

SAG Report

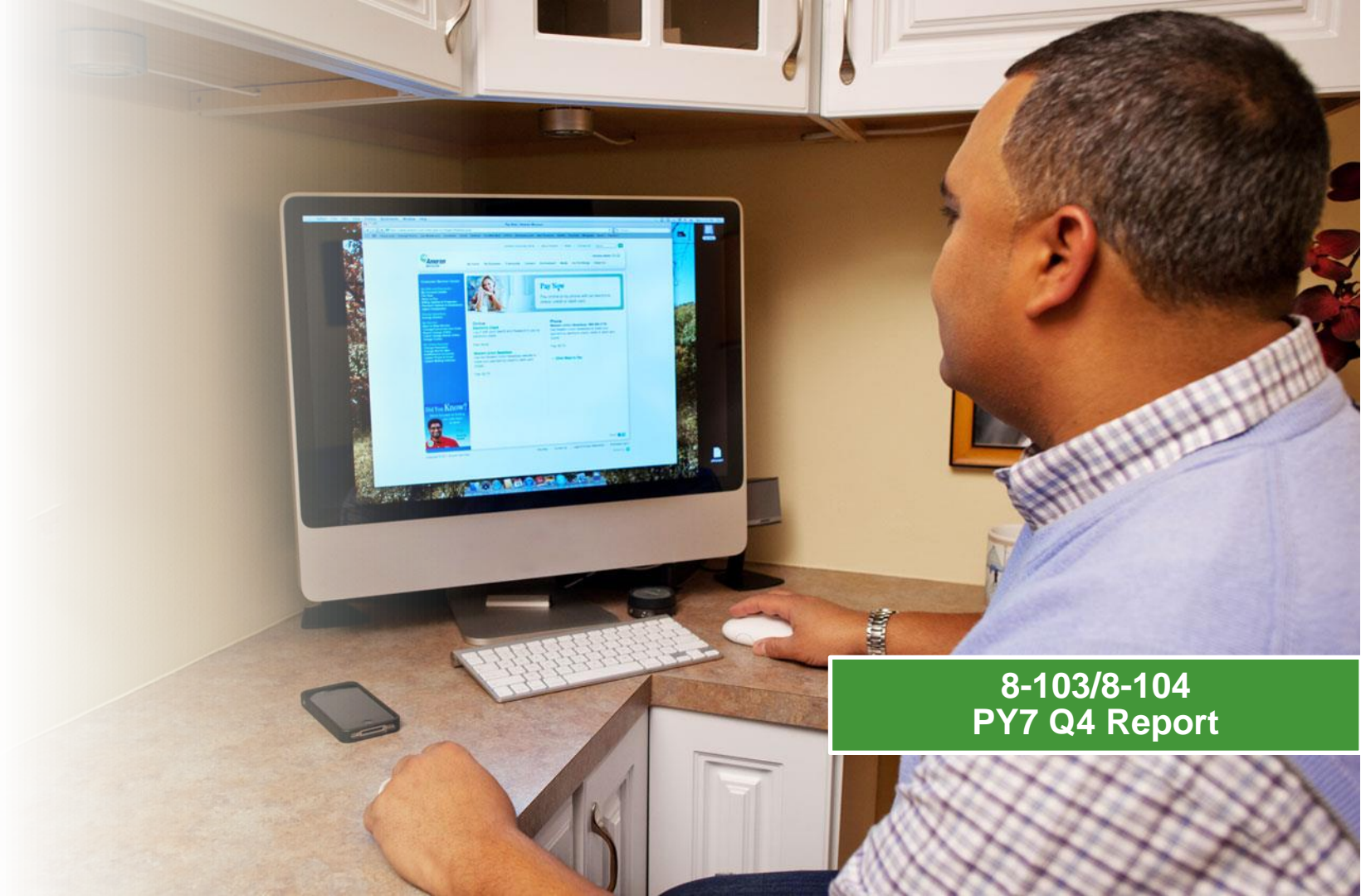
PY7 Q4 8-103/8-104 and 16-111.5B (IPA)

Results and Highlights

Ken Woolcutt

01-15-16





8-103/8-104
PY7 Q4 Report

8-103/8-104: PY7 Adjusted Goal Analysis - Savings

	PY7 Compliance Goal (MWHs)	PY7 Compliance Goal (Therms)	PY7 Electric Adjusted Goals (MWHs)	PY7 Gas Adjusted Goals (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	TRM V3.0 Adjustment Explanations *
Energy Efficiency									
RES-Appliance Recycling	4,010	0	4,010	0	0	0	0%	0%	
RES-Behavior Modification	29,350	1,887,500	29,350	1,887,500	0	0	0%	0%	
RES-ENERGY STAR New Homes	791	25,663	791	25,663	0	0	0%	0%	
RES-HPwES	5,346	768,779	5,183	672,478	-162	-96,302	-3%	-13%	Reduced Savings due to insulation adjustment factor
RES-HVAC	4,492	0	4,474	0	-18	0	0%	0%	Change to the Blower Motor Algorithm
RES-Lighting	26,359	0	27,383	0	1,024	0	4%	0%	Shifted savings due to a change in the In Service Rate and more bulbs are counted in first year
RES-Moderate Income	1,194	219,987	1,176	206,600	-17	-13,387	-1%	-6%	Reduced Savings due to insulation adjustment factor
RES-Multifamily In-Unit	5,517	112,521	4,993	99,219	-523	-13,301	-9%	-12%	Reduced Savings due to insulation adjustment factor
RES-School Kits	388	54,986	372	49,709	-17	-5,277	-4%	-10%	Reduced savings due to changes in showerhead algorithm
RESIDENTIAL PORTFOLIO TOTAL	77,447	3,069,437	77,733	2,941,170	287	-128,267	0%	-4%	
BUS-Standard	78,548	851,087	78,344	851,000	-204	-87	0%	0%	Changes in algorithms for GREM on PTAC system and gas boiler and furnace replacement
BUS-Custom	32,716	1,139,309	32,716	1,139,309	0	0	0%	0%	
BUS-RCx	17,254	135,089	17,254	135,089	0	0	0%	0%	
BUS-Large C&I	17,480	0	17,480	0	0	0	0%	0%	
BUSINESS PORTFOLIO TOTAL	145,999	2,125,485	145,795	2,125,398	-204	-87	0%	0%	
AMEREN ILLINOIS PORTFOLIO TOTAL	223,446	5,194,921	223,529	5,066,568	83	-128,354	0%	-2%	

Note: NTG values for PY7 were known at time of compliance filing(2/28/14) so no goal adjustments related to NTG.

* For a complete list of measure changes, reference Illinois Statewide TRM Version 3.0 Table 1.3

8-103/8-104: PY7 Adjusted Goals vs PY7 Implementation Plan Savings

	PY7 Electric Adjusted Goals (MWHs)	PY7 Gas Adjusted Goals (Therms)	PY7 Electric Implementation Plan (MWHs)	PY7 Gas Implementation Plan (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	Explanations or +/- 20% variance
Energy Efficiency									
RES-Appliance Recycling	4,010	0	4,010	0	0	0	0%	0%	
RES-Behavior Modification	29,350	1,887,500	36,950	1,753,243	7,600	-134,257	26%	-7%	Additional dual fuel customers have been added to the program with minimal changes to budget.
RES-ENERGY STAR New Homes	791	25,663	533	20,880	-258	-4,783	-33%	-19%	The savings results from the PY5 EM&V report were lower than what was used in the original filed plan.
RES-HPwES	5,183	672,478	3,189	488,310	-1,994	-184,168	-38%	-27%	Participation was scaled back in the implementation plan compared to the filed plan as a result of trends identified during the last quarter of PY6 and the shift in focus to rapid expansion of the Moderate Income program.
RES-HVAC	4,474	0	4,797	0	323	0	7%	0%	
RES-Lighting	27,383	0	34,160	0	6,777	0	25%	0%	Due to market changes we anticipate achieving 25% more bulb sales within current budget.
RES-Moderate Income	1,176	206,600	1,374	258,394	198	51,794	17%	25%	Rapid expansion of this program over Plan 3 will require investment in developing additional resources during PY7 to ramp up greater participation levels in PY8 and PY9.
RES-Multifamily In-Unit	4,993	99,219	8,738	255,591	3,745	156,372	75%	158%	The planned reduction in electric and gas savings resulting from a scaled down HPwES program will be realized by continuing the Major Measures component of the Multifamily program. Retrofit of buildings with air sealing and attic insulation will result in significant budget and savings variances for this program.
RES-School Kits	372	49,709	558	74,564	186	24,855	50%	50%	Due to market changes we anticipate completing 50% more kits within current budget.
RESIDENTIAL PORTFOLIO TOTAL	77,733	2,941,170	94,309	2,850,982	16,576	-90,188	21%	-3%	
BUS-Standard	78,344	851,000	58,444	1,367,762	-19,901	516,762	-25%	61%	Market Changes: Very large steam trap standard projects increased the expected program gas savings. We anticipate less standard electric projects (lighting and VFDs) in PY7.
BUS-Custom	32,716	1,139,309	69,025	1,170,015	36,309	30,706	111%	3%	Staffing Grant and Competitive Large Incentive Program offerings generate more large custom electric projects each year. Also Large C&I goal shifted to custom.
BUS-RCx	17,254	135,089	9,384	183,894	-7,870	48,806	-46%	36%	Market changes: Anticipate Compressed Air RCx (elec) to be less savings in a mature market. Anticipate more Health Care/Commercial Building RCx projects (gas) in 4th year of gas offerings for this market.
BUS-Large C&I	17,480	0	0	0	-17,480	0	-100%	0%	Pilot discontinued due to no participation
BUSINESS PORTFOLIO TOTAL	145,795	2,125,398	136,853	2,721,671	-8,942	596,274	-6%	28%	
AMEREN ILLINOIS PORTFOLIO TOTAL	223,529	5,066,568	231,162	5,572,653	7,633	506,086	3%	10%	

8-103/8-104: PY7 Adjusted Goals vs PY7 Implementation Plan - Budget

Energy Efficiency	PY7 Electric Plan Budget	PY7 Gas Plan Budget	PY7 Electric Implementation Budget	PY7 Gas Implementation Budget	Electric Variance	Gas Variance	Electric %Variance	Gas %Variance	Explanations or +/- 20% variance
RES-Appliance Recycling	\$ 1,583,161	\$ -	\$ 1,388,578	\$ -	\$ (194,583)	\$ -	-12%	0%	
RES-Behavior Modification	\$ 984,375	\$ 984,375	\$ 1,031,500	\$ 1,031,500	\$ 47,125	\$ 47,125	5%	5%	
RES-ENERGY STAR New Homes	\$ 655,381	\$ 361,921	\$ 809,841	\$ 352,955	\$ 154,460	\$ (8,966)	24%	-2%	Costs to achieve savings are coming in higher than originally planned
RES-HPwES	\$ 4,004,637	\$ 2,175,415	\$ 3,325,609	\$ 1,988,853	\$ (679,028)	\$ (186,562)	-17%	-9%	
RES-HVAC	\$ 2,844,928	\$ -	\$ 2,787,129	\$ -	\$ (57,799)	\$ -	-2%	0%	
RES-Lighting	\$ 6,351,096	\$ -	\$ 6,372,368	\$ -	\$ 21,272	\$ -	0%	0%	
RES-Moderate Income	\$ 1,040,225	\$ 1,257,159	\$ 4,148,829	\$ 1,540,310	\$ 3,108,604	\$ 283,151	299%	23%	Rapid expansion of this program over Plan 3 will require investment in developing additional resources during PY7 to ramp up greater participation levels in PY8 and PY9.
RES-Multifamily In-Unit	\$ 1,061,851	\$ 312,752	\$ 1,880,656	\$ 899,873	\$ 818,805	\$ 587,121	77%	188%	The planned reduction in electric and gas savings resulting from a scaled down HPwES program will be realized by continuing the Major Measures component of the Multifamily program. Retrofit of buildings with air sealing and attic insulation will result in significant budget and savings variances for this program.
RES-School Kits	\$ 115,375	\$ 120,175	\$ 124,900	\$ 124,900	\$ 9,525	\$ 4,725	8%	4%	
RESIDENTIAL PORTFOLIO TOTAL	\$ 18,641,029	\$ 5,211,797	\$ 21,869,410	\$ 5,938,391	\$ 3,228,381	\$ 726,594	17%	14%	
BUS-Standard	\$ 10,504,921	\$ 2,648,495	\$ 10,333,176	\$ 2,135,146	\$ (171,745)	\$ (513,349)	-2%	-19%	
BUS-Custom	\$ 5,427,404	\$ 2,002,992	\$ 8,237,765	\$ 1,728,281	\$ 2,810,361	\$ (274,711)	52%	-14%	Market changes: Staffing Grant and Competitive Large Incentive Program offerings generate more large custom electric projects each year. Large C&I budget shifted to custom.
BUS-RCx	\$ 1,882,077	\$ 127,854	\$ 615,957	\$ 457,868	\$ (1,266,120)	\$ 330,014	-67%	258%	Market changes: Anticipate Compressed Air RCx (elec) to see less projects in a mature market. Anticipate more Health Care/Commercial Building RCx projects (gas) in 4th year of gas offerings for this market.
BUS-Large C&I	\$ 1,710,000	\$ -	\$ -	\$ -	\$ (1,710,000)	\$ -	-100%	0%	Pilot discontinued due to no participation
BUSINESS PORTFOLIO TOTAL	\$ 19,524,402	\$ 4,779,342	\$ 19,186,898	\$ 4,321,296	\$ (337,504)	\$ (458,045)	-2%	-10%	
Ameren Illinois - Portfolio Admin costs	\$ 1,921,679	\$ 503,067	\$ 1,921,679	\$ 503,067	\$ -	\$ -	0%	0%	
Ameren Illinois - EM&V costs	\$ 1,340,706	\$ 350,977	\$ 1,340,706	\$ 350,977	\$ -	\$ -	0%	0%	
Ameren Illinois - Education	\$ 960,839	\$ 251,533	\$ 960,839	\$ 251,533	\$ -	\$ -	0%	0%	
Ameren Illinois - Marketing	\$ 960,839	\$ 251,533	\$ 960,839	\$ 251,533	\$ -	\$ -	0%	0%	
R&D Budget (Emerging Technologies)	\$ 1,340,706	\$ 350,977	\$ 1,340,706	\$ 350,977	\$ -	\$ -	0%	0%	
AMEREN ILLINOIS PORTFOLIO TOTAL	\$ 44,690,200	\$ 11,699,226	\$ 47,581,077	\$ 11,967,774	\$ 2,890,877	\$ 268,549	6%	2%	
DCEO AMEREN ILLINOIS TOTAL	\$ 14,896,733	\$ 3,899,742	\$ 14,896,733	\$ 3,899,742	\$ -	\$ -	0%	0%	
TOTAL PORTFOLIO	\$ 59,586,934	\$ 15,598,967	\$ 62,477,811	\$ 15,867,516	\$ 2,890,877	\$ 268,549	5%	2%	



8-103/8-104: PY7 Implementation Plan vs Actual Q4 Activity - Savings

	PY7 Electric Implementation Plan (MWHs)	PY7 Gas Implementation Plan (Therms)	PY7 Electric Actuals * (MWHs)	PY7 Gas Actuals * (Therms)	Electric % Complete	Gas % Complete	Explanations
Energy Efficiency							
RES-Appliance Recycling	4,010	0	4,471	0	112%	0%	
RES-Behavior Modification	36,950	1,753,243	33,380	1,905,900	90%	109%	
RES-ENERGY STAR New Homes	533	20,880	586	41,841	110%	200%	As noted in prior reports, this program was forecasting to be at 157% of the gas implementation plan at the end of Q2 and 180% of the gas implementation plan at the end of Q3.
RES-HPWES	3,189	488,310	3,105	402,561	97%	82%	
RES-HVAC	4,797	0	5,081	0	106%	0%	
RES-Lighting	34,160	0	34,977	0	102%	0%	
RES-Moderate Income	1,374	258,394	881	180,090	64%	70%	As noted in Q3 report, this program was forecasting to be at 53% of the electric implementation plan and 72% of the gas implementation plan.
RES-Multifamily In-Unit	8,738	255,591	8,447	267,873	97%	105%	
RES-School Kits	558	74,564	569	76,011	102%	102%	
RESIDENTIAL PROGRAM TOTAL	94,309	2,850,982	91,497	2,874,277	97%	101%	
BUS-Standard	58,444	1,367,762	61,072	1,368,623	104%	100%	
BUS-Custom	69,025	1,170,015	77,739	1,452,812	113%	124%	As noted in the Q2 report, this program was forecasting to be at 131% of the implementation plan.
BUS-RCx	9,384	183,894	9,182	188,898	98%	103%	
BUS-Large C&I	0	0	0	0	0%	0%	
BUSINESS PROGRAM TOTAL	136,853	2,721,671	147,993	3,010,333	108%	111%	
AMEREN ILLINOIS PROGRAM TOTAL	231,162	5,572,653	239,490	5,884,610	104%	106%	

* All savings values are unevaluated

8-103/8-104: PY7 Implementation Plan vs Actual Q4 Activity - Budgets

	PY7 Electric Implementation Plan	PY7 Gas Implementation Plan	PY7 Electric Actuals	PY7 Gas Actuals	Electric % Complete	Gas % Complete	Explanations
Energy Efficiency							
RES-Appliance Recycling	\$ 1,388,578	\$ -	\$ 1,423,210	\$ -	102%	0%	
RES-Behavior Modification	\$ 1,031,500	\$ 1,031,500	\$ 1,043,806	\$ 1,047,039	101%	102%	
RES-ENERGY STAR New Homes	\$ 809,841	\$ 352,955	\$ 666,272	\$ 407,249	82%	115%	
RES-HPwES	\$ 3,325,609	\$ 1,988,853	\$ 3,112,620	\$ 1,722,312	94%	87%	
RES-HVAC	\$ 2,787,129	\$ -	\$ 2,764,426	\$ -	99%	0%	
RES-Lighting	\$ 6,372,368	\$ -	\$ 6,259,613	\$ -	98%	0%	
RES-Moderate Income	\$ 4,148,829	\$ 1,540,310	\$ 3,241,860	\$ 1,259,927	78%	82%	As noted in Q3, this program was forecasting to be at 72% spend of the electric implementation plan budget and 78% spend of the gas implementation plan budget.
RES-Multifamily In-Unit	\$ 1,880,656	\$ 899,873	\$ 2,147,653	\$ 1,053,852	114%	117%	
RES-School Kits	\$ 124,900	\$ 124,900	\$ 114,897	\$ 134,778	92%	108%	
RESIDENTIAL PROGRAM TOTAL	\$ 21,869,410	\$ 5,938,391	\$ 20,774,357	\$ 5,625,158	95%	95%	
BUS-Standard	\$ 10,333,176	\$ 2,135,146	\$ 8,831,227	\$ 1,409,114	85%	66%	This program was forecasting to be at 66% and 70% spend of the gas implementation plan at the end of Q2 and Q3, respectively.
BUS-Custom	\$ 8,237,765	\$ 1,728,281	\$ 8,335,521	\$ 2,258,938	101%	131%	This program was forecasting to be at 141% and 126% spend of the gas implementation plan at the end of Q2 and Q3, respectively.
BUS-RCx	\$ 615,957	\$ 457,868	\$ 643,302	\$ 429,594	104%	94%	
BUS-Large C&I	\$ -	\$ -	\$ -	\$ -	0%	0%	
BUSINESS PROGRAM TOTAL	\$ 19,186,898	\$ 4,321,296	\$ 17,810,050	\$ 4,097,646	93%	95%	
AMEREN ILLINOIS PROGRAM TOTAL	\$ 41,056,308	\$ 10,259,687	\$ 38,584,406	\$ 9,722,803	94%	95%	

8-103/8-104: PY7 Q4 New Measures - Residential

Program	Measure Description	TRC	Explanations for TRC < 1
<p>No new measures for Q4</p>			

8-103/8-104: PY7 Q4 New Measures - Business

Program	Measure Description	TRC	Explanations for TRC < 1
<p>No new measures for Q4</p>			

A young man with short dark hair, wearing a green and white plaid shirt, is shown in profile, focused on playing a red electric guitar. He is wearing a colorful, multi-strand beaded bracelet on his left wrist. The guitar has a white pickguard and a maple neck. The background is dark and out of focus, suggesting an indoor setting like a rehearsal space or a stage. A green banner is overlaid on the right side of the image.

Ameren Illinois EE
Awards

Ameren Illinois Energy Efficiency Awards

Chartwell – Business Symposium

ENERGY STAR® Certified Homes Market Leader Award

Hermes Creative Award

Communicator Award – Consumer Awareness

Telly Award – Public Relations

Telly Award – Social Responsibility





8-103/8-104
Residential Highlights

Moderate Income Program Highlights

- 64% of electric implementation plan and 70% of gas implementation plan
- OBF restarted in April and resulted in an increase in participation during the final months of the program year
- 487 projects completed
- Over 80 active program allies



ENERGY STAR® New Homes Program Highlights

- 110% of electric savings and 200% of the gas savings implementation goal.
- 374 Single family homes
- 141 multi-family homes
- Multifamily projects will no longer be eligible for this program in PY8





8-103/8-104

Business Highlights



Business Highlights

- Savings goals attained for business programs
- Online Lighting applications proved beneficial in PY7 to customers and program allies by reducing application processing time
- 16 RCx projects completed in PY7 for a total of 9,188 MWhs and 188,898 therms
- Successful Business Symposium
 - 558 registered attendees and 435 application downloads
 - Chartwell Best Practices Award winner for leveraging Symposium as an educational and marketing tool to increase non-residential customer participation in EE programs



**16-111.5B (IPA)
PY7 Q4 Report**

IPA: PY7 Q4 Plan vs Actual – Savings and Budget

IPA Energy Efficiency	IPA Plan		PY7 Electric		Electric % Complete	Spend % Complete
	Goal (MWHs)	IPA Plan Budget (\$)	Actuals* (MWHs)	PY7 Spend Actuals (\$)		
Rural Efficiency Kits	3,316	\$377,365	3,317	\$330,285	100%	88%
Specialty Lighting	5,569	\$2,794,093	5,623	\$2,450,959	101%	88%
Multifamily	13,289	\$4,292,956	13,398	\$3,756,555	101%	87%
All Electric Homes	10,437	\$7,039,702	10,445	\$6,075,364	100%	86%
Small Business Direct Install	28,670	\$8,715,840	32,599	\$8,150,000	114%	94%

* All savings values are unevaluated





16-111.5B (IPA)
Highlights

16-111.5B (IPA) Program Highlights

ENERGY EFFICIENCY KITS

- Savings goal achieved (*based on unevaluated savings*)
- 10,012 kits distributed
- Positive customer response
- Surveying for the last distribution has been reviewed and will be used to inform next program year's offerings

16-111.5B (IPA) Program Highlights

ALL ELECTRIC HOMES

- Savings goals achieved (*based on unevaluated savings*)
- 627 multi-family units
- 310 single family units
- Program Ally CFM production less than anticipated (housing stock challenges).



16-111.5B (IPA) Program Highlights

MULTIFAMILY MAJOR MEASURES

- Savings goals achieved (*based on unevaluated savings*)
- 943 projects completed
 - 896 Major Measures projects
 - 47 Common Area Lighting projects
- 112 property managers/owners participated in PY7
- Nine Program Allies completed projects in PY7 with one Program Ally completing nearly 70% of dollars paid out



16-111.5B (IPA) Program Highlights

SPECIALITY LIGHTING

- Savings goals achieved (*based on unevaluated savings*)
- Production goal of 400,000 specialty bulbs achieved

16-111.5B (IPA) Program Highlights

SMALL BUSINESS DIRECT INSTALL

- Savings goals surpassed at 114% (*based on unevaluated savings*)
- 2,343 projects completed
- A different program implementer was approved for PY8 in the IPA Procurement process.



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