

**Illinois EE Stakeholder Advisory Group
Reporting Working Group Meeting
Ameren Illinois Multi-Family Metric Workshop**

Tuesday, September 12, 2023
9:00 am – 11:00 am (Teleconference)

Attendees and Meeting Notes

Meeting Materials.....1
Attendees (by webinar).....1
Opening & Introductions.....2
Ameren Illinois Multi-Family Metrics.....2
Closing and Next Steps.....10

Meeting Materials

Posted on the [September 12 meeting page](#) of the SAG website:

- [Tuesday, September 12 SAG Reporting Working Group Agenda – Ameren Illinois Multi-Family Metrics Workshop](#)
- [Ameren Illinois Presentation: Multi-Family Metrics Workshop](#)

Attendees (by webinar)

Celia Johnson, SAG Facilitator
Caty Lamadrid, Inova Energy Group (SAG Meeting Support)
Andy Vaughn, Leidos
Becca McNish, ComEd
Cassidy Kraimer, Community Investment Corp.
Chris Vaughn, Nicor Gas
David Brightwell, ICC Staff
Dena Jefferson, Franklin Energy
Diana Fuller, Walker-Miller Energy Services
Dylan Royalty, Applied Energy Group
Elizabeth Horne, ICC Staff
Erin Stitz, Applied Energy Group
Fernando Morales, Ameren Illinois
Jason Fegley, Ameren Illinois
John Carroll, Leidos
Karen Lusson, National Consumer Law Center
Kari Ross, NRDC
Ken Parker, Community Investment Corp.
LaJuana Garret, Nicor Gas
Laura Goldberg, NRDC
Matt Armstrong, Ameren Illinois
Michael Brandt, Elevate
Philip Mosenthal, Optimal Energy, representing IL AG's Office and NCLC
Randy Opdyke, Nicor Gas
Ron Siddle, CMC Energy
Sam Lamos, Opinion Dynamics
Sy Lewis, Meadows Eastside Community Resource Org.

Tammy Jackson, Ameren Illinois
Ted Weaver, First Tracks Consulting, representing Nicor Gas
Tina Grebner, Ameren Illinois
Victoria Nielsen, ScottMadden

Meeting Notes

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

Opening & Introductions

Celia Johnson, SAG Facilitator

Purpose: To hold a multi-family data metrics workshop for Ameren Illinois and interested stakeholders, as referenced in the 2022-2025 Ameren Illinois EE Plan Revised Stipulated Agreement. The last workshop was held in [September 2022](#).

Ameren Illinois Multi-Family Metrics

Matt Armstrong and Tammy Jackson, Ameren Illinois

Introduction to Presentation

- Materials: [Ameren Illinois Presentation: Multi-Family Metrics Workshop](#)
- 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. Ameren 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.*
- During the 9/12 workshop, Ameren will present the status and recommendations for each IQ MF metrics topic identified in the stipulated agreement, having taken feedback and action items from the last meeting (Sept. 2022) into consideration.

One Stop Shop Timeline (see slides 3-4)

- One Stop Shop Energy Advisors became the single point of contact for project coordination for residential and business programs
- In 2020, this approach was expanded beyond direct install
- In 2022, we started streamlining bulk equipment applications for appliance and equipment rebates
- In 2022, we added natural gas measures
- This year (2023), we continued creating an automated method to keep customers

Laura Goldberg: With the change in eligibility verification, what types of properties that you weren't able to serve before are you now able to serve?

- *Matt Armstrong: We are referring to the change that happened with the previous Policy Manual update (Version 2.0), to use proxies to identify IQ properties – census tract, rent roll, etc. This led to more properties being eligible under IQ, instead of market rate.*

Karen Lusson: Can you explain how the single point of contact works for multi-family building owners?

- *Tammy Jackson: An assessment is filled out first. We look at everything at the property that we can do, all of the measure possibilities.*

- *Matt Armstrong: We have shared our MF one stop shop customer journey in the past, happy to share that again. Once a new property comes into the program, that property is assigned an Energy Advisor. That Energy Advisor is the single point of contact that works with the property – incentives available, working with contractors, and quality assurance to wrap up the project. This helps to ensure there isn't confusion.*

Karen Lusson: You mentioned water heaters are often in a closet. Can you explain that? I'm glad you raised it. One issue NCLC is looking at right now is DOE is looking at changing the baseline from electric storage water heaters to only heat pump water heaters. One concern I have heard is that the water heater in a closet is in a tight space; heat pump water heaters have a larger footprint so this may be difficult.

- *Matt Armstrong: The heat pump water heater requires fresh air to operate. There is a certain volume of air the heat pump needs. When it's in a closet, that doesn't provide the fresh air it needs. We have heard of instances of the coil freezing up in this scenario.*

Definitions (see slide 5)

- **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 slides include a list 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.

Stipulations 1-3 (slide 6)

Stipulation Topic 1: Number of IQ MF buildings in which efficiency measures were installed and number of apartments in those treated buildings, by zip code

- Status of Reporting
 - Currently included in quarterly reports
 - Example shown in Appendix (slide 11)
- Ameren Illinois Suggestions
 1. The year-to-date reporting doesn't provide the best information; we would like to move forward with rolling year reporting
 2. Heat map format vs. table format (see Appendix slides)

Stipulation Topic 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

- Status of Reporting
 - Currently included in quarterly reports
 - Example shown in Appendix (slide 11)
- Ameren Illinois Suggestions
 1. Report number of buildings for building envelope measures and number of units for Air Source Heat Pumps
 2. The year-to-date reporting doesn't provide the best information; we would like to move forward with rolling year reporting
 3. Heat map format vs. table format (see Appendix slides)

Laura Goldberg: What is "rolling year" reporting?

- *Matt Armstrong: If we were reporting Q1 2024, we would go back to April 2023 data, and the next quarterly report would look at 12 months prior. Instead of year-to-date. It often takes a long time for these projects to be served comprehensively.*
- *Laura Goldberg: Is there room to do both? It's hard to know what's happening in a calendar year. We want to see the flexibility of properties doing some things one year, and some the next year. It may be confusing in reviewing the numbers what is happening when.*
- *Matt Armstrong: Ameren is concerned it would be confusing to report year-to-date, since the IQ MF projects are often long-term. Going forward, Ameren will report on a rolling year basis, 12 months prior to the quarterly report being shared.*

Laura Goldberg: Interested in reviewing the map vs. table format, then will share feedback.

Stipulation Topic 3: Percent of buildings / projects (and number of apartments within those buildings) served YTD that received whole building assessments

- Status of Reporting
 - Currently included in quarterly reports.
- Ameren Illinois Suggestions
 - We would like to discontinue reporting because 100% of the properties will receive a building assessment.

Stipulations 4-6 (slide 7)

Stipulation Topic 4: % of buildings / projects and apartments served YTD that received only direct install (DI) measures

- Status of Reporting
 - Currently included in quarterly reports
- Ameren Illinois Suggestions
 1. Not all properties are eligible for more than DI measures, include only those that are eligible in reporting
 2. Track reasons properties who are eligible for more than DI measures cannot move forward
 3. Move to a rolling year report-out, instead of calendar year

Karen Lusson: How do we know how many MF buildings in Ameren's service territory are being treated? It would be good to see the progress.

- *Matt Armstrong: The heat map is a good way to measure this progress. If there are customers that cannot be served, we would like to exclude them from the tables and the heat maps.*
- *Phil Mosenthal: % of buildings that are eligible is helpful from my perspective. It would also be good to know if there are properties that could not be served due to a health & safety issue.*
 - *Celia will include Phil's health & safety suggestion in the SAG Reporting Working Group / health & safety metrics discussion this fall.*
- *Laura Goldberg: Interested in process / whether these metrics from the stipulation can be changed?*
- *Matt Armstrong: The stipulation was written in a way that allows us to assess these MF metrics and pivot as needed.*

Stipulation Topic 5: % of buildings / projects and apartments YTD that only received in-unit measures

- Status of Reporting
 - Same as stipulation topic 4
- Ameren Illinois Suggestion
 - This is the same as stipulation topic 4; remove this reporting requirement since it is duplicative

Laura Goldberg: Stipulation 5 is supposed to be distinct from stipulation 4; properties that have only received common area measures. Stipulation 4 is for properties that only received direct install measures. I will want to take a closer look at this.

Phil Mosenthal: It would be good to show how many are eligible, and how many are not, perhaps as a percentage. Why would an apartment building not be eligible for direct install measures?

- *Tammy Jackson: They would not be eligible if they received DI measures within the past few years.*
- *Phil Mosenthal: It would be good to see the numbers, how that breaks out.*
- *Laura Goldberg: Agreed – interested in how many are not eligible. It would also be useful to know who is not eligible because they previously received common area measures.*

Karen Lusson: Why wouldn't a building be eligible for the more comprehensive measures?

- *Tammy Jackson: If they are already insulated, over R-19, they would not be eligible.*
- *Ron Siddle: Also, if there is a recent ownership change, and the building wants an assessment, and the new owner doesn't know what the previous owner has done.*
- *Phil Mosenthal: It would be good to know*

Stipulation Topic 6: % of buildings / projects and apartments YTD that received only common-area measures

- Status of Reporting
 - Currently included in quarterly reports
- Ameren Illinois Suggestion
 1. Report only buildings
 2. Not all properties have common areas, include only those that do in reporting

3. Not all properties are eligible for more than common area measures, include only those that are eligible in reporting
4. Exclude properties that had previous DI or major measure projects in the last 10 years

Stipulations 7-9 (slide 8)

Stipulation Topic 7: % of buildings / projects and apartments served YTD that got recommendation to install at least one major measure

- Status of Reporting
 - Not reporting
 - Metric does not return actionable results as larger properties take much longer to complete projects
 - Complexity limits automated reporting
- Ameren Illinois Suggestions
 1. Track reasons properties cannot move forward with major measures
 2. Rolling year (12 months) or multi program year reporting
 3. Report % of properties instead of buildings and units

Stipulation Topic 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

- Status of Reporting
 - Not reporting
 - Metric does not return actionable results as larger properties take much longer to complete projects
- Ameren Illinois Suggestions
 - Eliminate reporting requirement

Stipulation Topic 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

- Status of Reporting
 - Not reporting
 - Metric does not return actionable results as larger properties take much longer to complete projects
- Ameren Illinois Suggestions
 - Eliminate reporting requirement

Karen Lusson: It seems important to understand the number of buildings that got a recommendation to install a major measure, but didn't – and to understand why they didn't.

- *Phil Mosenthal: Agreed. We want to know what % of people who received major measure recommendations actually followed through with them.*
- *Laura Goldberg: Agreed. How many buildings are getting recommended major measures that are eligible? And how many are actually installing those major measures?*
- *Laura Goldberg: Concerned about reporting only at the property level – at least properties and buildings should be reported on.*
- *Phil Mosenthal: In stipulation 2, Ameren would be showing the number of buildings that had major measures installed.*

- *Matt Armstrong: Important to take a step back and recognize that we can make recommendations, but there are situations beyond our control – such as a building with existing insulation that means they do not qualify.*
- *Laura Goldberg: Stakeholders are interested in understanding how many recommendations are being shared, and who is moving forward / who is not, and why not. Understand there are reasons some properties are not moving forward.*
- *Matt Armstrong: There is a CEJA requirement on comprehensiveness / whole building weatherization. Also want to recognize it takes administrative resources to share this type of data / reporting.*
- *Laura Goldberg: Agreed, we want to strike that middle ground with the information that is being reported. Advocates are interested in understanding how the CEJA requirement is tracked.*
- *Phil Mosenthal: We don't want to blame, but interested in tracking these types of projects.*

Potential New Metrics from Sept. 2022 Workshop (slide 9)

Potential New Metric 1: % of buildings and units that have electric resistance heat that choose to install heat pumps

- Ameren Illinois update:
 - 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.
 - The ability of properties to move forward with ASHP projects is directly tied to both program budgets and property budgets.

Potential New Metric 2: % of commercially rated properties moving forward with common area projects

- Ameren Illinois update:
 - Measuring the % of commercially rated properties that moved forward with recommendations to Business, Small Business, Midstream, or other cross-promoted initiatives.
 - This reporting would be very complex, and the current database framework does not support reporting without significant changes.

Potential New Metric 3: % of residentially rated properties moving forward with recommended cross channel measures

- Ameren Illinois update:
 - Measuring the % of non-commercially rated properties (residential accounts only) that moved forward with recommendations to cross-promoted initiatives.
 - This reporting would be very complex, and the current database framework does not support reporting without significant changes.

Phil Mosenthal: For new metric 2, I'm not sure it matters the % of commercially rated properties. Is common area lighting a major measure? Interested in how many properties are getting common area measures, and major measures.

- *Andy Vaughn: Common area lighting would not be a major measure.*
- *Laura Goldberg: For #2 and #3, perhaps there is room for a qualitative update, instead of numerical, if that's easier to report.*

Karen Lusson: What about a MF property with retail on the first floor? Are those treated as residential buildings?

- *Matt Armstrong: We aren't seeing much of that type of property in our service territory.*

Laura Goldberg: Are air source heat pumps coming up for electrification projects?

- *Matt Armstrong: We are not pushing electrification with MF projects at this time.*
- *Phil Mosenthal: Is this because there is plenty of opportunity under SF? Or is there another reason?*
- *Matt Armstrong: In the stipulation, the electrification we agreed to is focused on propane customers. This is generally moving very slowly. A lot of propane customers are very hesitant to electrify. We are happy to have a discussion outside of today to share these challenges. Early 2024 may be a good time to share.*
 - *Celia Johnson will follow-up with Ameren on an early 2024 EE electrification meeting.*
- *Karen Lusson: Does Ameren corporate oppose electrification efforts for gas customers?*
- *Matt Armstrong: I can't speak to that today.*

Phil Mosenthal: What does "cross channel" refer to?

- *Tammy Jackson: Those measures offered though the 'one stop shop', such as midstream and business.*
- *Matt Armstrong: This recognizes we are serving the property through other channels, may be cross promoted through one stop shop.*

Appendix (Slide 11) Zip Code Reporting Tables

- This is an example of the table format from the quarterly report
 - IQ MF Major Measures Installed by Zip Code
 - IQ MF Direct Install Measures Installed by Zip Code
 - IQ Multifamily Measure Types
- The first table shows measures installed by zip code, for major measures

Matt Armstrong: Ameren is interested in feedback on how the data in table format provides insight to stakeholders.

Karen Lusson: Can you define "total tenant buildings"? Is that buildings available for treatment or buildings where you had a conversation with customers?

- *Tammy Jackson: Total tenant buildings = the total number of buildings where those measures have been installed*

Karen Lusson: What is missing is the total number of MF buildings available in zip code. Is that possible to add?

- *Laura Goldberg: I don't think we have asked for that before; stakeholders could discuss. I do think providing these tables is helpful. Heat maps may not be able to show everything. Do you have the measure types linked to the data for buildings?*
- *Kari Ross – via chat: Would love to see city + % Area Median Income (AMI) (or other income indicator) attached to each zip code.*

Elizabeth Horne: Are these IQ MF projects, and this is the number of projects completed? It would be beneficial to include the number that qualified vs. how many were completed.

- *Phil Mosenthal: Agreed. The raw numbers are interesting, but what I care about is the % - if you are serving 500 buildings and only 39 are installing major measures, that is more significant information.*
- *Elizabeth Horne: It would be helpful to see how many Income-Qualified projects are performed in a zip code vs how many projects total are served in that zip code. (Percentage that are IQ)*
- *Matt Armstrong: We need to recognize that some buildings did not move forward for one reason or another.*
- *Phil Mosenthal: Suggests adding a column – number of projects with major measures recommended. Also interested in the heat maps including zip code information.*
- *Karen Lusson: When looking at zip codes, how do we know the size / number of MF buildings in each of these zip codes? Assume the marketing team has this information? Data becomes meaningless if we don't have a sense of whether a zip code has thousands of MF buildings.*
- *Phil Mosenthal: I believe that that data (how many MF buildings and tenants exist in each zip code) is something that you can download from American Community Survey Data.*
- *Phil Mosenthal: Could also add a column with the total population for these zip codes.*
- *John Carroll: One thing to note is marketing at the MF level takes place in a much more direct, one-on-one engagement, rather than a blanket marketing to a particular zip code.*
- *Kari Ross: Interested in seeing the city and Area Median Income (or other income indicator) attached to each zip code. Also, noting which measures were installed for each project and the % of buildings served vs. buildings eligible.*
- *Phil Mosenthal: Label should be "Total Multi-Family Buildings" instead of "Total Tenant Buildings."*

Slide 12 – Heat Map Example

- Map 1 shows where each of the measures were installed, and the Map 2 is the major measures installed by zip code.

Phil Mosenthal: can you provide a broader scale gradation? From one color to another so the difference could be seen better.

- *Karen Lusson – via chat: Can the heat map be interactive, so when a person holds the cursor over the highlighted area the zip code will pop up? This is how the ICC's credit and collection heat maps are done.*
- *Matt Armstrong: The resources to maintain an interactive heat map would be heavy, perhaps there is a different way to provide a key or information for readers unfamiliar with service territories.*
- *Laura Goldberg: I think the table provides better information than the maps. The tables have a lot more detail. Would it be possible to overlay these heat maps with median income data? Overlay with low income zip codes?*
- *Karen Lusson – via chat: Have you investigated the cost of an interactive heat map? I think the combo of an effective heat map and tables would be ideal. Seeing where the work is being done is helpful but only if you understand the geography of the state.*
- *Laura Goldberg: Would it be possible to use the mapping with CCRPC has done for Ameren?*

- *Karen Lusson – via chat: EJ map on Solar for All website. It's interactive and immediately tells the user whether the community is an EJ community. Click on the "Zoom to" button and you see the name of the community, etc."*
<https://elevate.maps.arcgis.com/apps/webappviewer/index.html?id=d87a45c18a5c4e0fa96c1f03b6187267>
- *Laura Goldberg: Stakeholders are interested in a space to better understanding the IQ MF programs, beyond discussing reporting metrics.*

Closing and Next Steps

Celia Johnson, SAG Facilitator

- Next steps: SAG Facilitator will debrief will Ameren Illinois regarding stakeholder feedback and discuss determine best approach moving forward.