#### Ameren Illinois Quarterly Report to SAG

PY9 Q4 8-103/8-104 and 16-111.5B (IPA)

**Results and Highlights** 

11-13-17





#### 8-103/8-104: PY9 Adjusted Goal Analysis - Savings

Energy Efficiency	PY9 Compliance Goal (MWHs)	PY9 Compliance Goal (Therms)	PY9 Electric Adjusted Goals (MWHs)	PY9 Gas Adjusted Goals (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	PY9 NTG and/or TRM V4.0 Adjustment Explanations *
RES-Appliance Recycling	3,329	0	3,169	0	-160	C	-5%	0%	Slight increase due to change PY9 NTG and a reduction in savings due to reversed coefficients TRM V 3
RES-Behavior Modification	0	1,887,500	0	1,887,500	0	C	0%	0%	
RES-Energy Star New Homes	791	25,663	760	32,271	-31	6,608	-4%	26%	Electric NTGRs decreased Gas NTGRs increased.
RES-HPWES	5,346	768,779	2,389	427,530	-2,957	-341,249	-55%	-44%	Changes to air sealing and insulation measure algorithms caused reduction to electric and gas goals.
RES-HVAC	4,492	. о	4,832	. c	340	C	8%	0%	NTGRs for ROB measures decreased by 5-10%; NTGRs for ER measures 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.
RES-Lighting	4,968	c C	4,513	C	-455	C	-9%		Change to ISR in TRM V3.0 increased the savings recognized in PY7, causing a reduction to carryover savings in years PY8 & PY9. Midstream lighting is in IPA for PY8 and these savings are stricly carryover from PY7.
RES-Moderate Income	6,604	462,778	4,420	322,597	-2,184	-140,181	-33%	-30%	Changes to air sealing and insulation measure algorithms caused reduction to electric and gas goals.
RES-Multifamily In-Unit	5,517	112,521	5,151	98,838	-366	-13,683	-7%	-12%	Electric NTGR generally increased for most measures, offset by a reduction in HOU for CFLs TRM change). Gas NTGRs generally remained relatively stable.
RES-School Kits	388	54,986	273	33,605	-115	-21,380	-30%		Electric or gas NTGRs generally increased with exception of CFLs which 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 and ISR.
RES PROGRAM TOTAL	31,435	3,312,228	25,506	2,802,342	-5,929	-509,885	-19%	-15%	
BUS-Standard	93,178	851,087	82,880	744,554	-10,298	-106,532	-11%	-13%	Electric variance is primarily driven by changes to HOU in lighting measures and algorithm changes to occupancy sensors. Gas variance was the result of reduced NTG values.
BUS-Custom	32,372	1,131,575	32,111	1,271,811	-262	140,235	-1%	12%	Slight decrease in electric NTG and increase in gas NTG
BUS-RCx	17,137	134,172	16,372	129,528	-765	-4,644	-4%	-3%	Reductions in both electric and gas NTG
BUS-Large C&I	17,480	C	17,480	C	0	C	0%	0%	
BUS PROGRAM TOTAL	160,168	2,116,833	148,843	2,145,893	-11,325	29,059	-7%	1%	
AMEREN ILLINOIS PROGRAM	191,603	5,429,061	174,349	4,948,235	-17,254	-480,826	-9%	-9%	

Note: These values may still be affected by any errata identified in the TRM V6.0 update process. \* For a complete list of measure changes, reference Illinois Statewide TRM Version 5.0 Table 1.3

#### 8-103-8-104: PY9 Adjusted Goals vs PY9 Implementation Plan Savings

Energy Efficiency	PY9 Electric Adjusted Goals (MWHs)	PY9 Gas Adjusted Goals (Therms)	PY9 Electric Implementation Plan (MWHs)	PY9 Gas Implementation Plan (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	Explanations or +/- 20% variance
RES-Appliance Recycling	3,169	0	3,312	0	143	0	5%	0%	
<b>RES-Behavior Modification</b>	0	1,887,500	0	1,837,000	0	-50,500	0%	-3%	
RES-Energy Star New Homes	760	32,271	121	8,464	-639	-23,807	-84%	-74%	During annual develompment of PY9 implementation plan and incorporation of TRM & NTG changes, on a prospective basis this program was found to be cost-ineffective for PY9. The program was terminated Aug 31, 2016.
RES-HPWES	2,389	427,530	81	17,923	-2,308	-409,607	-97%	-96%	During annual develompment of PY9 implementation plan and incorporation of TRM & NTG changes, on a prospective basis this program was found to be cost-ineffective for PY9. The program was terminated July 31, 2016.
RES-HVAC	4,832	0	4,326	51,631	-506	51,631	-10%	0%	
RES-Lighting	4,513	0	5,948	0	1,435	0	32%	0%	Greater participation in the PY7 lighting program resulted in larger carryover
RES-Moderate Income	4,420	322,597	3,857	649,851	-563	327,254	-13%	101%	Increase in the number of homes to be treated for Moderate Income resulting in increased gas savings.
RES-Multifamily In-Unit	5,151	98,838	6,461	156,503	1,310	57,665	25%	58%	Greater planned participation results in larger savings to offset reductions in other programs.
RES-School Kits	273	33,605	451	45,509	178	11,904	65%	35%	Increased delivery with minimal budget impact.
RES PROGRAM TOTAL	25,506	2,802,342	24,557	2,766,881	-949	-35,461	-4%	-1%	
BUS-Standard	82,880	744,554	67,667	2,077,737	-15,213	1,333,183	-18%	179%	Gas variance due to anticipated participation from a few large industrial customers with high pressure steam traps
BUS-Custom	32,111	1,271,811	72,617	418,000	40,506	-853,811	126%	-67%	Electric variance due to a large amount of savings expected from Large electric customers (see savings shift to Custom under Large C&I explanation). Gas variance due to less savings expected from Custom gas due to lower natural gas prices making return-on-investment less favorable to customers
BUS-RCx	16,372	129,528	9,076	275,039	-7,296	145,511	-45%	112%	Electric variance due to reduced number of eligible customers for electric retrocommissioning offers than original expected during planning. Gas variance due to more customers pursuing retrocommissioning than originally anticipated during planning.
BUS-Large C&I	17,480	0	0	0	-17,480	0	-100%	0%	No customers signed up for Large C&I offering in PY7, savings shifted to Custom to serve the same target customers
BUS PROGRAM TOTAL	148,843	2,145,893	149,360	2,770,776	517	624,883	0%	29%	
AMEREN ILLINOIS PROGRAM TOTAL 4	174,349	4,948,235	173,917	5,537,657	-432	589,422	0%	1 <b>2</b> %	

#### 8-103/8-104: PY9 Adjusted Goals vs PY9 Implementation Plan - Budget

Energy Efficiency	PY9 Electric Plan Budget	PY9 Gas Plan Budget	PY9 Electric Implementation Budget	PY9 Gas Implementation Budget	Electric Variance	Gas Variance	Electric %Variance %	Gas Variance	Explanations or +/- 20% variance	
RES-Appliance Recycling	\$ 1,313,788	\$-	\$ 1,312,917	\$-	\$ (871)	\$ -	0%	0%		
RES-Behavior Modification	\$ -	\$ 984,375	\$-	\$ 1,070,390	\$-	\$ 86,015	0%	9%		
RES-Energy Star New Homes	\$ 655,381	\$ 361,921	\$ 931,633	\$ 436,422	\$ 276,252	\$ 74,501	42%	21%	With closing of program in Q1, currently working to reallocate dollars to other programs.	
RES-HPwES	\$ 4,004,447	\$ 2,211,350	\$ 2,016,308	\$ 474,233	\$ (1,988,139)	\$ (1,737,117)	-50%	-79%	With closing of program in Q1, currently working to reallocate dollars to other programs. Discontinued incentives on central air conditioners to ensure	
RES-HVAC	\$ 2,844,928	\$ -	\$ 2,194,425	\$ 65,180	\$ (650,503)	\$ 65,180	-23%	0%	compliance with not overpromoting cost-ineffective measures.	
RES-Lighting	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%		1
RES-Moderate Income	\$ 8,375,886	, ,,	\$ 10,382,518		\$ 2,006,632	\$ 2,105,745	24%		Increase in the number of homes to be treated for Moderate Income resulting in increased gas savings.	
RES-Multifamily In-Unit	\$ 1,061,851		\$ 2,735,990	. ,		\$ 528,307	158%		Greater funding to meet increased planned participation.	_
RES-School Kits	\$ 115,375	\$ 120,175	\$ 120,891	\$ 139,260	\$ 5,516	\$ 19,085	5%	16%		_
RES PROGRAM TOTAL	\$ 18,371,656	\$ 5,294,459	\$ 19,694,682	\$ 6,436,176	\$ 1,323,026	\$ 1,141,717	7%	22%		_
BUS-Standard	\$ 11,661,911	\$ 2,636,097	\$ 10,445,471	\$ 1,534,546	\$ (1,216,440)	\$ (1,101,551)	-10%	-42%	Anticipated participation from a few large industrial steam trap projects resulting in less expenditures for gas incentives.	
BUS-Custom	\$ 5,379,948	\$ 1,989,674	\$ 9,977,786	\$ 1,802,645	\$ 4,597,838	\$ (187,029)	85%	-9%	Electric variance due to a large amount of incentives expected to go to electric customers (see savings shift to Custom under Large C&I explanation). Gas variance due to less projects expected from Custom gas due to lower natural gas prices making return-on-investment less favorable to customers	
BUS-RCx	\$ 1,869,563	\$ 127,004	\$ 772,018	\$ 529,074	\$ (1,097,545)	\$ 402,070	-59%	317%	Electric variance due to reduced number of eligible customers for electric retrocommissioning offers than original expected during planning. Gas variance due to more customers pursuing retrocommissioning than originally anticipated during planning.	
BUS-Large C&I	\$ 1,710,000	ś -	\$ -	ś -	\$(1,710,000)	Ś -	-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	\$ 20,621,422	\$ 4,752,776	\$ 21,195,275	\$ 3,866,265	\$ 573,853	\$ (886,511)	3%	-19%		1
Ameren Illinois - Portfolio Admin costs	\$ 1,963,352		\$ 1,963,352	\$ 505,891	\$ -	\$ -	0%	0%		1
Ameren Illinois - EM&V costs	\$ 1,369,780		\$ 1,369,780		\$ -	\$ -	0%	0%		1
Ameren Illinois - Education	\$ 981,676				\$ -	\$ -	0%	0%		1
Ameren Illinois - Marketing	\$ 981,676	. ,			\$ -	\$ -	0%	0%		1
R&D Budget (Emerging Technologies)	\$ 1,369,780		\$ 1,369,780		\$ -	\$ -	0%	0%		1
AMEREN ILLINOIS PROGRAM TOTAL	\$ 45,659,342	\$ 11,764,912	\$ 47,556,221	\$ 12,020,118	\$ 1,896,879	\$ 255,206	4%	2%		A
DCEO AMEREN ILLLINOIS TOTAL	\$ 15,219,781	\$ 3,921,637	\$ 15,219,781	\$ 3,921,637	\$ -	\$ -	0%	0%		10
TOTAL PORTFOLIO	\$ 60,879,122	\$ 15,686,549	\$ 62,776,001	\$ 15,941,756	\$ 1,896,879	\$ 255,206	3%	2%		15

#### 8-103/8-104: PY9 Implementation Plan vs Actual Q4 Activity - Savings

Energy Efficiency	PY9 Electric Implementation Plan (MWHs)	PY9 Gas Implementation Plan (Therms)	PY9 Electric Actuals * (MWHs)	PY9 Gas Actuals * (Therms)	Electric % Complete	Gas % Complete	Explanations
RES-Appliance Recycling	3,312	0	1,072	0	32%	0%	With an est. prospective TRC <1, the program was closed during PY9 Q1.
RES-Behavior Modification	0	1,837,000	0	2,075,869	0%	113%	
RES-ENERGY STAR New Homes	121	8,464	185	13,503	153%	160%	With an est. prospective TRC <1, the program was closed during PY9 Q1; however, more projects in the pipeline were completed than anticipated.
RES-HPWES	81	17,923	33	9,122	41%	51%	With an est. prospective TRC <1, the program was closed during PY9 Q1.
RES-HVAC	4,326	51,631	3,666	59,420	85%	115%	
RES-Lighting	5,948	0	5,948	0	100%	0%	
RES-Moderate Income	3,857	649,851	2,818	470,762	73%	72%	Due to a number of changes in program design at the beginning of PY9, the program got off to a slow start.
RES-Multifamily	6,461	156,503	4,346	161,161	67%	103%	In-unit activity fell short of the goal.
RES-School Kits	451	45,509	536	45,504	119%	100%	
RESIDENTIAL PROGRAM TOTAL	24,557	2,766,881	18,605	2,835,341	76%	102%	
BUS-Standard	67,667	2,077,737	97,505	1,980,503	144%		Standard Program saw increased activity with the shifting of dollars from the residential programs that closed in PY9 Q1.
BUS-Custom	72,617	418,000	74,627	1,023,917	103%	245%	Typical, historical cancellation of gas projects throughout the year did not materialize.
BUS-RCx	9,076	275,039	8,737	221,610	96%	81%	
BUS-Large C&I	0	0	0	0	0%	0%	
BUSINESS PROGRAM TOTAL	149,360	2,770,776	180,869	3,226,030	121%	116%	
AMEREN IL <mark>LINOIS PRO</mark> GRAM TOTAL	173,917	5,537,657	199,474	6,061,371	115%	109%	

#### 8-103/8-104: PY9 Implementation Plan vs Actual Q4 Activity - Budget

Energy Efficiency	PY9 Electric Implementation Plan	PY9 Gas Implementation Plan	PY9 Electric Actuals	PY9 Gas Actuals	Electric % Ga Complete Com		Explanations
RES-Appliance Recycling	\$ 1,312,917	\$ -	\$ 345,378	\$ ·	26%		With an est. prospective TRC <1, the program was closed during PY9 Q1.
RES-Behavior Modification	\$-	\$ 1,070,390	\$-	\$ 1,072,266	0%	100%	
RES-ENERGY STAR New Homes	\$ 931,633	\$ 436,422	\$ 198,357	\$ 86,002	21%	20%	With an est. prospective TRC <1, the program was closed during PY9 Q1.
RES-HPWES	\$ 2,016,308	\$ 474,233	\$ 177,240	\$ 52,797	9%	. c	With an est. prospective TRC <1, the program was closed during PY9 Q1.
RES-HVAC	\$ 2,194,425	\$ 65,180	\$ 2,396,610	\$ 78,649	109%	121%	Increased activity from smart thermostats than from original plan.
RES-Lighting	\$-	\$ -	\$-	\$ -	0%	0%	
RES-Moderate Income	\$ 10,382,518	\$ 3,409,632	\$ 8,068,169	\$ 2,852,363	78%	84%	Due to a number of changes in program design at the beginning of PY9, the program got off to a slow start.
RES-Multifamily In-Unit	\$ 2,735,990	\$ 841,059	\$ 2,431,138	\$ 713,456	89%	85%	
RES-School Kits	\$ 120,891	\$ 139,260	\$ 121,462	\$ 139,552	100%	100%	
RESIDENTIAL PROGRAM TOTAL	\$ 19,694,682	\$ 6,436,176	\$ 13,738,353	\$ 4,995,085	70%	78%	
BUS-Standard	\$ 10,445,471	\$ 1,534,546	\$ 15,774,885	\$ 1,322,088	151%	86%	Standard Program saw increased activity with the shifting of dollars from the residential programs that closed in PY9 Q1.
BUS-Custom	\$ 9,977,786	\$ 1,802,645	\$ 7,779,273	\$ 1,719,419	78%	95%	Although most projects completed, many were after the bonus deadline so costs were reduced
BUS-RCx	\$ 772,018	\$ 529,074	\$ 797,430	\$ 475,648	103%	90%	
BUS-Large C&I	\$-	\$-	\$-	\$ .	0%	0%	
BUSINESS PROGRAM TOTAL	\$ 21,195,275	\$ 3,866,265	\$ 24,351,588	\$ 3,517,155	115%	91%	
AMEREN ILLINOIS PROGRAM	\$ 40,889,957	\$ 10,302,441	\$ 38,089,941	\$ 8,512,241	93%	83%	

#### 8-103/8-104: PY9 New Measures - Residential

Program	Measure Description	TRC	Explanations for TRC < 1
HVAC	Pool Pump	3.86	

#### 8-103/8-104: PY9 New Measures - Business

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

#### 8-103/8-104 Residential Highlights

10



#### Residential Appliance Recycling Program Highlights

- Nothing new to report in Q4.
- Program closed 8/31/2016 and completed its last pick ups in September 2016.
- Over 75,000 appliances were recycled throughout the 8 years of the program.



#### Residential HVAC Program Highlights

The 4<sup>th</sup> Quarter was extremely strong for this program processing 2,252 incentive applications (678 ECM/162 ASHP/2 Pool Pumps/1,410 Thermostats (1,224 Smart Thermostats)

Smart thermostats are contributing nicely to the gas savings and we
 continue to work with our allies to promote the ASHP measure.



## Residential Gas **Behavior Modification** Program Highlights

• This program is anticipated to achieve 100% of the gas and electric targets for PY9.



#### Residential **HPwES** Program Highlights

 Nothing new to report in Q4 for this program that closed in August 2016



#### Residential Moderate Income Program Highlights

- 451 projects completed in the 4<sup>th</sup> Quarter which makes the PYTD total 1,117.
- The program maintains a strong project pipeline expecting to finish approximately 1,300 homes for the current year.
- Customer interest remains high and we expect the transition period production to be very strong for this program.
- Demand has increased significantly in the Metro East area creating the need for additional resources and we are currently exploring options to better serve this market.





#### Residential Multifamily Program Highlights

- Direct install monthly production saw an increase this quarter with 2,039 units served. 18,471 CFLs installed (including 322 in common areas); 4,775 DHW measures installed and 233 thermostats.
- Seven major measure projects approved for completion n the last quarter.
- The market has shifted and interest in CFLs has declined. The program began installing LEDs in May.



#### esidential ENERGY STAR<sup>®</sup> New Homes Program Highlights

• Nothing new to report for this program that closed in late August 2016.



#### Residential School Efficiency Kits Program Highlights

- 43 presentations were given at 19 school locations during the 4<sup>th</sup> Quarter. 1,534 kits were distributed.
- The program achieved 100% of goal.



#### 8-103/8-104 Business Highlights

#### **Business Standard Program Highlights**

- **Online Store Offering** continued 25% off LEDs through 05/31/17. Since promotion started, over 5,000 products were sold.
- Instant Incentives participation quadrupled in Q4 over Q3. Main drivers were a large marketing effort and ally bonus.
  - Several **large quick turnaround gas and electric applications** from retailers, industrial customers, and hospitals received/finished during Q4.



#### **Business Custom Program Highlights**

- Large Compressed Air Optimization project finished – 8,900 net MWh
- New Construction Warehousing project finished –
  1,000 net MWh
- Large Heat Recovery projects at Industrial manufacturer 200,000 therms
  - SEM first rounds of applicants finished the two-year process
    - 8 customer (7 industrial, 1 commercial)
    - 10,000 MWh and 128,000 therms total annual savings





#### Business Retro-Commissioning (RCx) Program Highlights

- Compressed Air RCx
  - Finished 5,200 net MWh in Q4
  - Simplified application process to provide more streamlined process for service providers and customers
  - Large Facility RCx
    - Finished 1,100 net MWh and 9,000 therms in Q4
- Several **first-time participants** finished RCx projects with potential to do follow-up projects in the future



**Business: PY9 Large Electric Customer Impact** 

In PY9, the large 10 MW customers provided 40% of overall Business
 Savings or 70,700 out of 181,000 MWh

Standard Program = 18% 17,700 out of 97,200 MWh

Custom Program = 70% 51,900 out of 74,600 MWh

RCx Program = 12% 1,100 out of 8,700 MWh





#### Business: PY9 Large Gas Customer Impact

In PY9, SDC-eligible customers provided 68% of overall Business gas savings or 2,200,000 out of 3,200,000 therms

Standard Program = 88% 1,750,000 out of 1,980,000 therms

•Custom Program = 44% 450,000 out of 1,020,000 therms

RCx Program = 0%

(mainly a commercial gas program)



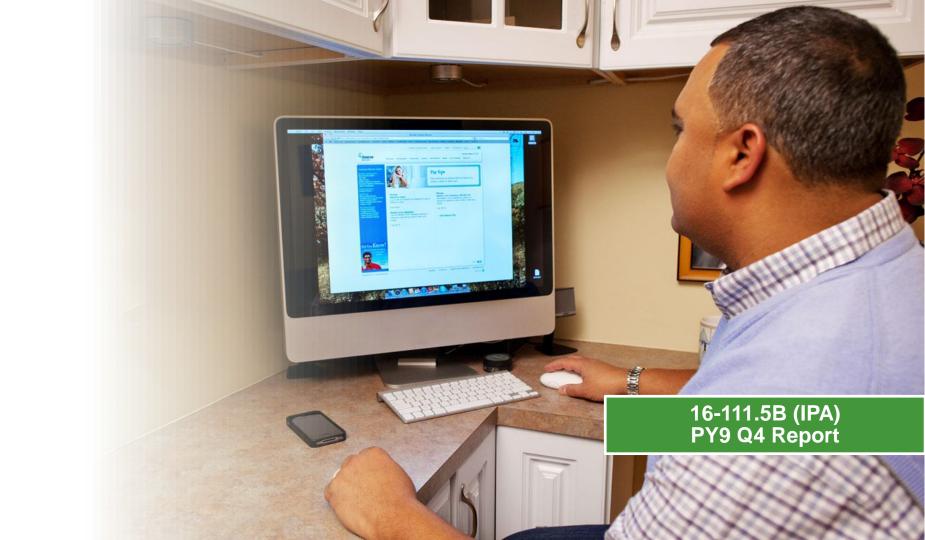
#### Plan 3 Data Center Highlights

•Large Hospital System Data Center project received metering & monitoring incentive. Incentive led to Custom project that was able to eliminate the need for two chillers year round

- •Supported Data Center Presentations by several vendors at locations around Ameren Illinois territory
- •Large Facility RCx projects worked to optimize cooling in data centers
- Energy Efficiency for Data Centers Webinar in Dec 2014

•ENERGY STAR Computers – Approximately 300 Computers installed at a hospital in Metro East St Louis area and 1400 computers installed in hospitals in Peoria area

•Data Center flyer created to encourage use of the Feasibility Study intentive to gather data for Custom incentive EE project



#### PY9 IPA Program Summary – 2015 and 2016 IPA Electricity Procurement Plan

IPA	Approved in IPA	IPA Plan	IPA Plan	PY9 Electric	PY9 Contract	Differer	nce	Explanations
Energy Efficiency	Electric Procurement Plan	Goal (MWHs)	Budget (\$) **	Contract (MWHs)	Budget (\$)	% Energy	% Budget	Explanations
Rural Efficiency Kits	2015	7,381	\$971,160	5,490	\$971,160	-26%	0%	Reduction to the PY9 energy savings goal driven by CLEAResult's over-delivery in PY8 and updates to TRM algorithms.
Multifamily	2015	36,498	\$14,395,090	19,798	\$10,016,520	-46%	-30%	Due to reductions in air sealing and insulation savings, CLEAResult had to remodel their program to get it to pass TRC screening.
Moderate Income Kits	2015	1,469	\$692,550	1,466	\$693,090	0%	0%	ana
Small Business Direct Install	2015	9,173	\$3,263,754	11,641	\$3,287,814	27%	19	Franklin revised their measure mix for PY9 which resulted in additional savings.
Behavior Modification (Electric Portion Only)	2015	37,500	\$1,013,625	37,500	\$1,013,625	0%	09	ana -
Small Business Refrigeration	2015	16,820	\$3,283,169	8,205	\$2,632,867	-51%	-209	Staples revised their program for PY9 after their experience in PY8. They drastically reduced the proposed savings but still have a program design that passed TRC screening.
Residential Lighting	2015	50,193	\$9,707,900	49,413	\$9,696,614	-2%	09	CLEAResult shifted some of the participation among the bulb types from CFL to LED which resulted in a small reduction to savings.
Community-Based CFL Distribution	2016	8,402	\$1,037,531	8,401	\$1,039,500	0%	0%	ana
Public HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	-10%	09	360 Energy revised their program measure mix which resulted in a reduction to savings.
Private HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	-10%	09	360 Energy revised their program measure mix which resulted in a reduction to savings.
Small Commercial Lit Signage	2016	8,480	\$1,999,999	12,884	\$2,000,000	52%	09	GDS revised their program measure mix which resulted in an increase in energy savings.
HVAC Check-Up	2016	5,349	\$1,021,467	0	\$0	0%	09	When reviewing all programs prior to June 1st Implementation, the TRC analysis for this program was below one (1). Nexant made multiple attempts to revise the proposed program to get the program level TRC above 1 but was not successful. AIC ceased contract negotiations.
LED Linear Lighting for Small Facilities	2016	13,281	\$2,790,000	11,467	\$2,609,976	-14%	-69	When reviewing all programs prior to June 1st Implementation, the TRC analysis for this program was below one (1). Matrix revised their proposed program by reducing cost to get the TRC screening back above 1. Savings reductions were due to changes in the TRM.
Demand Based Ventilation Fan Control	2016	5,148	\$1,080,610	4,932	\$1,080,047	-4%	0%	Matrix made some revisions to this programs measure mix which resulted in reduced energy savings.
Public Facility Engagement Elec Only	2016 Conditional Approval	26,397	\$5,823,662	26,397	\$5,823,662	0%	0%	Program was conditionally approved by the Commission. Once DCEO received an approved budget from the State, AIC ceased contract regonations with GDS.
STEP	2016 Conditional Approval	2,495	\$683,706	1,833	\$683,706	-27%	0%	Program was conditionally approved by the Commission. Once DCEO received an approved budget from the State, AIC ceased contract regotiations with MEEA.

\*\* Implementer Budgets do not reflect AIC Administration costs which are being tracked seperately

#### IPA: PY9 Q4 Plan vs Actual – Savings and Budget

IPA	Approved in IPA	IPA Plan	IPA Plan	PY9 Electric	PY9 Contract			Difference	
Energy Efficiency	Electric Procurement Plan	Goal (MWHs)	Budget (\$) **	Contract (MWHs)	Budget (\$)	PY9 Activity (MWHs)	PY9 Spend (\$)	% Energy	% Budget
Rural Efficiency Kits	2015	7,381	\$971,160	5,490	\$971,160	5,278	\$917,632	96%	94%
Multifamily	2015	36,498	\$14,395,090	19,798	\$10,016,520	13,584	\$6,660,955	69%	66%
Moderate Income Kits	2015	1,469	\$692,550	1,466	\$693,090	1,357	\$626,820	93%	90%
Small Business Direct Install	2015	9,173	\$3,263,754	11,641	\$3,287,814	9,061	\$2,584,953	78%	79%
Behavior Modification Electric Portion Only)	2015	37,500	\$1,013,625	37,500	\$1,013,625	35,755	\$1,022,390	95%	101%
Small Business Refrigeration	2015	16,820	\$3,283,169	8,205	\$2,632,867	4,581	\$1,535,331	56%	58%
Residential Lighting	2015	50,193	\$9,707,900	49,413	\$9,696,614	53,177	\$8,341,349	108%	86%
Community-Based CFL Distribution	2016	8,402	\$1,037,531	8,401	\$1,039,500	7,509	\$928,778	89%	89%
Public HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	66	\$48,584	1%	5%
Private HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	328	\$15,258	5%	2%
Small Commercial .it Signage	2016	8,480	\$1,999,999	12,884	\$2,000,000	8,185	\$1,942,489	64%	97%
HVAC Check-Up	2016	5,349	\$1,021,467	0	\$0	-	\$0	0%	0%
ED Linear Lighting for Small Facilities	2016	13,281	\$2,790,000	11,467	\$2,609,976	8,695	\$1,979,143	76%	76%
Demand Based /entilation Fan Control	2016	5,148	\$1,080,610	4,932	\$1,080,047	2,359	\$516,959	48%	48%
Public Facility Engagement Elec Only	2016 Conditional Approval	26,397	\$5,823,662	26,397	\$5,823,662	-	\$0	0%	0%
STEP	2016 Conditional Approval	2,495	\$683,706	1,833	\$683,706	-	\$0	0%	0%
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\*\* Implementer budgets do not reflect AIC Administration costs which are being tracked separately



Program: RESIDENTIAL LIGHTING Vendor/Implementer: CLEAResult

• At the end of the fourth quarter, the program is at 108% of goal with a total of 53,177 MWh achieved (unevaluated) against a target of 49,413.



Program: RURAL EFFICIENCY KITS Vendor/Implementer: CLEAResult

- The program reached 96% of its goal of 5,490 MWhs.
- Customer survey results from March shipments have been submitted.



Program: MODERATE INCOME KITS Vendor/Implementer: AM Conservation Group

- This program reached 93% of both the electric savings and 90% budget targets for PY9.
- The program fully subscribed at 20,000 kits.



#### 16-111.5B (IPA) Program Highlights - Residential Program: MULTIFAMILY MAJOR MEASURES Vendor/Implementer: CLEAResult

- The program reached 69% of its goal of 19,798 MWhs.
- 245 reservation requests were verified this quarter. 320 applications were processed and approved bringing the PYTD total to 1,453.
- There are now 6 allies participating in this program.



#### 16-111.5B (IPA) Program Highlights - Residential Program: HOME ENERGY REPORTS

Vendor/Implementer: OPower

• This program achieved 95% of the electric savings target while spending 101% of the budget for PY9.



Program: COMMUNITY BASED CFL DISTRIBUTION Vendor/Implementer: CLEAResult

- The program reached 89% of its goal of 8,401 MWhs while spending 89% of the budget.
- This program has made up a lot of lost ground in the last months of the program year. Shipments ceased to Food Banks and excess inventory was distributed during the month of May.



#### 16-111.5B (IPA) Program Highlights – Small Business PROGRAM: SMALL BUSINESS DIRECT INSTALL Vendor/Implementer: Franklin Energy

 The SBDI program reached 78% of its goal of 11,641 MWhs while spending 79% of the budget.



Program: REFRIGERATION Vendor/Implementer: Staples Energy

• The Refrigeration program reached 56% of its goal of 8,205 MWhs while spending 58% of the program budget.



Program: HVAC Check-Up Vendor/Implementer: Nexant

 As noted in the SAG PY9 Q1 report, Ameren Illinois provided notice to the vendor in July 2016 that contract negotiations could no longer continue as the program could not be structured in a manner to pass the TRC.



Program: HVAC OPTIMIZATION (Public) Vendor/Implementer: 360 Energy Group

• The program reached 1% of its goal of 6,257 MWhs while spending 5% of the program budget.



Program: HVAC OPTIMIZATION (Private) Vendor/Implementer: 360 Energy Group

The program reached 5% of its goal of 6,257 MWhs while spending 2% of the program budget.



Program: LIT SIGNAGE Vendor/Implementer: GDS Associates

 The program reached 64% of its goal of 12,884 MWhs while using 97% of the budget.



Program: LINEAR LED LIGHTING Vendor/Implementer: Matrix Energy Services

 The program reached 76% of its goal reaching 8,695 MWhs while utilizing 76% of the budget.



Program: Public Facility Engagement Vendor/Implementer: GDS Associates

 As noted in the SAG PY9 Q1 report, once the Department/DCEO received an approved budget from the State of Illinois, AIC began the process to terminate the contract with the vendor.



Program: STEP (public only) Vendor/Implementer: MEEA

 As noted in the SAG PY9 Q1 report, once the Department/DCEO received an approved budget from the State of Illinois, AIC began the process to terminate the contract with the vendor.





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