

A photograph of two men in a kitchen. The man on the right, wearing a pink t-shirt, is smiling and hugging the man on the left, who is wearing a light blue polo shirt. They are standing in front of an open refrigerator. The refrigerator contains various items, including a large bottle of Welch's Fruit Light juice, a carton of milk, and a container of garlic. The background shows a kitchen with wooden cabinets and a lamp with a warm glow.

**2023 Ameren Illinois Multifamily Metrics Workshop**  
**SAG Reporting Working Group**  
**September 12, 2023**

# Overview



- **Stipulated Agreement:** Starting in 2022, parties agree to host multifamily workshops, twice per year, to outline data gathering consistent with the topics identified in the agreement. AIC will work with stakeholders to establish an appropriate data sharing review and process. Parties agree to assess the schedule/frequency and need for continued multifamily workshops.
- **Last Workshop:** September 15, 2022
- **Today:** Ameren Illinois will present status and recommendations for each topic identified in the agreement, having taken feedback and action items from September 15, 2022, into consideration.

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

# One Stop Shop (OSS) Timeline

## 2020 and 2021

- 2020
  - **OSS format implemented for all Ameren Illinois multifamily customers.**
  - **OSS Energy Advisor became the single point of contact for project coordination with Program Allies in Residential and Business Programs.**
  - **Streamlined multiple applications into a single process.**
  - Began formalized referral process from OSS Energy Assessments to highlight Business and Small Business Initiative measures for eligible commercially rated properties.
  - Integrated Illinois Policy Manual eligibility standards leading to a higher percentage of properties that previously qualified as market rate to become income qualified.
  - **Expanded OSS Energy Assessments beyond direct install and building envelope in-unit to include common spaces, whole building, in-unit appliances, mechanical equipment, parking areas and all accessory buildings and exterior lighting.**
- 2021
  - **Began offering Program Staff review of new construction and large-scale renovation plans with recommendations, incentives, or alternatives provided to developers and properties.**

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

# One Stop Shop (OSS) Timeline



## 2022 to Current

- January 2022 – July 2022
  - **Began work to create OSS Energy Assessment Tool in Amplify database to document building demographics and findings, track referrals and any recommendations at the time of the Assessment.**
- Spring 2022
  - Streamlined bulk equipment application for appliance and equipment rebates.
- Winter 2022
  - **Integrated bulk purchases through Midstream channel for HVAC, hot water heating, and lighting equipment recommended during OSS Energy Assessments.**
- 2023
  - Working toward creating an automated method to keep customers reminded of recommended "next level" projects.
  - Completed comprehensive “8 Great Reasons” video series to educate property points of contact on the value of energy efficiency projects.
  - **Working toward creating automated marketing journeys and upgrading quarterly e-newsletter to provide property managers with education/tips and energy efficiency project opportunities.**
  - **Expanding webpage and other resources educating/assisting properties to find grants, financing, and tax incentives as new programs are introduced from HUD, DOE, and other resources.**

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

# Definitions

- **Common areas:** these are areas in the property that are accessed by all or some of the tenants. There are many areas that can be called common areas including:
  - Connecting hallways or stairwells, elevators, and walkways for residents to get to their units.
  - Laundry rooms, offices, community centers, courtyards, gyms, pool houses, parking lots, parking garages, playgrounds and parks.
  - Commercial laundry and commercial kitchens that serve residents (i.e.: senior apartments).
- **Direct install:** commonly referred to “in-unit” for resident units, but direct install can also be in common area spaces that serve residents like:
  - Water measures in public bathrooms, community kitchens and laundry rooms.
  - Shared resident unit living rooms/kitchens (i.e.: student apartments).
  - Electric measures and smart thermostats in lobby spaces, hallways, business centers and meeting rooms.

*Note Appendix includes a listing of measures and classification as Direct Install or Major Measure*

- **Residential Units:** referred to as "apartments" in the stipulated agreement. Our program refers to apartments as "residential units" within multifamily properties where residents live. There are many types of resident units including apartments, townhomes, condos, etc. Some rented by residents and others are owned.

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

Stipulation Topic	Status of Reporting	Suggestions
<p>1. Number of IQ MF buildings in which efficiency measures were installed and number of apartments in those treated buildings, by zip code</p>	<ul style="list-style-type: none"> <li>• Currently included in Quarterly Reports</li> <li>• Example shown in Appendix (slide 11)</li> </ul>	<ol style="list-style-type: none"> <li>1. Rolling year (12 months) or multi program year reporting</li> <li>2. Heat map format versus table format (see Appendix)</li> </ol>
<p>2. Number of IQ MF buildings in which major measures (building envelope and / Air Source Heat Pumps) were installed and number of apartments in those treated buildings, by zip code</p>	<ul style="list-style-type: none"> <li>• Currently included in Quarterly Reports</li> <li>• Example shown in Appendix (slide 11)</li> </ul>	<ol style="list-style-type: none"> <li>1. Report number of buildings for building envelope measures and number of units for Air Source Heat Pumps</li> <li>2. Rolling year (12 months) or multi program year reporting</li> <li>3. Heat map format versus table format (see Appendix)</li> </ol>
<p>3. % of buildings/projects (and number of apartments within those buildings) served YTD that received whole building assessments</p>	<ul style="list-style-type: none"> <li>• Currently included in Quarterly Reports</li> </ul>	<p>Discontinue reporting (100% of properties receive a whole building assessment)</p>

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

Stipulation Topic	Status of Reporting	Suggestions
4. % of buildings/projects and apartments served YTD that received only DI measures	<ul style="list-style-type: none"> <li>Currently included in Quarterly Reports</li> </ul>	<ol style="list-style-type: none"> <li>Not all properties are eligible for more than DI measures, include only those that are eligible in reporting</li> <li>Track reasons properties who are eligible for more than DI measures cannot move forward</li> <li>Rolling year (12-24 months) or multi program year reporting</li> </ol>
5. % of buildings/projects and apartments YTD that only received in-unit measures	Same as topic above, see definition of Direct Install (DI)	Eliminate reporting requirement (duplicative)
6. % of buildings/projects and apartments YTD that received only common-area measures	<ul style="list-style-type: none"> <li>Currently included in Quarterly Reports</li> </ul>	<ol style="list-style-type: none"> <li>Report only buildings</li> <li>Not all properties have common areas, include only those that do in reporting</li> <li>Not all properties are eligible for more than common area measures, include only those that are eligible in reporting</li> <li>Exclude properties that had previous DI or major measure projects in the last 10 years</li> </ol>

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

Stipulation Topic	Status of Reporting	Suggestions
<p>7. % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure</p>	<p>Not reporting</p> <ul style="list-style-type: none"> <li>• Metric does not return actionable results as larger properties take much longer to complete projects</li> <li>• Complexity limits automated reporting</li> </ul>	<ol style="list-style-type: none"> <li>1. Track reasons properties cannot move forward with major measures</li> <li>2. Rolling year (12 months) or multi program year reporting</li> <li>3. Report % of properties instead of buildings and units</li> </ol>
<p>8. % of buildings/projects and apartments that got recommendations for major measures 12-24 months ago that followed through and installed at least one recommended major measure, if possible</p>	<p>Not reporting</p> <ul style="list-style-type: none"> <li>• Metric does not return actionable results as larger properties take much longer to complete projects</li> </ul>	<p>Eliminate reporting requirement</p>
<p>9. % of buildings/projects and apartments that got recommendations for major measures 0-12 months ago that followed through and installed at least one recommended major measure, if possible</p>	<p>Not reporting</p> <ul style="list-style-type: none"> <li>• Metric does not return actionable results as properties take much longer to complete projects</li> </ul>	<p>Eliminate reporting requirement</p>

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

Potential New Metrics (not in Stipulated Agreement)	Results of Further Evaluation
<p>1. % of buildings and units that have electric resistance heat that choose to install heat pumps</p>	<p>No barriers to tracking and reporting this. Assessments provide this information. Electric Resistant Heat is the main qualifying factor for Air Source Heat Pumps (ASHP) projects.</p> <p>The ability of properties to move forward with ASHP projects is directly tied to both program budgets and property budgets.</p>
<p>2. % of commercially rated properties moving forward with common area projects</p>	<p>Measuring the % of commercially rated properties that moved forward with recommendations to Business, Small Business, Midstream, or other cross-promoted initiatives.</p> <p>This reporting would be very complex, and the current database framework does not support reporting without significant changes.</p>
<p>3. % of residentially rated properties moving forward with recommended cross channel measures</p>	<p>Measuring the % of non-commercially rated properties (residential accounts only) that moved forward with recommendations to cross-promoted initiatives.</p> <p>This reporting would be very complex, and the current database framework does not support reporting without significant changes.</p>

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

Questions?

# Appendix – ZIP Code Reporting (Page 1 of 2)



Example of Table Format  
from Quarterly Report

**IQ - Multifamily Major Measures Installed by ZIP Code**

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units
62221	1	1	2
62951	3	2	4
61554	9	13	179
62539	1	1	4
62226	4	5	18
61462	1	4	32
61571	2	2	12
62379	1	2	10
62274	2	2	12
62223	1	1	4
61443	1	1	2
62513	1	1	8
62447	1	3	12
61929	1	1	8
<b>Total</b>	<b>29</b>	<b>39</b>	<b>307</b>

**IQ - Multifamily Direct Install Measures Installed by ZIP Code**

ZIP Code	Number of Projects	Total Tenant Buildings	Total Tenant Units
61401	2	2	166
62526	1	21	97
62002	3	21	164
62269	1	8	52
62864	1	8	150
62401	1	1	4
61938	2	3	6
61615	1	1	24
62226	1	8	16
62225	5	190	240
61614	1	1	17
62301	1	1	18
62523	1	2	120
61607	4	4	14
62040	2	4	14
61604	1	1	2
62901	1	1	3
61443	1	2	4
61301	1	1	3
62881	1	6	24
61520	1	1	13
61528	1	1	4
62548	1	2	4
62447	1	3	12
<b>Total</b>	<b>36</b>	<b>293</b>	<b>1171</b>

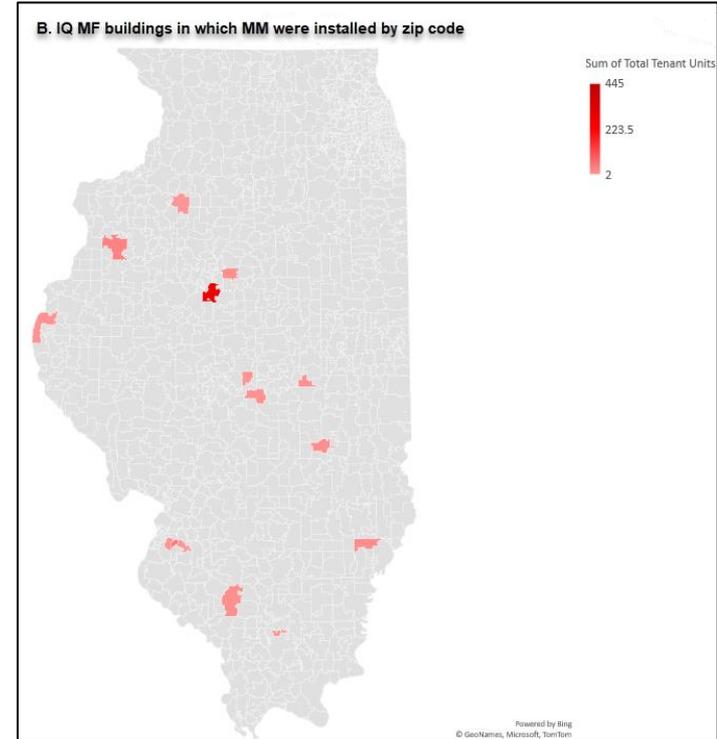
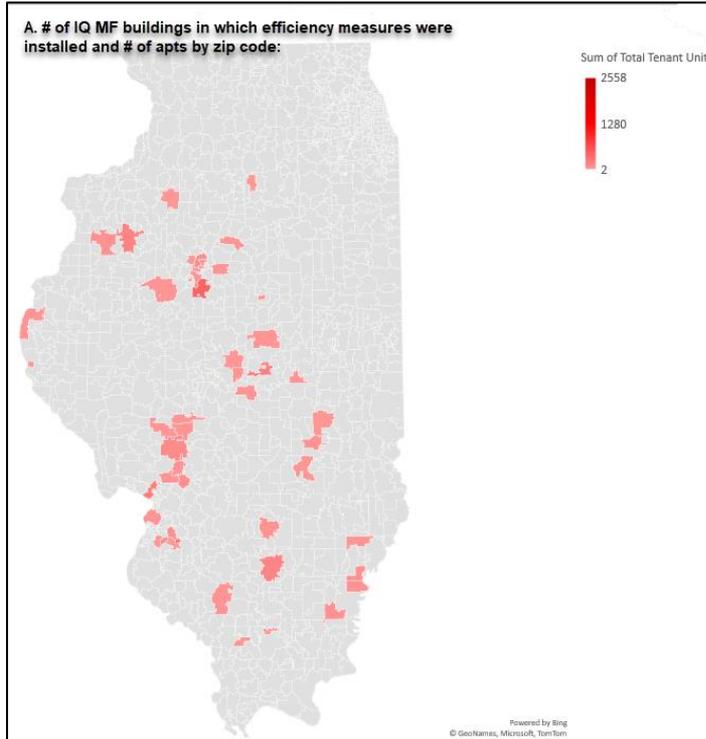
**IQ - Multifamily Measure types**

End Use	Measure	Measure Type
Building Shell	Air Sealing	Major
Building Shell	Ceiling/Attic Insulation	Major
Consumer Electronics	Advanced Power Strip	Direct Install
HVAC	Advanced Thermostat	Direct Install
HVAC	Air Source Heat Pump	Major
HVAC	Duct Insulation and Sealing	Major
HVAC	Ductless Heat Pump	Major
Lighting	Commercial LED Exit Sign	Direct Install
Lighting	LED Specialty Lamp, Candelabra Base	Direct Install
Lighting	2 LED Specialty Lamp, Directional	Direct Install
Lighting	LED Specialty Lamp, Globe	Direct Install
Miscellaneous	Health and Safety	Direct Install
Water Heating	Domestic Hot Water Pipe Insulation	Direct Install
Water Heating	Low-Flow Faucet Aerator	Direct Install
Water Heating	Low-Flow Showerhead	Direct Install

*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*

# Appendix – ZIP Code Reporting (Page 2 of 2)

## Example of Potential Heat Map Format



*Preliminary information for SAG discussion purposes only; subject to Section 3.1 of EE Policy Manual.*