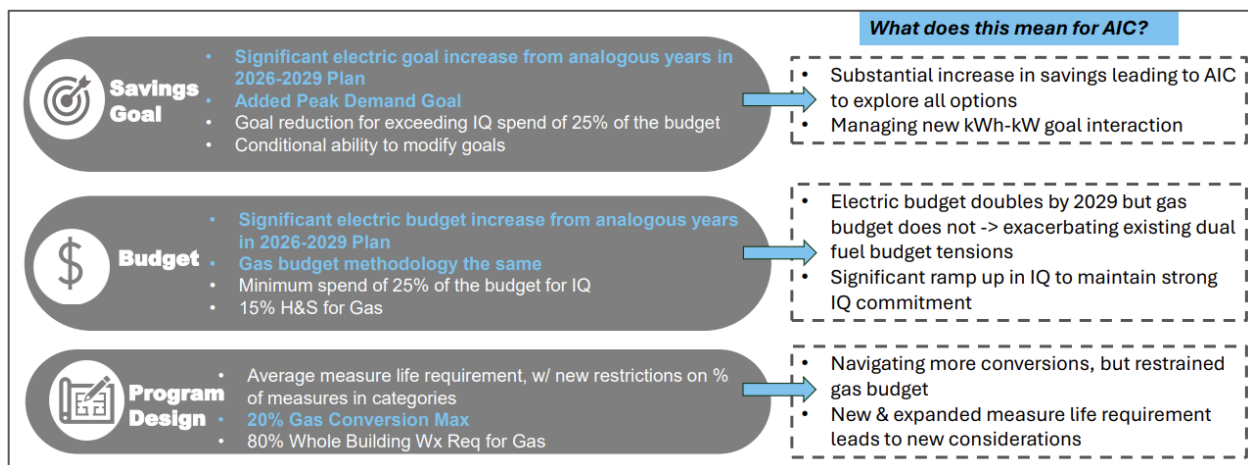
Karen Lusson (via chat): Is Ameren not open to increasing the new statutory minimum budget for income-qualified programs?

- *Matt Armstrong: The idea is let's set a high level of IQ spending that aligns what Ameren has done historically, while not having to muddy the waters of settlement to discuss IQ spend. So that we can focus our conversations on other topics.*
- *Karen Lusson (via chat): We don't interpret a statutory IQ minimum budget as establishing the ceiling, particularly given the new provisions that allow for reducing goals with increased IQ spend.*
- *Fernando Morales (via chat): Matt will add more context in later slides, but Ameren's intent is to increase investment to IQ customers beyond the minimum requirement.*

Darleen DeRosa (via chat): What is the new coincident peak demand savings goal?

- *Fernando Morales (via chat): I will be covering that shortly. It is different each year.*
- *Denise Munoz (via chat): Curious to the driver behind adding a new peak demand goal to Ameren's plan. Will you be addressing that as well?*
- *Fernando Morales (via chat): The goal and how its calculated was written into CRGA. I will be covering our projected achievement.*

CRGA Change Summary



CRGA Targets

- Energy Goal Methodology
 - Gather Sales Data for 2021-2023 & Calculate Average
 - Apply statutory goal % amounts to average sales
 - Calculate new statutory goal for including above 25% of total budget for IQ
 - Apply reduced statutory goal % to the average sales from 2021-2023
- Demand Goal Methodology
 - Gather 2023 energy and demand savings from AIC evaluation.
 - Calculate ratio of kWh to kW
 - Apply 2023 ratio to the statutory energy goal

	2027	2028	2029
Energy Savings Goal (MWh) - Reduced from IQ	306,460	386,406	466,352
Increase from Yr in '26-'29 Plan	8%	38%	78%
Demand Savings Goal (kW)	40,832	51,843	62,135
Total Budget	\$178,050,020	\$222,033,873	\$256,290,528
Increase from Yr in '26-'29 Plan	41%	76%	103%
35% IQ Budget	\$62,317,507	\$77,711,856	\$89,701,685

Abigail Miner (via chat): Thanks for laying out the budgets and savings goals in such a straightforward way. Including comparisons from the original 2026-2029 plan is helpful.

Kari Ross (via chat): Can you repeat annual goals as a percent sales given the IQ increase to 35%?

- *Matt Armstrong: In 2027 our statutory goal is 1.4%. By spending the 35% on IQ, that goal is reduced to 1.15%. In 2028 the statutory goal is 1.7%. The reduced goal for IQ spend is 1.45%. In 2029 the goal levels out at 2%, and we reduce it to 1.75% due to IQ spend.*

Karen Lusson (via chat): Is this for income-qualified or low-income?

- *Matt Armstrong: Income-qualified, up to 300% of FPL.*
- *Fernando Morales (via chat): Income-qualified, though primarily low-income*
- *Matt Armstrong: Including up to 300% of the poverty level, recognizing that we have worked together on what that split of low and moderate income is.*
- *Karen Lusson: What % is low income, and what % is moderate income? Can you confirm the reductions in energy savings goals is only tied to the actual low income spend? That is what the statute says.*
- *Matt Armstrong: We disagree on the reading of the statute. Referring to the 35% IQ spend, over 90% of that is low-income in our model.*
- *Kari Ross (via chat): Statute says low- and/or moderate-income. See page 528 of the new law: <https://www.ilga.gov/Documents/Legislation/PublicActs/104/PDF/104-0458.pdf>*
- *Karen Lusson (via chat): Matt, you were right. It includes moderate income in the 0.025 reductions.*
- *Matt Armstrong: Thanks Karen.*

Karen Lusson (via chat): Ameren has a moderate-income program that you've characterized as income eligible. What, if any portion of the 35%, is directed to moderate income?

- *Kari Ross (via chat): The statute says low- and/or moderate-income*
- *Fernando Morales (via chat): That's our interpretation as well.*
- *Kari Ross (via chat): Page 528 of the new law: <https://www.ilga.gov/Documents/Legislation/PublicActs/104/PDF/104-0458.pdf>*

Draft Portfolio Overview

- Electric Budget increases \$78M from 2027 to 2029, 44% increase
- Electric savings represent a 56% increase over 2026 Plan for the same combined 3 years
- Ameren does not have the ability to increase gas budgets per the statute

Highlights

- Combined investment of \$197-274M
- Portfolio constrained by limit on gas budget
- All statutory requirements are satisfied
- Portfolio is highly cost effective – TRC above 2.5
- Average electric measure life is 12.43
- Average gas measure life is 13.55

	Electric			Gas		
	2027	2028	2029	2027	2028	2029
Budget	\$178.0	\$222.0	\$256.3	\$18.7	\$18.5	\$18.1
Energy Savings (MWh or Therm)	355,529	437,985	492,918	2,739,606	3,169,855	3,849,306
Demand Savings (MW)	42	52	57	n/a	n/a	n/a

Program Overview

- Highlights
 - Maintaining high investment in IQ for both electric and gas
 - Business program largest electric savings
 - Largest investment growth compared to 2026 plan occurs in Market Rate Single Family, IQ, and Business Standard
 - Portfolio cost percentages remain aligned with previous filing except for Breakthrough, Equipment, & Devices.

		Electric			Gas		
		2027	2028	2029	2027	2028	2029
Budget (MM)	Res	\$16.6	\$22.0	\$26.7	\$3.5	\$5.5	\$7.0
	IQ	\$62.3	\$77.7	\$89.7	\$8.5	\$7.3	\$6.6
	Bus	\$64.5	\$79.3	\$90.2	\$3.9	\$3.0	\$1.9
	Portfolio Costs	\$34.6	\$43.1	\$49.7	\$2.7	\$2.7	\$2.6
Savings (MWh/Therm)	Res	34,043	44,664	57,308	1,364,785	1,860,471	2,548,934
	IQ	88,599	111,249	137,840	615,486	731,123	1,003,069
	Bus	207,887	262,072	297,770	759,336	578,261	297,304
	VO	25,000	20,000	0	0	0	0
Savings (MW)	Res	5.45	7.16	9.30	0	0	0
	IQ	8.28	10.17	12.86	0	0	0
	Bus	24.16	30.96	34.67	0	0	0
	VO	4.07	3.26	0	0	0	0

Business Program

- Business Program
 - Standard

- Standard
 - Public
 - Small Business
 - Standard
 - Enhanced
 - Disadvantaged
 - Midstream
 - Lighting
 - Food Service
 - Custom
 - Public
 - Private
 - Retro-Commissioning
 - Public
 - Private
 - Business Market Transformation
- Highlights
 - Largest investment in the Standard and Small Business initiatives
 - Electric Incentives are increased 25-50% depending on the measure & channel
 - Largest contributor to savings
 - Custom and Standard offerings for electric, Standard on the gas side
 - Added kW incentive to Custom Initiative
 - Top savings measures include
 - Custom projects, LED Interior Directionals, LED Exterior Fixtures, RCx, and Linear Replacements

Initiative	Combined Electric and Gas Budgets		
	2027	2028	2029
Standard	\$19,129,067	\$25,994,715	\$30,106,903
Small Business	\$21,929,932	\$23,213,564	\$24,637,044
Midstream Lighting	\$4,271,144	\$4,125,126	\$3,993,715
Midstream Food Service	\$603,160	\$603,160	\$603,160
Custom	\$16,441,169	\$21,073,354	\$23,083,371
Retro-Commissioning	\$5,269,617	\$6,511,847	\$8,935,041
Business Market Transformation	\$773,868	\$773,868	\$773,868
Total	\$68,417,957	\$82,295,634	\$91,133,101

Kari Ross (via chat): Which business offerings have the most peak demand reduction impact?

- *Victoria Nielsen (via chat): The top initiatives contributing to Peak Demand savings for business are Standard Prescriptive: 28.3 MW, Small Business Standard: 19.3 MW, Custom Private: 17.1 MW.*

Julia Friedman (via chat): Can you share a little bit more of what's included in a Standard business offering?

- *Fernando Morales (via chat): The standard initiative offers private and public sector customers fixed incentives for installation of prescriptive EE measures. These can include lighting controls, motors, HVAC equipment, steam traps, refrigeration measures, and even some agricultural measures.*

Residential Program

- Market Rate Single Family
 - Home Efficiency
 - Midstream HVAC
- Market Rate Multifamily
 - Direct Install
 - Heat Pumps
 - Whole Building
- Retail Products
 - POP Retail Products
 - Online Marketplace
- Residential Market Transformation
 - Market Transformation
- Market Rate Behavioral
- Income Qualified

Highlights

- Largest investment in Market Rate SF and Retail Products Initiatives
 - (Home Efficiency and POP Retail Products)
- Substantial reinvestment in market rate single family, Home Efficiency combined budget increasing 206% 2027-2029
 - Home Efficiency represents 6-12% of the Residential (incl IQ) Budget in 2027-2029 Compared to 2% for 2026
- Individual measure incentives increased 50% for Home Efficiency and Multifamily Heat Pumps

Initiative	Combined Electric and Gas Budgets		
	2027	2028	2029
Market Rate Single Family	\$11,301,690	\$17,468,756	\$21,792,448
Market Rate Multi Family	\$2,670,838	\$3,167,645	\$3,629,187
Retail Products	\$4,752,205	\$5,001,701	\$5,453,521
Market Rate Behavioral	\$936,740	\$1,357,595	\$2,280,759
Residential Market Transformation	\$509,000	\$494,000	\$494,000
Total	\$20,170,473	\$27,489,697	\$33,649,914

Karen Lusson (via chat): Did you say the moderate-income was 10% of the 35% IQ budget dollar amount or 10% of the total portfolio?

- *Fernando Morales (via chat): The former. Approximately 10% of the 35%, or approximately 3% of the total portfolio.*

Amy Jewel (via chat): For Market Rate Multifamily, you had a Heat Pump channel. Does that include converting from electric resistance heating to heat pumps?

- *Matt Armstrong: Yes, we have been leveraging AMI data to identify customers with electric resistance heating and target them.*

Abigail Miner (via chat): Does Home Efficiency = weatherization?

- *Matt Armstrong: Yes, whole-home efficiency which means insulation, air sealing, weatherization, or HVAC.*

Scott Mallory: Can you explain how you determined a 50% increase in measure incentives is reasonable?

- *Matt Armstrong: The increase is based on our experience with incentives, a 50% increase from our previously small incentive is not as large as it sounds.*

Karen Lusson: On slide 21, are you saying 6-12% of the total Residential (including IQ) Budget goes to whole-home weatherization?

- *Victoria Nielsen: It is 6-12% of the entire residential budget, including IQ, 12% of residential budget, which is a substantial increase which was 2%, including IQ.*
- *Karen Lusson: 80% of IQ budget must be whole-building weatherization, so that seems low.*
- *Matt Armstrong: It may be the way that we have framed these numbers, the portfolio is compliant with the statute.*
- *Ted Weaver: Everything on this slide is non-IQ and there is a weatherization IQ budget.*
- *Matt Armstrong: We will work on an explanation for NCLC.*

Kari Ross (via chat): What is the appliance recycling program and how does it lead to energy savings?

- *Matt Armstrong: This involves purchasing a new fridge, our team will take it to a recycling facility, and then the customer will purchase a new efficient unit through the POP retail products channel.*
- *Kristol Simms: It's designed to encourage customers to get rid of their inefficient fridge or freezer, from their garage or basement.*

Residential Program: Income Qualified

- **Highlights**
 - Substantial increases in IQ SF, IQ MF channels investment
 - IQ SF and IQ MF represent over 68% of the Combined IQ budget
 - Also, among largest contributors to savings
 - CAA, and Smart Saver investment remains generally in line with current 2026 Plan
 - Electrification remains targeted at propane customers with a slight increase to number of participants
 - Added windows and doors to Whole Home and Products offerings

	Combined Electric and Gas Budgets		
Channel	2027	2028	2029
Appliance Recycling	\$1,398,956	\$1,538,852	\$1,818,643
IQ Behavioral	\$570,190	\$868,860	\$1,444,481
School Kits	\$786,715	\$965,309	\$1,206,680
CAA	\$3,841,535	\$3,777,034	\$3,754,450
IQ Single Family	\$33,912,207	\$41,636,498	\$45,249,903
IQ Multifamily	\$14,173,808	\$18,611,958	\$20,899,060
IQ Retail Products	\$1,901,941	\$1,842,315	\$2,534,253
IQ Online Marketplace	\$2,873,838	\$2,587,159	\$2,628,976
Community Kits	\$342,946	\$685,954	\$857,521
Smart Savers	\$739,895	\$716,579	\$704,922
Electrification	\$950,456	\$1,092,679	\$1,425,830
Manufactured Homes	\$4,301,121	\$4,899,877	\$6,290,271
Public Housing	\$4,988,598	\$5,734,806	\$7,483,222
Total	\$70,782,205	\$84,957,879	\$96,298,211

Amy Jewel: What will be included in the IQ electrification program?

- *Matt Armstrong: Electrification remains targeted at propane users. We have slightly increased the number of participants that we intend to serve, compared to the 2026 plan.*

Kari Ross: The bottom totals include 3% moderate income of the entire budget, which then means adding the 32% low-income to then equal 35%?

- *Fernando Morales: Yes, that is correct. Approximately 90% of the LI budget goes to customers, and then the rest goes to moderate income customers.*
- *Kari Ross: What channels will the moderate income program be focused on?*
- *Fernando Morales: We can follow-up.*

Karen Lusson (via chat): These numbers reinforce my confusion from the earlier slide which said that whole building Wx, including IQ, only represented 6-12% of the Residential portfolio.

- *Zach Ross: I think Ameren was saying that the spend on the Home Efficiency channel (which is the NON-IQ home Wx program) was 6-12% of the entire residential program budget (inclusive of both of the non-IQ and IQ budgets). Not that whole building Wx was 6-12% of the res portfolio.*

Scott Mallory (via chat): A prior slide noted changes in pilot programs. Can you elaborate on pilot program changes if not addressed in future slides?

- *Matt Armstrong: Historically due to the statute, because Ameren had a modified energy savings goal, we were not allowed to invest in pilot programs or "breakthrough equipment and devices" as it is called in the Policy Manual. Ameren is not proposing a modified energy savings goal today. With the significant increase in energy savings, we must think out of the box. We are proposing to invest in pilots going forward. We don't have details today on what those pilots look like. We are gathering input from our CBOs and CAAs. Some of those ideas may lead to pilots.*

Darleen DeRosa: Can you share more about your new Market Rate Behavioral program?

- *Matt Armstrong: That is a new program so I don't have a lot to share; we are thinking through an RFP for that.*

Abigail Miner: Because the utilities are not consistent across the state with branded program names, definitions or short program descriptions would be helpful.

Karen Lusson: For CAA programs, do the numbers reflect conversations had with the agencies to confirm capacity?

- *Matt Armstrong: We have not reviewed these numbers with the CAAs, but we collaborate closely with 18 agencies on a weekly basis so we have a good handle on their capacity.*

MDI Assessment: Workforce Development

- Channel Participation
 - 450 total participants
 - 337 job-seeking support
 - 122 training participants
 - 54 wraparound services recipients
- Employment Outcomes
 - 48 participants gained employment through participation in the program
 - 25+ entered energy efficiency roles
 - 14+ placed with AIC EE delivery partners
- Program Ally Incubator
 - Project Volume Growth
 - 2023 cohort: 73 -> 387 projects post-graduation
 - 2024 cohort: 27 ->
 - Key Insight
 - Graduates deliver 5-7x more EE projects after incubator participation

Karen Lusson (via chat): In the Program Ally box, can you define what you mean by "projects"?

- *Keyla Ward: Those are relative to offered EE projects and relate to a broader clean energy channel across our team.*
- *Karen Lusson: Is completing an insulation considered a project?*
- *Keyla Ward: Yes. If we have a contractor that goes through the program, they will complete projects associated with the channel and across our portfolio.*

CBO Management Channel

- Grant Writing Overview
 - 2023-2025 Results
 - 14 grant applications submitted
 - 5 awards secured
 - \$9.7M awarded
 - Aligned Funding Areas
 - Workforce development
 - Contractor growth
 - Underserved community services
- Grant Writing Value to MDI
 - What it Enables
 - Expands EE workforce beyond utility funding
 - Builds CBO capacity

- Extends Ameren EE reach into priority communities
- Example
 - CEJA-funded hubs delivering IQ and Smart Savers projects

MDI Mission

- The Market Development Initiative (MDI) translates clean energy policy into equitable, community-driven results.
- Reduce Barriers: Lower energy burden and remove obstacles that limit participation in clean energy, workforce, and supplier programs.
- Expand Opportunity: Create clear pathways to prosperity for workers, students, and small businesses across Illinois.
- Invest Locally: Direct resources to communities so growth is shared, rooted locally, and built to last.
- Build Capacity & Systems: Strengthen partnerships and coordination to turn ambition into measurable, scalable outcomes.

Karen Lusson (via chat): Does your workforce development program connect with community action agency workforce growth efforts to try and increase their capacity?

- *Keyla Ward: Yes, we do work with our CAA workforce development efforts.*

Future Focus

- Continue to develop MDI programs and expand outreach across the territory to build a stronger, more connected workforce and contractor pipeline aligned with Ameren Illinois needs.
- Build upon job placement outcomes by strengthening employer partnerships, employment pathways, and post-program tracking.
- Expand contractor capacity and reach through enhanced post-incubator support, collaboration, and access to capital.
- Increase grant impact and consistency by improving grant writer matching, capacity, and outcome reporting tied to MDI goals.

Portfolio Next Steps

- Portfolio Refinement
 - Continue to refine portfolio based on external/internal feedback and portfolio guidance.
- Collaboration & Settlement
 - Looking forward to working with stakeholders, consideration of feedback, etc.
 - Key Dates:
 - Stakeholder Feedback: March 17th
 - Negotiation #1: March 25th
 - NFI Comments on Stipulation: May 13
- Filing
 - Filing complete package by June 1, 2026

Odette Hyatt-Watson: With what is happening in the Middle East, I think about COVID where prices jumped, especially for contractors. Has Ameren explored possible contingencies with what is happening?

- *Matt Armstrong: We appreciate you raising that question and we recognize the disruption that unexpected things can have on our portfolio. CRGA has language*

specific to those kinds of disruptive events and recognizes the ability to change goals if there is a significant increase in costs.

Closing and Next Steps

Follow-up Items:

1. Karen Lusson (NCLC) requested an explanation of the 6-12% reference on slide 21: Home Efficiency represents 6-12% of the Residential (incl IQ) Budget in 2027-2029, compared to 2% for 2026
2. Kari Ross (NRDC): What channels will the moderate income program be focused on?
3. Abby Miner (Illinois Office of the Attorney General) requested definitions or short descriptions of each program.

Next Steps:

Notify the SAG Facilitator (Celia@CeliaJohnsonConsulting.com) **by Friday, March 13** if you plan to present feedback on Ameren's draft EE Plan.

- Feedback will be presented at the Tuesday, March 17 Large Group SAG Meeting

If you are a non-financially interested stakeholder interested in participating in confidential EE Plan negotiations with Ameren, please email the SAG Facilitator

(Celia@CeliaJohnsonConsulting.com) **by Friday, March 13**

- 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 \(clean final\)](#)
- Ameren legal will review negotiation participation requests
- Negotiations with Ameren begin the last week of March, and require signing a Non-Disclosure Agreement (NDA)