Ameren Illinois Quarterly Report to SAG

PY8 Q2 8-103/8-104 and 16-111.5B (IPA)

Results and Highlights

02.12.2016





8-103/8-104: PY8 Adjusted Goal Analysis - Savings

	PY8 Compliance Goal C	PY8 Compliance Goal	PY8 Electric Adjusted Goals	PY8 Gas Adjusted Goals	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	PY8 NTG and/or TRM V4.0 Adjustment Explanations *
Energy Efficiency	(MWHs)	(Therms)	(MWHs)	(Therms)	variance	variance	variance	variance	Aujustinent Explanations
RES-Appliance	3,702	0	3,535	0	-166	0	-4%	0%	Refrigerator and freezer NTGRs decreased slightly. Updated coefficient values
Recycling	3,702	U	3,333	O	-100	U	-470	070	of savings formula in TRM.
RES-Behavior Mod	0	1,887,500	0	1,887,500	0	0	0%	0%	
RES-ENERGY STAR New	791	25,663	765	32,271	-26	6,608	-3%	26%	
Homes				,		5,555	0,15		Electric NTGRs decreased for Multifamily. Gas NTGRs increased.
RES-HPWES	5,346	768,779	3,956	622 070	-1 300	-146,709	-26%		NTGRs for electric measures generally decreased. NTGRs for gas measures decreased for air sealing and insulation but increased for aerators and
NE3-HFWE3	3,340	700,773	3,330	022,070	-1,330	-140,703	-20/6		showerheads. TRM change - CFL savings decreased with reduction in HOU.
									NTGRs for ROB measures decreased by 5-10%; NTGRs for ER measures
RES-HVAC	4,492	0	4,832	0	340	0	8%	0%	increased by 10-15%; NTGR for BMP blower motor increased by 10%. TRM
									change - Baseline for ASHP ROB measures changed to 14 SEER from 13 SEER. Change to ISR in TRM V3.0 increased the savings recognized in PY7, causing a
RES-Lighting	5,841	0	5,272	0	-569	0	-10%		reduction to carryover savings in years PY8 & PY9. Midstream lighting is in IPA
	3,2 .2	Ī	-,	·		Ī		0,-	for PY8 and these savings are stricly carryover from PY7.
RES-Moderate Income	6,604	462,778	5,605	423,505	-999	-39,273	-15%	-8%	TRM changes - CFL savings decreased with reduction in HOU and baseline for
The moderate moonie	0,00 .	.02,770	3,003	.23,303	333	33,273	2570	0,0	ASHP ROB measure changed to 14 SEER from 13 SEER. Electric NTGR generally increased for most measures, offset by a reduction in
RES-Multifamily In-Unit	5,517	112,521	5,179	100,402	-338	-12,119	-6%		HOU for CFLs (TRM change). Gas NTGRs generally remained relatively stable,
, , , , , , , , , , , , , , , , , , , ,	3,3 = 1	,	-,	,		,	• • • • • • • • • • • • • • • • • • • •		except the NTGR value for showerheads decreased significantly.
									Electric or gas NTGRs generally increased with exception of CFLs which
RES-School Kits	388	54,986	331	46,599	-58	-8,387	-15%	-15%	decreased. This was offset in electric by TRM changes - lighting parameter reductions in hours, WHF and ISR. Gas measures were affected by TRM
									changes to water heater temperature reduction methodology.
RESIDENTIAL	32,681	3,312,228	29,474	3,112,348	-3,207	-199,880	-10%	-6%	
PROGRAM TOTAL					-	-			Variance is primarily due to facility type changes and TRM adjustment for
DLIC Chandand	05 270	054 007	00.202	050 040	005	F 7C2	10/		HVAC and Lighting measures this increased the savings expected by these
BUS-Standard	85,378	851,087	86,363	856,848	985	5,762	1%	1%	measures. The other major TRM change was on GREMs where the savings
DUIS 0 .	22.544	4 425 426	22.544	4 274 044		406 075	00/		decreased for that measure
BUS-Custom	32,544	1,135,436	32,544	1,271,811		136,375			Business Custom had an increase in the gas program NTGR.
BUS-RCx	17,196	134,629	16,479	128,961	-716 0	-5,669	-4% 0%	-4% 0%	Business RCx had a slight decrease in both the electric and gas NTGR.
BUS-Large C&I BUSINESS PROGRAM	17,480	U	17,480	U	U	U	0%	0%	
TOTAL	152,598	2,121,152	152,867	2,257,620	269	136,468	0%	6%	
AMEREN ILLINOIS	405.370	F 422 270	102.244	E 200 007	2.020	C2 442	20/	40/	
PROGRAM TOTAL	185,278	5,433,379	182,341	5,369,967	-2,938	-63,412	-2%	-1%	

Note: These values may still be affected by any errata identified in the TRM V5.0 update process. * For a complete list of measure changes, reference Illinois Statewide TRM Version 4.0 Table 1.3

8-103-8-104: PY8 Adjusted Goals vs PY8 Implementation Plan Savings

Energy Efficiency	PY8 Electric Adjusted Goals (MWHs) Adj	PY8 Gas usted Goals (Therms)	PY8 Electric Implementation Plan (MWHs)	PY8 Gas Implementation Plan (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	Explanations or +/- 20% variance
RES-Appliance Recycling	3,535	0	3,535	0	0	0	0%	0%	
RES-Behavior Modification	0	1,887,500	0	1,800,000	0	-87,500	0%	-5%	
RES-ENERGY STAR New Homes	765	32,271	565	55,473	-200	23,202	-26%		Adjusted measure mix to reflect a greater proportion of gas heated homes expected compared to filing. This resulted in less electric savings and greater gas savings.
RES-HPWES	3,956	622,070	2,300	401,314	-1,656	-220,756	-42%	-35%	Reduced participation due to higher cost of savings in PY8.
RES-HVAC	4,832	0	4,541	0	-291	0	-6%	0%	
RES-Lighting	5,272	0	6,645	0	1,373	0	26%		Carryover savings higher due to higher lighting sales in PY7.
RES-Moderate Income	5,605	423,505	2,970	500,447	-2,635	76,942	-47%	18%	Reduced volume of Central AC installations resulting in decreased electric savings.
RES-Multifamily In-Unit	5,179	100,402	8,512	162,271	3,333	61,869	64%		ncreased production for building envelope measures resulting in greater electric and gas savings
RES-School Kits	331	46,599	496	69,898	165	23,299	50%	50%	ncreased delivery with minimal budget impact.
RESIDENTIAL PROGRAM TOTAL	29,474	3,112,348	29,564	2,989,403	90	-122,945	0%	-4%	
BUS-Standard	86,363	856,848	65,570	1,396,224	-20,793	539,376	-24%		Anticipated decreased participation in Standard Electric due to multiple IPA programs for small business customers. Greater participation with the Standard Gas steam trap measure than originally forecasted.
BUS-Custom	32,544	1,271,811	80,141	1,215,971	47,597	-55,840	146%	-4%	Greater participation in Custom program from large C&I customers
BUS-RCx	16,479	128,961	9,407	189,627	-7,072	60,666	-43%	47%	ncreased participation in Custom reduced opportunities in RCx for electric. Increased gas savings due to additional customer desires for more Large Facility RCx projects
BUS-Large C&I	17,480	0	0	0	-17,480	0	-100%		No customers signed up for Large C&I offering in PY7, savings shifted to Custom to serve the same target customers
BUSINESS PROGRAM TOTAL	152,867	2,257,620	155,118	2,801,822	2,251	544,202	1%	24%	
AMEREN ILLINOIS PROGRAM TOTAL	182,341	5,369,967	184,682	5,791,225	2,341	421,258	1%	8%	

8-103/8-104: PY8 Adjusted Goals vs PY8 Implementation Plan - Budget

Energy Efficiency	PY8 Electric Plan Budget	PY8 Gas Plan Budget	PY8 Electric Implementation Budget	PY8 Gas Implementation Budget	Electric Variance	Gas Variance	Electric %Variance	Gas %Variance	Explanations or +/- 20% variance
RES-Appliance Recycling	\$ 1,461,234	\$ -	\$ 1,313,763	\$ -	\$ (147,471)	\$ -	-10%	0%	
RES-Behavior Modification	\$ -	\$ 984,375	\$ -	\$ 1,066,390	\$ -	\$ 82,015	0%	8%	
RES-ENERGY STAR New Homes	\$ 655,381	\$ 361,921	\$ 878,089	\$ 371,439	\$ 222,708	\$ 9,518	34%	3%	ncreased funding of electric incentives to achieve electric savings.
RES-HPWES	\$ 4,004,447	\$ 2,177,727	\$ 3,720,589	\$ 1,351,698	\$ (283,858)	\$ (826,029)	-7%	-38%	Fewer participants resulted in less budget needed. Funding reallocated to Moderate ncome program.
RES-HVAC	\$ 2,844,928	\$ -	\$ 2,488,123	\$ -	\$ (356,805)	\$ -	-13%	0%	
RES-Lighting	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	
RES-Moderate Income	\$ 8,375,886	\$ 1,303,887	\$ 6,951,682	\$ 2,128,642	\$ (1,424,204)	\$ 824,755	-17%	63%	More incentive funding allocated to achieve greater gas savings.
RES-Multifamily In-Unit	\$ 1,061,851	\$ 312,752	\$ 2,035,202	\$ 662,529	\$ 973,351	\$ 349,777	92%	112%	Additional funding allocated to this program for building envelope measures.
RES-School Kits	\$ 115,375	\$ 120,175	\$ 115,788	\$ 134,013	\$ 413	\$ 13,838	0%	12%	
RESIDENTIAL PROGRAM TOTAL	\$ 18,519,102	\$ 5,260,837	\$ 17,503,236	\$ 5,714,711	\$ (1,015,866)	\$ 453,874	-5%	9%	
BUS-Standard	\$ 11,274,400	\$ 2,642,285	\$ 10,558,537	\$ 1,955,523	\$ (715,863)	\$ (686,762)	-6%	-26%	Steam Trap projects providing low cost savings while still achieving goal, allowing shifting of budgets to other Business programs.
BUS-Custom	\$ 5,403,637	\$ 1,996,322	\$ 9,006,770	\$ 2,128,312	\$ 3,603,133	\$ 131,990	67%		ncrease in budgets to accommodate large C&I projects
BUS-RCx	\$ 1,875,810	\$ 127,428	\$ 695,318	\$ 522,489	\$ (1,180,492)	\$ 395,061	-63%		Greater demand in custom program required a shift of electric funds. Gas budget increased due to meet demand for Large Facility RCx projects.
BUS-Large C&I	\$ 1,710,000	\$ -	\$ -	\$ -	\$ (1,710,000)	\$ -	-100%	0%	No customers signed up for Large C&I offering in PY7, budget shifted to Custom to serve the same target customers
BUSINESS PROGRAM TOTAL	\$ 20,263,846	\$ 4,766,036	\$ 20,260,625	\$ 4,606,324	\$ (3,221)	\$ (159,712)	0%	-3%	
Ameren Illinois - Portfolio Admin costs	\$ 1,952,771	\$ 504,866	\$ 1,952,771	\$ 504,866	\$ -	\$ -	0%	0%	
Ameren Illinois - EM&V costs	\$ 1,362,399	\$ 352,232	\$ 1,362,399	\$ 352,232	\$ -	\$ -	0%	0%	
Ameren Illinois - Education	\$ 976,386	\$ 252,433	\$ 976,386	\$ 252,433	\$ -	\$ -	0%	0%	
Ameren Illinois - Marketing	\$ 976,386	\$ 252,433	\$ 976,386	\$ 252,433	\$ -	\$ -	0%	0%	
R&D Budget (Emerging Technologies)	\$ 1,362,399	\$ 352,232	\$ 1,362,399	\$ 352,232	\$ -	\$ -	0%	0%	
AMEREN ILLINOIS PROGRAM TOTAL	\$ 45,413,289	\$ 11,741,069	\$ 44,394,201	\$ 12,035,231	\$ (1,019,088)	\$ 294,162	-2%	3%	
DCEO AMEREN ILLLINOIS TOTAL	\$ 15,137,763	\$ 3,913,690	\$ 15,137,763	\$ 3,913,690	\$ -	\$ -	0%	0%	
TOTAL PORTFOLIO	\$ 60,551,052	\$ 15,654,758	\$ 59,531,964	\$ 15,948,921	\$ (1,019,088)	\$ 294,162	-2%	2%	

8-103/8-104: PY8 Implementation Plan vs Actual Q2 Activity - Savings

Energy Efficiency	PY8 Electric Implementation Plan (MWHs)	PY8 Gas Implementation Plan (Therms)	PY8 Electric Actuals * (MWHs)	PY8 Gas Actuals * (Therms)	Electric % Complete	Gas % Complete	Explanations
RES-Appliance Recycling	3,535	0	2,351	0	67%	0%	
RES-Behavior Modification	0	1,800,000	0	417,501	0%	23%	
RES-ENERGY STAR New Homes	565	55,473	270	70,574	48%	127%	
RES-HPWES	2,300	401,314	634	28,165	28%	7%	
RES-HVAC	4,541	o	3,321	0	73%	0%	
RES-Lighting	6,645	O	6,645	0	100%	076	This represents lighting carryover from PY7 and is unevaluated at this point.
RES-Moderate Income	2,970	500,447	1,691	216,190	57%	43%	Moderate Income is currently forecasting to be at 131% of the implementation plan goal.
RES-Multifamily	8,512	162,271	3,820	75,462	45%	47%	
RES-School Kits	496	69,898	180	25,415	36%	36%	
RESIDENTIAL PROGRAM TOTAL	29,564	2,989,403	18,912	833,307	64%	28%	
BUS-Standard	65,570	1,396,224	13,657	1,387,169	21%	99%	Standard is currently forecasting to be at 121% of the gas implementation plan goal.
BUS-Custom	80,141	1,215,971	6,732	289,200	8%	24%	
BUS-RCx	9,407	189,627	0	0	0%	0%	RCx is currently forecasting to be at 175% of the gas implementation goal.
BUS-Large C&I	0	0	0	0	0%	0%	
BUSINESS PROGRAM TOTAL	155,118	2,801,822	20,389	1,676,369	13%	60%	
AMEREN ILLINOIS PROGRAM TOTAL	184,682	5,791,225	39,301	2,509,676	21%	43%	

^{*} All savings values are unevaluated

8-103/8-104: PY8 Implementation Plan vs Actual Q2 Activity - Budget

Energy Efficiency		/8 Electric nentation Plan	-	PY8 Gas nentation Plan		'8 Electric Actuals		PY8 Gas Actuals	Electric % Complete	Gas % Complete	Explanations
RES-Appliance Recycling	\$	1,313,763	Ş	-	\$	788,762	Ş	-	60%	0%	
RES-Behavior Modification	Ş	; -	\$	1,066,390	Ş	-	\$	948,938	0%	89%	
RES-ENERGY STAR New Homes	\$	878,089	\$	371,439	\$	374,582	\$	192,796	43%	52%	
RES-HPWES	\$	3,720,589	\$	1,351,698	\$	1,299,771	\$	452,384	35%	33%	
RES-HVAC	\$	2,488,123	Ş	-	\$	1,812,594	Ş	-	73%	0%	
RES-Lighting	Ş	; -	Ş	-	Ş	-	Ş	-	0%	0%	
RES-Moderate Income	\$	6,951,682	\$	2,128,642	\$	3,297,243	\$	1,200,317	47%	56%	
RES-Multifamily In-Unit	\$	2,035,202	\$	662,529	\$	1,090,107	\$	305,460	54%	46%	
RES-School Kits	\$	115,788	\$	134,013	\$	49,183	\$	56,421	42%	42%	
RESIDENTIAL PROGRAM TOTAL	\$	17,503,236	\$	5,714,711	\$	8,712,242	\$	3,156,316	50%	55%	
BUS-Standard	\$	10,558,537	\$	1,955,523	\$	3,016,811	\$	833,015	29%	43%	
BUS-Custom	\$	9,006,770	\$	2,128,312	\$	1,307,823	\$	618,944	15%	29%	Custom is currently forecasting to be at 121% of the electric implementation plan budget and 71% of the gas implementation budget.
BUS-RCx	\$	695,318	\$	522,489	\$	130,275	\$	69,155	19%	13%	RCx is currently forecasting to be at 136% of the gas implementation budget.
BUS-Large C&I	Ş	-	Ş	-	Ş	-	Ş	-	0%	0%	
BUSINESS PROGRAM TOTAL	\$	20,260,625	\$	4,606,324	\$	4,454,909	\$	1,521,114	22%	33%	
AMEREN ILLINOIS PROGRAM TOTAL	\$	37,763,861	\$	10,321,035	\$	13,167,151	\$	4,677,430	35%	45%	

8-103/8-104: PY8 Q2 New Measures - Residential

8-103/8-104: PY8 Q2 New Measures – Business

Program	Measure Description	TRC	Explanations for TRC < 1
Program			No New Measures Added





 Participation continues to be strong with total of 5,016 units picked up year to date.

65% of annual savings goal has been achieved.





Residential HVAC Program Highlights

 Boosted by continued high volume of CAC and blower motors, production continues to be stronger than forecasted.

Incentives budget reached 95% of annual allotment.

Incentives for specific measures will be cut effective January 1, 2016 to reduce the spend rate.





Residential Behavior Modification Program Highlights

- A total of 18,366 MWhs towards the goal of 37,000 MWhs has resulted in 50% attainment of electric savings.
- A total of 173,736 therms towards the goal of 189,800 therms has resulted in 92% attainment of electric savings.
- IVR development was implemented this month and should improve customer experience when opting out of the program.





 Program has lagged from forecasts, currently at 28% of MWh and 18% therm goals.

Program allies have focused on Moderate Income program which draws away from this program.

84 gold and 1,270 silver ENERGY STAR® certificates have been issued to homeowners in this program







Residential Moderate Income Program Highlights

- Savings achieved for this quarter were on track to meet goals.
- A high volume of A/C and furnace measures have caused some budget pressure.
 - Plans to reduce incentives in January 2016 should relieve budget pressure.
- 428 gold and 159 silver ENERGY STAR® certificates have been awarded year to date.









 Savings are on track for year to date with 61% of the electric and 51% of the therm goals attained.

Work in the Bloomington area has concentrated on primarily electric projects.



sidential ENERGY STAR® New Homes Program Highlights

- 176 homes were completed this quarter.
- Current pending projects are forecasted to surpass the PY8 goal.
- Efforts to reduce delivery costs should result in opportunities to extend incentives to additional production.









 Custom gas has experienced a drop due to project slippage and cancellations

 A new bonus structure is being discussed to help manage project slippage





 The midstream lighting Instant Incentives offering continues to gain traction in the market.

 An effort to expand the geographic coverage of participating distributers is underway.

 Online lighting applications have seen increased interest and there are now 60 program allies trained.





- 12 RCx compressed air projects have been submitted year to date.
- 4 RCx large facilities projects have been submitted year to date.
- The grocery RCx pilot has completed its first survey of a large store.





IPA: PY8 Q2 Plan vs Actual – Savings and Budget

IPA Energy Efficiency	IPA Plan Goal (MWhs)	IPA Implementer Budget (\$) **	PY8 Electric Actuals * (MWhs)	PY8 Spend Actuals (\$)	Electric % Complete	Spend % Complete
Rural Efficiency Kits	7,120	\$971,160	3,560	\$485,600	50%	50%
Multifamily	36,334	\$14,395,090	14,488	\$5,760,005	40%	40%
Moderate Income Kits	1,601	\$1,001,310	1,719	\$898,409	107%	90%
Small Business Direct Install	9,933	\$3,029,863	6,308	\$1,879,871	64%	62%
Behavior Modification	37,000	\$1,022,390	18,366	\$757,845	50%	74%
Demand Controlled Vent.	4,984	\$1,006,000	0	\$0	0%	0%
Small Business Refrigeration	15,346	\$3,274,207	203	\$116,427	1%	4%
Residential Lighting	45,210	\$9,242,864	19,195	\$3,168,031	42%	34%

^{*} All savings values are unevaluated



^{**} Implementer Budgets do not reflect AIC Administration costs which are being tracked seperately



Program: RESIDENTIAL LIGHTING Vendor/Implementer: CLEAResult

- Year to date savings of 21,728 MWhs were achieved towards the goal of 45,210 MWhs.
- Some specialty LED measures have reached plan goals and have been shut down.



Program: HOME ENERGY REPORTS

Vendor/Implementer: Opower

- A total of 18,366 MWhs towards the goal of 37,000 MWhs has resulted in 50% attainment of electric savings.
- A total of 173,736 therms towards the goal of 189,800 therms has resulted in 92% attainment of electric savings.
- IVR development was implemented this month and should improve customer experience when opting out of the program



Program: RURAL EFFICIENCY KITS
Vendor/Implementer: CLEAResult

- The second distribution of 5,000 kits has been mailed and invoiced.
- The next scheduled mailing is in February 2016.



Program: MODERATE INCOME KITS

Vendor/Implementer: AM Conservation

- PY8 energy savings and kit goals were achieved in November resulting in 1,719 MWhs.
- Due to stronger than anticipated demand, approximately 3,500 customers have been placed on a wait list for PY9



Program: MULTIFAMILY MAJOR MEASURES
Vendor/Implementer: CLEAResult

- Currently at 40% of the annual MWh goal.
- Currently at 63% of annual goal for completed projects.
- Multifamily pipeline continues to be healthy with 700 projects currently in place.



PROGRAM: SMALL BUSINESS DIRECT INSTALL Vendor/Implementer: Franklin Energy

- The program is fully subscribed.
- Anticipate closing the program year by March 2016.



Program: DEMAND-CONTROLLED VENTILATION

Vendor/Implementer: Sodexo

Sodexo has yet to launch its program.



Program: SMALL BUSINESS REFRIGERATION

Vendor/Implementer: Staples Energy

- Both savings and budget goals are below program expectations.
- Staples has implemented program ally bonuses and measure bonuses to assist in driving projects.





FOCUSED ENERGY. For life.