

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

Tuesday, September 29

9:30 am – 12:00 pm

Teleconference

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Meeting Materials

- [September 29, 2026 Large Group SAG Q3 Agenda](#)
- [SAG Facilitator Introduction to September 29 Meeting](#)
- [Ameren Illinois Presentation: EE Portfolio Progress Update](#)
- [ComEd Presentation: EE Portfolio Progress Update](#)
- [SAG Facilitator Presentation: Illinois Energy Efficiency Policy Update Process](#)
- [SAG Facilitator Presentation: SAG Website Survey Results](#)
- [SAG Website Survey Responses \(Final August 2026\)](#)

Attendees

Name	Company or Organization
Celia Johnson	Facilitator (Celia Johnson Consulting)
Zoe Knaus	SAG Facilitation Support (Inova Energy Group)
Aaron Wang	No Organization Identified
Amy Jewel	Elevate
Andrea Salazar	Michaels Energy
Andrey Gribovich	DNV
Andy Vaughn	Leidos
Babette Washington	Ameren Illinois
Brad Fortson	ICF
Brook Cranford	Ameren Illinois
Caleb Simpson	ComEd
Carl Samuelson	Michaels Energy
Caryn DeSignor	Leidos
Charles Ampong	Guidehouse
Chris Neme	Energy Futures Group, representing NRDC

Name	Company or Organization
Chris Vaughn	Nicor Gas
Christine Flynn	NIU Workforce Policy Lab
Colin Santel	Leidos
Courtney Golino	Guidehouse
Danielle Marquis	Equinox Creative
Danish Murtaza	Peoples Gas and North Shore Gas
Deb Dynako	Energy Infrastructure Partners
Elder Calderon	ComEd
Elena Savona	ES Consulting
Elizabeth Horne	ICC Staff
Emily Lanyon	DNV
Emily Pauli	ComEd
Erin Kempster	Power TakeOff
Heather Gordon	ComEd
Ian Champ	ComEd
Jaleesa Scott	ComEd
Jamie Capece	Elevate
Jason Fegley	Leidos
Jean Gibson	Peoples Gas and North Shore Gas
Jenae Batt	Center for Energy & Environment
Joe Mays	Cascade Energy
Joel McManus	TRC Companies
Jonathan Skarzynski	Nicor Gas
Julie Soderna	Energy Solutions
Justin Gordon	Peoples Gas and North Shore Gas
Kara Jonas	ComEd
Karen Lusson	National Consumer Law Center
Kari Ross	NRDC
Karianne McCue	Nicor Gas
Katrina Choi	ComEd
Ken Parker	Community Investment Corp.
Kevin Johnson	DNV
Kim Swan	ComEd
Kimberly Petzing	Walker-Miller Energy Services
Kit White	Midwest Energy Efficiency Alliance (MEEA)
Kristina Murphy	ComEd
Lalita Kalita	ComEd
LaShelle Newland	Resource Innovations
Laura Agapay-Read	Guidehouse
Lawrence Kotewa	Elevate
Lee Ringo	Energy Infrastructure Partners
Lilieric Florez Monroy	Peoples Gas and North Shore Gas

Name	Company or Organization
Liz Connolly	ComEd
Madhu Bhargava	ComEd
Maria Onesto Moran	Power Path Logistics
Mark Milby	Elevate
Mary Johnson	Resource Innovations
Matt Armstrong	Ameren Illinois
Mike King	Nicor Gas
Minya Coleman	ComEd
Naveed Khan	Leidos
Neil Curtis	Guidehouse
Nicholas Crowder	Ameren Illinois
Nick Burstein	CMC Energy Services
Nick Warnecke	Ameren Illinois
Nicole Popejoy	IL Association of Community Action Agencies (IACAA)
Pat Justis	Ameren Illinois
Paul Grimyser	ComEd
Randy Opdyke	Nicor Gas
Rashaan Keeton	Center for Energy & Environment
Rose Williamson	E Source
Ryan Kroll	Driftless Energy
Sara Castleberry	Resource Innovations
Sarah Evans	DNV
Scott Allen Bloedorn	Resource Innovations
Scott Grost	Resource Innovations
Scott Mallory	Brubaker & Associates, representing Illinois Industrial Energy Consumers (IIEC)
Seth Craigo-Snell	SCS Analytics
Steven LaBarge	ComEd
Sushi Ramakrishnan	ComEd
Tammy Jackson	Ameren Illinois
Tara Cunningham	Rinnai
Thomas Manjarres	Peoples Gas and North Shore Gas
Tina Grebner	Ameren Illinois
Travis Hinck	GDS Associates
Tyler Sellner	E Source
Vaishali Patel	ComEd
Wade Morehead	Morehead Energy
Wen Zhang	ComEd

Meeting Notes

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

Introduction to Third Quarter Large Group SAG Meeting

Celia Johnson, SAG Facilitator

Agenda for September 29th meeting:

1. Ameren Illinois EE Portfolio Report-Out
2. ComEd EE Portfolio Report-Out
3. SAG Update – Illinois EE Policy Updates and SAG Website Survey Results

Ameren Illinois EE Portfolio Report-Out

Babette Washington, Tammy Jackson, and Nic Crowder, Ameren Illinois

Agenda

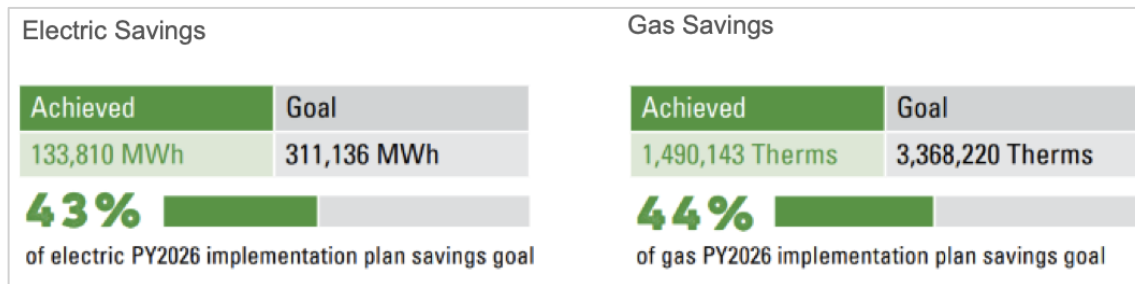
- Introduction and Portfolio Overview
- Residential Update
- Business Update and Market Transformation
- Questions and discussion

Note:

- For more detailed portfolio information, please refer to the Q2 Semi-Annual Narrative and Quarterly Template Reports (posted on the [Utility Reports page](#) of the SAG website). Metrics presented today align with the Q2 reports.

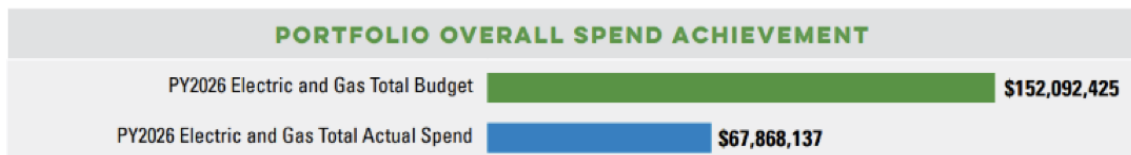
Portfolio Performance

- Portfolio Summary - Progress Toward 2026 Goals
 - Energy savings performance through Q2 2026



- Portfolio Summary – Progress Toward 2026 Spending
 - Budget and spend performance through Q2 2026
 - Electric Budget
 - Approved 2026 electric budget: \$133,501,575
 - Percent of budget spent: 44%
 - Gas Budget
 - Approved 2026 gas budget: \$18,590,850
 - Spend through Q2: \$9,031,984

- Percent of budget spent: 48%



Portfolio-Level Changes from the 2022-2025 EE Plan

- New budget commitments and where they are showing up
 - Program Ally Support
 - Recruit. Train. Retain.
 - Dedicated budget supports allies who deliver in the field.
 - IRA Support
 - One consistent experience.
 - Dedicated budget supports Inflation Reduction Act program delivery and coordination with the statewide effort.

IRA Support and Statewide Coordination

- Working together so customers are not navigating this alone
 - Statewide Coordination
 - Ameren Illinois funds Inova
 - A contract backs coordination of IRA-related work across the state
 - Consistent messaging helps utilities work alongside DCEO, the agency responsible for putting IRA funding to work statewide.
 - Upcoming Stakeholder Touchpoint
 - November 10
 - IRA updates
 - SAG Large Group meeting

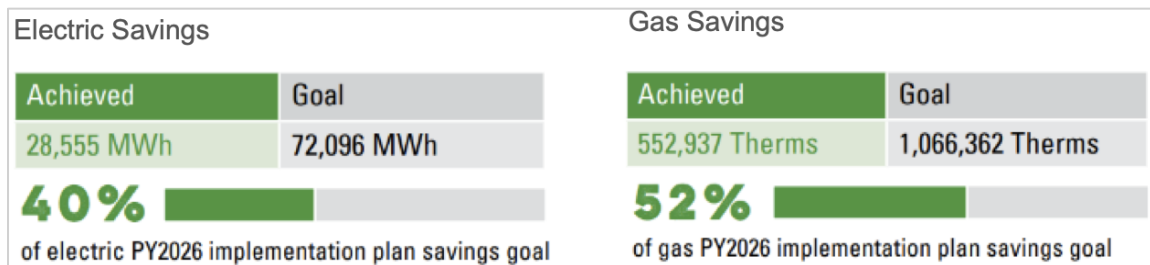
Market Development Initiative (MDI)

- Increase investment and a broader footprint
 - Additional investment expands four areas of impact across our service territory.
 - Workforce Development
 - Create and strengthen programs that build a skilled workforce ready to meet local industry needs
 - Equitable economic opportunity
 - Expand internships and scholarships with education and employer partners; help local, inclusive vendors access resources to grow.
 - Community education and engagement
 - Communicate clean energy benefits through outreach events and partnerships built on shared, measurable impact.
 - Clean energy innovation
 - Advance economic development, beneficial electrification and innovative clean energy pilots that deliver lasting community value
 - October 28
 - Ameren Illinois MDI update
 - SAG Equity Subcommittee meeting

Residential Program

- Residential Program Summary - Progress Toward 2026 Goals

- Residential energy savings performance through Q2 2026



Income-Qualified Guardrails

- 2026 EE Plan Stipulated Agreement Section III.B Income Qualified
 - \$55.6M – Annual-average IQ spend
 - Combined electric and gas spending, with no less than 85% of the IQ budget serving low-income customers.
 - 80% - Major-measure minimum
 - At least 80% of IQ measure incentive spending, with best efforts to reach at least 85%
 - Whole-home – Qualifying measures
 - Insulation, Air sealing, and heat pump technologies

Guardrail Progress Through Q2

- \$26.3M – Total IQ spend
 - \$22.8M Low-Income Spend (86.7%)
 - Tracking to the annual average total IQ spend target of \$55.6M and Low-Income spend target of 85%
 - \$12.0M - Major measures delivered
 - Meeting the 80% guardrail
 - Calculated on IQ measure incentive spending, not total IQ spending
 - Measures – Driving major-measure spend
 - Insulation & air sealing
 - Heat pump technologies
- On Target – IQ dollars are reaching low-income customers today while the portfolio stays focused on deeper, longer-lasting customer benefits.

Measure Uptake Barriers and Options

- Income-Qualified Single Family and Multifamily
 - Reporting pursuant to 2026 EE Plan Stipulated Agreement Section III.B Income Qualified
 - More detailed information can be found in the Appendix
 - Barriers to installation
 - Remediation timelines – Health and safety work extends the timeline
 - Customer hesitation – Disruption and time required in the home
 - Contractor capacity – Scheduling and coverage gaps in the service territory
 - Landlord participation – Reluctance to undertake envelope work; limited air-sealing opportunities
 - Paths forward
 - Prioritize remediation
 - Address health and safety before envelope work.

- Build local partnerships
 - Clear remediation backlogs.
- Expand delivery capacity
 - Onboard and train program allies to broaden coverage.
- Engage multifamily owners
 - Identify and educate owners on air sealing and insulation opportunities.

Programmatic Changes from the 2022-2025 EE Plan

- Income Qualified Initiative
 - Lower participation barriers
 - Simpler access
 - Simplified IQ application and a residential eligibility tool reduce customer friction
 - Less paperwork
 - Self-attestation removes income-validation paperwork barriers and follow-up.
 - Whole-home benefits
 - Continued emphasis on whole-home benefits over single-measure fixes; expanded heat pump promotion.
 - New delivery channels
 - Healthier Homes
 - Clean air quality and comprehensive weatherization for income-qualified customers.
 - Accessibility
 - Supports customers experiencing mobility and accessibility barriers.
 - 10% Accessibility referral conversion to whole-home comprehensive programs

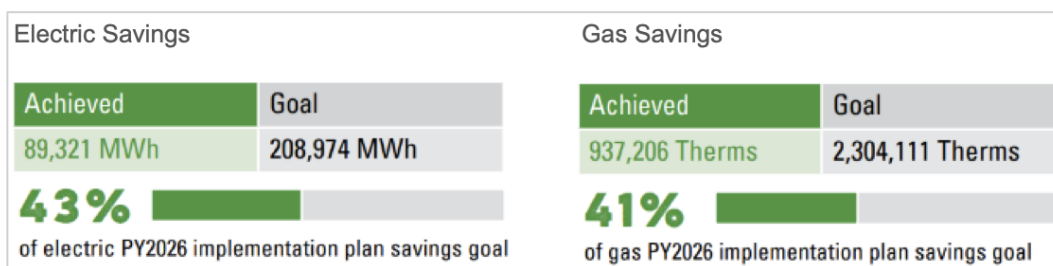
Electronification Bill Impact Analysis Tool

- Reporting pursuant to the Illinois EE Policy Manual
- More detailed information can be found in the Appendix
 - Current Rates
 - Ameren Illinois continues to use the same bill impact analysis tool, with costs updated to align with current rates.
 - Same methodology
 - The underlying methodology is unchanged, keeping results comparable to prior reporting periods.
 - LICA included
 - The tool was updated to include LICA on October 1.

Business Program

- Business Program Summary – Progress Toward 2026 Goals

- Business energy savings performance through Q2 2026



Programmatic Changes from the 2022-2025 EE Plan

- Optimizing availability of Weatherization and HVAC upgrades
 - Weatherization stays available
 - Small Business Direct Install continues to include weatherization measures.
 - Envelope work remains available along with equipment measures supporting deeper, longer-lived savings from a single engagement.
 - HVAC incentives are simplified
 - Midstream HVAC measures moved into Standard Prescriptive.
 - Provides distributors, installers, and customers access on a simpler path with fewer overlapping incentives.
 - Digital applications
 - Ameren Illinois is launching an expanded portal for digital completion and submission of Standard applications, starting with HVAC equipment

AMI Integration

- Strategic Energy Management and Retro commissioning
 - Visualize building performance
 - AMI interval data shows business customers how buildings perform and how equipment categories affect energy costs.
 - Inform customer conversations
 - This visibility opens these engagements and helps Program Energy Advisors hold informed conversations about potential projects and savings opportunities.
 - Plan long-term investments
 - Detailed energy-use analysis helps facility operators and building owners plan capital investment in energy upgrades and facility optimization.
 - Facility data clarifies the role of energy efficiency and strengthens the case for action.

Market Transformation

- Ameren Illinois is engaged with regional and national working groups and partners, including Midwest Energy Efficiency Alliance (MEEA), the Northwest Energy Efficiency Alliance (NEEA), the Minnesota Efficient Technology Accelerator (ETA), the Consortium for Energy Efficiency, ENERGystar, and other national consultants that are working at a broader level to bring change, education, equipment, and incentives to the market.
- HPW – High Performance Windows
 - Manufacturer and Distributor engagement advancing availability and adoption of higher performing windows.

- LLLC – Luminaire Level Lighting Controls
 - Distributor and Installer training to increase knowledge, installation, and stocking of LLLC equipment
- eRTU – Efficient Rooftop Units
 - Manufacturer and Distributor engagement to improve efficiency and availability of packaged rooftop equipment.
- ESRPP – Energy Star Retail Products Platform
 - National Retailer intervention to shift the products customers find on the shelf.

Wrap Up

- Questions and discussion on any portion of the update today are welcome
- For more detailed portfolio information, please refer to the Q2 Semi-Annual Narrative and Quarterly Template Report

Discussion and Q&A:

Karen Lusson (via chat): Do you share AMI interval data information with the IQ weatherization program, particularly the multi-family program and multi-family building owners?

- *Nic Crowder: We can discuss opportunities. This is not a formal channel, but something we are thinking about.*
- *Karen Lusson: It makes sense to provide this information to multi-family properties, particularly for master metered properties.*

Chris Neme: On slide 12, the total income-qualified (IQ) spend is at 86%. Is the remaining 13% on moderate income spending?

- *Brook Cranford: Yes, the remaining balance is for moderate income.*
- *Kari Ross (via chat): Is it on kits and products?*

Chris Neme: On slide 12, the \$12 million is solely on measure costs, correct?

- *Brook Cranford: Yes, the major measures that are delivered.*
- *Chris Neme: On this slide, it says you are meeting the 80% guardrail. Can you share what percentage of total measure spending Ameren is currently at?*
- *Brook Cranford: The actual spend through Q2 should be in the appendix. If it is not, we can follow up after the meeting.*
- *Chris Neme: I was curious to see Ameren's spending trajectory.*
- *Jason Fegley: We are at about 81%, with projections to reach 82%.*
- *Karen Lusson (via chat): 80% of what dollar figure? I am not sure how you got to meeting the 80% of IQ spend. My calculations show it would have had to be \$18.24M, not \$12M. Can you tell me what I've got wrong?*
- *Jason Fegley: It is major measures versus income qualified incentive spend. The 22.8M and 26.3M are total budget values, and the 12M is a portion of the total incentive budget.*
- *Karen Lusson: What is the total incentive budget?*
- *Jason Fegley: About 15M.*
- *Chris Neme: Is the 11M difference between the 15M and 26M budgets primarily for delivery contractors? What are the additional dollars used for?*
- *Jason Fegley: For major measures, this includes incentives for both materials and installation costs of air sealing attic insulation, health and safety measures, heat pumps, etc. Total IQ spend is T&M inclusive.*
- *Karen Lusson: What is T&M?*

- Jason Fegley: T&M includes implementers and program costs.
- Karen Lusson: Labor falls in the second bucket, but what are implementer costs?
- Jason Fegley: People that oversee marketing, implementation, and delivery costs.
- Karen Lusson: Implementation does not include the trade allies installing the measures, correct?
- Jason Fegley: Correct.
- Chris Neme: I assume this includes marketing to recruit customers, income verification, managing the program, and initial home audits and assessments?
- Jason Fegley: Yes.

Chris Neme: On slide 26, the multi-family and single-family numbers are out of a total of how many units served?

- **Brook Cranford: These numbers reflect projects at the conclusion of Q2. We can follow-up.**

Karen Lusson: Regarding slide 13, do you see a difference in engagement with buildings that are master metered versus individually metered? Sometimes with individually metered buildings, the landlord loses interest in understanding the efficiency of the building because they are no longer paying most of the bill.

- **Tammy Jackson: We can follow up with our implementation team and get back to you.**
- Karen Lusson: Thank you. You also mentioned gaps in contractor capacity on the same slide. Are these gaps in areas of performance, expertise, or geographical coverage?
- Tammy Jackson: We have gaps for weatherization insulation contractors, and we are short on contractors wanting to participate. We are trying to increase weatherization allies in our territory, and we did receive three new program allies after partnering with IDI and utilizing their training.
- Brook Cranford: We're doing full analysis, as you referenced. We are looking for more contractors and trade allies to support within our service territory and are outlining areas where we have limited support. We are always looking for allies to fill specific gaps, such as health and safety remediations, electricians, roofing companies, etc.
- Karen Lusson: Once gaps are identified, do you collaborate with the state to identify opportunities to engage trade allies?
- Brook Cranford: We have a new team working with trade ally recruitment efforts. **We can review and provide insights into their recruitment plan.**

Karen Lusson: On slide 14, what does self-attestation behind the scenes mean?

- Brook Cranford: We conduct quality checks on about 10% of overall applicants to verify their self-attestation. These customers are randomly selected and need to provide verification of the income they have self-attested to. This is done by our customer care team.

Amy Jewel (via chat): What measures are offered in the Healthy Homes channel, other than weatherization?

- Brook Cranford: We are also looking at HVAC measures. What sets this program apart is that it looks at indoor air quality measures, including air quality monitors, air purifiers, ventilation, and anything else that is associated with helping air quality.

Kari Ross: If Ameren is conducting work in an IQ home and ventilation measures seem necessary, but the work is being conducted under the retrofit channel, how is the work transferred to the healthy homes channel?

- *Brook Cranford: All customers are channeled under the same process and asked specific questions about indoor air quality. If they have medical needs, or a referral source, we drive those customers to being with the healthier homes program. However, sometimes customers do not identify these needs at the beginning of the process, so we may conduct assessments under the single-family IQ program. From there, we can transfer the project into the healthier homes channel.*
- *Karen Lusson (via chat): I would imagine that the Healthier Homes program would be a great opportunity to talk about electric heat pumps with the customer, particularly for gas customers.*
- *Kari Ross: Are you seeing that the need for the healthier homes channel is greater than anticipated?*
- *Brook Cranford: Yes, this is the third year for the healthier homes channel, and it continues to grow each year.*

Kari Ross: On slide 14, you mention a 10% accessibility referral conversation to whole-home comprehensive programs. Does this mean a customer has completed the accessibility program and signed up for a whole-home program? How is this defined?

- *Tammy Jackson: The 10% represents customers that have moved on to whole-home income-qualified projects.*
- *Kari Ross: Do you have any data you can share on that 10% figure, and how the company may be utilizing tools to increase that conversion rate?*
- *Tammy Jackson: Yes, we can follow-up after the meeting.*

Karen Lusson (via chat): Is the bill impact analysis tool using both LICA – Low Income Credit Adjustment - (gas) or ESDA (electric)?

- *Jason Fegley (via chat): The Electrification Tool does not use the LICA rate, as it was built to support Propane displacement. However, the program does have a Gas Water Heater to Heat Pump Water Heater tool that reviews LICA. ESDA has not been discussed at this time.*
- *Kari Ross: Is there an assumption that these customers would automatically be enrolled in ESDA? It is important for a propane customer to benefit from electric services and the LIDR. Why has this not been included?*
- *Jason Fegley: We can follow up after the meeting with more information.*
- *Karen Lusson (via chat): Ameren's implementation of the Rider ESDA process is being litigated at the moment in Docket 26-0598. That may have something to do with Ameren not yet incorporating it. (It officially takes effect on October 1.) But once the Commission weighs in on how the program should work, I would hope that the Company begins incorporating ESDA bill impacts in electrification analysis.*

Chris Neme (via chat): On slide 18, if the issue in switching to downstream rebates was that not enough distributors signed up for the midstream HVAC program, can you say why that is? What was preventing more distributors from participating in Midstream - and did you explore expanding participation before deciding to switch to downstream?

- *Nic Crowder (via chat): We certainly drove at engaging distributors, with great success in lighting, but less so for HVAC. In addition to not reaching all distributors, we struggled with getting volume of equipment submitted. Low distributor participation was both from total number of distributors as well as participation volumes for those distributors we had engaged. I've spoken with other utilities in the same place with midstream C&I HVAC, so we'll test this standard approach and keep thinking through how best to meet this market.*

Follow-up items for Ameren Illinois:

1. Slide 26 of the Appendix includes “Income-Qualified Single Family and Multifamily Installed Units by Measure.” The numbers for SF and MF are out of a total of how many units served (separated by SF and MF)?
2. Slide 13 mentions MF challenges. Has Ameren experienced a difference between master metered and individually metered MF units?
3. Slide 13 mentions gaps in contractor capacity. Once Ameren identifies gaps, does Ameren work with the state weatherization program or the CEJA job training programs to see if there are opportunities to engage trade allies through those programs? Ameren offered to follow-up with information about Ameren’s recruitment plan.
4. Slide 14 mentions a 10% accessibility referral conversion to whole-home comprehensive programs. Does Ameren have data on the 10% figure and how the company might be utilizing tools to increase that conversion?
5. Slide 15 describes Ameren’s electrification bill impact analysis tool. There was discussion in the meeting chat regarding whether the tool uses the Low Income Credit Adjustment (LICA) for gas, or ESDA for electric. Can Ameren explain why this data hasn’t been included, or what the plans might be to use this in the future?

ComEd EE Portfolio Report-Out

Elder Calderon, Kim Swan, Sushmitha Ramakrishman, Matt Worms, Steven Labarge, Madhu Bhargava, Katrina Choi, Wen Zhang, Liz Connolly, ComEd

About the ComEd Energy Efficiency Portfolio

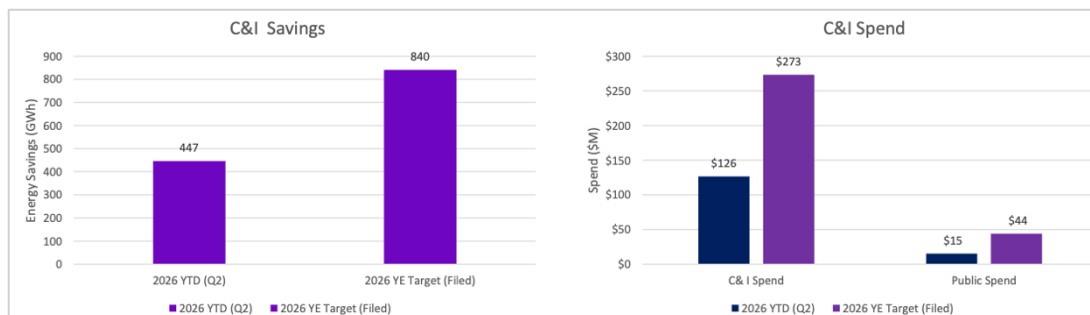
- From 2008 to Q2 2026*:
 - 169.44 million efficient bulbs sold
 - 559,711 assessments completed
 - \$14.2 billion on customer bills saved
 - 117.6 million Net MWh saved
 - 9.6` million cars off the road for a year
 - 190,778 business projects completed
 - 17,464,113 rebates & incentives provided
 - 41.23 million acres of trees planted
 - 90.90 billion pounds of CO2 reduced
 - \$2.82 billion in incentives provided to customers*
 - 13.63 million homes powered for one year
- **Based on lifetime net MWH savings realized through CY2025. Incentives for the ongoing year is based on applied percentage of about 67%*

Agenda

- Portfolio Year-to Date (Q2) Overview & Highlights
 - Year-to-Date Overview
 - C&I – Streamlining Participation and Improving Customer Experience
 - R&D – Pilot Highlights
- Electrification Year-to Date (Q2) Overview & Highlights
 - Electrification Overview
 - Residential Heat Pumps
 - Whole Home Electric – Expanding Income Eligible Electrification
 - Bill Impacts Update

Year-to-Date Overview

- Spend & Savings Highlights: Commercial & Industrial

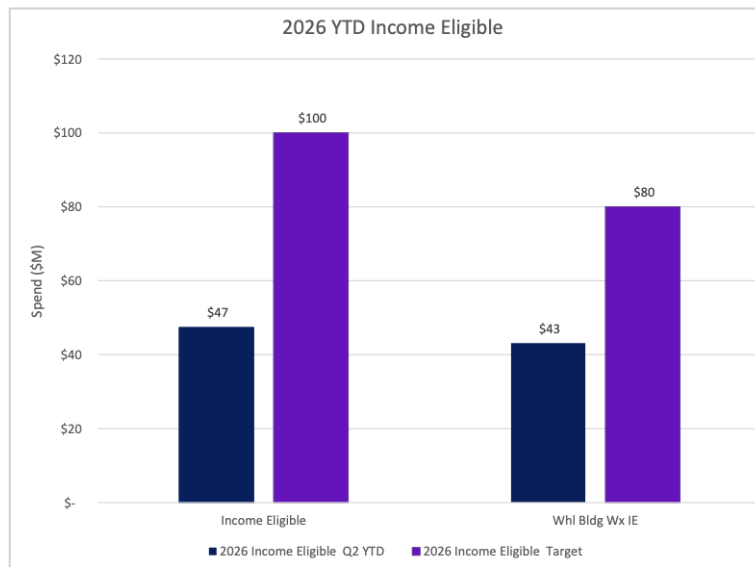


- Midstream/Upstream continued to lead portfolio performance through Q2, achieving 241 GWh of savings and 76% of annual forecasted savings through more than 530,000 incentivized product sales
 - Small Business generated nearly 90 GWh of savings through Q2 across more than 2,500 completed projects, supported by strong participation following the Kickstart promotion.
 - Industrial Systems maintained a strong future pipeline, generating 16 study-based application representing an estimated 512 GWh of potential savings while delivering 11 GWh of completed project savings through Q2.
- Spend & Savings Highlights: Residential



- Home Energy Products reached income eligible customers through more than 500,000 incentivized products and 270,000 food bank distributed measures through Q2.
- Customer engagement expanded through Q2, with Home Energy Reports adding 75,000 customers, including enhanced reporting capabilities for net-metered customers and expanded digital and Spanish-language outreach.
- Home Heating & Cooling processed 2,960 incentives through Q2, including 2,723 heat pump installations, while implementing updated heat pump incentive tiers and conducting contractor, distributor, and trade ally outreach to support the July 1, 2026 launch of heat pump water heater incentives.

- 2026 YTD Highlights: Income Eligible Achievements



- Multi Family Energy Savings program generated more than 7,700 MWh of savings and \$7.7 million in incentives, driven by strong participation in both income eligible and public housing segments.
- Whole Home Electric program generated approximately 9 GWh of savings and \$5.4 million in incentives for income eligible customers through Q2, driven by full electrification projects.
- Affordable Housing New Construction program enrolled 11 new projects and completed seven affordable housing developments, delivering 330 income eligible units while continuing to strengthen its affordable housing pipeline and industry partnerships.

Portfolio Highlight: Commercial & Industrial - Streamlining Participation and Improving Customer Experience: Expanding Eligibility for Straight to Final Applications through the Standard Offering

What We Changed and Why

- Starting Jan 1, 2026, ComEd Standard Offering raised is straight to final incentive track
- Straight-to-Final Threshold
 - \$1,000 to under \$10,000
 - 62.5% of Standard applications fall under \$10,000 - but only ~14% of program savings
- How it Works
 - No pre-approval required — full technical review still available on request
 - Final application due within 60 days of project completion; projects completed within 120 days of purchase
 - Repeat under-\$10K applications at one facility must be 120 days apart
- Why We Did It
 - Drive more pipeline
 - Application effort is a barrier to entry: some measures can now be installed same-day.
 - Improve the experience
 - Satisfaction runs ~9/10, yet paperwork is still the top complaint.

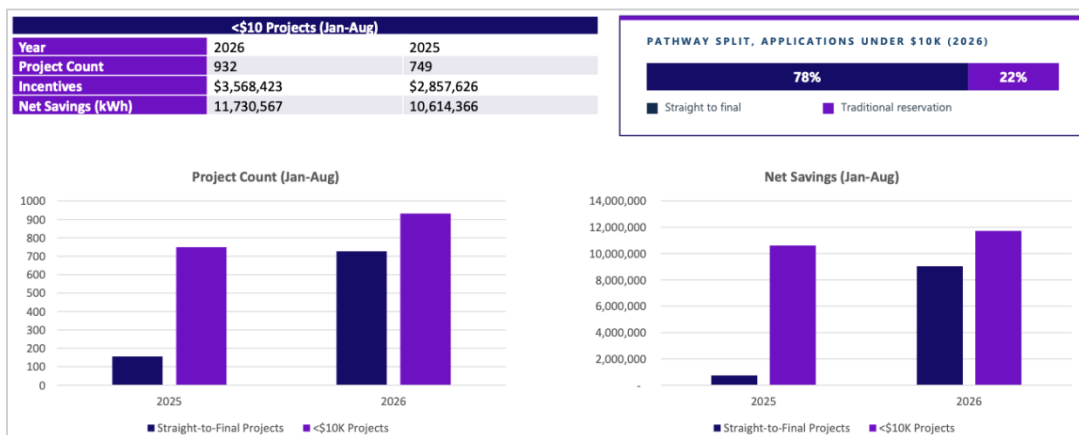
- Align and refocus
 - Matches Ameren Illinois and frees Outreach staff to build pipeline.

Considerations and Risk Mitigations

- Every identified risk was reviewed against program data or confirmed with our evaluation partners before launch
- Forecast accuracy
 - Risk – Without pre-applications we lose early visibility when small projects will submit final application.
 - Safeguard – Use past-month trend estimates, along with current outreach prospect data, to forecast.
- Customer and EESP satisfaction
 - Risk – Participants could install ineligible equipment and have their application voided, causing frustration.
 - Safeguard – Developed new marketing material highlighting how to verify equipment and updated the website to better reinforce measure requirements.
- Evaluation integrity
 - Risk – Approving projects only after installation could raise evaluation concerns.
 - Safeguard – Guidehouse confirmed no such integrity issue exists since they don't use pre-applications to document influence. Program also developed STF specific rules on application.

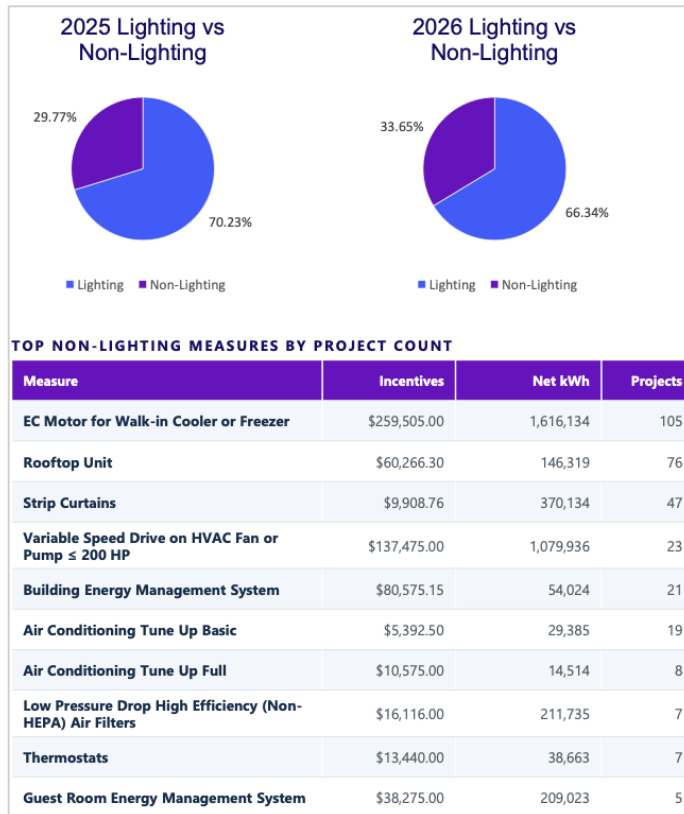
Straight to Final – Results to Date

- Compared to 2025, the # of pre-applications under \$10K are up 24% and net savings from them have grown 10% to date



- Early signals from the measure mix and from the providers working the track
 - Measure mix
 - We are seeing some growth in participation from non-lighting measures, increasing from nearly 30% in 2025 to nearly 34% in 2026, notably in refrigeration (EC motors and strip curtains).
 - Positive engagement
 - Feedback on this track expansion has been very positive to date. An EESP active in refrigeration communicated that not having to
 - EESP participation diversity

- Starting to see more participation from less active EESPs, which could suggest this track is a better delivery model for some EESPs.



Pilot Highlight: Research & Development – Pilot Highlights

- Emerging Tech Spotlight: Window Heat Pumps
 - EE R&D is leading a pilot that involves laboratory testing and field evaluation of two new-to-market window heat pumps that explore non-traditional options to improve residential space conditioning.
 - The technology is a self-contained saddlebag-style unit that installs over an existing windowsill – no ductwork needed; operates on a standard 120V outlet.
 - The initial pilot cohort is Income-Eligible Multi Family customers that may not be able to be served by conventional HVAC pathways.
 - Product performance indications are promising but finding real-world sites with non-intrusive and relatively repeatable installation conditions has been harder than expected. Some common challenges have been:
 - Window configuration and compatibility
 - Building geometry and obstructions
 - Maintaining minimum clearance to existing heat source(s)
 - Building owner preferences
 - Industry engagement is validating and helping inform directional progress
 - Manufacturer feedback loops
 - Peer utility findings/learnings
 - Collaborative industry working groups
- Emerging Tech Spotlight: Alternative Form Factor Heat Pumps

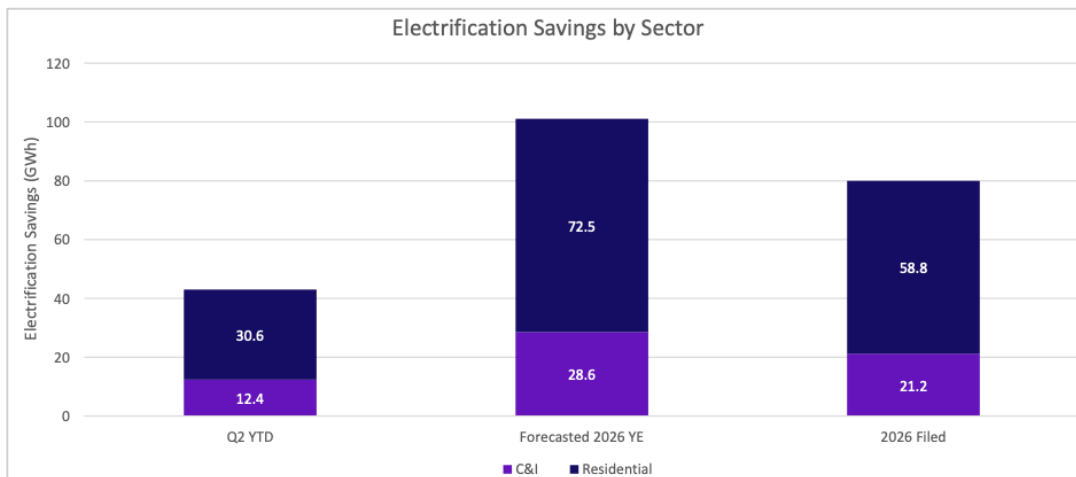
- Ongoing learning from the Window HP pilot are driving us to broaden the search for heat pumps with alternative form factors¹, as we balance customer experience with energy savings benefits.
 - Through a multi-phased approach, EE R&D is evaluating a portfolio of room/package heat pump options that match available information² on building stock in ComEd territory.
 - These technologies are expected to primarily inform our offerings to Public and Affordable Housing customers in addition to informing potential pathways for all Income Eligible customers.
 - Equipment form factors being assessed are:
 - Packaged Terminal Heat Pumps (PTHPs)
 - Sleeve-mount PTHPs
 - Two Port PTHPs
 - Vertical Stack Systems
 - Window-mount Room Heat Pumps
 - Saddlebag units
 - Two-way window box units
- VHE HVAC Pilot – Overview
 - EE R&D Team has supported installation of 5 Variable Refrigerant Flow HVAC systems in Small-Medium customers across ComEd Service Territory.
 - Projects held to a Very High Efficiency (VHE) Standard. To meet this standard, new HVAC systems installed were VRF Heat Pump Systems with Heat Recovery and Demand Control Ventilation equipment.
 - Installed Sites
 - Suburban Religious Building
 - Rural Medical Clinic
 - Suburban Community Center
 - Suburban Office Building
 - Rural Commercial Restaurant
- VHE HVAC Pilot – Initial Results
 - Significant HVAC Energy Reduction with Mixed Bill Impacts
 - Initial 2 sites achieved 50-60% overall HVAC energy reduction
 - Final three sites to be evaluated in 2027
 - Bill impacts vary based on existing customer rate structures
 - R&D Team using findings to determine future Program fit and customers best served by this equipment, as well as understand Energy Savings, Bill Impacts, and specific building types best suited for this approach
 - Considering future technology research, including dual-fuel applications and alternative refrigerant options

¹Form Factor is referring to the physical size, shape and configuration of the equipment i.e. how the equipment is packaged and mounted rather than the technology itself.

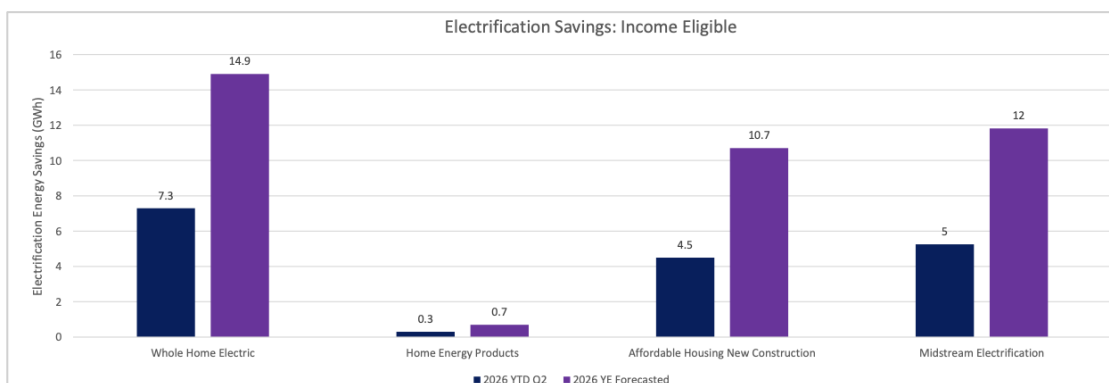
² Available information on building stock includes synthesis of publicly available data like ACS (American Community Survey), NLR (National Lab of the Rockies) ResStock, etc. that provides a high-level characterization of building stock for planning grade estimates.

Electrification Overview

- Electrification Update YTD



- Several offerings have launched and expanded electrification technologies across residential and commercial markets, including heat pump water heaters, induction cooking equipment, variable refrigerant flow (VRF) systems, and other emerging electric alternatives.
 - Continued to advance all-electric new construction, with the Electric Homes New Construction (EHNC) program completing 24 homes and units through Q2 across single-family, townhome, and multifamily development while also forecasting our first C&I All Electric New Construction project in Q4.
 - Commercial electrification offerings have gained momentum, including the first incentivized VRF heat pump project through our midstream offering while expanding availability of electrification technologies such as heat pump water heaters, induction cooking equipment, and heat pump appliances through residential retail channels.
- Income Eligible Electrification



- Income Eligible Savings currently make up about 30% of total portfolio electrification savings
 - The portfolio has continued to advance IE electrification through partnerships such as the City of Chicago Green Homes Chicago program and expanded multifamily engagement by adding two new outreach partners, Utility Energy

Services (UES) and Metropolitan Mayors Caucus (MMC), to increase participation among multifamily property owners.

- We've also continued to expand participation opportunities within Whole Home Electric by offering a dual-fuel pathway for customers who are not eligible for full electrification. Through Q2, the offering completed 52 SF and 29 multi-family dual-fuel projects

Electrification Highlight: Residential Heat Pumps

- Heat Pump Water Heater Technology
 - Growing interest from existing programs + contractors + industry conferences
 - Annual Distributor Roundtable from 2025
 - Go Electric – Heat Pump Water Heater Savings Calculator
 - <https://goelectric.comed.com/heat-pump-water-heater/>
 - \$750 Customer Incentive for ENERGY STAR® certified units
 - Effective July 1, 2026
 - Units purchased at Retail - DIY/Self-Install
 - Units purchased & installed through Heat Pump Water Heater Contractor
- Home Energy Products: Retail Program
 - 2026 Measures include Heat Pump Water Heaters, All-in-one Washer Heat Pump Dryers, Heat Pump Clothes Dryers, Induction Cooktops and Ranges, and more.
 - <https://www.comed.com/appliancerebates>
 - Customers can engage with our team by phone, email, and in person to learn more about the rebates and discounts available:
 - In-Store Engagements
 - Upcoming: Rheem training trailer at Menards
 - Past: Electrification Lab
- Heat Pump Market Growth for HH&C

Measure Breakdown	2022 Actuals		2023 Actuals		2024 Actuals		2025 Actuals		2026 YTD Actuals (06/30/2026)	
	Units	Incentives	Units	Incentives	Units	Incentives	Units	Incentives	Units	Incentives
Air Source Heat Pump-Tier 1	414	\$ 345,600	2,386	\$ 3,332,000	3,553	\$ 4,400,000	1,878	\$ 2,300,600	316	\$ 442,200
Air Source Heat Pump-Tier 2	123	\$ 156,000	910	\$ 1,813,100	2,251	\$ 3,246,200	2,915	\$ 4,596,400	1,207	\$ 2,415,200
Ductless Mini Split Heat Pump	623	\$ 447,750	1,516	\$ 2,027,600	1,539	\$ 1,639,450	1,336	\$ 1,336,000	345	\$ 345,000
Air Source Heat Pump <2.5 - Tier 1	Incentive tiering structure was introduced on March 01, 2026.								12	\$ 10,800
Air Source Heat Pump <2.5 - Tier 2									120	\$ 180,000
Air Source Heat Pump >=2.5 - Tier 1									145	\$ 203,000
Air Source Heat Pump >=2.5 - Tier 2									360	\$ 720,000
Ductless Mini Split Heat Pump <1.5									68	\$ 34,000
Ductless Mini Split Heat Pump >=1.5									150	\$ 150,000
Total	1,160	\$ 949,350	4,812	\$ 7,172,700	7,343	\$ 9,285,650	6,129	\$ 8,233,000	2,723	\$ 4,500,200

- Strong market growth: Heat pump participation increased from 1,160 units in 2022 to a peak of 7,343 units in 2024, demonstrating substantial market adoption.
- Incentive investment expanded: Total incentives grew from approximately \$0.9 million in 2022 to \$9.3 million in 2024, before declining to \$8.2 million in 2025.
- Continued Strong Performance in 2026: The HH&C Program has supported 2,723 heat pump installations and issued approximately \$4.5 million in incentives year to date. The program remains on track to achieve more than 6,000 heat pump installations in 2026, representing approximately \$10 million in incentive investments.

- Heat Pump Incentive Tiering for HH&C

Product	Minimum Efficiency Level			Incentive Per Heat Pump	
Air Source and Centrally Ducted Mini-Split Heat Pumps	SEER2	EER2	HSPF3	With Heat Pump Installation Only	Heat Pump Installation With ENERGY STAR® Smart Thermostat*
Tier 1 < 2.5 tons	≥ 15.2 SEER2	≥ 9.4 EER2	≥ 8.1 HSPF2	Up to \$900	Up to \$975
Tier 1 ≥ 2.5 tons	≥ 15.2 SEER2	≥ 9.4 EER2	≥ 8.1 HSPF2	Up to \$1,400	Up to \$1,475
Tier 2 < 2.5 tons	≥ 17 SEER2	≥ 9.4 EER2	≥ 8.5 HSPF2	Up to \$1,500	Up to \$1,575
Tier 2 ≥ 2.5 tons	≥ 17 SEER2	≥ 9.4 EER2	≥ 8.5 HSPF2	Up to \$2,000	Up to \$2,075
Tonnage is based off heating capacity (47°F) only. Heat Capacity (Btu per Hours) / 12000 = Heating Tons.					
*Must be ENERGY STAR certified					
Product	Minimum Efficiency Level			Incentive Per Heat Pump	
Ductless and Mixed Use Mini-Split Heat Pumps	SEER2	EER2	HSPF3	With Heat Pump Installation Only	Heat Pump Installation With ENERGY STAR® Smart Thermostat*
< 1.5 tons	≥ 17 SEER2	≥ 9.4 EER2	≥ 9 HSPF2	Up to \$500	Up to \$575
≥ 1.5 tons	≥ 17 SEER2	≥ 9.4 EER2	≥ 9 HSPF2	Up to \$1,000	Up to \$1,075
*Must be ENERGY STAR certified					

- September 15, 2025: Increased heat pump incentives to help offset the expiration of federal tax credits and drive market adoption.
- Program Impact: Higher incentives drove increased participation from lower-tonnage equipment with comparatively lower energy savings. Additional incentive refinement is being explored to accelerate adoption and drive more savings.
- March 01, 2026: Introduced incentive tiering to better align incentive levels with energy savings and incremental equipment costs and optimize program investment. The incentives are now split into tiers by tonnage level.
- The tiered structure provides incentives that are more proportional to both the expected energy savings and the higher installed costs associated with larger-capacity equipment. This approach rewards higher-impact projects.

Whole Home Electric (WHE): Expanding Income Eligible Electrification

- 2026 WHE Program Highlights
 - Single family (SF) and multi-family (MF) electric resistance heat (ERH) pathways launched under WHE
 - Strong SF electrification (Elx) performance
 - Outreach partner efforts and subsequent referrals increased SF Elx enrollment earlier in the year. Elx incentives for SF natural gas customers are fully allocated for 2026.

2024 – 2026 YTD Whole Home Electric Averages and Total Households Served				
	SF		MF	
	ERH	ELX	ERH	ELX
ComEd Investment per Unit	\$24,935	\$46,541	\$12,192	\$12,439
Fuel Switch Savings / Project (Net MWhs)	n/a	32	n/a	14
Non-Fuel Switch Savings / Project (net MWhs)	26	16	21	2
Modeled Annual Bill Savings per Unit	n/a	\$1,097	n/a	\$377
Households Served	27	393	112	513

WHE Challenges

- Anticipating contractor capacity constraints as utility weatherization (Wx) and electrification programs continue to expand, leading to increased demand on weatherization contractors
- Longer Multi-Family project timelines creating pipeline challenges
 - MF project typically take between 2 months and 1 year
 - Buildings that require electric service upgrades have longer timelines
- Factors that impact MF project timing
 - Size and complexity of the project
 - Permitting and structural engineering
 - Underground electric service often requires more expensive and extensive electrical upgrades
 - Customer financing
- Specific MF electrification barriers
 - High rise buildings present more challenges and longer timelines
 - Identifying eligible buildings – central heating systems do not qualify; units must be individually metered so the bill savings benefits of the upgrades go to the tenants
- Multi-Family Lifecycle
 - Outreach -> Enrollment Screening -> Assessment -> Scope Development -> Pre-approval -> Customer Signoff -> New Business Review -> Installation -> QA/QC -> Final Review

Bill Impact Updates

- Bill Impact Communications – Tailored based on offering and customer context
 - Market-Based Communications
 - Retail Products
 - Kits
 - Midstream Programs
 - Market Transformation
 - Electrification
 - Whole Home Electric
 - All-Electric New Construction
 - Program-Guided Communications
 - Small Business
 - Standard Incentives
 - Targeted Systems
 - Direct Engagement-Based Communications
 - Facility Assessments
 - Affordable Housing New Construction
- Why Communication Approaches Differ
 - Across All Offerings: Communication approaches reflect available information and engagement opportunities.
 - Market-Based: Limited customer or premises information; communications rely on representative assumptions.
 - Program-Guided: Customer engagement often occurs through contractors, distributors, or program partners.
 - Direct Engagement: Direct recommendations and customer-specific information support more tailored communications.

- Electrification: Custom Bill impacts based on customer usage, equipment specs, building characteristics, and fuel interactions.
- Assessment Report – Bill Impacts
 - Eligible electrification customers receive a detailed, modeled annual bill impact estimate broken out by the impact the upgrades will have to their energy bills and the other savings from switching to ComEd's space heat rate, removing any gas utility fees and weatherization and DI savings.
 - Bill impact report lists the estimated bill impact for each pre-approved measure

Discussion and Q&A:

Karen Lusson: On slide 7, the left bars represent income-eligible spending, and the right bars represent whole-building. Does income-eligible spending include kits, and does whole-building spending include electrification, IHWAP, single family, multi-family, and new construction programs?

- *Elder Calderon: Yes, that is correct.*

Karen Lusson (via chat): (On slide 8), is this the small business program being discussed? It's unclear.

- *Celia Johnson (via chat): I believe this is an update on the commercial & industrial standard offering.*
- *Karen Lusson (via chat): I'm not sure what the "Standard Offering" program is. Is this standard offering program a joint program?*
- *Matt Worms: Our standard offering is the prescriptive offering on the C&I side, per unit incentives like lighting, HVAC, refrigeration, compressed air and some other measure categories. Any C&I customer is eligible, outside of the 10 MW opt-out customers.*
- *Karen Lusson: Is this a joint program?*
- *Matt Worms: This is only ComEd.*

Karen Lusson (via chat): Will you be updating on the IQ joint weatherization program? How are these programs going?

- *Elder Calderon: We can follow-up on specific metrics for IQ programs or share a general update on whole-home weatherization.*
- *Karen Lusson: Please share it with the group as well.*
- *Elder Calderon: You mentioned customer participation, but let us know which other areas you're curious about.*
- *Karen Lusson: I am curious specifically about the joint electric and gas home energy savings programs.*
- *Kara Jonas: As of Q2, the program had completed over 400 joint retrofit projects. This is a combination of both utility-only and IHWAP braided projects. The program also completed over 1,500 home energy assessments. We used program data to identify customers who might be good candidates for a retrofit and added funds to increase program capacity in anticipation of expanding future budgets.*
- *Karen Lusson: Can you provide the breakdown of single family versus multi-family, and IHWAP versus utility-only projects through Q2?*
- *Kara Jonas: Yes, we will follow up.*

Karen Lusson (via chat): (On slide 10), what does EESP stand for?

- *Joe Mays: Energy Efficiency Service Provider.*

- Karen Lusson (via chat): Is that another term for trade allies or subcontractors to implementers?
- Joe Mays: It is another term for trade allies.

Kari Ross: Question about Income Eligible Electrification. How is the dual-fuel pathway determined as opposed to all-electric?

- Kara Jonas: The dual-fuel pathway was developed to help bring more customers who could benefit from electrification but did not qualify for whole-home electrification. We do modeling to see what technology makes sense for them. Typically, a hybrid heat pump is included, and we may upgrade the water heater.
- Kari Ross: It is essentially partial electrification. Do you install an electric heat pump and leave the gas backup?
- Kara Jonas: Yes, and we determine a switch-over temperature.

Karen Lusson (via chat): It's my understanding that the IQ Whole Home Electrification program is closed due to budget constraints. Is that true?

- Kara Jonas (via chat): Funding for the single family electrification pathway within whole home electric, which serves customers with natural gas heating, has been fully allocated for 2026. The program continues to seek and identify eligible single family customers with propane heating for electrification upgrades, and opportunities remain available within that customer segment. In addition, the single family electric resistance heating (ERH) upgrade pathway has not been fully allocated, and the program is continuing to identify and develop potential projects for those customers. We also continue to accept leads for multi-family projects, though based on project timelines associated with multi-family, many of those projects would likely be completed in 2027.

Karen Lusson (via chat): Do you incorporate low-income discount rates in these bill assessment reports, for both gas and electric?

- Liz Connolly: We are not incorporating it now, but we are committed to incorporate this in 2027. We are prepared to launch this in January for both gas and electric.
- Karen Lusson: The gas and electric rates are tiered by income. I assume you can determine what percentage bill discount should be applied?
- Liz Connolly: We are working through the details on how to operationalize this.
- Kari Ross (via chat): Is there a reason to launch in 2027 vs adding the discount rates for Q3-Q4?
- Liz Connolly: It takes time to figure out how to best operationalize. We are still working through it.

Chris Neme: I don't think the tiers speak to cold-climate certification. For both the midstream program and whole-home program where ComEd is specifying the precise heat pump that would go into a home, does this include cold climate models?

- Wen Zhang: We do not differentiate incentives for cold-climate heat pumps. We have a flat incentive structure based on efficiency levels.
- Kara Jonas: There is a cold-climate requirement only for whole-home electric. For hybrid electrification projects, they are not required to have cold climate heat pumps as they may still have natural gas technology.
- Chris Neme: For the cold-climate heat pumps required in whole-home electrification, are they ENERGY STAR certified?
- Kara Jonas: I believe it is NEEP certified, but I will follow up to confirm.

- Chris Neme: Do you have a way of tracking the percentage of heat pumps installed that are cold climate?
- Kara Jonas: I do not believe we are tracking this.

Karen Lusson (via chat): What is the determining factor in the whole-home electrification program between whole-home electrification and hybrid homes? What are the factors that lead to the decision to leave the gas furnace?

- Kara Jonas: We look at overall energy bill savings, age of existing equipment, ability to minimize removing newer equipment, anticipated cost of the project, and whether they are a good candidate for electrification.
- Karen Lusson: Is the dual-fuel pathway different than the whole-home electrification heat pumps? What is the difference?
- Kara Jonas: We will follow up with the specifications we are using for full electrification and partial electrification.
- Chris Neme: Is there a standard switch-over temperature?
- Kara Jonas: Yes. We will follow-up.

Karen Lusson (via chat): Can you remind us of what the budget is for the AC variation pilot?

- Madhu Bhargava (via chat): The residential pilots that could be potential AC replacement options are expected to be implemented across multiple years. We are currently anticipating total budget to be around 800k at the high-end over three planned years, and that is planned to cover incentives, installation, monitoring and data analysis for energy and bill impacts.

Karen Lusson (via chat): Why aren't the Electric Resistance Heat (ERH) homes provided in the savings (for the Whole Home Electrification program)?

Follow-up items for ComEd:

1. For the IQ joint weatherization program, provide the breakdown of SF vs. MF, and IHWAP vs. utility only (joint), for both customer participation and budget through Q2.
2. ComEd will follow-up with additional details on the cold climate heat pump specification that is used for the full electrification offering and for the partial /hybrid electrification offering. Is it the ENERGY STAR cold climate, the NEAP cold climate, or something else?
3. Does ComEd have a standard switchover temperature that is recommended for partial/hybrid electrification?
4. Research & Development: What is the budget for the AC variation pilot?
5. 2026 Whole Home Electrification Program Highlights: Why aren't the electric resistance heat (ERH) homes provided the savings?

Illinois Energy Efficiency Policy Update Process

Celia Johnson, SAG Facilitator

Policy Manual Background

- Creating an Illinois energy efficiency "policy manual" was a directive from the ICC to SAG in 2014
 - Illinois Attorney General's Office requested a Policy Manual be created in the ICC dockets to approve the 2014-2017 utility EE Plans
 - The first Policy Manual was developed through SAG through a 1+ year Subcommittee process, and approved by the ICC in December 2015

- The Policy Manual “provides guiding principles for procurement, oversight, evaluation and operation of the electric and gas Energy Efficiency Programs authorized under Sections 8-103B and 8-104 of the Illinois Public Utilities Act. The principles and policies articulated in the Policy Manual were derived from Commission orders, policies and procedures developed by the SAG, as well as best practices from state Energy Efficiency Programs delivered throughout the nation.” *See Policy Manual Section 2.1, Background*
- Illinois Energy Efficiency Policy Manual Version 3.1 (effective January 1, 2026)

Policy Manual Examples

- Evaluation
 - Defines responsibilities for independent evaluators
 - Independence protocols for evaluators
 - Process for annually submitting draft EM&V work plans; process for providing draft EM&V reports
- SAG
 - Describes role of SAG Facilitator
 - Independence protocols for SAG Facilitator
 - Options for consensus decision-making at SAG
 - Describes recurring SAG activities
- Utility EE Plans
 - EE Portfolio objectives
 - Budget allocations
 - Flexibility and budgetary shift rules
 - Defines cost categories, to standardize reporting among utilities and for transparency and consistency (examples: marketing costs, evaluation costs)
 - Prohibited expenses for EE
- Reporting
 - Types of reports available for Illinois EE portfolios
 - List of info required for utility quarterly reports
 - List of info required for utility annual reports

IL-TRM Policy Document Background

- The first IL-TRM Policy Document was developed and finalized through SAG in 2012, and approved by the ICC in 2013
 - To establish an annual TRM update process and consistent policies in the applicability of the TRM by Illinois utilities
 - “The purpose of the TRM Policy Document is to provide transparency of and consistency in the applicability of TRM values so that all stakeholders have a common reference document for measure, program and portfolio savings...” *see IL-TRM Policy Document, Section 1.1, Objectives and Purpose of the TRM Policy Document*
 - [IL-TRM Policy Document Version 4.0 \(Final\)](#)

Updating Illinois EE Policy Documents

- The IL EE Policy Manual and IL-TRM Policy Document are updated as needed, through the SAG Policy Manual Subcommittee
 - Timing: Typically updated every 3-4 years through the SAG Policy Manual Subcommittee; all interested participants have an opportunity to propose new policies or a change to an existing policy. SAG also has a process where policy

- issues can be reviewed and resolved outside of a formal policy document update.
 - **Participation:** Open to all interested participants; final consensus may need occur between utilities and non-financially interested stakeholders.
 - **Approval by the ICC:** A docket will be opened with the ICC to request approval of the updated IL EE Policy Manual and IL-TRM Policy Document; the goal is to submit both to the ICC as consensus updates.
- See the Policy page of the SAG website for previous versions of Illinois EE policy documents and additional information: <https://www.ilsag.info/policy/>

Upcoming Policy Updates

- **2026:** The Illinois EE Policy Manual will be updated in 2026 to correct errors due to the passage of the Clean and Reliable Grid Affordability (CRGA) Act in 2025; CRGA was effective on June 1, 2026
- **Next Steps:**
 - A redline IL EE Policy Manual was circulated to the SAG Policy Manual Subcommittee for review on September 28
 - Comments deadline: **Friday, October 16**
 - A follow-up discussion will be scheduled, if needed
 - The goal is to submit a consensus update to the ICC in November, requesting a docket be opened for approval
- **2027:** A comprehensive update process for both the IL EE Policy Manual and IL-TRM Policy Document will occur in 2027 through the SAG Policy Manual Subcommittee – including an opportunity for any interested SAG participant to propose a new policy or a change to an existing policy (if needed)
 - **Proposed Policy Deadline:** Friday, February 19
 - **SAG Policy Manual Subcommittee Meetings:** Anticipated to begin in March
- **Next Steps:** A policy proposal template with guidelines for submittal will be circulated to SAG in early January

Discussion and Q&A:

No comments or questions were raised.

SAG Website Survey Results

Celia Johnson, SAG Facilitator

SAG Website Survey

- The SAG website was re-designed in 2019
 - A survey was circulated in July to collect feedback on the user experience and opportunities to improve functionality
 - Survey responses were due Friday, August 14.
- Survey Questions
 1. Which page(s) of the SAG website do you visit most frequently?
 2. Have you encountered any broken links, missing pages, or other SAG website issues? If so, please describe.
 3. How easy is it to find the information you need on the website? If there is information that is difficult to find, please explain.
 4. The SAG website includes an Advanced Search option for evaluation materials. How often do you use this search tool?

5. Do you have any improvements to suggest on the search tool for evaluation materials?
6. The SAG website includes an Advanced Search option for a limited number of Large Group SAG meeting materials. How often do you use this search function?
7. Do you have any improvements to suggest on the search tool for Large Group SAG meeting materials?
8. Would it be useful if the Advanced Search tool was available for all Large Group SAG meeting materials?
9. Do you have any other feedback about using the SAG website?

Survey Results

- Survey Responses: 5 SAG participants
 - [SAG Website Survey Responses \(Final August 2026\)](#)
- Most frequently used pages:
 - Evaluation, Policy, and IL-TRM pages
 - Resources, Meetings, Reports, and Reporting Working Group pages
- Overall, navigation is accessible. Respondents described the site as fairly straightforward and well organized.
- Advanced Search feature functionality needs improvement. Users reported rarely using it, filters not working, and relevant documents not appearing in results.
- Calendar feature could be improved through real-time updates and addition of response deadlines.
- Certain EE resources, including the current Illinois EE Policy Manual and reporting metrics, should be more visible.
- Overall, sentiment is positive and respondents value the website as a helpful resource.

Next Steps

- Investigating SAG website updates to improve accessibility, search functionality, and navigation
 - Advanced Search: Adding explanation on how to use the advanced search for Evaluation Materials; discussing potential improvements with website host
 - Evaluation Materials: Planning improvements to page organization and language to clarify where documents can be found
 - Calendar: Looking at upgrading the calendar to a plugin with additional capabilities; whether deadline(s) can be added
 - Net-to-Gross (NTG) Page: Discussing with website host whether it's possible to link the NTG page as a header for easier accessibility
 - Policy: Reviewing policy pages for clarity; looking at how to highlight the Policy page for easier accessibility
 - Reporting: Looking at how to highlight reporting page(s) for easier accessibility

Discussion and Q&A:

Karen Lusson: I frequently use the website to review energy efficiency docket approvals, as it's hard to remember the docket numbers.

Closing and Next Steps

Celia Johnson, SAG Facilitator

Follow-up items for Ameren Illinois:

1. Slide 26 of the Appendix includes “Income-Qualified Single Family and Multifamily Installed Units by Measure.” The numbers for SF and MF are out of a total of how many units served (separated by SF and MF)?
2. Slide 13 mentions MF challenges. Has Ameren experienced a difference between master metered and individually metered MF units?
3. Slide 13 mentions gaps in contractor capacity. Once Ameren identifies gaps, does Ameren work with the state weatherization program or the CEJA job training programs to see if there are opportunities to engage trade allies through those programs? Ameren offered to follow-up with information about Ameren’s recruitment plan.
4. Slide 14 mentions a 10% accessibility referral conversion to whole-home comprehensive programs. Does Ameren have data on the 10% figure and how the company might be utilizing tools to increase that conversion?
5. Slide 15 describes Ameren’s electrification bill impact analysis tool. There was discussion in the meeting chat regarding whether the tool uses the Low Income Credit Adjustment (LICA) for gas, or ESDA for electric. Can Ameren explain why this data hasn’t been included, or what the plans might be to use this in the future?

Follow-up items for ComEd:

1. For the IQ joint weatherization program, provide the breakdown of SF vs. MF, and IHWAP vs. utility only (joint), for both customer participation and budget through Q2.
2. ComEd will follow-up with additional details on the cold climate heat pump specification that is used for the full electrification offering and for the partial /hybrid electrification offering. Is it the ENERGY STAR cold climate, the NEAP cold climate, or something else?
3. Does ComEd have a standard switchover temperature that is recommended for partial/hybrid electrification?
4. Research & Development: What is the budget for the AC variation pilot?
5. 2026 Whole Home Electrification Program Highlights: Why aren't the electric resistance heat (ERH) homes provided the savings?