

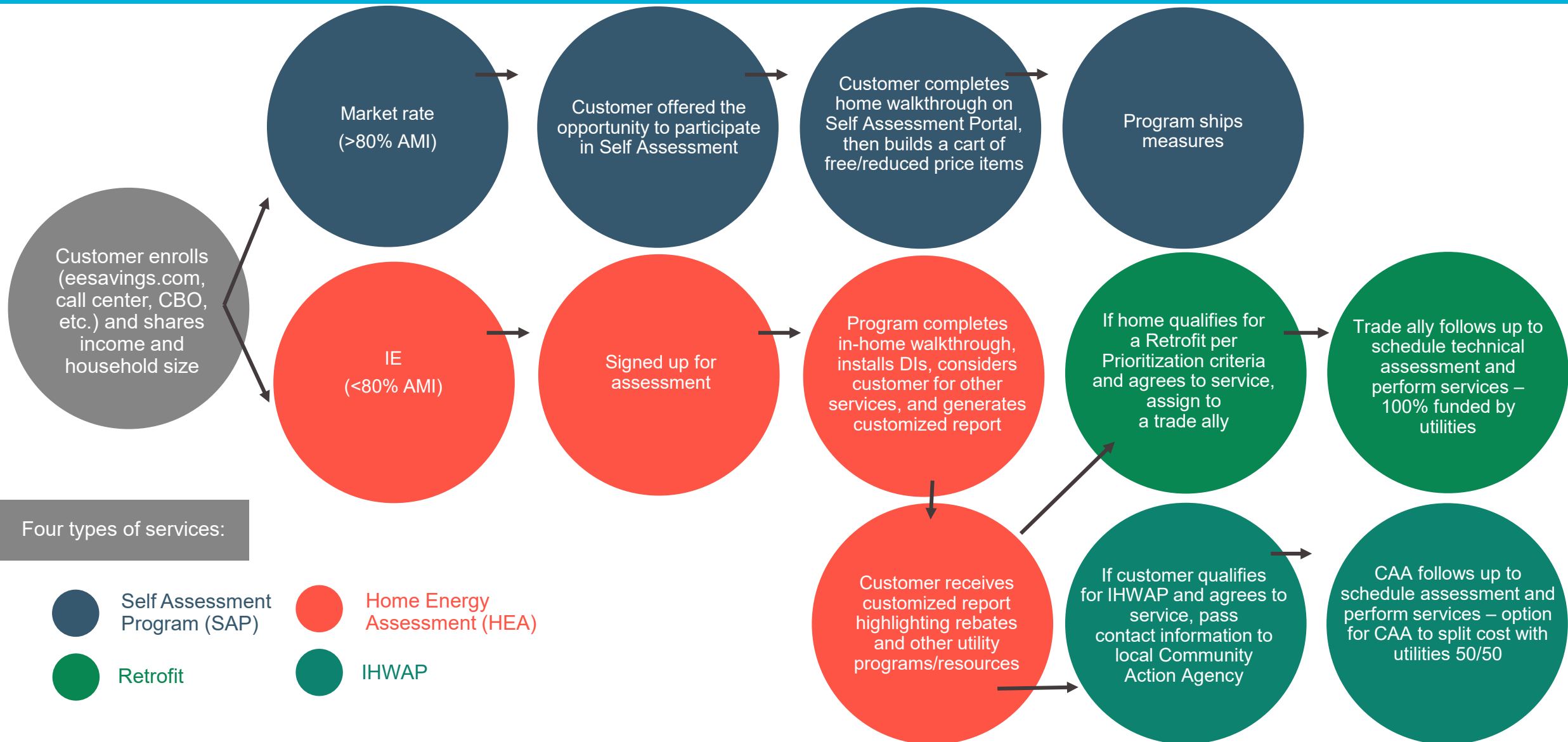
Home Energy Savings 2026 Retrofits Prioritization Plan

September 18, 2025



Home Energy Savings Customer Journey

High Level Overview

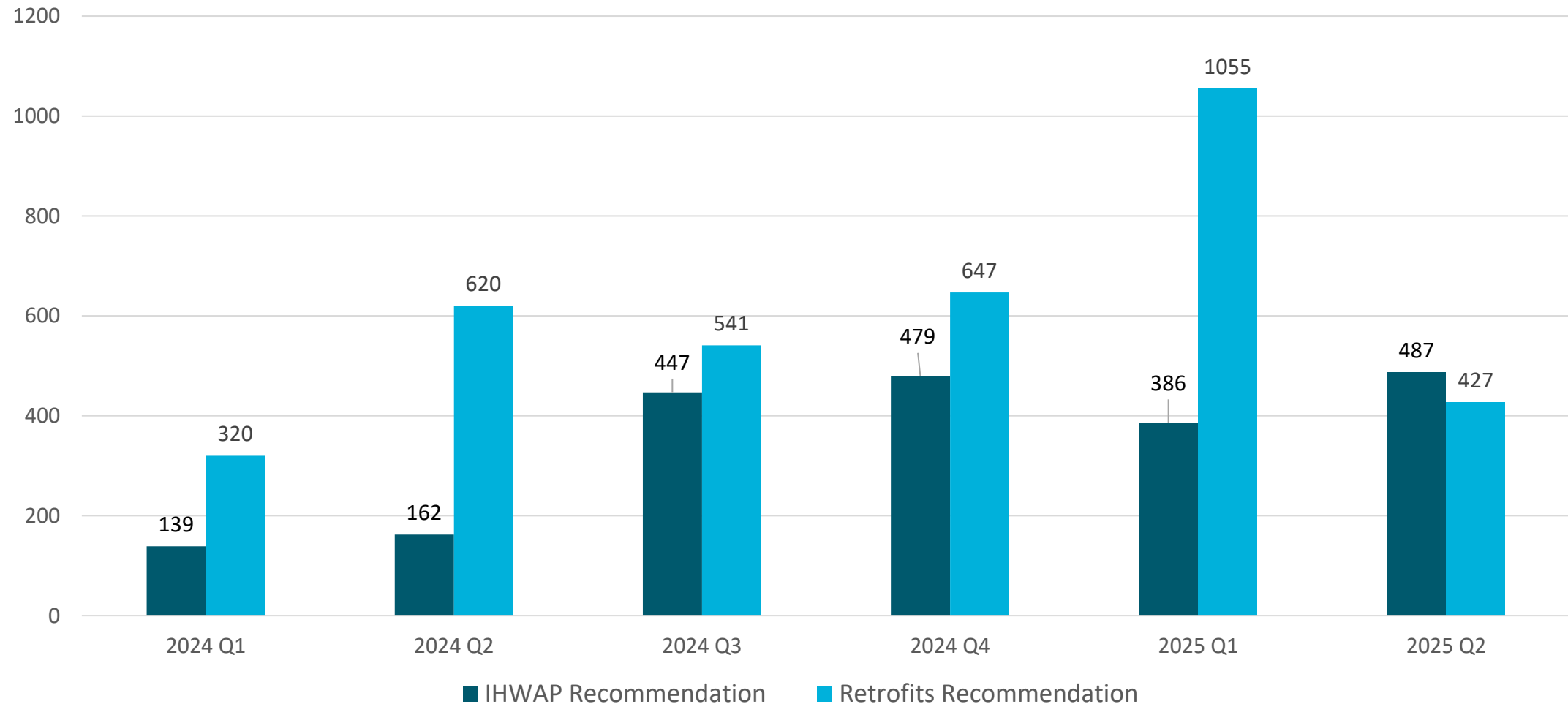


Objectives of Retrofit Prioritization

- **Maximize customer benefit.**
 - **Maximize the number of customers who can be served comprehensively by directing eligible customers to IHWAP.**
 - HES shares customer's contact information with agencies (CAA) willing to receive leads from the program. The CAA manages the intake process from there.
 - **Equitably determine, based upon baseline home conditions, which customers should be served with the limited number of available Retrofits.**
 - Homes with more significant energy efficiency needs are prioritized for deeper services.
 - **Identify customers who will *not* ultimately be eligible for a Retrofit early in the customer journey to avoid timely- and cost-intensive comprehensive assessments for those customers.**
 - This improves both the customer and contractor experience.
 - **Manage the participation funnel, ensuring volume of customers referred for Retrofits aligns with available budget.**
 - This prevents long wait times or waitlists for services.
 - It also allows us to better balance service across contractors and utility territories.



How have customers been referred after their HEA (RP) since January 2024?



"No Recommendation" (not shown in chart) -- of 4,168 customers who did not receive a recommendation, the top reasons were: no opportunity (58%), housing type (21%), health and safety (9%), no consent (3%), and HOAs (3%). Other reasons include not having access to parts of the home necessary to evaluate prioritization.

2025 Retrofits Prioritization Criteria

Home must have:

A. SF-type configuration

In-unit mechanical equipment

Customer has decision-making power over building envelope (building envelope can be addressed comprehensively); the attic and/or basement of the unit can be served without impacting any other units.

B. No obvious deferrable conditions.

No blatantly obvious issues that would likely exceed the per home health and safety funding available

Current list is roof leaks, vermiculite, hoarding, active water damage/bulk moisture, cracked ceilings that prohibit attic insulation, knob and tube wiring, or severe disrepair of access points (e.g., lack of railings, deteriorating porch).

C. Attic air sealing and insulation opportunity.

Attic insulation must be less than 6 inches on average across the entire attic.

If attic does not have a hatch, criterion is marked “yes” if the customer is willing to let a contractor cut a hatch in the future.

If the home does not have an attic, this criterion is waived (marked n/a).

If customer refuses access to space, criterion is marked “no.”

D. Basement/crawlspace air sealing opportunity.

At least 20% of rim joist is accessible and not air sealed.

If the home does not have a basement, this criterion is waived (marked n/a).

If basement is finished (i.e., rim joist and ducts are not accessible) and home does not have a crawlspace, criterion is marked “no.”

If basement is finished and home has a crawlspace, criterion is marked “yes.”

If there is only a crawlspace, criterion is marked “yes.”

And at least one of the following:

E. Duct sealing opportunity.

Ducts located in semi-or unconditioned spaces.

F. HVAC equipment is inefficient.

Existing furnace or boiler is $<$ or $=$ 80% efficient and/or AC is $<$ or $=$ SEER 13

OR home must have:

G. An electric resistance heating system and the customer meets A and B

Per Plan 7 Stipulations: 2026 Proposal

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~~E. Duct sealing opportunity:~~

~~Ducts located in semi-or unconditioned spaces:~~

~~F. HVAC equipment is inefficient:~~

~~Existing furnace or boiler is < or = 80% efficient and/or AC is < or = SEER 13~~

~~OR home must have:~~

~~G. An electric resistance heating system and the customer meets A and B~~

**equivalent to R-19, per ComEd Plan 7
Stipulation Agreement**

***Estimate 24% referral rate
to Retrofits based upon
historic data.**

Minimal Screening Option

- Focus on:
 - SF home type
 - No deferrable conditions
 - Referrals to IHWAP
- Exclude:
 - Anything related to energy savings opportunity

*Estimate 48% referral rate to Retrofits based upon historic data.

What if this was just first-come, first-served?

- Customer journey
 - Do customers have to be aware of the offering January 1 so they can rush for a spot?
 - How long do customers have to wait for service if we establish a long line in Q1?
 - How do we manage expectations/make clear what's available?
 - Marketing overhaul in Q1 after Retrofits are fully allocated
 - This will cause customer confusion, particularly for customers who hear of the offering through word of mouth.
 - This will cause partner confusion, requiring retraining when available services change.
- Contractors
 - Rather than having level production across the year, this will require staffing fluctuations and potentially layoffs.
 - We assume Retrofits will be complete by July given historic production volume and demand.

How long can we serve customers with Retrofits?

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
HEAs												
Per Plan 7 Stip												
Minimal screening												
First-come, first-served												

Estimates based on modeled referral rates informed by historical data.

Decision timeline

- Comment period through October 3rd, 2025.
- Retrofits Prioritization criteria must be finalized by October 21st meeting in order to implement on January 1, 2026.

Thank you!



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