

STATE OF ILLINOIS



ILLINOIS COMMERCE COMMISSION

Staff Report

Summary of Ameren Energy Savings Goal Workshops Required by ICC Order Docket No. 17-0311

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- Attachment A: Workshop 1 – Ameren Presentation
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Background

The Illinois Commerce Commission’s September 11, 2017 [Final Order](#) in ICC Docket No. 17-0311 (“Ameren EE Plan Order”) directed the Staff of the Illinois Commerce Commission (“Staff”) to initiate a minimum of three workshops “involving Ameren Illinois and interested stakeholders to develop a path to achieving the [cumulative persisting annual savings goals] set out in the statute for future plans, with a focus on reduction of the cost/kWh in the Ameren Illinois service territory subject to the objectives and requirements of the Act.”¹ Page 71 of the Ameren EE Plan Order further states that “[a]t the workshops, stakeholders may offer proposals to aid Ameren Illinois in achieving statutory savings goals. The Staff shall compile a summary of the alternatives so offered and shall submit a report on the same to the Commission.”

This report conveys Staff’s summary of the workshop process, Stakeholder Proposals, and Ameren Plan changes. The summaries contained herein are solely those of Staff and are based in part on discussion during the workshops and the presentations received from interested parties.

Acknowledgements

Staff thanks all the workshop participants, including representatives from: Ameren Illinois Company (“Ameren”); Applied Energy Group (on behalf of Ameren); Celia Johnson Consulting (on behalf of the SAG Facilitator); the Citizens Utility Board (“CUB”); Energy Futures Group (on behalf of NRDC); Future Energy Enterprises (on behalf of the Income Qualified Advisory Committee Facilitator); Geothermal Alliance of Illinois; the Illinois Attorney General’s Office (“AG”); Leidos (on behalf of Ameren); the Midwest Energy Efficiency Alliance (“MEEA”); the Natural Resources Defense Council (“NRDC”); Opinion Dynamics Corporation (“ODC”); and Optimal Energy (on behalf of the AG). The listing of an entity here indicates that a representative from that entity attended some portion of at least one of the three workshops.

Web Access

This report along with certain other materials related to the Ameren Energy Savings Goals Workshops can be found in electronic form by using the following link to the Commission’s website: <https://www.icc.illinois.gov/workshops/Ameren%20Energy%20Savings%20Goals%20Workshops>

¹ [Ameren Illinois Co. d/b/a Ameren Illinois](#), ICC Final Order Docket No. 17-0311, 45 (September 11, 2017) (“Ameren EE Plan Order”).

Staff Report

Summary of Ameren Energy Savings Goals Workshops Required by the Commission's Order in ICC Docket No. 17-0311

I. Introduction

The Illinois Commerce Commission's September 11, 2017 [Final Order](#) in ICC Docket No. 17-0311 ("Ameren EE Plan Order") directed the Staff of the Illinois Commerce Commission ("Staff") to initiate a minimum of three workshops involving Ameren Illinois Company ("Ameren") and "interested stakeholders to develop a path to achieving the [cumulative persisting annual savings goals] set out in the statute for future plans, with a focus on reduction of the cost/kWh in the Ameren Illinois service territory subject to the objectives and requirements of the Act."² Page 71 of the Ameren EE Plan Order further states "that the Staff is directed to convene a minimum of three workshops, and Ameren Illinois is directed to participate. At the workshops, stakeholders may offer proposals to aid Ameren Illinois in achieving statutory savings goals. The Staff shall compile a summary of the alternatives so offered and shall submit a report on the same to the Commission." In accordance with the Ameren EE Plan Order, Staff held three workshops and facilitated an information sharing process that provided interested stakeholders the opportunity to learn about and assess the results of the first year of Ameren's 2018-2021 Energy Efficiency Plan approved in ICC Docket No. 17-0311. The workshops and information sharing process provided stakeholders an opportunity to present proposals to aid Ameren in achieving statutory savings goals. This report provides a summary of the workshops, Stakeholder Proposals, and Ameren Plan changes.

II. Overview of the Workshops

Between March 29, 2019 and May 30, 2019, Staff held three workshops in the Commission's office in Springfield, Illinois,³ with a teleconference option for remote participants. In order for stakeholders to have the information necessary to prepare proposals to aid Ameren in meeting its statutory energy savings goals, stakeholders submitted questions that they wanted to have answered by Ameren in advance of the first workshop. The following stakeholders submitted questions to Ameren: the Illinois Attorney General's Office ("AG"), the Citizens Utility Board ("CUB"), EDF, Elevate Energy, and the Natural Resources Defense Council. The stakeholder questions and Ameren's written responses to some of the stakeholder questions can be found on the workshop website:

² Ameren Illinois Co. d/b/a Ameren Illinois, ICC Final Order Docket No. 17-0311, 45 (September 11, 2017) ("Ameren EE Plan Order").

³ The video conference room at the Commission's office in Chicago was also reserved for participants.

<https://www.icc.illinois.gov/workshops/Ameren%20Energy%20Savings%20Goals%20Workshops>

Ameren also provided verbal responses to some of the stakeholder questions and other responses were provided as part of its presentation.

At the first workshop on March 29, 2019, Ameren presented on 2018 energy efficiency costs, verified savings results, challenges, and successes. In summary, Ameren achieved its Commission-approved electric and gas savings goals in 2018 and spent nearly all of its approved budget. At this first workshop, Ameren also provided a deep dive into how specific programs are marketed and implemented. Ameren presented responses to stakeholder questions at this first workshop. The goal for the first workshop was for stakeholders to obtain the information necessary to make proposals to aid Ameren in meeting statutory energy savings goals. Ameren's presentation from this first workshop can be found in Attachment A to this report.

At the second workshop on May 13, 2019, stakeholders presented proposals for how they believe Ameren could achieve higher savings at lower costs so that Ameren can achieve its statutory energy savings goals in the future. The stakeholder presentation from this second workshop can be found in Attachment B to this report.

At the third workshop on May 30, 2019, Ameren presented responses to stakeholder proposals, which included action items and topics for future discussions. Ameren's presentation from this third workshop can be found in Attachment C to this report.

III. Summary of the Ameren Energy Savings Goal Workshops

Below is Staff's summary of the Stakeholder Proposals and Ameren Plan changes.

A. Summary of Stakeholder Proposals

Below is Staff's summary of the stakeholder observations and proposals to Ameren to achieve greater savings at lower costs so Ameren can achieve its statutory energy savings goals. Please see Attachment B to this report for more details regarding the Stakeholder Proposals. Please see Attachment C to this report for details regarding Ameren's Response to the Stakeholder Proposals.

Income Qualified ("IQ") Offerings

- Stakeholders observed that in 2018 Ameren spent 30% of IQ incentives on central A/C replacements and this generated only 4% of IQ savings, costing roughly \$5/kWh. Stakeholders proposed that Ameren reallocate central A/C replacement spending such that Ameren could generate much greater savings. For example, the stakeholders suggested that the same amount of money could be spent on ductless heat pumps in IQ multifamily buildings and that would result in a gain of 5,500 MWh in savings. In addition, the stakeholders suggested spending the money on more comprehensive energy efficiency measures in multifamily buildings, and not just direct install measures.

Finally, the stakeholders suggested that if Ameren was to shift the central A/C replacement spending to business prescriptive rebates, then Ameren could achieve approximately 50,000 MWh in savings.

- Stakeholders suggested that Ameren could better leverage the Illinois Housing and Weatherization Assistance Program (“IHWAP”) for IQ single family and multifamily projects, and this should lower costs per unit.
- Stakeholders proposed that Ameren reduce its non-incentive spending over time.
- Stakeholders proposed that Ameren increase participation of IQ single family and multifamily electric heat customers to garner more savings.
- Stakeholders proposed increasing participation by IQ multifamily electric heat customers by more focused targeting of such buildings, streamlining multifamily eligibility, and implementing a whole-building (including common areas and not just direct install) “one-stop-shop approach” to treating multifamily buildings. Stakeholders also proposed that Ameren consider adding ductless heat pump retrofits to IQ multifamily projects. Finally, stakeholders proposed that Ameren build a relationship with the Illinois Housing Development Authority (“IHDA”) to find owners going through the re-financing process as they may be ready to make capital investments and do more comprehensive energy efficiency work.

Business Offerings

- For the Business Custom Initiative, stakeholders suggested that Ameren consider greater use of specialized industrial expertise for individual customers/segments.
- Stakeholders proposed that Ameren consider a separate specialized Agricultural energy efficiency sub-program.
- Stakeholders proposed that Ameren consider other specialized offers, perhaps initially as pilots. For example, the stakeholders mentioned that Ameren could consider lighting as a service to more comprehensively address lighting options (including controls).
- Stakeholders proposed that Ameren create a separate commercial new construction program because a targeted focus can result in high participation rates.
- Stakeholders suggested that Ameren may want to consider energy efficiency performance incentives (or enhancing them) for account managers.
- Stakeholders proposed that Ameren invest in getting key customers’ trade allies ICC-certified.

Other Offerings

- Stakeholders proposed that Ameren expand its midstream and upstream incentive offerings because evidence from other jurisdictions suggests that large participation increases are possible for at least some measures. Some additional benefits of expanding midstream and upstream offerings include: improved relationships with distributors/contractors, reduced rebate fulfillment costs, and reduced paperwork. Stakeholders proposed Ameren consider implementing the following measures as

midstream or upstream measures: heat pump water heaters, circulation pumps, residential retail products, business lighting (broader application), HVAC equipment (residential and business), and food service equipment.

- Stakeholders suggested that Ameren invest in market transformation initiatives.
- Stakeholders proposed that Ameren strategically consider joint program delivery where it can cut costs. Stakeholders noted that there should be potential in some programs to get economies of scale, without losing focus on unique aspects of different service territories.
- Stakeholders proposed shifting some market development budget to business programs starting in 2022, because after four years of the initiative, the same level of annual funding may not be needed.

B. Summary of Ameren Plan Changes

As a result of the Stakeholder Proposals, Ameren has committed to make a number of changes to its Plan. Below is a summary of the changes to Ameren's Plan as a result of the workshop process. Attachment C to this report provides a detailed summary of Ameren's Response to the Stakeholder Proposals. Please note that this summary has largely been excerpted from Ameren's Presentation contained in Attachment C.

Income Qualified Offerings

- Ameren Illinois will explore the possibility of adding a window A/C replacement measure pilot as early as 2019.
- Ameren Illinois will evaluate existing resistance space heating and resistance water heating utilizing AMI data with potential to begin opportunities in this area in 2020. Additionally, Ameren Illinois will analyze actual savings and impact on customers for 12 mini splits installed in 2018.⁴
- Ameren Illinois will adopt expanded eligibility requirements for multifamily properties consistent with the Illinois Energy Efficiency Policy Manual and agreements with stakeholders. Ameren Illinois will explore the "one-stop-shop" option. In parallel, Ameren Illinois is working to build relationships with IHDA to align program design with their energy/water requirements.⁵

Business Offerings

- Ameren Illinois will launch enhanced efforts in 2019 to increase participation from large customers.⁶ Elements may include, but are not limited to:

⁴ Proposal was to increase participation of single family and multifamily electric heat customers to garner more savings.

⁵ Proposal was to streamline multifamily eligibility criteria, increase multifamily participation beyond direct install measures, implement a "one-stop-shop" approach and build a relationship with IHDA.

⁶ Proposal was to enhance the Business Custom Initiative to increase participation closer to filed savings by greater use of customer segmentation specialists, implementation of specialized sub-offerings and specialized

- Enhanced marketing efforts to all personnel levels including facility managers, plant supervisors, finance departments and executives. Outreach and account management staff (Energy Advisors) will increase their focus on the Business Custom Initiative and marketing and outreach emphasis will be placed on large projects.
- Strategic funding increases to encourage more projects, adding engineering and industry expertise, and enhanced Feasibility Study and/or Staffing Grant incentives.
- Expansion of sector engagement, increased partnerships with industry groups, and the continuation of sector specific trainings and webinars. The creation of a specialized agriculture offering to combine custom and prescriptive measures adopting aspects of the Michigan Farm Energy Program and associated utility incentives, as applicable, in 2020 with a target of evaluating the usefulness of a pilot in 2021.
- Assess opportunities to pursue lighting as a service, including lighting controls. While this is a relatively new concept/idea and while it is premature to determine the impact it will have on savings, Ameren will continue to assess the potential for lighting as a service to increase savings. Ameren Illinois recommends elevating this opportunity to SAG for discussion.
- Utilization of case studies as done in the past. Ameren Illinois welcomes new ideas, sectors and best practice information.
- Consider performance incentives for Energy Advisors, beyond limited performance incentives in place. Again, Ameren Illinois welcomes new ideas and best practice information.
- Additional work with national accounts on ICC Installer Certification – Ameren Illinois plans to continue work in this arena with dedicated national account outreach and a well-documented process.
- Ameren Illinois commits to have a focused discussion on a separate commercial new construction opportunity and will attempt to incorporate a business new construction pilot, as early as 2020.⁷ Additionally, Ameren Illinois will create a separate commercial new construction application.

Other Offerings

- Ameren Illinois will engage with the Midwest Market Transformation Collaborative and will look for opportunities to work jointly with other Illinois utilities on strategies that will yield increased savings at lower cost.⁸
- Ameren Illinois will work to expand joint program delivery beyond On Bill Financing, statewide retail products implementer and implementation of the Community Action

offers, such as agriculture and lighting as a service, enhancing the account management structure and tackling the ICC installer certification barrier.

⁷ Proposal was to create a separate commercial new construction program with a targeted focus to develop high participation rates.

⁸ Proposal was to invest in market transformation initiatives.

Agency channel. Ameren Illinois will explore launching a pilot before the end of this cycle to jointly deliver incentives to customers with other Illinois utilities.⁹

IV. Conclusion

It is important to point out that a number of the Stakeholder Proposals have resulted in Ameren's proposed development of specific Illinois Energy Efficiency Stakeholder Advisory Group ("SAG") working groups and other collaborative processes. Therefore, this Staff workshop process for Ameren is not the only opportunity that stakeholders will have to engage with Ameren to try to help it achieve its statutory energy savings goals. Given these other collaborative processes in place, Staff does not anticipate holding any additional workshops during the course of this Plan pertaining to Ameren achieving its statutory energy savings goals.

Further, Staff points out that Ameren has committed to the following next steps:

- Continue to collaboratively engage with interested stakeholders on topics raised during the workshop process.
 - Engage with the Office of the Attorney General to plan for and participate in statewide discussions regarding low income programs.
 - Engage NRDC for further discussion on developing best practices related to the business ideas and recommendations.
- Work with the SAG Facilitator to determine which topics can be incorporated into the 2020 SAG plan, as appropriate.
- Maintain an open dialogue with interested parties in an effort to identify potential ways to increase savings, when appropriate.

Staff looks forward to answering any questions that the Commission may have about this report.

⁹ Proposal was to strategically consider joint program delivery where it can cut costs.



ENERGY SAVINGS GOALS WORKSHOP

SPRINGFIELD, ILLINOIS

MARCH 29, 2019

AmerenIllinoisSavings.com

Overview

Workshop Process (ICC and Ameren Illinois)

- Scope and Goals

PY2018 Overview (Ameren Illinois)

- Portfolio Results
- Portfolio Objectives
- Marketing Approach

Residential Program (Ameren Illinois)

- Initiatives

Business Program (Ameren Illinois)

- Initiatives

Market Development Initiative Activities (Ameren Illinois)

Next Steps (ICC, Stakeholders and Ameren Illinois)

Questions (Ameren Illinois)



Workshop Process – Scope & Goals

#1: “The Illinois Commerce Commission’s September 11, 2017 Final Order in ICC Docket No. 17-0311 (“Ameren EE Plan Order”) directed the Staff of the Illinois Commerce Commission (“ICC Staff”) to initiate workshops ‘involving Ameren Illinois and interested stakeholders to develop a path to achieving the [cumulative persisting annual savings goals] set out in the statute for future plans, with a focus on reduction of the cost/kWh in the Ameren Illinois service territory subject to the objectives and requirements of the Act.’” ICC Notice of Energy Efficiency Workshops regarding Ameren Achieving Statutory Energy Savings Goals (Mar. 5, 2019).

#2: Provide information regarding PY2018 performance to assess market conditions, successes, challenges and impact on path to achieving cumulative persisting annual savings goals.

#3: Receive collaborative, innovative, concrete ideas and suggestions from interested stakeholders to assist with path towards future portfolio success.



PORTFOLIO OVERVIEW



PY2018 OVERVIEW PORTFOLIO RESULTS

Ameren Illinois achieved:

106.4% of approved electric savings goals*

99% program related spend compared to approved budget**

Most successful initiatives in 2018

- **Business Standard**
- **Income Qualified**

	Savings (MWh)	Savings (therms)	Spend \$
	Actual	Actual	Actual
C&I Program	221,621	5,505,926	\$46,720,074
Residential	131,503	1,071,149	\$19,130,652
IQ	28,033	683,720	\$30,280,120
Portfolio Level Costs			\$17,820,848
Total Portfolio	381,157	7,260,795	\$113,951,693

Expanded diverse vendor involvement and spend, supporting diverse spend for program delivery of more than \$8.5 million

60 market development efforts were in process or complete at the end of PY2018

40% increase in minority and woman-owned business enterprises that are identified allies to the program

Launched 12 new partnerships with CAAs and other CBOs in central and southern Illinois

* The Independent Evaluator's draft evaluation report estimated savings of 381,157 MWhs and 7,260,795 therms and approved PY2018 savings goals are 358,145 MWhs and 3,716,492 therms

** Based on preliminary results from Q4 report that included combined natural gas and electric program related spend



Portfolio Objectives

- Implement a cost-effective portfolio that achieves savings goals and complies with provisions set forth in Section 8-103B and Section 8-104, using the Total Resource Cost Test;
- Optimize annual and lifecycle savings with an increased focus on long-term measures
- Provide a diverse portfolio that:
 - Delivers a cross section of energy savings opportunities to customers, including delivery of energy efficiency to low- to moderate-income and public sector customers;
 - Focuses on delivery and development of under-served energy efficiency markets through innovative delivery channels;
 - Seeks to achieve savings and improve the economic health, viability and safety of traditionally unserved and underserved communities;
 - Addresses the unique circumstances and attributes of Ameren Illinois' service territory and customer base;
- Increase engagement with diverse business enterprises acknowledging the importance of expanding participation in the energy efficiency economy in Illinois;
- Implement the Voltage Optimization Plan, as approved by the Commission;
- Seek to maintain program continuity and stability for customers and trade partners (Program Allies).



Portfolio Marketing Strategies

Portfolio marketing strategies support energy savings goals across the Portfolio:

- Increase participation and long-term energy savings in all initiatives, particularly in business programs
- Generate education and broader awareness of Ameren Illinois Energy Efficiency offerings
- Increase community and association engagement to influence participation
- Strengthen Program Ally network including new Ally recruitment, and existing Ally engagement to:
 - Grow skills and depth of trained Program Ally network to promote programs and deliver increased energy savings
 - Transform operating practices to include most efficient equipment and services



Portfolio Marketing Strategies

Overarching marketing strategy can be broken down into five main components:



These components allow us to diversify marketing outlets and reach target audiences through multiple touch points



Organizations & Associations

Illinois Manufacturing Excellence Center (IMEC)
 Illinois Facilities Managers Association (IFMA)
 Illinois Manufacturers Association (IMA)
 Illinois Hospital Association (IHA)
 Illinois Health Care Association (IHCA)
 Illinois Critical Access Healthcare Network (ICAHN)
 Illinois Nursing Home Administrators Association
 American Society of Healthcare Engineers (ASHE)
 Illinois Food Retail Association (IFRA)
 Illinois Association of C-Stores
 Grocery Merchandising Association
 Illinois Retail Merchants Association (IRMA)
 IGA (Independent Grocers Association)
 M-PACT
 Illinois Hotel & Lodging Association (IHLA)
 Bloomington Hotel & Lodging Association
 Champaign Hotel & Lodging Association
 Quincy Hotel & Lodging Association
 Galesburg Restaurant & Lodging Association
 Illinois Society of Professional Engineers (ISPE)
 Illinois Library Association
 Illinois Public Transportation Association
 Illinois Association of Park Districts
 Illinois City/County Management Association
 Illinois Association of County Officials
 Township Officials of Illinois
 Illinois Association of School Business Officials
 Illinois Correctional Association
 Illinois Public Health Association

Midwest Association of Physical Plant Administrators (MAPPA)
 Illinois Section of the American Water Works Association (ISAWWA)
 Illinois Association of Public Procurement Officials
 Illinois Association of Public Health Administrators
 Illinois Public Airport Association
 Illinois Association of School Administrators
 Illinois Association of Housing Authorities
 Illinois Association of School Boards
 Illinois Association of School Board Officials
 Illinois Principals Association
 Illinois Council of Community College Administrators
 Illinois Green Economy Network (IGEN)
 Association of Illinois Rural and Small Schools
 Illinois Counties Association
 Illinois Association of County Board Members
 Illinois County Treasurers' Association
 Illinois Energy Consortium (IEC)
 Illinois Municipal League (IML)
 Heart of Illinois Hospitality Association (HOIHA)
 Convention & Visitors Bureaus
 Illinois Department of Agriculture
 Grain & Feed Association
 Illinois Farm Bureau
 Association of Professional Energy Consultants (APEC)
 Association of Energy Engineers (AEE)
 Illinois Association of Chamber of Commerce Executives (IACCE)
 Illinois Restaurant Association (IRA)



Portfolio Marketing Strategies

Transitioned to Salesforce Marketing Cloud:

- **Increases customer engagement by:**
 - **Providing a 1:1 journey based on customer engagement (rather than individual marketing)**
 - **Using segmentation of residential, ally, & business audiences to allow online advertising to reach customers at their point in the journey, engaging broader participation from all customer segments throughout the Ameren Illinois service territory**
 - **Providing enhanced reporting functionality that will show how many customers have signed up for an energy assessment as a result of the outreach**
- **Leverages several applications for streamlined delivery, including:**
 - **Email Studio – Enables creation & delivery of emails**
 - **Journey Builder – Allows for creation of 1:1 personalized journeys for customers**
 - **Content Builder – Serves as a single content repository within Marketing Cloud**
 - **Web Studio – Provides the ability to create digital web pages**
 - **Analytics Builder – Customizes reports on marketing activity**
 - **Advertising Studio – Segments ads based on customer activity & attributes**



RESIDENTIAL PROGRAM



Residential Initiatives

- **Appliance Recycling - New 2018 Implementer - SEEL***
- **Direct Distribution of Efficient Products (SEEKits)**
- **Retail Products**
- **Multifamily - New 2018 Implementer – CMC Energy Services***
- **Income Qualified - New 2018 Implementers - Walker Miller Energy Services & Resource Innovations, CMC Energy Services***
- **Public Housing Authority – CMC Energy Services***
- **Heating & Cooling**
- **Behavior Modification - New 2018 Implementer - Tendril**

*Denotes Diverse Vendor



Residential Overarching Marketing Efforts

Partnerships, collaboration, cross-promotion

Outreach

- Community Based Organizations
- Associations
- Community Presentations & Events
- Home Shows

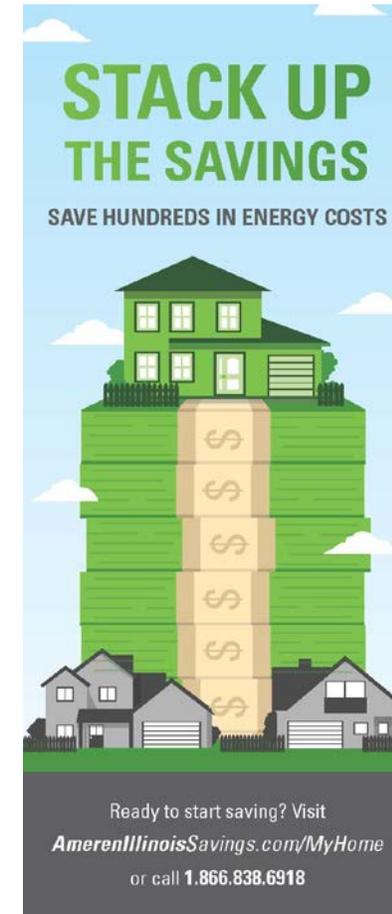
Education & Training

Print Materials

Digital Media

Website

- 131,458 views of "Explore Incentives for your Home" webpage



Residential Marketing Delivery Channels

Marketing Tactic	IQ	Multifamily	PHA	Retail Products	Other*
Advertisements	X	X		X	X
Bill Inserts & Messaging	X			X	X
Digital Media	X			X	X
Direct Mail	X	X	X		X
Education & Training	X	X	X	X	X
Email Communications				X	X
Outreach & Events	X	X	X	X	X
Printed Materials	X	X	X	X	X
Program Ally Engagement	X	X	X		X
Sponsorships	X	X	X	X	X
Website	X	X	X	X	X

* Other includes – Behavior Modification, Direct Distribution Efficient Products, HVAC, Appliance Recycling

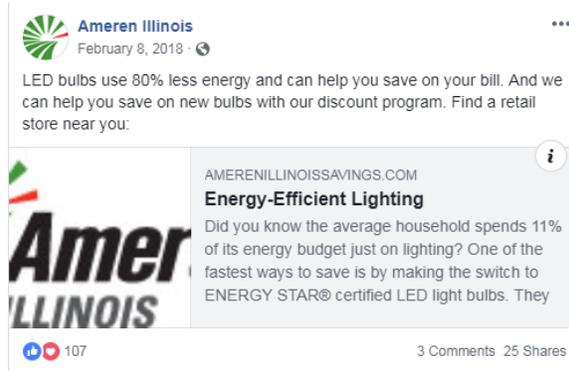


Residential Marketing Digital Delivery Channels

Social media posts shared energy efficiency program information and tips with users of:

- Facebook
- Twitter

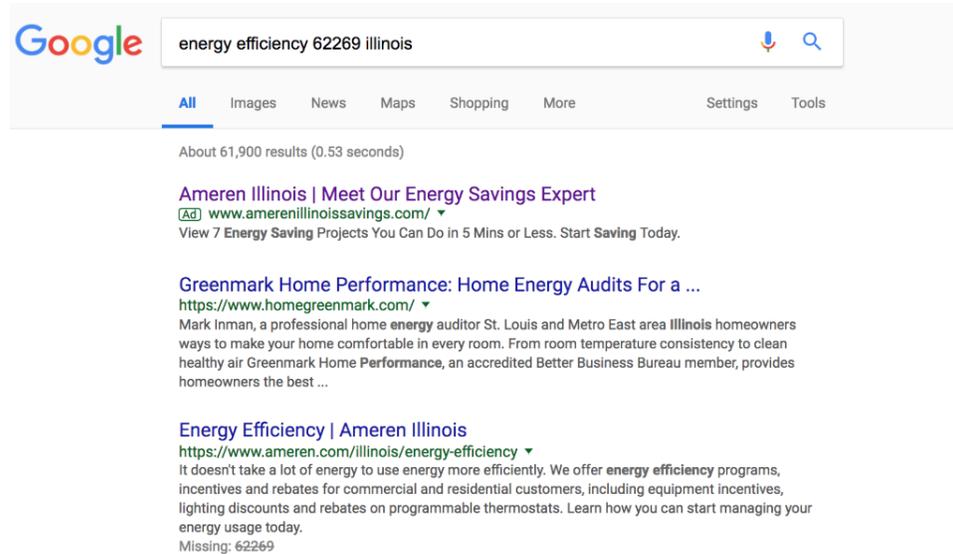
Drove customers to website for additional program information



Residential Internet Marketing

Paid search to make program information easy and simple to find

Articles providing energy efficiency information to customers; ex: "6 Energy Savings Hacks for the Perfect Party"



Google search results for "energy efficiency 62269 illinois".

About 61,900 results (0.53 seconds)

Ameren Illinois | Meet Our Energy Savings Expert
www.amerenillinoisavings.com/
 View 7 Energy Saving Projects You Can Do in 5 Mins or Less. Start Saving Today.

Greenmark Home Performance: Home Energy Audits For a ...
<https://www.homegreenmark.com/>
 Mark Inman, a professional home energy auditor St. Louis and Metro East area Illinois homeowners ways to make your home comfortable in every room. From room temperature consistency to clean healthy air Greenmark Home Performance, an accredited Better Business Bureau member, provides homeowners the best ...

Energy Efficiency | Ameren Illinois
<https://www.ameren.com/illinois/energy-efficiency>
 It doesn't take a lot of energy to use energy more efficiently. We offer energy efficiency programs, incentives and rebates for commercial and residential customers, including equipment incentives, lighting discounts and rebates on programmable thermostats. Learn how you can start managing your energy usage today.
 Missing: 62269



Summer is the perfect season for parties with family and friends. From celebratory graduation parties to fun-filled birthday gatherings, these simple projects can help everyone enjoy the festivities while you enjoy saving money on your energy bill.

Use a Meat Thermometer

These ovenproof, digital meters can tell you what temperature your dish should be when it's done. This means you don't need to open the oven door as often while you're cooking, which allows heat energy to escape each time. Now you can focus on the fun instead of the heat.

Turn on the Fan

A ceiling fan circulates the air so your guests feel cooler no matter where they sit — which means you can set your thermostat a little higher and give the AC unit a break. Fans use significantly less energy than central AC units do, so saving energy is a breeze.

Clear the Area

Your AC unit will operate better if it has room to breathe, so keep plants, patio furniture and other outdoor obstructions away from the system. Your AC unit won't have to work as hard to cool your house which means you can save energy. [Find more helpful ways to increase your outdoor energy-efficiency here!](#)



Residential Television Marketing

Savings Made Easy campaign shared energy efficiency tips and program information

Shown in:

Geographic Area	Stations
Metro East	KMOV, KPLR, KSDK, KTVI, Spectrum, AT&T
Champaign/Springfield/Decatur	WAND, WCIA, WCIS, Comcast, DISH, Consolidated Cable
Peoria/Bloomington	EEEEK, WEEK, WMBD, Comcast, Heartland Wire
Quincy/Hannibal	KHQA, WGEM, Comcast
Paducah/Cape Girardeau/Harrisburg	KFVS, WSIL, Spectrum



Appliance Recycling Successes & Challenges

Successes

- A new diverse implementer successfully overcame inherent challenges of startup and launch
- Enhanced the initiative to include low-income communities and recycled 5,876 units
- Expanded measures to include kits to those low-income communities

Challenges

- Serving the vast Ameren Illinois service territory

Higher Than Plan Measure Uptake - Freezers

Lower Than Plan Measure Uptake - Refrigerators



Direct Distribution of Efficient Products Successes & Challenges

Successes

- We distributed 9,048 throughout the program year
- Between August and December of the 4,500 kits, 2,123 of the middle school kits were distributed to low income schools

Higher Than Plan Measure Uptake – LEDs, Showerheads, Aerators, Temperature Adjustment Cards

Lower Than Plan Measure Uptake - None



Retail Products Successes & Challenges

Successes

- Program launched an online marketplace for residential customers in June – over 2,500 customers purchased energy efficiency products through PY2018
- Retail Products Initiative as a whole contributed 24% of savings towards low/moderate income customers
- Exceeded planned smart thermostat goal – 15,180

Challenges

- Balancing savings and spend between standard and specialty LEDs

Higher Than Plan Measure Uptake – LEDs Standard & Specialty, Advanced Power Strips, Smart Thermostats

Lower Than Plan Measure Uptake - Pool Pumps



Retail Products Marketing Efforts

Ads – Monthly

Bill Inserts - June, July, October, December

Bill Messaging - January, April, July, August, October, December

Cross Promotion - Home Energy Reports

Email Marketing - Timed around manufacturer promotions

Digital Marketing - Paid search campaigns, social media, Facebook, Yahoo native advertising

Website Banners - Special promotions

Website Visitors

- 85,613 views of Smart Thermostat Page
- 27,196 views of Smart Thermostat Rebate Portal Page
- 16,860 outbound links to AmerenIllinoisRebates.com
- 18,346 outbound links to the Online Marketplace
- 3,063 views of Pool Pump rebate portal page
- 1,954 to Advanced Power Strip page



Successes

- Exceeded kWh savings goals
- Added Smart Thermostat and Advanced Power Strips as available measures
- Served 3,868 units

Challenges

- Less than anticipated savings per unit due to the number of CFLs in existing units

Higher Than Plan Measure Uptake – 42w LED Replacement, Smart Thermostats

Lower Than Plan Measure Uptake – Specialty LEDs, Programmable Thermostats, Showerheads, Aerators

Non-IQ Multifamily Successes & Challenges

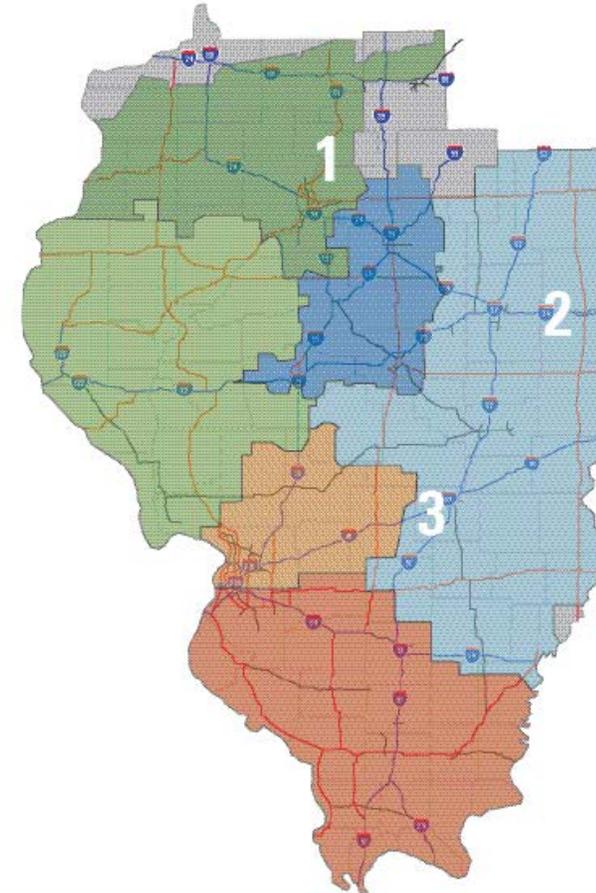


Income Qualified Initiative

- The Income Qualified (IQ) Initiative helps low- to moderate-income customers reduce their energy consumption through comprehensive home retrofit services, enhanced rebates on HVAC equipment, LED lighting, and direct distribution of energy saving kits
- Single family homes and multi-family properties with average household incomes up to 300% of Federal Poverty Guidelines may receive a free comprehensive home assessment, including a health and safety evaluation, to identify the energy efficiency services to be offered
- Low-cost energy saving devices will be installed in conjunction with the assessment at no cost including LED's, aerators, shower heads, advanced power strips and smart thermostats
- New implementers to serve this market were CMC Energy Services*, Resource Innovations*, and Walker-Miller Energy Services*

*Denotes diverse vendor

ENERGY ADVISOR & OUTREACH TERRITORY MAP



IQ Registered Program Ally Successes & Challenges

Successes

- Impacted the lives of 3,498 low to moderate income customers of which 3,307 received at least one energy efficiency measure and 2,671 completed comprehensive retrofits
- Network of 25 active CORE Program Allies
- Recruited and trained 2 new DBE CORE Program Allies

Challenges

- Program staffing and identifying candidates who are properly trained to perform the work required
- Enough Program Ally resources to serve our vast territory and various types of housing stock such as mobile homes

Higher Than Plan Measure Uptake – ECM Single Family, Single Family Ceiling Insulation (R11 to R38), Rim Joist Insulation, Smart Thermostats, Food Bank Kits, Mail Kits, Air Conditioners, Tier 1 Advanced Power Strips, Air Sealing Gas Heat

Lower Than Plan Measure Uptake – Air Sealing Electric Heat, Ceiling Insulation (R5 to R38)



IQ Registered Program Ally Marketing Efforts

Ads - Monthly

Bill Inserts - March, April

Bill Messaging - March

Conferences, Events & Tradeshows

Direct Mail - January, March, May, July, September, November

Education & Training

Outreach

Print Materials

Webpage

- 44,083 visitors to IQ landing page
- 10,999 visitors to IQ application page

Yard Signs

Summary

- Difficult managing marketing efforts with desired pipeline levels and Program Ally/Energy Advisor capacity
- The introduction of an Initiative-focused outreach team was launched in PY2018 and 137 outreach events were conducted with 123 in targeted income-qualified regions

Ameren Illinois Home Efficiency Offering

Incentives for Home Improvements

Improve the efficiency and comfort of your home with help from Ameren Illinois. Through this offering, you can:

- » Identify ways to reduce your home's energy costs
- » Receive generous incentives to make energy-saving upgrades
- » Choose to make a number of recommended improvements, including air sealing and insulation, new heating and cooling equipment, and smart thermostats
- » Get professional installation of the improvements by Program Allies — contractors specially trained by Ameren Illinois

WHY PARTICIPATE?

- » Lower your energy use and utility bills
- » Generous cash incentives can cover a portion of your project costs
- » Fewer drafts and more comfortable rooms
- » Increased long-term value of the home

STEPS TO SAVE

- 01** **VERIFY** that you are qualified. Contact Ameren Illinois at 1.866.838.6918 or IllinoisResidentialCEE@ameren.com to receive an application.
- 02** **SCHEDULE** a home energy audit. Following qualification, we will perform an audit of your home and provide energy saving recommendations.
- 03** **RECEIVE** an estimate of your out-of-pocket cost to make the recommended upgrades. Our staff will develop a work scope explaining the details of your project.
- 04** **AGREE** to the work scope and have the work completed by a trusted Program Ally.
- 05** **START** saving with your energy efficiency improvements!



ACT NOW

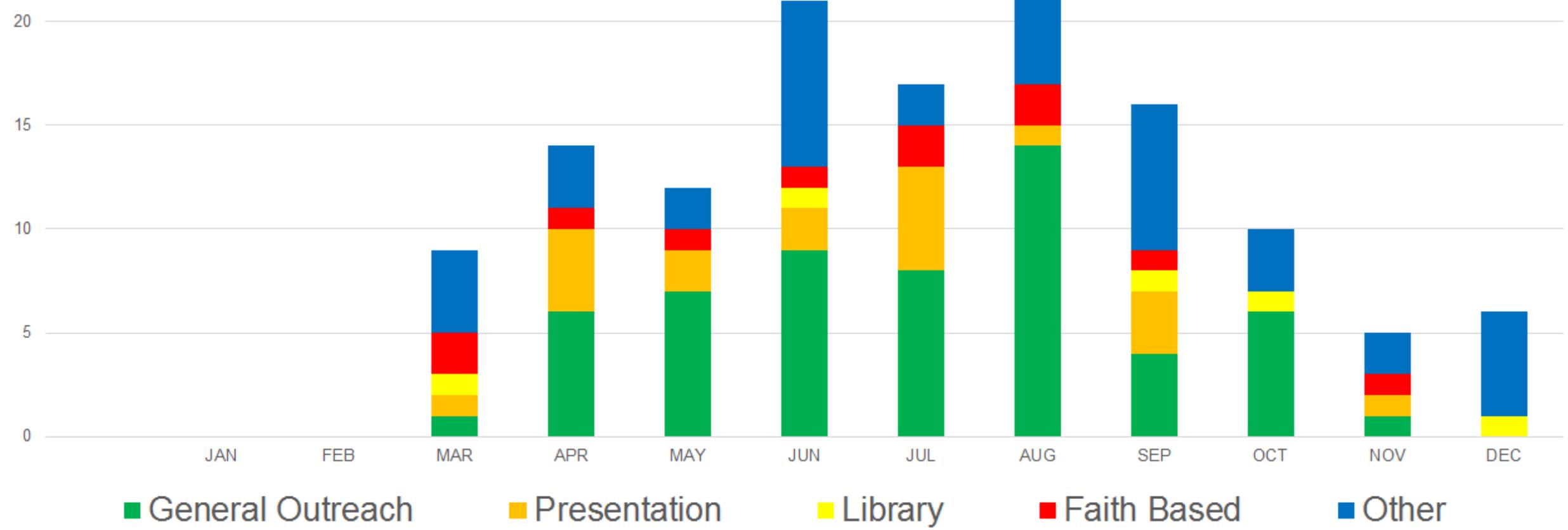
Learn more at
AmerenIllinoisSavings.com
or call 1.866.838.6918





Number of Presentations

Attachment A



IQ REGISTERED PROGRAM ALLY OUTREACH EFFORTS



Residential Marketing Print Delivery Channels

Have drafty rooms? Need to save some money?
OUR PROGRAM CAN HELP.

Ameren Illinois knows that your home is important to you. That's why we've created an easy and affordable way to make your home more comfortable and energy efficient. Through this offering, you may qualify for generous incentives that can help **cover a large portion of the costs** to make energy-saving improvements like:



Upgrading to energy-efficient lighting



Adding insulation and sealing air leaks*



Replacing old heating and cooling equipment



Installing a smart thermostat to manage energy use

◀ Open for more information on how to get started.

It's the **PERFECT TIME** to save energy.

Look inside to learn more about our award-winning program and the incentives available to make energy-efficient improvements in your home.

Last year alone, we helped over 2,400 customers across Illinois reduce their energy costs by more than \$1 million through this offering. **Are you the next real result?**



300 Liberty St
5th Floor
Peoria, IL 61602



**HOW CAN 3 MINUTES
SAVE YOU HUNDREDS
IN ENERGY COSTS?**

In less time than it takes you to open the rest of your mail, you can **SEE IF YOU QUALIFY** for incentives to make energy-saving upgrades to your home.

Thousands of other homeowners have made energy-efficient improvements to their homes with the help of our incentives. Your home in <<City Proper>> can enjoy these benefits of participating:

- » High-efficiency LEDs, added insulation, and air sealing **Installed at no charge***
- » **Save hundreds of dollars** each year on your energy bills
- » Increased long-term value of your home
- » Fewer drafts and more comfortable rooms

WELCOME TO <<CITY PROPER>>

» READY TO SEE WHAT WE CAN OFFER YOU?

You may be eligible to make energy-saving improvements to your home through our award-winning program**. Go to the webpage **AmerenIllinoisSavings.com/<<Campaign URL>>** and complete a short, online form. It will take about three minutes to fill out – you can even do it on your tablet or mobile device.

Once you have submitted the form, we will contact you about your free home energy audit and help you start saving the most energy possible.

FILL OUT THE SHORT ONLINE FORM:
AmerenIllinoisSavings.com/<<Campaign URL>>

Questions? Call us at <<Phone Number>>

* Ameren Illinois residential electric and/or gas account required to participate; primary heat source must be supplied by Ameren Illinois. Ameren Illinois Program *not* available and install of equipment to achieve the project to be eligible for incentives. Customer and home must meet all eligibility requirements of the program. Incentives can only be offered while funds are available. Other required upgrades and associated costs may apply. See website for complete details.
** Individual project results will vary based on the work scope, home specific, and the existing equipment. Average cost per kWh or them used to estimate energy savings.

Check out **REAL RESULTS** in your area:

<<Case Study 1>>†

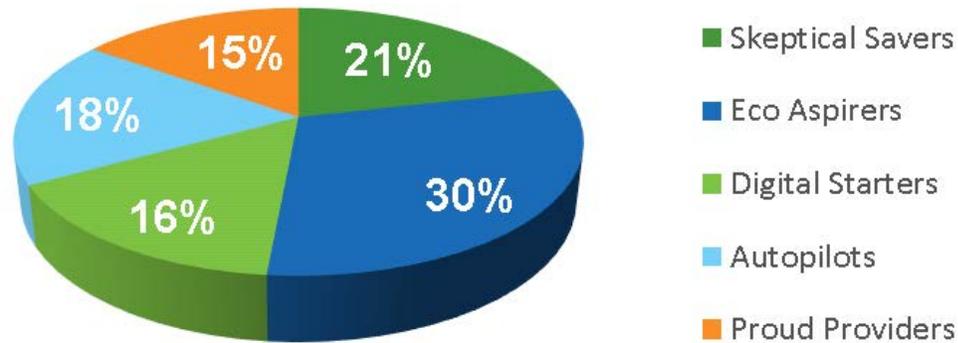


<<Case Study 2>>†

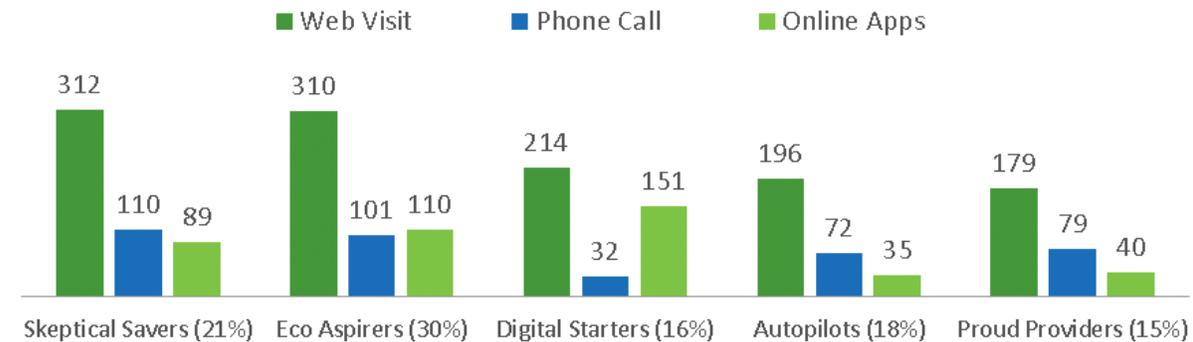



IQ Registered Program Ally Marketing Efforts

Market Segment Breakdown



Final Results by Market Segment



Summary

- Initial direct mail to all customer market segments in target areas sent in January 2018
- July direct mail expanded to all areas for those segments with greatest response - Skeptical Savers & Eco Aspirers
- Continued marketing efforts focused on all segments with priority given to Skeptical Savers & Eco Aspirers



Successes

- On-boarded 17 Community Action Agencies to participate in the braided funding design with DCEO
- Served 147 homes
- Added smart thermostats and kits in the last quarter of the year
- Increased collaboration and communication with the CAAs and DCEO

Challenges

- Start-up with program design and training, which delayed agencies to participate
- Integrating the utility program with the IHWAP program was challenging for a number of reasons including
 - Agencies had constrained resources to perform administrative tasks
 - Forecasting accurate monthly activity

Higher Than Plan Measure Uptake – Smart Thermostats, Kits

Lower Than Plan Measure Uptake – Direct Install, Air Sealing, Insulation, Duct Sealing

IQ CAA Successes & Challenges



IQ Multifamily Successes & Challenges

Successes

- Began serving Income Qualified – Multifamily properties in March of 2018
- The initiative completed 1,027 projects of which 871 received direct install and 156 received building envelope measures

Challenges

- Identifying Income Qualified properties proved to be a challenge
- Less than anticipated savings per unit due to the number of CFLs existing in each unit
- Direct installs require the presence of the property staff and competing demands on the property managers schedule is often a barrier

Higher Than Plan Measure Uptake – Smart Thermostats, Advanced Power Strips, Air Sealing, Insulation, Mini-Splits

Lower Than Plan Measure Uptake – LEDs, Showerheads, Aerators, Pipe Wrap Insulation



IQ Multifamily Marketing Efforts

Calling Campaign - September

Direct Mail - May

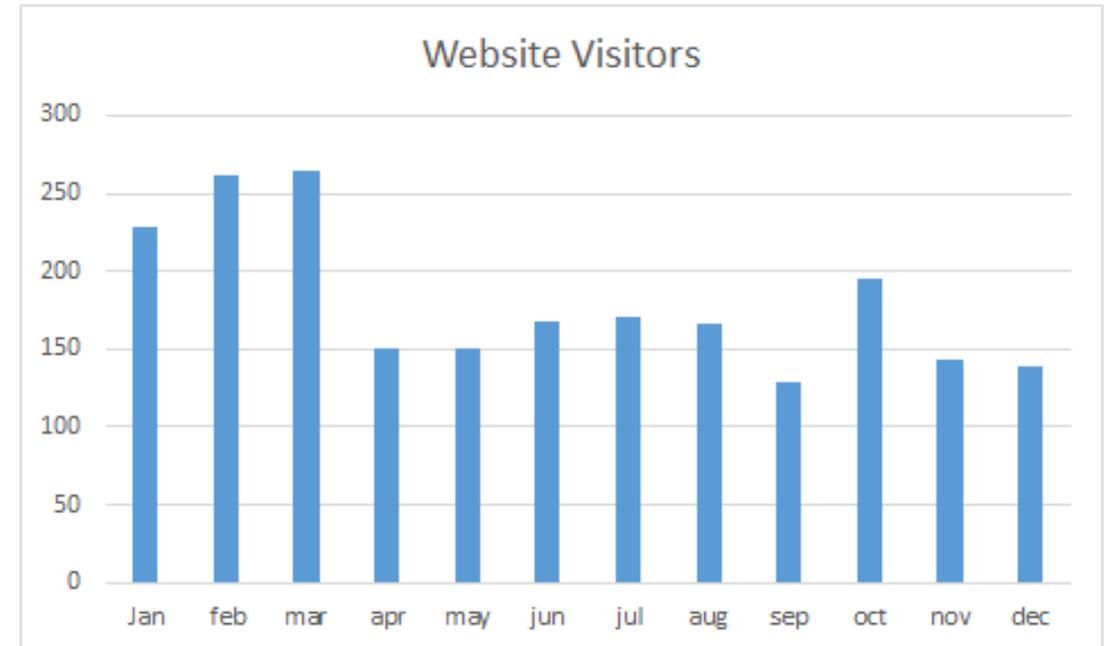
Flyers & Leave-Behinds

Tradeshows & Conferences

- Illinois National Assoc. of Housing Rental Officers

Website

- 2,613 views of multifamily landing page
- 379 view to in-unit incentive page
- 334 views to common area incentive page



Summary

- Interest in this initiative peaked at the beginning of the program year
- Direct mail caused a slight increase in website visitors
- Calling campaign and attendance at the IL National Assoc. Of Housing Rental Officials had greatest impact on initiative activity



Successes

- Exceeded original planned kWh & therm savings goals in 2018
- Finished the year with 4,350 units served
- Smart thermostats were added to the offering
- 184 building envelope projects were completed
- Positive engagement with the PHAs

Challenges

- Less than anticipated savings per unit from public housing due to the number of CFLs in existing units.

Higher Than Plan Measure Uptake – Air Sealing, Ceiling Insulation (R11 to R38), Showerheads, Aerators, Smart Thermostats, LED Lighting, Tier 1 Advanced Power Strips

Lower Than Plan Measure Uptake – Duct Sealing, ECMs

PHA Successes & Challenges



PHA Marketing Efforts

Direct Mail – March

Flyers & Leave-Behinds

Outreach

Tradeshows & Conferences

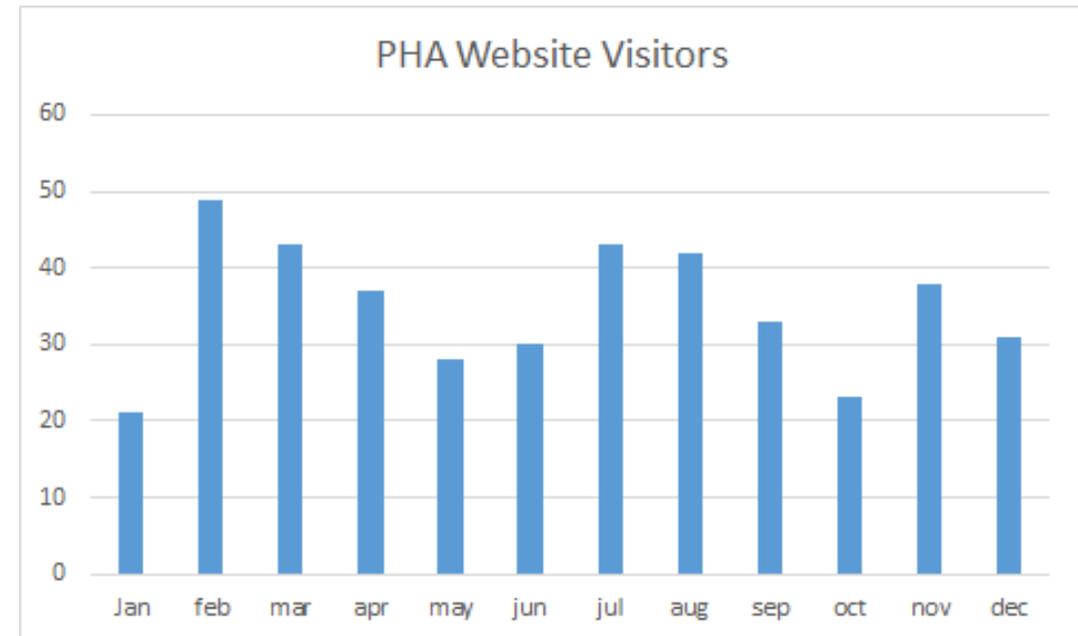
- Illinois Association of Housing Authorities

Website – 558 views

Summary

- Interest in this initiative peaked at the beginning of the program year
- Neither direct mail nor tradeshow/conferences increased website visitors

Cash in on energy efficiency upgrades
for your public housing authority



DCEO Affordable Housing New Construction

While the DCEO New Construction commitment is not an Ameren Illinois initiative under the Residential Program, it is being reported under this section because it covers the cost of incentives associated with pre-existing commitments DCEO made to income-qualified new construction projects in the Ameren Illinois service territory and for which budget was allocated.

All commitments from DCEO were completed and are considered closed



MARKET DEVELOPMENT INITIATIVE



Smart Savers Pilot

- This pilot offered smart thermostats without a co-pay to eligible Ameren Illinois customers in qualifying zip codes across the Ameren Illinois service territory
- Target zip codes were chosen based on high concentrations of income-qualified customers in areas of Peoria, Champaign, Decatur, and East St. Louis
- In addition to distributing 5,500 smart thermostats, the pilot also did a small smart speaker pilot with connected lighting for smart thermostat recipients
- Customers were able to choose self-install or to have the device installed by a Registered Program Ally as this pilot sought to engage local and diverse vendors in these communities to perform the installs

Utilized local and diverse contractors:

Local	Local & Diverse
Air King	Greens Heating & Cooling
Kelso	HandyMack
PCB	Tillman/Minority Electric



Diverse Contractor Expansion & Support

- In 2018, Ameren Illinois undertook efforts to support, train and expand local and diverse business enterprises in the Ameren Illinois service territory
- These efforts primarily included staffing grants, other supportive funding and costs associated with providing business owners with energy audit equipment and pre-payment for weatherization material being installed for Ameren Illinois energy efficiency projects.
- These efforts allowed these businesses to increase the number of Ameren Illinois customers they could serve within the residential program
 - Green Titan
 - Green Home Weatherization
 - John's Mechanical

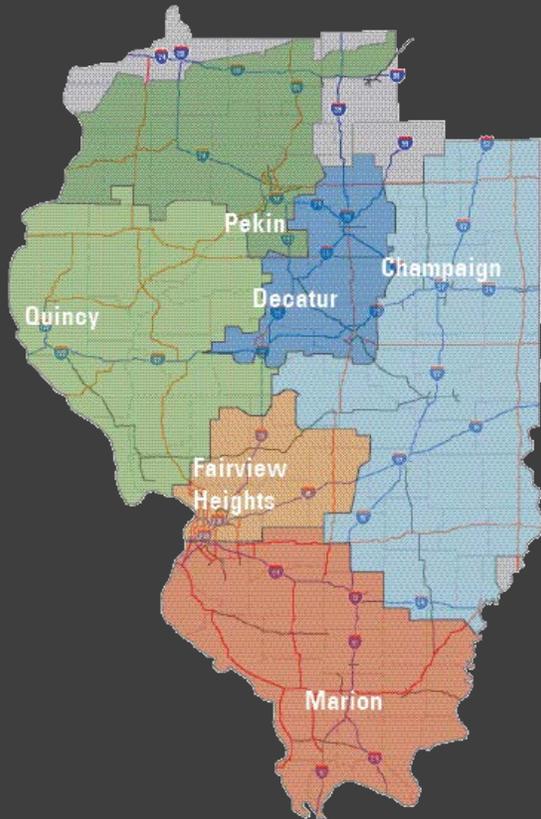


Bill Pay Assistance Events

- Starting in 2018, Ameren Illinois Energy Efficiency partnered with Customer Service to bring energy efficiency education to customer events where LIHEAP eligible customers received assistance
- In addition to receiving a \$150 bill credit, through the customer service group, eligible customers also received an energy efficiency kit containing items such as LED bulbs, a advanced power strip, and aerators
- Recipients also were educated about the benefits of all included items to ensure they knew how to use them to save energy



Senior Power Hours



In August 2018, Ameren Illinois hosted Senior Power Hour events in Pekin, Quincy, Decatur, Champaign, Fairview Heights, and Mt. Vernon

The events brought seniors together to learn about Ameren Illinois residential energy efficiency programs, as well as provide easy and simple sign-up for home energy audits

In addition to an energy efficiency presentation, attendees could visit “open house” style stations to learn about appliance recycling, LED lighting, home audits, and scam awareness and prevention



Senior Heating Assistance Partnership

- In December 2018, Ameren Illinois' Customer Service department provided bill credits to over 600 qualifying seniors to relieve winter heating costs
- In partnership with Customer Service, Ameren Illinois Energy Efficiency placed education materials in the award letters that notified the customers they were receiving a grant
- The education materials informed them of additional energy efficiency opportunities to help them lower their bill
- In addition to the education materials, Ameren Illinois partnered with local community partners to identify an additional 15 seniors to receive energy efficiency gift baskets containing LED bulbs, an advanced power strip, and additional program information to encourage recipients to begin their journey with energy efficiency
- Seniors that did not receive a basket were sent an energy efficiency kit



Workforce Development Activities

The Market Development Initiative built capacity in Ameren Illinois service territory to serve customers with energy efficiency offerings through the following:

- **Workforce Development**
 - **Internship Program**
 - **Scholarship Program**
 - **Program Ally Expansion (examples: Green Home, Green Titan, Jodeci Mack)**
 - **Job Training and Certification**
- **Successfully offered 18 scholarships to candidates at 6 community colleges throughout service territory**
- **Successfully trained and engaged 13 interns during 1st energy efficiency internship program year**



Real Results

A customer in Peoria was 1 of 5 area customers to receive a holiday gift basket as well as \$150 towards his energy bill.

Through customer service, the EE team learned that the customer did not have a functioning boiler. He is a longtime Peoria resident in a historic home, but he has had a difficult past few years, including the loss of a family member. The customer was staying warm through the use of a single space heater in his bedroom, while the rest of his house went unheated.

Program staff ensured we did all we could to help. Ameren Illinois worked with a local contractor to quote, size, and order a new boiler for him. We were able to identify resources to replace this steam boiler, though we normally only work with hot water boilers, making this situation unique.

On December 14th, Ameren Illinois and PCCEO went together to present this customer with his energy efficiency gift basket in person. During this visit, we informed him that he would be provided a new boiler at no cost.



3rd Party RFP

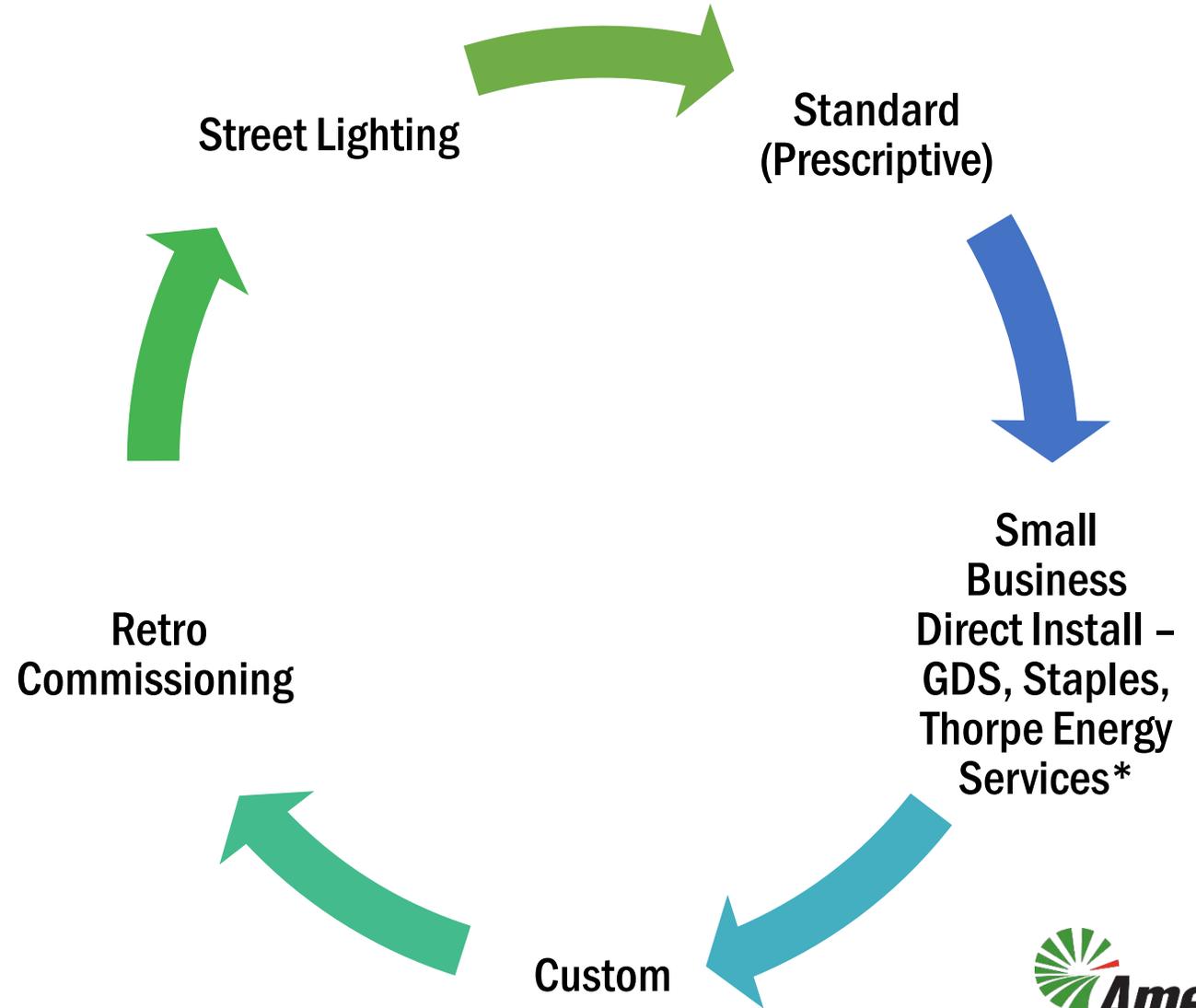
- The Large Group SAG presentation provided on February 25, 2019, outlined the statutory framework, approved approach, process implemented by the independent evaluator and bid results. This presentation can be found on the SAG website
- The unevaluated cost and savings for the retail products program in 2018 was approximately \$9.7 million and 103,000 MWhs, respectively; with a first year cost of 9.4 cents/kwh
- The results of the RFP and implementation cost for 2019 for the retail products program utilized a budget of \$9.1 million for a forecasted savings of 74,700 MWhs, or a first year cost of approximately 12.2 cents/kwh
- The general program design, implementer and target market as proposed by the 3rd party program approved by the Commission, and presented to the SAG, did not change substantially from the program implemented in 2018



BUSINESS PROGRAM



Business Initiatives



** Denotes Diverse Vendor*

Business Overview

Provides incentives and services to non-residential customers to achieve energy savings

Core initiatives - Standard (including small business direct install), Custom, Retro-Commissioning (RCx) and Street Lighting

Other aspects include:

- **Education and training for customers and market professionals**
- **Energy efficiency marketing**
- **Enhanced focus on reaching underserved markets**
- **Advancement of energy efficiency systems above building code/standard industry practices**

Approximately 160,000 business customers spanning the 43,000 square mile Ameren Illinois service territory



Business Customer Recruiting

New customer recruiting activities in 2018 included:

- Public sector participation (formerly DCEO managed) >1,500 projects
- Small Business Direct Install (formerly IPA) >2,500 projects
- Weaving Market Development Initiatives into the program
- Enhanced focus on customers over 400 kW demand (DS-3B)
- Street Lighting



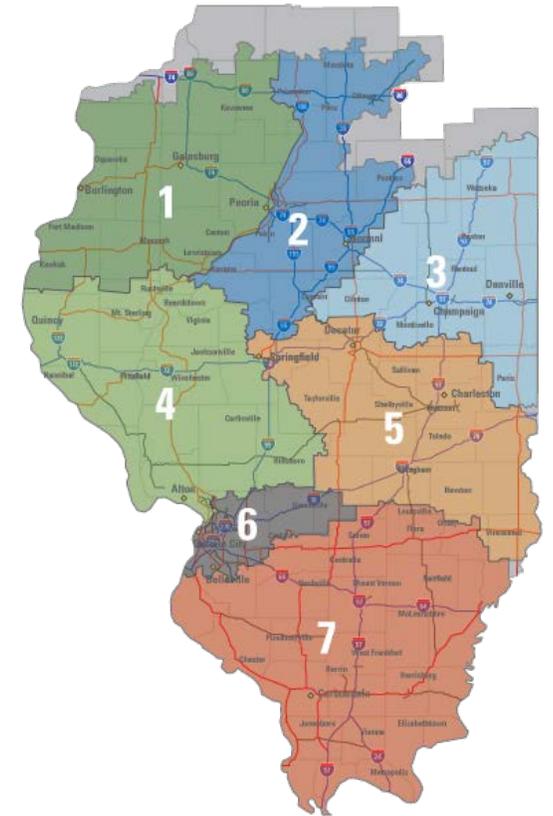
Business Customer Recruiting

Continue to use hybrid “account management” as method for technical interface with C&I customers for Standard and Custom Initiatives

- Leidos jointly partners with Ameren Illinois Key Account Executives to reach commercial and industrial accounts
- Leidos Energy Advisors are assigned in seven geographic territories with specific goals
- Ten Ameren Illinois Key Account Executives (>600 key customers and >8,300 accounts)

Main Objectives:

- Develop a strategic relationship with customers in Top 100 (excludes largest 55), Top 500, Top 1,000, and Public Sector
- Gain a comprehensive understanding of customer’s business activities, financial health and strategic direction
- Develop and maintain a pipeline of energy savings projects with focus on measures that deliver long-term savings
- Ameren Illinois has 358 customers between 1 -10 MW (account managed)



Business Standard & Custom Initiatives Account Management

Leidos Energy Advisors have established relationships with thousands of C&I customers over the last 10 years

- 7 Energy Advisors focused on larger customers and 7 dedicated to small business customers and Program Allies focused on small facilities
 - For the SBDI offer, the Program Allies form a close partnership with the Small Business Energy Advisors
 - Advisors provide Program Allies with technical assistance, recruitment, training and general project support
- Creating long term partnerships, such as Strategic Energy Management (SEM) with larger customers
- Recruit and partner with Program Allies and contractors who offer HVAC, lighting, food service and other product distribution or vendors
- Leidos Staff (additional)
 - Program Ally Support, Recruitment and Training (2)
 - Market Segmentation and Analysis (3)
 - Industrial Account Manager Technical Assistance (1)
 - Public Sector Account Manager (1)



Business Standard & Custom Initiatives Program Allies

Critical component – “boots on the ground” for the program

- **526 active business Allies**
- **98 active SBDI Allies**
- **92 active Instant Incentives Allies**

Many Program Allies are design/contractor firms that help develop/influence new construction projects

Ameren Illinois is focused on creating a robust and transformative energy efficiency market allowing Program Allies to assist customers and grow their business



Business Market Development Activities

Engaged with facility employees to provide energy savings tips for their home and energy saving kits (e.g. light bulbs, power strips, and aerators).

- Cross-promotion with residential
- Little or no incremental cost
- In cooperation with the SEM offering – fostering a culture of energy savings that goes beyond business and into the home

Approximately 40% of SBDI projects in economically challenged areas

Introduction of SBDI offering while delivering Residential School Kits in economically challenged areas

Diverse and small business groups involved in annual Business Symposium



Business Market Development Example

Illinois Black Chamber of Commerce



ENERGY EFFICIENCY COMMUNITY PARTNERSHIPS

Across its territory, Ameren Illinois is partnering with community-based organizations to engage customers in energy efficiency. These trusted and established organizations help bridge the gap between underserved customers and incentives available to them.

Community organizations are in a prime position to identify prospects for the Ameren Illinois Energy Efficiency Program. For example, the **Illinois Black Chamber of Commerce** helped connect Community Storage with the Ameren Illinois Small Business Direct Install Initiative. As a result, the storage rental facility received cash incentives covering roughly

87 percent of the cost to upgrade to state-of-the-art LED lighting. The new lighting will save the East St. Louis business more than **\$5,000** every year.

To further boost local economies, these community partnerships promise to enhance **supplier diversity**. In the case of Community Storage, the lighting assessment and installation work was completed by Jarvis Electric — **one minority-owned business serving another**.

"We believe it makes good sense for businesses to take advantage of energy savings... We are also excited about partnering with Ameren Illinois in our common goal of increasing access to procurement."

— Larry Ivory,
IL Black Chamber of
Commerce, President & CEO



Enlists the help of community-based organizations to raise energy efficiency awareness in underserved communities



Connects small businesses to Ameren Illinois incentives, while building supplier diversity



Illinois Black Chamber referral leads to **\$5,064** in annual energy savings for Community Storage

CONTACT

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Walker-Miller Energy Services
dominick@wmeenergy.com
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Business Marketing Delivery Channels

Marketing Tactic	Standard	Small Business	Custom	RCx	Streetlighting
Advertisements	X	X	X		X
Bill Inserts	X	X	X		
Digital Media	X	X	X		
Direct Mail	X	X	X		X
Education and Training	X	X	X	X	X
Email Communications	X	X	X		X
Outreach and Events	X	X	X	X	X
Print Materials	X	X	X	X	X
Program Ally Engagement	X	X	X	X	X
Sponsorships	X	X	X	X	
Website	X	X	X	X	X

Business Marketing Delivery Examples

The 2018 Ameren Illinois
Business Symposium
OCT. 24 | SPRINGFIELD

ENERGY SAVINGS MADE EASY

A banner with a colorful city skyline on the left and text on the right. The text includes 'The 2018 Ameren Illinois Business Symposium' and 'OCT. 24 | SPRINGFIELD'. Below the skyline is the slogan 'ENERGY SAVINGS MADE EASY'.

EARLY COMPLETION BONUS

Get up to a **15% BONUS** for energy efficiency projects completed in 2018!

Visit AmerenIllinoisSavings.com/Bonus
or call 1.866.800.0747

An advertisement featuring a cartoon bird wearing sunglasses and holding a green cup with a dollar sign and a lime wedge. The text reads 'EARLY COMPLETION BONUS' and 'Get up to a 15% BONUS for energy efficiency projects completed in 2018!'. At the bottom, it provides a website and phone number, along with the Ameren Illinois logo.

Instant
INCENTIVES
from
Ameren Illinois

The simple way for business customers* to save up to 80% on energy-efficient lighting.

Learn more at
AmerenIllinoisSavings.com/Discounts
or call 1.866.800.0747

A vertical advertisement with a green background. At the top, it says 'Instant INCENTIVES from Ameren Illinois'. Below that, it says 'The simple way for business customers* to save up to 80% on energy-efficient lighting.' In the center, there is an illustration of a hand holding a light bulb. At the bottom, it says 'Learn more at AmerenIllinoisSavings.com/Discounts or call 1.866.800.0747' and includes the Ameren Illinois logo.

THE AMEREN ILLINOIS ENERGY EFFICIENCY PROGRAM IS HANDING OUT CASH INCENTIVES!

Save thousands in energy costs with energy efficiency projects unique to your business.

Visit AmerenIllinoisSavings.com/Custom
or call 1.866.800.0747

A hand holding a stack of green cash bills.

50706

0119

SUMMER BREAK BONUS

Get a **15% CASH INCENTIVE BONUS** for energy efficiency projects completed while students are on summer break!

Visit AmerenIllinoisSavings.com/Break or call 1.866.800.0747

A calendar showing dates 01 through 12, with 06, 07, and 08 circled.

An advertisement featuring a calendar with dates 01 through 12. The dates 06, 07, and 08 are circled. The text reads 'SUMMER BREAK BONUS' and 'Get a 15% CASH INCENTIVE BONUS for energy efficiency projects completed while students are on summer break!'. At the bottom, it provides a website and phone number.

Business Standard & Custom Overarching Marketing Efforts

Annual Business Symposium

- Over 600 attendees
- Over 50 Program Ally exhibitors
- Keynote speaker and 9 educational sessions
- Customer 15% Bonus Coupon

Webpage

- 72,382 visitors

Training & Education

- Webinars
- Monthly Power Lunch
- Building Operator Certification
- Certified Energy Manager
- Case Studies
- Compressed Air Challenge

Partnerships, collaboration, cross-promotion

Energy Innovators Awards

- Technology, Community Benefit, Savings

Top 1,000 Customers

Outreach

- Associations
- Chambers of Commerce
- Conferences
- Lunch & Learns
- Public Sector
- Trade Shows
- Customer Facility Events
- Corporate Events



Business Standard Initiative

Incentivizes customers to purchase energy efficient products

Program Allies (including contractors, retailers, and distributors) are the main sales force promoting and educating consumers

Midstream offerings provide simple access to incentives for business customers

Small facilities receive unique services and higher incentives through a network of Program Allies experienced and trained to assist facilities

- **Includes non-profits, schools, and local government facilities**
- **Electric DS-2 and the gas GDS-2 delivery service rates**



Business Standard Initiative Small Business Direct Install Process

1

Customers receive a no-cost, no-obligation site visit from a registered Small Business Program Ally

2

The Program Ally proposes upgrades via an assessment report which includes Ameren Illinois incentives, savings calculations, potential payback, and any customer co-pays

3

Once agreed upon, the project is sent to the SBDI staff for pre-approval (24 - 48 hour turnaround), and installation is arranged and completed by the Program Ally

4

The Program Ally collects any agreed upon co-pay from the customer and receives incentives from SBDI



Business Standard Initiative Marketing Efforts

Ads

- Illinois Auto Dealers News - March, June, September
- Illinois Manufacturing Association - May
- Illinois Municipal League - April, June, July
- Illinois Society of Professional Engineers - June
- Peoria Inter Business Issues – January, June, November, December

Bill Inserts – June, July, October

Bill Messaging - January, July, December

Case Studies and Collateral

Digital Media

Direct Mail – June, July October

Education & Training

Email Communications – June, July, August, October

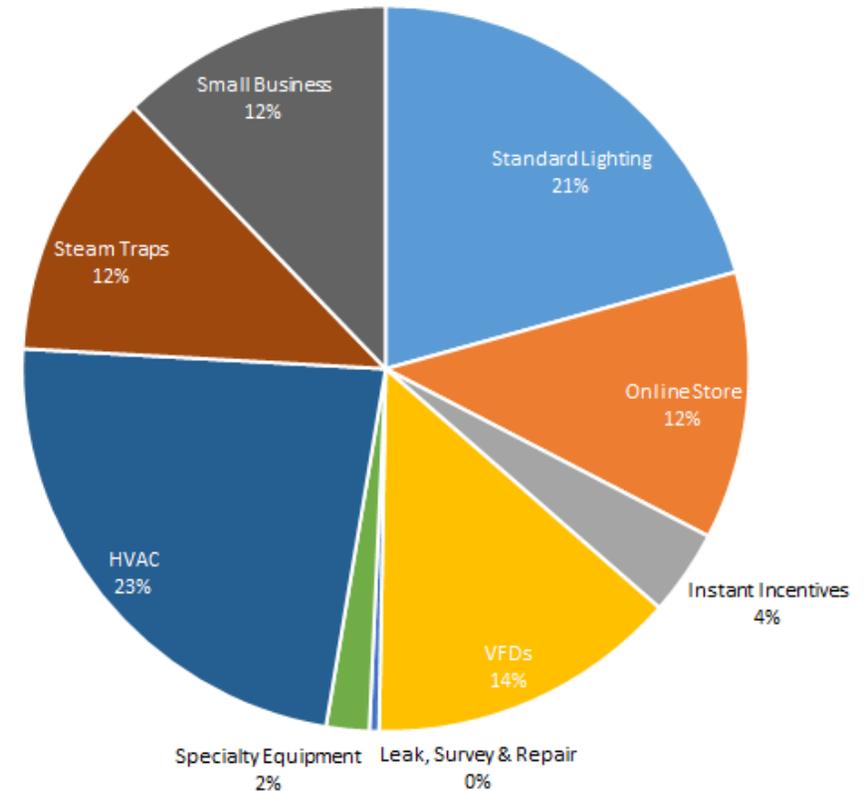
Webinars – January, November

Webpage Visitors

Online store

- Utilization of promo codes
- Special promotions (Memorial Day, Labor Day, Black Friday)
- Free shipping on all orders

Business Standard Webpage Views



Business Standard Small Business Initiative Marketing Efforts

Ads

- Illinois Municipal League – October

Bill Inserts – March

Bill Messaging – February, March

Digital Media* – Facebook, Yahoo, LinkedIn

Direct Mail* – October

Emails – Monthly

Program Ally Support

Webinar – June

- Webpage - 17,172 visitors

* Denotes greatest impact

SMALL FACILITIES ACROSS ILLINOIS ARE SAVING WITH OUR OFFERING!

As a small business owner or facility manager, your time is valuable. That's why we are providing a quick and simple way to reduce your energy costs for years to come.

WHAT'S THE CATCH?

There is absolutely no catch. Ameren Illinois wants to help you and your business lower operating costs, improve indoor air quality, improve appearance and increase employee productivity.

ELIGIBLE UPGRADES AVAILABLE

- > Lighting
- > Heating and cooling systems
- > Water heating
- > Refrigeration
- > Food Service (kitchen demand control ventilation)
- > Compressed air
- > Steam traps
- > Beverage and snack machine controls



2018 Changes to Business Standard Initiative

SBDI initial launch offered some electric incentives that were higher than plan levels which generated strong and early engagement by Program Allies

- Successful in filling the pipeline
- Further adjustments to electric incentives were made in response to market feedback

Installation incentive expanded to non-profit customers for installation of products available through the Ameren Illinois midstream channels (Instant Incentives and Online Store)

Added to midstream channel:

- Notched v-belts
- Type B TLED lamps
- Mogul-based LED lamps



2018 Changes to Business Standard Initiative

After efforts to increase participation, AIC implemented a shift of electric funds from the Business Custom, Retro-Commissioning, and Street Lighting Initiatives to the Business Standard Initiative in response to market conditions

Ally bonus was increased throughout the program year for all electric savings projects in order to motivate allies to add to the pipeline and complete projects in 2018

A Public Sector commercial kitchen offer had widespread acceptance in Q4, generating both therm and kWh savings

Activity for T12 lighting replacements was higher than originally planned and replacement of this old technology is beneficial for customers but creates uncertainty to future levels of expired savings



2018 Changes to Business Standard Initiative

The Standard HVAC/Water Heaters incentive was increased on several gas measures to increase Public Sector gas participation

Marketing Adjustments

- More focus on longer life measures
- Public sector emphasis



Business Standard Initiative Successes

To address slow market activity and increase Program Ally engagement a 25% Ally bonus for Business electric created a positive response and drove energy savings at a higher rate

The commercial kitchen offer for Public Sector – helped many school districts across the territory

- 76 schools
- 60 of the schools had 100% free/reduced lunch (78% in low income areas)

Higher incentives increased number of larger projects and Business Standard energy savings represented about 80% of the Business program total kWhs

The steam trap incentive generated high therm savings



Business Standard Initiative Successes

AIC hosted a Business Symposium on October 24, 2018 that created interest from attending schools, municipalities and larger DS-2 accounts which are all hard to influence customers

Direct mail postcard sent to 85,000 DS-2 customers in targeted areas resulting in a 22% increase in Small Business Direct Install projects in the following months

Numerous business partnerships and collaboration with regional Industrial Assessment Centers (IACs) and various state and professional organizations such as SEDAC

Various marketing and outreach efforts to better serve non-residential customers in lower income areas, including cross promotion between Residential and Business events

SBDI - hired a diverse subcontractor for completing a significant portion of the outreach activities – approximately 40% of completed SBDI projects in low-income areas



Business Standard Initiative Challenges

Certified Installer requirements

- **Operational challenges**
- **Program Ally frustrations**
- **AIC held meetings for approximately 400 Program Allies to assist them with the application process**

Obtaining Public Sector natural gas savings

Small business and public sector customers have little tolerance for co-pays

- **State, local, and school district budget issues**

Trying to gain participation in longer life measures for persistent savings



Business Standard Initiative Measures

Higher Than Plan

- LED lighting especially small business (Interior fixtures, exterior fixtures, Linear Tubular LED (TLED))
- Anti-sweat heater controls
- Permanent fixture removal (de-lamping)
- Process VFDs

Lower Than Plan

- New highbay fluorescent lighting (customers adopting LEDs)
- Omni-directional LED lighting (midstream and small business)
- High efficiency battery chargers
- Fixture-mounted occupancy sensors
- T5 LED midstream

Business Custom Initiative

Markets include manufacturing, healthcare, agriculture, hospitality, data centers, light commercial

Typical technologies include:

- Compressed air
- Lighting
- HVAC
- Refrigeration
- Motors/drives
- Waste/water treatment
- Industrial and manufacturing process improvement
- Complex and large scale new construction and building renovation project



Services such as New Construction, Staffing Grant, Metering & Monitoring, Strategic Energy Management (SEM), Building Operator Certification, and Feasibility Study

Recruit participation via Program Allies, Energy Advisors, Key Account Executives, enhanced incentives as well as marketing and outreach efforts

Business Custom Initiative Process

1

Customers engage with program through Energy Advisor or ally, and identify an energy savings project that does not meet any prescriptive measures

2

Program works with the customer to collect data needed to show energy savings

3

A 'custom' application is submitted, and pre-approval letter is sent to the customer, work may begin

4

Upon project installation, an inspection may occur, and a final set of 'after' data is collected to verify the actual energy savings. Once verified, the incentive check is sent to the customer

5

Development and execution of a custom project can take from a few months to several years

Business Custom Initiative Account Management

Engaged with C&I customers for long term project development

Strategic Energy Management (SEM) cohorts have been developed over the past several years and have resulted in multiyear energy efficiency projects

- 5 cohorts, 36 customers to date
- Manufacturing & Industrial Focus
- Expanded to Healthcare, Schools, and Municipalities
- Include energy saving goals and other financial and non-financial goals developed within the strategic management of the customer's facilities

Staffing Grants and Metering & Monitoring incentives provided to key customers to develop multi-year partnerships

The Energy Advisors develop these long-term partnership relationships with the Top 1,000 customers



Business Custom Initiative Marketing Efforts

Direct Mail (Letter/Flyer) – April

Education & Training

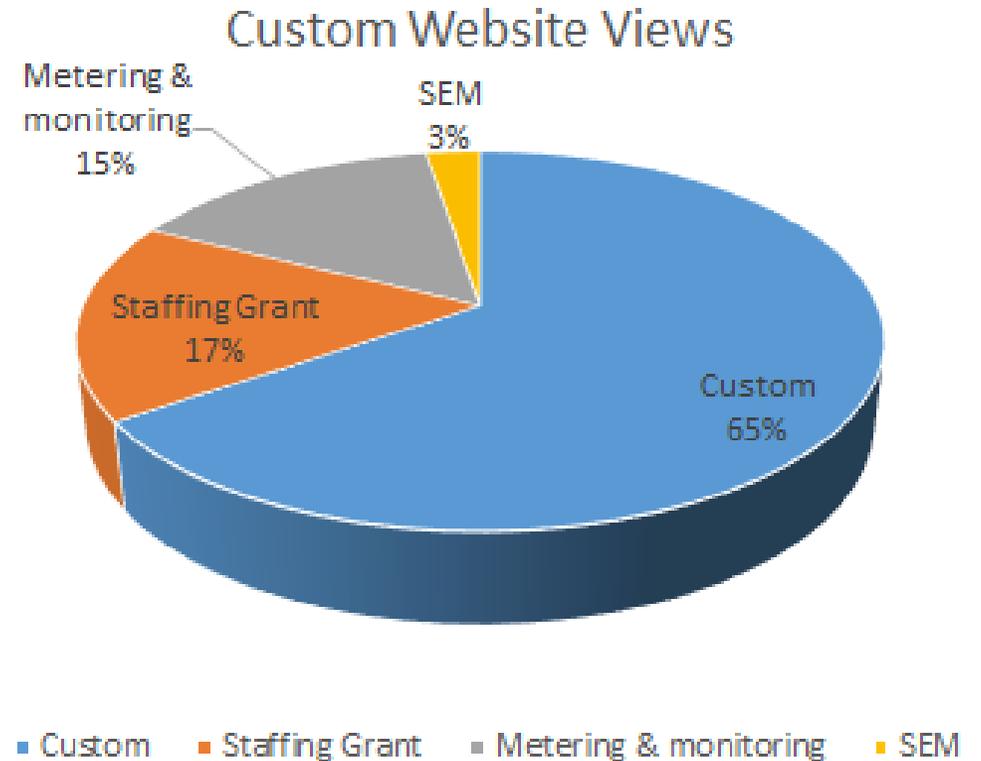
Emails – January, April, June

Outreach

- Energy Advisors
- Marketing Outreach Team
- Program Allies

Website Views

- Custom Landing Page – 3,009 views
- Staffing Grant – 779 views
- Metering & Monitoring – 695 views
- SEM – 119 views



2018 Changes to Business Custom Initiative

Custom electric incentives were increased from \$0.08/kWh to \$0.10/kWh in Q1 and then from \$0.10/kWh to \$0.12/kWh in Q3

- Double incentive rate of PY9

Raised cap on Custom application to cover a larger portion of project cost

Custom Wastewater Treatment Plant (WWTP) incentives were increased from \$0.08/kWh to \$0.21/kWh

Increased incentives on New Construction Lighting by 20-40% (depending on improvement above code) and cap increased by 50% to \$150,000

Emphasis was placed on getting the program information to the decision maker at potential customer locations, including reaching out multiple levels within the customer facility (executives, facility managers, financial personnel, etc.)

Placed more emphasis on longer lived measures



2018 Changes to Business Custom Initiative

Energy Management System (EMS) offer released for public K-12 schools

The Public Sector Energy Assessment Application was released utilizing Smart Energy Design Assistance Center (SEDAC)

Increased incentives for Metering & Monitoring application to drive more participation to lead to future Custom projects

Feasibility Study incentives increased to generate a future pipeline of projects



Business Custom Initiative Successes

Energy Management System (EMS) Offer for public K-12 Schools successful in driving late Custom savings

Several Public Sector energy assessments were completed to maintain Custom projects in future years

SEM pilot cohorts of hospitals, community colleges, and schools finished first year of participation which should lead to future savings in these customers from non-industrial sectors

Gas Rate Code GDS-3 (mid-size customers) produced more gas savings than any other year, second most savings ever from GDS-2 (small customers)

Electric Rate Code DS-3 (mid-size customers) produced more electric savings than any other year



Business Custom Initiative Staffing Grant Successes

Staffing Grant released in April 2018 with more than 40 applications received

Worked with community groups and businesses in economically challenged communities to encourage applying for Staffing Grants, provided step by step assistance when needed

Incorporated prioritization of economically challenged communities, promotion of diversity within the workplace or community, and assistance of locally-owned businesses and organizations into scoring

staffUP HOW MUCH CAN YOU
SAVE *by* STAFFING UP?



Business Custom Initiative Challenges

Obtaining Public Sector natural gas savings

Continued challenge of project inflow despite higher incentives for all aspects of Custom Initiative

- Metering & Monitoring, Feasibility Studies, Custom \$/kWh, and New Construction Lighting all higher than any other year

Customers desire to not share production data to assist in SEM

Customer cost for energy continues to be historically low which drives up payback

Economic considerations may drive participation decisions and levels

Year end difficulty in completing around holiday and winter shutdowns



Business Custom Initiative Challenges

Program Ally confusion over who was still eligible for electric incentives amongst large customers

- **Occurred late in 2017/early 2018, which impacted Custom more than other initiatives**
- **Program Allies left the territory and focused on other areas of the U.S.**

Installer Certification

- **For example, some national accounts and compressed air Program Allies have still decided that certification is a hurdle in Illinois**
- **Not able to fund some projects that were actually installed**

Length of time to get customers engaged and develop projects

Smaller customers require more support in their approach to energy savings and projects



Business Custom Initiative Measures

Higher Than Plan

- Participation by DS-3B rate code customers

Lower Than Plan

- New Construction Lighting
- Metering & Monitoring
- Feasibility Study
- Participation by DS-2 and DS-4 rate code customers

Business Standard & Custom Initiatives New Approaches

Program added notched v-belts, type B TLED lamps, mogul-based LED lamps

Continuously looking to add additional measures, particularly HVAC equipment

Have focused on agricultural market segment since inception of the program – typically focused on efficient grain dryers (corn/soybean producers) and efficient livestock equipment (dairy/pork producers)

Ameren Illinois' Data Center Team continuously monitors latest trends in data center EE and looks for opportunities (fairly limited in Ameren Illinois service territory)

Incentives supporting New Construction projects are offered through Custom Initiative - activity in this segment is continuously evaluated for possible development into a stand alone New Construction Initiative



Business Retro Commissioning Initiative

Identifies no cost/low cost (zero- to one-year payback) energy efficiency measures

Optimize the operation of existing systems for:

- Compressed air
- Healthcare
- Commercial and public sector building facilities
- Industrial ventilation systems
- Industrial refrigeration
- Grocery stores
- Retro Lite, new in 2018, made available for smaller facilities

In Q3 and Q4, offered increased survey incentives for additional Compressed Air RCx projects that could complete prior to year end



Business Retro Commissioning Initiative Successes & Challenges

Successes

- Developing additional service providers for both Compressed Air and Large Facility Offerings to gather additional activity
- Provided several levels of training to service providers emphasizing:
 - Increased incentives
 - Stressing that RCx helps build long-term customers that lead to additional projects after RCx is completed

Challenges

- Finding qualified service providers for Large Facility and Industrial Refrigeration Offerings
- Public Sector participation
- Increased Custom and Standard incentives has customers and allies more interested in Custom and Standard Initiatives
- Getting to the right level of management to generate interest in RCx
- Measure lifetime for Compressed Air RCx



Business Retro Commissioning Initiative Measures

Higher Than Plan

- Compressed Air DS3-A participation
- Industrial Refrigeration

Lower Than Plan

- Compressed Air DS-4 participation
- Grocery Store
- Large Facility

Business Street Lighting Initiative

Municipal-Owned

- Incentivizes municipal customers to upgrade street light fixtures to LED technology
- Incentive levels were increased by 200% versus Plan

Ameren Illinois-Owned

- Incentivized to encourage replacement prior to burn out with a per fixture incentive provided to the customer
- Redesigned to move from an incentive per fixture approach to a small copay with work subcontracted out

Successes

Municipal-Owned Street Lights

- A total of 16 applications received for PY2018 and 11 projects completed
- Illinois Department of Transportation submitted two PY2019 applications for street lighting in the Standard Business Initiative.

Ameren Illinois-Owned Street Lights

- AIC continued to work to identify a diverse contractor, low income communities and necessary enhanced incentives to upgrade Ameren-Owned lights.
- Pilot completed using the newly on-boarded diverse contractor, 536 LED street lights installed

Challenges

- Limited municipality budgets and return on investment due to low operational cost
- Customers understanding ownership



MARKET DEVELOPMENT INITIATIVE



Market Development Initiative Overview

In 2017 Ameren Illinois Company worked hard to develop an energy efficiency plan that the Commission approved

That plan dedicated *\$2.9M for market development, diversity and economic empowerment* for communities in the AIC service territory

The AIC Energy Efficiency Plan was designed with the Market Develop Initiative and has three primary goals:

- Increase energy efficiency participation and engagement by customers and communities who have not traditionally participated
- Increase the number of local, diverse candidates filling untapped energy efficiency jobs
- Expand or launch new local and diverse energy efficiency businesses



MDI - Diverse & Local Business Enterprise Training & Support

In 2018, Ameren Illinois undertook efforts to support, train and expand local and diverse business enterprises in the AIC service territory

These efforts primarily included staffing grants and other supportive funding. It also included costs associated with providing business owners with energy audit equipment and pre-payment for weatherization material being installed for AIC energy efficiency projects

These efforts allowed these businesses to increase the number of AIC customers they could serve within the residential program

Diverse and Local Business Enterprise Training and Support

- Green Titan Investment
- Green Home Investment
- John's Mechanical Investment
- Total Investment \$98,640.38



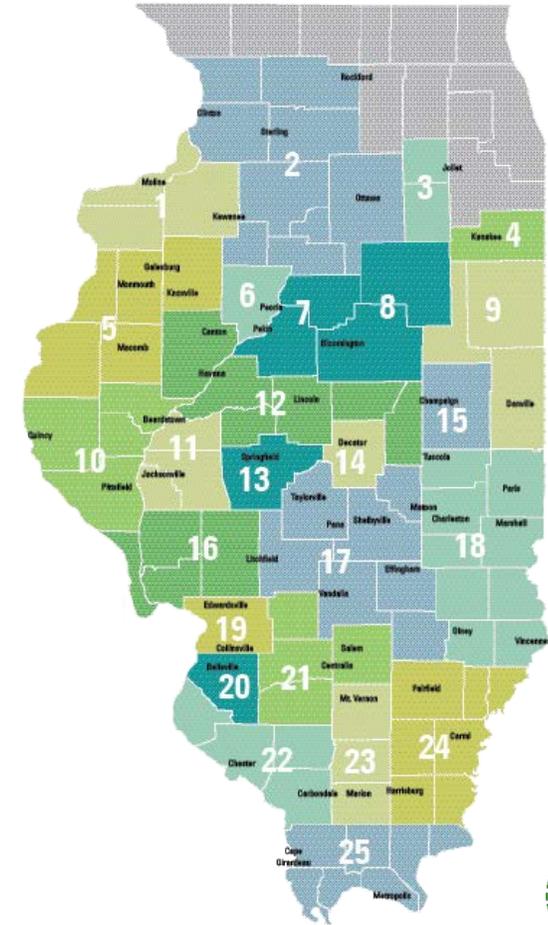
MDI - CAAs & CBOs

Ameren Illinois partnered with Community Action Agencies and other Community Based Organizations in central and southern Illinois to build their capacity to deliver energy efficiency services, as well as outreach and education for the communities they serve

These partnerships ranged from assisting the agencies with staffing grants to growing their energy efficiency workforce to provide more targeted resources for outreach that would produce leads to the Ameren Illinois Energy Efficiency Programs

These partnerships were launched to advance efforts to reach unserved and underserved communities through energy efficiency education and measures

COMMUNITY ACTION AGENCY TERRITORY MAP



MDI - CAAs & CBOs

Community Based Organizations

- Champaign County Regional Planning Commission
- Springfield Urban League
- CEFS Economic Opportunity Corporation
- Wabash Area Development, Inc.
- Embarras River Basin Agency, Inc.
- Sangamon County Department of Community Resources
- Illinois Black Chamber of Commerce
- Peoria Citizens Committee for Economic Opportunity
- Illinois Valley Economic Development Corporation
- BCMW Community Services
- Senior Services Plus
- SouthTown Construction
- Total Investment: \$990,890



MDI – Internships & Scholarships

Ameren Illinois developed internships and scholarships to build a pipeline of local and diverse job candidates that are knowledgeable of, and interested in, energy efficiency careers

In 2018, Ameren Illinois funded internship positions with small businesses, non-profits, CBOs and other organizations in Illinois to offer real-world experience in the energy efficiency industry to a diverse group of student interns

Ameren Illinois invested in interns for host organizations and provided regular, in-depth training about the energy efficiency industry

Ameren Illinois also funded 18 scholarships at 6 schools (3 per school). Each scholarship recipient received \$6,000 for the 2018 school year (\$3,000 per semester) to cover tuition and other needs such as textbooks

Scholarship recipients were diverse candidates studying either HVAC or Construction Management

Diversity of candidates is defined broadly to allow inclusion of several groups; for example, women, people of color, those who are the first in their family to attend college, and non-traditional students



MDI – Internships & Scholarships

Internship Partners

- Meyer Climate Control
- Parker Heating and Cooling
- Wabash Area Development, Inc.
- University of Illinois at Champaign-Urbana
- Neighborhood House (2)
- Champaign County Regional Planning Commission
- Resource Innovations
- Future Energy Enterprises
- CLEAResult
- Sangamon County
- NAACP (2)
- Total Investment: \$106,834



**ENERGY EFFICIENCY
INTERNSHIPS**

Connecting the future workforce with opportunities in the energy efficiency industry.

Ameren Illinois is helping local companies and organizations in the energy efficiency field identify potential candidates that would benefit from participating in a summer internship program. Through these connections, interns will be able to learn about employment opportunities in energy efficiency, receive mentorship from professionals in the industry, and learn skills relevant to obtaining a full-time position in energy efficiency.

Key points of this program

- » The program anticipates providing internships to 10–15 candidates
- » Internships are offered for 10–12 weeks, during May through August
- » Selected interns will work full-time during the internship period, and no less than 30 hours per week
- » Internships are paid positions, commensurate with experience and the responsibilities of the position
- » Internships are being offered throughout central and southern Illinois, specifically within the Ameren Illinois service territory

Internships will be granted, as available, to candidates who demonstrate a strong work ethic, commitment to the position and a willingness to learn about working in the energy efficiency field.

Learn more at:

AmerenIllinoisSavings.com/Internships

or call 1.844.494.1225



Who is eligible for an internship through this program?

We are seeking high school upperclassmen or college undergraduate students to participate in this program. Interested candidates must be eligible to work in the United States, complete a job application, and commit to actively participate in the internship program as required for the position's entire duration.



MDI – Internships & Scholarships

Scholarship Schools

- John A. Logan College
- Southwestern Illinois College
- Heartland Community College
- Illinois Central College
- Richland College
- Kaskaskia College
- Total Investment \$108,000



AMEREN ILLINOIS OPPORTUNITIES SCHOLARSHIP PROGRAM

As part of Ameren Illinois' mission to bring diverse candidates into the energy efficiency industry, Ameren Illinois created the Opportunities Scholarship to help train the next generation of Construction Management and HVAC professionals.

The program provides a total of **36 scholarships** per school year at six community colleges in Illinois. Scholarship winners receive a \$3,000 stipend to defray the costs of their training.

Looking beyond a student's GPA, Ameren Illinois works closely with school instructors to identify promising diverse candidates based on attitude, performance, and work ethic — students like Bryan Payton.

After his mother's death when he was just 11 years old, Payton navigated life's challenges — and Chicago's south side — with the help of meaningful mentorships. Eventually, he found a home at Heartland Community College and a **passion for HVAC work**. He plans to pay it forward via a youth advocate program.

"I found a love for HVAC. There is joy in what I do, and nothing can stop me. This is the start of my legacy."

— Bryan Payton,
HVAC Student,
Ameren Illinois Scholar

To date, the Ameren Illinois Opportunities Scholarship program has provided **over \$100,000** to support the promises of the future energy efficiency workforce in central and southern Illinois.



\$100,000+

in scholarship dollars awarded



Aims to bring diverse candidates into the energy efficiency industry



Changes the lives of **36** promising students every year

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Rev. 03 /19



MDI – Energy Efficiency Education & Services

Costs covered in this category included costs that were incurred for the delivery of energy efficiency education and outreach to multiple customer segments like seniors and LIHEAP customers at Community Action Agencies

Examples include, but are not limited to, energy saving kits, marketing pieces, office equipment and supplies for community organizations, charges associated with venue rental for education and outreach, and training meetings with community based organizations

➤ Investment \$441,916.96



MDI – Project Management & Oversight

In order to develop and support efforts related to the market development initiative Ameren Illinois engaged two diverse companies with significant experience in the energy efficiency industry

These companies, Walker Miller Energy Services and Resource Innovations provided services ranging from program design research and support to day-to-day management of CBO programs

➤ Total Investment: \$507,220



MDI – Smart Savers Pilot

This pilot offered smart thermostats without a co-pay to eligible Ameren Illinois customers in qualifying zip codes

Target zip codes were chosen based on high concentrations of income qualified customers in areas of Peoria, Champaign, Decatur, and East St. Louis

In addition to distributing 5,500 smart thermostats, the pilot also did a small smart speaker pilot with connected lighting for smart thermostat recipients

Customers were able to choose self-install or to have the device installed by a Registered Program Ally

This pilot sought to engage local and diverse vendors in these communities to perform the installs

➤ Total Investment \$959,681



**AMEREN ILLINOIS
SMART SAVERS PILOT**

Too often, those who would most benefit from lower energy bills are least able to afford energy-efficient upgrades.

Launched in 2018, Smart Savers brings the latest smart thermostat technology directly to low- and moderate-income customers — at no cost. Approximately **5,400** income-eligible customers in the pilot communities of Champaign, Decatur, East St. Louis and Peoria were given a Nest E or ecobee3 lite thermostat. Collectively, their new smart thermostats are expected to save an estimated 2.5 million kWh and 270,000 therms every year. This is equivalent to approximately **\$250,000** in electric savings and **over \$270,000** in gas savings annually.

To further boost local economies, the pilot program relied extensively on **local or diverse**-owned suppliers to help identify program participants and install thermostats. This commitment made a huge impact for small businesses like Jodeci Mack, who completed \$50,000 in installation work in Illinois' Metro East area in a five-month period.

“One of my goals has been to ensure that all utility customers, regardless of income, have an opportunity to receive real and meaningful savings from the energy efficiency programs they have been paying for.”

— Richard Mark,
Ameren Illinois
Chairman & President

Thanks in part to Smart Savers, the Ameren Illinois Energy Efficiency Program **doubled** the number of diverse vendors it worked with in 2018 and increased its diverse spend by seven-fold.

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5,400 smart thermostats provided free of charge to low- and moderate-income customers

Boosted energy efficiency engagement and supplier diversity in underserved areas

Customer annual energy savings: 2.5 million kWh & 270,000 therms. Roughly equivalent to the annual energy usage of 380 homes.

Rev. 03 /19

MDI – Participation Metrics By Category

Metric	Number of Participants	Number of Customers Served or Leads Produced
Number of diverse vendors	3	183 customer projects
Number of Smart Savers local vendors	7	2,286 thermostats installed by these vendors
Number of Smart Savers diverse vendors	3	650 thermostats installed by these vendors
Number of Street Lighting diverse vendors	1	536 LED street lights installed
Number of interns	13	N/A
Number of scholarships offered	18	N/A
Number of CBO projects launched	12	2,062 participants and 1,373 program leads*

* As of December 31, 2018



MDI – Market Development Action Plan

In 2018, Ameren Illinois implemented an action plan designed to help meet the objectives of the 2018-2021 Market Development Initiative as approved by the Illinois Commerce Commission

This Market Development Action Plan (MDAP) contains both diagnostic and action-oriented attributes that will allow our team to better understand the communities that comprise the Ameren Illinois service territory, as well as the markets therein

It is designed with a goal to provide opportunities to increase the gender, low-income, racial, ethnic, disability, and veteran profile, among others, of the supplier workforce and of Ameren Illinois' eligible customers participating in the Ameren Illinois Energy Efficiency Programs

In 2018, Ameren Illinois used the MDAP to weave the concepts of the Market Development Initiative into the fabric of the delivery of its energy efficiency programs

As a result, AIC has taken great strides in just one short year

To start, the company has expanded its diverse vendor involvement and spend, supporting diverse spend for program delivery of more than \$8.5 million which is nearly a seven-fold increase to expenditures in 2017

Additionally, in total, sixty MDAP efforts were in process or complete at the end of PY2018, with fourteen MDAP initiatives successfully integrated and complete within portfolio operations for PY2018



MDI – Market Development Action Plan

Year over year growth of minority and woman-owned business enterprises (MWBE) that are identified Program Allies to the program:

MWBE Allies	12/31/18	12/31/17	Difference	%Difference
Residential	68	23	45	195.7%
Business	303	239	64	26.8%
Subtotal	371	262	109	41.6%

*Please note, the 'All Diverse Allies Row' is **not a total** of the other categories due to overlap of Allies; i.e. a Program Ally is minority-owned and woman-owned*



MDI – Market Development Action Plan

Baseline Projects and Incentives – Diverse (self-identified) Program Allies

	Projects	Incentives	Business Incentives	Residential Incentives
Minority-owned	75 (0.5%)	\$413,522 (0.8%)	\$403,062 (1.4%)	\$10,460 (0.1%)
Woman-owned	260 (1.8%)	\$732,256 (1.5%)	\$689,336 (2.4%)	\$42,920 (0.2%)
Veteran-owned	284 (2.0%)	1,613,285 (3.2%)	\$1,575,355 (5.5%)	\$37,930 (0.2%)
All Diverse Allies	564 (3.9%)	\$2,509,565 (5.0%)	\$2,433,415 (8.5%)	\$76,150 (0.4%)

Program Year 2018 Projects and Incentives – Diverse (self-identified) Program Allies

	Projects	Incentives	Business Incentives	Residential Incentives
Minority-owned	500 (3.36%)	\$2,240,000 (4.4%)	\$2,170,000 (7.3%)	\$70,000 (0.3%)
Woman-owned	473 (3.19%)	\$2,321,000 (4.5%)	\$2,127,000 (7.2%)	\$194,000 (0.9%)
Veteran-owned	762 (5.0%)	\$2,285,000 (4.5%)	\$2,164,000 (7.3%)	\$121,000 (0.6%)
All Diverse Allies	1,572 (10.3%)	\$6,640,000 (12.9%)	\$6,353,000 (21.5%)	\$288,000 (1.3%)



Please note, the 'All Diverse Allies Row' is **not a total** of the other categories due to overlap of Allies; i.e. a Program Ally is minority-owned and woman-owned

APPENDIX





AmerenIllinoisSavings.com



**ENERGY EFFICIENCY
PROGRAMS**

— 2018 —
**CASE
STUDIES**

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R E S I D E N T I A L P R O G R A M



SCHOOL EDUCATION PROGRAM

Education empowers people of all ages to make informed decisions about their energy use — and early education has the power to create helpful habits that can last a lifetime.

Targeting fifth through eighth grade students, Ameren Illinois' School Education Program provides energy efficiency curriculum and training to teachers, along with take-home kits for students. The program highlights how seemingly small actions and low-cost measures can reduce electricity, natural gas, and water use in the home.

“Our School Education Program positions young people as ambassadors to bring energy efficiency into their homes and share it with their families.”

— Kristol Simms,
Director of Energy Efficiency &
Innovation, Ameren Illinois

To reach a broader group of students, Ameren Illinois changed its selection criteria before the new school year began in August 2018. The new criteria required that 50% of schools served by the program qualify as low- to moderate-income (as determined by Illinois Report Card data). Of the **4,500 kits** distributed between August and December, 53% of middle school kits and 100% of elementary school kits went to these schools.

Ameren Illinois distributed a total of **9,048 kits** to grade school and middle school students across its 43,700 square-mile territory in 2018. By implementing new selection criteria, the School Education Program makes energy efficiency more accessible to underserved populations.



9,000+

Energy efficiency kits distributed to 5-8th grade students in 2018



Change in program criteria helps Ameren Illinois reach more low-income students



Between August and December 2018, low-income schools received **53% of middle school kits and 100% of elementary school kits**

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LEARN MORE

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CUSTOMER ASSISTANCE EVENTS

Even when winter's worst is behind us and summer has softened into fall, the effect of peak heating and cooling costs can linger. To help those struggling to keep up with their bills, Ameren Illinois partners with local community organizations to host customer assistance events every spring and fall.

Customer Service Representatives are on hand to help customers explore payment assistance programs. Eligible low-income customers receive a one-time bill assistance **grant of \$150**.

In 2018, Ameren Illinois hosted seven events that drew a total of **3,402 attendees**. Spring events were held in East St. Louis, Granite City, Danville, and Peoria. Fall events took place in West Frankfort, Macomb, and Decatur.

To help customers reduce future energy costs, in 2018 Ameren Illinois began providing a free energy-saving kit that included an advanced power strip, high-performance shower head, faucet aerator and LED light bulbs. Ameren Illinois representatives offered demonstrations of how to use items in the kits.

Customers were able to fill out a survey and provide feedback on the event. Those who participated received a miniature LED flashlight.

"We understand that these are challenging times for some of our customers. We are pleased to provide customers with immediate financial assistance at these events, as well as energy efficiency recommendations that will help them manage their energy usage and costs."

— Richard Mark,
CEO & President,
Ameren Illinois



3,400+

Customers received free energy efficiency kits in 2018



Customer assistance events provide bill payment grants and energy efficiency education



\$75 Value of energy efficiency kit containing power strip, LED light bulbs, a high-performance shower head and faucet aerators

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ENERGY STARS HEATING & COOLING — AN ALLY IN EFFICIENCY

Mike Boone and Jason Orsega have put decades of experience into Energy Stars Heating & Cooling Co. when they both co-founded the Granite City company in 2013. With a shared goal to help homeowners reduce their energy use, they joined forces with Ameren Illinois — and today, business is booming.

Program Allies — like Energy Stars Heating & Cooling Co. — help customers identify energy-saving improvements and incentives to help pay for the projects. Certified by the Building Performance Institute (BPI) as insulation/air sealing specialists and/or HVAC professionals, these independent contractors are specially trained on the Ameren Illinois program.

“We’ve actually built our processes around the Ameren Illinois Energy Efficiency Programs,” says Shanna Evans, Marketing Manager for Energy Stars Heating & Cooling Co. “We are trained on Ameren Illinois program requirements and have a good system in place to help customers apply for incentives — plus, we provide a quick turnaround on installations.”

“Together, we are making homes more comfortable and giving people more predictable energy bills.”

— Shanna Evans,
Energy Stars Heating & Cooling Co.
Marketing Manager

Helping Customers Who Need it Most

As a Program Ally, Energy Stars Heating & Cooling Co. helps low- and moderate-income families in the Metro East region outside St. Louis take advantage of Ameren Illinois’ Home Efficiency Offering. This offering provides incentives that can cover a substantial portion of the costs to make energy-saving improvements.

“Ameren Illinois created this offering to make energy efficiency affordable to those who need it most,” says Kristol Simms, Director – Energy Efficiency & Innovation. “Our Program Allies provide quality work that helps homeowners achieve greater comfort and significant monthly savings.”

Since Ameren Illinois launched the offering, Energy Stars Heating & Cooling Co. has added 18 new positions, from auditors to installers and office workers — with plans to add more.

“This is a great option for customers. It helps a lot of people with aging equipment make

Affordable Efficiency

The Ameren Illinois Home Efficiency Income Qualified Offering makes energy efficiency affordable to low- and moderate-income households with incomes up to 300 percent of federal guidelines. The Offering focuses on how homes work as a system and offers generous incentives to lower the cost of these upgrades:

- Air/Duct Sealing
- Insulation
- Heating & Cooling Systems
- Smart Thermostats
- High-Efficiency Lighting
- Faucet Aerators & Showerheads



Program Benefits

- Lower energy costs
- Incentives cover a significant portion of project costs
- Greater comfort in home
- Better indoor air quality
- Increased long-term value of home
- Reduced impact on environment
- Professional installation by specially trained contractors /Program Allies

Build Your Business with Ameren Illinois

Does your HVAC business have room to grow? When you become an Ameren Illinois Program Ally, you join an elite statewide network that customers can count on. Our Program Ally Network consists of independent contractors that are certified by the Building Performance Institute as insulation/air sealing specialists and/or HVAC professionals and are specially trained on Ameren Illinois programs. Become a Program Ally and watch your business grow!

their house more comfortable,” says Evans. “We get calls from a lot of single parents and seniors who can’t afford to spend thousands out-of-pocket on new heating and cooling equipment.”

Those customers can count on quality work, thanks to the highly trained workers at Energy Stars Heating & Cooling Co.

“We place high importance on training to ensure safe installations and good customer service,” says Evans.

In 2017, Energy Stars Heating & Cooling Co. took that training focus to new heights by building a fully functional training house.

The small, on-site replica allows trainees to practice common installations on equipment such as a furnace, air conditioner, water heater, circuit breaker, attic and wall insulation, and a smart thermostat. For new hires, many of whom are recent technical school graduates, the training house offers priceless experience to help them avoid costly mistakes at a customer’s home.

“The training house provides real hands-on experience that makes our technicians more confident in different situations,” says Evans. “We’re the only company in the Metro East area to have a training house like this — it’s pretty impressive.”

Where Science Meets Service

Energy Stars Heating & Cooling Co. takes a whole-house approach to achieve the greatest gains in efficiency. After all, a home’s comfort depends on how equipment like furnaces, air conditioners and ventilations work together. A problem with one system will affect the entire home’s efficiency and could even create a safety hazard.

Many homes have oversized heating and cooling equipment that costs hundreds or thousands of dollars more to operate. Before installing any equipment, Energy Stars Heating & Cooling Co. technicians perform a full load calculation that takes into account home size, air flow, insulation levels, and other factors. This focus on building science ensures that customers get right-sized equipment that delivers comfort at less cost.

Safety and efficiency go hand-in-hand at Energy Stars Heating & Cooling Co. During any home comfort project, technicians also test the home’s air quality to ensure safety.

That combination of science and service has made them one of the top HVAC companies in the Metro East area — and one of the most active Ameren Illinois Program Allies.

“Energy Stars Heating & Cooling Co. is a company that is making a difference,” says Simms. “We are proud to partner with them serving Metro East communities.”

LEARN MORE

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B U S I N E S S P R O G R A M



UTICA LIBRARY BEGINS NEW CHAPTER IN EFFICIENCY

Unlike the classic titles you'll find on the shelves of the Utica Public Library, its 1970s-era lighting has not stood the test of time.

The building was riddled with dark spots, patrons complained about low light, and staff struggled with eye strain. Simply keeping up with bulb and ballast replacement became a challenge.

"Poor lighting is a problem we've been battling for years," says Librarian Emily Schaub, whose desk was positioned directly under a four-bulb fluorescent fixture that would frequently flicker and fail. "We had to do something."

At the recommendation of Utica Fire Chief Ben Brown (also chief bulb replacer at the library), Schaub reached out to Ameren Illinois.

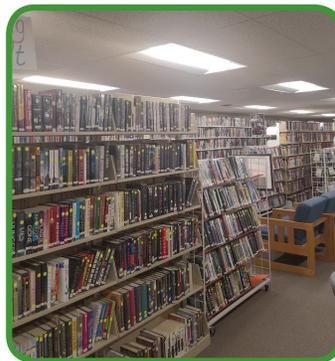
"Our Energy Efficiency Program provides information and incentives to help customers make changes that reduce their energy bills and preserve our energy resources," says Keith Martin, Director of Energy Efficiency Operations for Ameren Illinois. "Lighting is a great place for any facility to start saving."

The utility provided approximately \$8,500, which covered more than 90 percent of the library's cost to upgrade to 62 LED T12 fixtures. Ultimately, the library paid just under \$500 for upgrades worth nearly \$9,000.

The library chose Project Green Environmental Solutions, an Ameren Illinois Program Ally, to install the new lighting. In less than two months, the library was transformed into a far more welcoming place.

"We love our new lights. The entire library is much brighter, and we can all see a heck of a lot better," says Schaub. Today, one high-efficiency LED bulb has replaced the four-bulb fixture over her desk, making flickers a faint memory.

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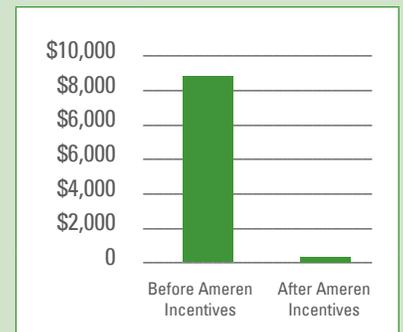
"Utica Public Library is a great example of how small changes can lead to big savings with energy efficiency projects."

— Keith Martin,
Director of Energy Efficiency

Benefits to Utica Library

- Approximately \$8,500 in incentives covered more than 90 percent of project costs
- Annual energy savings of more than 31,000 kWh
- Annual dollar savings of more than \$1,900
- Better quality of light
- 10-year guarantee on new LED lighting
- Improved patron and staff satisfaction
- Reduced impact on the environment

Project Cost Comparison



Brighten Your Business & Boost Your Bottom Line

Attachment A

Flip the Switch on Energy Waste

Lighting accounts for 20 to 50% of the average business' electricity consumption. On the bright side, that means you can enjoy significant savings — year after year — simply by making simple lighting improvements.

Ameren Illinois offers cash incentives for a variety of lighting projects, including:

- Replacing T12s with high-performance T8 or T5 lamps
- LED exit signs
- Interior LED lighting
- LED case lighting
- High-bay lighting replacements
- Exterior lighting for canopies and garages
- T8-to-T5 relamp and reballast
- Permanent lamp/fixture removal

The Lowdown on LEDs

ENERGY STAR®-qualified LED lighting uses at least 80% less energy than incandescent lighting, which cuts operating costs. And because it lasts 35 to 50 times longer than incandescent lighting — and up to five times longer than fluorescent lighting — you'll save on maintenance costs, too.



READY TO BEGIN?

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The LED lighting will reduce the library's annual energy use by more than 31,000 kilowatt-hours, while producing a better quality of light.

"The LED bulbs produce an amazing quality of light," says Schaub. "I was concerned at first, but they have a nice warmness to them."

Lasting up to five times longer than fluorescent lighting, the LED lights will reduce the library's impact on the environment (not to mention the Fire Chief.)

"We use a lot of energy —and a lot of trees have to die to make a library possible — so we want to try to be as green as possible," says Schaub. "The new lights help with that."

Another feel-good factor is the 10-year guarantee that came with the new lights.

"The price is right, the product is amazing, and the work was done quickly," says Schaub, who commends the tidy (and quiet) team at Project Green Environmental Solutions.

By switching from fluorescent to LED lighting, Utica Public Library will save nearly \$1,900 per year — money better spent on books.

Even as the library gears up for a major expansion, it will continue to reduce its carbon footprint with help from Ameren Illinois.

"Utica Public Library is a great example of how small changes can lead to big savings with energy efficiency projects," says Martin. "An action as simple as switching to LEDs can potentially save thousands of dollars per year."

There's no need to keep quiet about this library's success story. Schaub readily recommends the Ameren Illinois Energy Efficiency Program to any organization looking to ease its impact on the budget and the environment.

As Schaub says: "Ameren Illinois made this a really easy choice. I didn't have to do anything but reach out."

"Ameren Illinois made this a really easy choice. I didn't have to do anything but reach out."

— Emily Schaub, Librarian,
Utica Public Library

Energy Efficiency Pays

Since 2008, the award-winning Ameren Illinois Energy Efficiency Program has provided more than \$100 million in incentives to help business customers save more than \$525 million in annual energy costs. Incentives are available for a variety of energy-saving projects, including lighting, heating and cooling, refrigeration, motors, steam system improvements, and compressed air.





PARKLAND COLLEGE ACHIEVES NEW DEGREES OF EFFICIENCY

In its 50-year history, more than a quarter million students have chosen Parkland College as a stepping stone to success. Beyond creating sustainable careers, Parkland College aims to become a sustainable campus.

As part of the national Billion Dollar Green Challenge, Parkland maintains a self-managed green revolving fund that provides seed money for ongoing energy-saving projects. As Green Revolving Fund Coordinator for the college, Seth Rients seeks energy savings in every corner of the one-million-square-foot campus. Ameren Illinois has become an ally in this treasure hunt.

“Our goal is to save energy and money and to re-invest in future projects. Ameren Illinois incentives make projects economically viable,” says Rients. “Partnering with Ameren Illinois was a no-brainer for me.”

Between June 2017 and June 2018, Parkland College tackled more than 15 efficiency projects, ranging from lighting and HVAC to submetering and strategic energy management. During that time, the college received nearly \$24,000 in incentives from the utility and reduced its energy use by 170,000 kWh and 5,600 therms.

“What Parkland accomplished in a single year is remarkable, and the college continues to increase its efforts — and we’re with them every step of the way,” says Keith Martin, Director – Energy Efficiency for Ameren Illinois. “In an era of budget cuts, we’re proud to help educational institutions get the most bang for their energy buck.”

One of the first places Rients sought savings was in the large refrigeration systems that provide cold water to campus. Ameren Illinois provided \$12,800 in Custom incentives, which covered roughly two-thirds of the cost of eddy current testing of the aging chillers.

“Eddy current testing sends an electrical impulse that detects leaks and other imperfections,” says Rients. “The eddy current testing examined every single tube in the chillers. And as we spent time in the chiller plant, we saw other things we needed to do.”

But first, he would need to take a deeper dive into water flow.

“We had to do more metering and monitoring to get precise data on things like the volume and temperature of water flow,” says Rients.

(continued on next page)

Grade-A Savings

Ameren Illinois can help educational facilities — including universities, community colleges, and K-12 schools — cut annual energy costs and improve learning environments. Cash incentives are available for a variety of energy efficiency projects, including:

- No-cost/low-cost energy efficiency improvements
- Lighting upgrades
- Heating and cooling system improvements
- Commercial kitchen equipment upgrades
- LED exit signs, and vending controls
- Motor upgrades
- Steam system improvements
- Custom projects

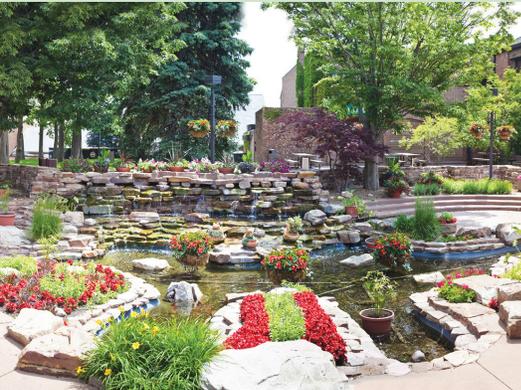
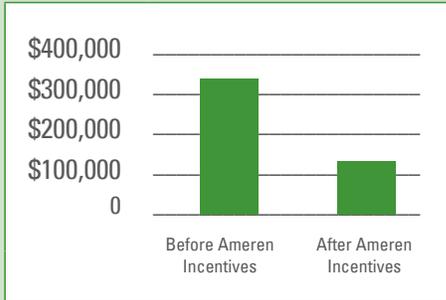
“In an era of budget cuts, we’re proud to help educational institutions get the most bang for their energy buck.”

— Keith Martin,
Director Energy Efficiency

Become a Student of Energy Efficiency

Attachment A

Building Automation & Chiller Optimization Project Cost Comparison



Metering and Monitoring: Track Usage. Target Savings.

Advanced sub-metering and energy monitoring can help your business gain crucial insight into when, where, and how much energy is being used in your facility. Ameren Illinois provides cash incentives that cover up to 100 percent of the cost to install enhanced monitoring equipment and software.

Through its Metering & Monitoring offering, Ameren Illinois provided cash incentives that covered 100 percent of the cost to install enhanced monitoring equipment and software.

“Advanced sub-metering and energy monitoring can show you when, where, and how much energy is being used in your facility,” says Martin. “This makes it easier to pinpoint specific areas for upgrades.”

“In this climate of state budget cutbacks, public entities need energy efficiency more than ever.”

A cross-functional team also helps identify upgrades, as part of Ameren Illinois’ Strategic Energy Management (SEM) offering.

— Seth Rients, Green Revolving Fund Coordinator at Parkland College

The SEM program assists the customer in setting up a structure and a team focused on reducing energy use. The team’s efforts address executive sponsorship, assessment, goal-setting and communications.

“We meet once a month to identify new projects and move them forward,” says Rients, whose team works closely with Ameren Illinois Energy Advisor Rod Rhoads and Key Account Manager Brad Pintar. “I’ve never waited more than a few hours for an answer from Ameren Illinois.”

With smart energy use on the agenda, Parkland’s SEM team is creating a culture of sustainability. And technology only adds to the college’s sustainability efforts — without sacrificing comfort. For example, software and sensors automate savings by powering down unoccupied rooms.

In fall 2018, Ameren Illinois provided more than \$201,000 in Custom incentives for a building automation project that would bring three campus buildings up to modern energy code requirements and incorporate chiller optimization controls. Those incentives covered 60 percent of project costs and reduced the payback period to just 1.25 years. The college also took advantage of deep discounts from Ameren Illinois to replace 1,700 linear fluorescent bulbs with high-efficiency LED lighting.

“It’s amazing to only spend \$1 for an LED bulb that would normally cost \$5 to \$9,” says Rients. “Incentives like these make a huge difference.”

In fact, Ameren Illinois incentives have been a catalyst to help Parkland achieve \$200,000 in annual energy savings (and counting) — a solid start on its \$1 million goal.

By walking the talk on sustainability, Parkland College is ensuring that its mission to “engage the community in learning” includes lessons in energy efficiency.

“Energy savings give us money to tackle more projects,” says Rients. “In this climate of state budget cutbacks, public entities need energy efficiency more than ever.”

Put Theory Into Practice — and Save!

Since 2008, the award-winning Ameren Illinois Energy Efficiency Program has provided millions in incentives to help business, nonprofit and public organizations reduce their annual energy costs. Incentives are available for a variety of energy-saving projects, including lighting, heating and cooling, refrigeration, motors, steam system improvements, and compressed air.



READY TO BEGIN?

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NEW CHURCH LIGHTING IS TESTAMENT TO EFFICIENCY

Much like Ameren Illinois, Crossbridge Church has roots that go back nearly a century in northern Illinois. Today, the thriving Ottawa-based church has grown to serve congregations in several area communities.

As organizations grow, however, so do energy costs. Fortunately, Ameren Illinois can help businesses, churches and non-profits spend less on energy.

“Our Energy Efficiency Program provides information and incentives to help customers make changes that reduce their energy bills and preserve energy resources,” says Keith Martin, Director of Energy Efficiency Operations for Ameren Illinois. “Lighting is a great place for any facility to start saving.”

That’s exactly where Crossbridge Church began its journey to energy efficiency. The church partnered with Ameren Illinois Program Ally Premium Light to upgrade outdated, 1970s-era parking lot lighting with high-efficiency LED bulbs.

Ameren Illinois provided cash incentives to help defray the church’s project costs. Beyond those up-front savings, the new exterior lighting will reduce the church’s monthly power bill by hundreds of dollars a year.

In light of the parking lot success, “we had our contractor do a walk-through of our Ottawa campus to look for other energy-saving opportunities,” says Pastor John Pickens. “We ended up replacing nearly all of our interior fluorescent lighting with LED bulbs.”

Rather than installing entirely new fixtures, Premium Light retrofitted existing fixtures and added reflectors to brighten the space even more. “In many fixtures, we were able to reduce four bulbs to three,” says Pickens. “Even with fewer bulbs, it’s amazing how much brighter the rooms feel.”

Light Up Your Facility for Less

Lighting accounts for as much as 50 percent of the average organization’s electricity consumption. On the bright side, that means your business or non-profit can enjoy significant savings — year after year — by making simple lighting improvements. Submit your qualified lighting project and gain:

- Cash incentives
- Lower electricity bills
- Better lighting
- Reduced project costs
- Longer lamp life
- Faster payback period
- Lower maintenance costs
- Reduced impact on the environment



Smart Thermostats: Comfort at Less Cost

Easy to operate and install, today's smart thermostats automatically adjust heating and cooling for optimal performance. By better controlling energy usage, a smart thermostat can help your organization save as much as 10 to 15% on heating and cooling costs. As an added convenience, you can control your smart thermostat from anywhere using your mobile device. Now you can save \$100 when you purchase an ENERGY STAR® qualified smart thermostat! Visit *AmerenIllinoisSavings.com* to learn more or apply for a rebate.



Along with the warm welcome it provides, the new interior lighting adds to the church's yearly energy savings. LED bulbs last for years, so they help reduce maintenance costs, too.

Cash incentives from Ameren Illinois put an otherwise beyond-budget project well within the church's reach.

"There was a very small chance that we could have taken on this project without the incentive," says Pickens. "The incentive made our decision super easy."

Energy management is super easy as well, thanks to the church's new smart thermostats.

"The new smart thermostats have been incredible for us. Like many churches, we only use rooms for a few hours at a time. Now we can schedule those times to keep the rooms comfortable when they're occupied and switch to an economy setting when they're not in use," says Pickens, who particularly appreciates the ability to remotely control temperatures when last-minute schedule changes occur. "Now we have better lights and cheaper electric bills — it's a win all around."

"The Ameren Illinois program has been a blessing to us."

— Pastor John Pickens,
Crossbridge Church

That win means more money is available to support the church's mission work — such as Cool Compassion, a summer lunch program that feeds children in need.

"Energy efficiency has become a huge motivator for us because those savings allow us to put dollars right back into the people and projects we're passionate about," says Pickens, who sings the praises of the Ameren Illinois Energy Efficiency Program.

"I recommend the Ameren Illinois program wholeheartedly — I was surprised at how easy it was," says Pickens. "It's been a blessing to us."

"Ameren Illinois can help churches and other non-profits impact the community with less impact on the environment," says Martin. "Something as simple as switching to high-efficiency lighting can potentially save thousands of dollars per year — money that can be put to better use in the community."

Cash Incentives: A Blessing for Your Budget

The award-winning Ameren Illinois Energy Efficiency Program offers incentives for a variety of energy-saving projects, including lighting, heating and cooling, refrigeration, motors, steam system improvements, and compressed air. Those cash incentives — and the annual savings they help generate — free up funds to support your organization's mission.



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MARKET DEVELOPMENT INITIATIVE



AMEREN ILLINOIS SMART SAVERS PILOT

Too often, those who would most benefit from lower energy bills are least able to afford energy-efficient upgrades.

Launched in 2018, Smart Savers brings the latest smart thermostat technology directly to low- and moderate-income customers — at no cost. Approximately **5,400** income-eligible customers in the pilot communities of Champaign, Decatur, East St. Louis and Peoria were given a Nest E or ecobee3 lite thermostat. Collectively, their new smart thermostats are expected to save an estimated 2.5 million kWh and 270,000 therms every year. This is equivalent to approximately **\$250,000** in electric savings and **over \$270,000** in gas savings annually.

To further boost local economies, the pilot program relied extensively on **local or diverse**-owned suppliers to help identify program participants and install thermostats. This commitment made a huge impact for small businesses like Jodeci Mack, of Handy Mack, who completed \$50,000 in installation work in Illinois' Metro East area in a five-month period.

Thanks in part to Smart Savers, the Ameren Illinois Energy Efficiency Program **doubled** the number of diverse vendors it worked with in 2018 and increased its diverse spend by seven-fold.

“One of my goals has been to ensure that all utility customers, regardless of income, have an opportunity to receive real and meaningful savings from the energy efficiency programs they have been paying for.”

— Richard Mark,
Ameren Illinois
Chairman & President



5,400 smart thermostats provided free of charge to low- and moderate-income customers



Boosted energy efficiency engagement and supplier diversity in underserved areas



Customer annual energy savings: **2.5 million kWh & 270,000 therms.** Roughly equivalent to the annual energy usage of 380 homes.

CONTACT

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AMEREN ILLINOIS OPPORTUNITIES SCHOLARSHIP PROGRAM

As part of Ameren Illinois' mission to bring diverse candidates into the energy efficiency industry, Ameren Illinois created the Opportunities Scholarship to help train the next generation of Construction Management and HVAC professionals.

The program provided a total of **36 scholarships** in the 2018 school year at six community colleges in Illinois. Scholarship winners received a \$3,000 stipend to defray the costs of their training.

Looking beyond a student's GPA, Ameren Illinois worked closely with school instructors to identify promising diverse candidates based on attitude, performance, and work ethic — students like Bryan Payton (*pictured center in the above photo*).

After his mother's death when he was just 11 years old, Payton navigated life's challenges — and Chicago's south side — with the help of meaningful mentorships. Eventually, he found a home at Heartland Community College and a **passion for HVAC work**. He plans to pay it forward via a youth advocate program.

"I found a love for HVAC. There is joy in what I do, and nothing can stop me. This is the start of my legacy."

— Bryan Payton,
HVAC Student,
Ameren Illinois Scholar

To date, the Ameren Illinois Opportunities Scholarship program has provided **over \$100,000** to support the promises of the future energy efficiency workforce in central and southern Illinois.



\$100,000+

in scholarship dollars awarded



Aims to bring diverse candidates into the energy efficiency industry



Changed the lives of **36** promising students in 2018

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ENERGY EFFICIENCY COMMUNITY PARTNERSHIPS



Across its territory, Ameren Illinois is partnering with community-based organizations to engage customers in energy efficiency. These trusted and established organizations help bridge the gap between underserved customers and incentives available to them.

Community organizations are in a prime position to identify prospects for the Ameren Illinois Energy Efficiency Program. For example, the **Illinois Black Chamber of Commerce** helped connect Community Storage with the Ameren Illinois Small Business Direct Install Initiative. As a result, the storage rental facility received cash incentives covering roughly **87 percent** of the cost to upgrade to state-of-the-art LED lighting. The new lighting will save the East St. Louis business more than **\$5,000** every year.

"We believe it makes good sense for businesses to take advantage of energy savings... We are also excited about partnering with Ameren Illinois in our common goal of increasing access to procurement."

— Larry Ivory,
IL Black Chamber of
Commerce, President & CEO

To further boost local economies, these community partnerships promise to enhance **supplier diversity**. In the case of Community Storage, the lighting assessment and installation work was completed by Jarvis Electric — **one minority-owned business serving another**.



Enlists the help of community-based organizations to raise energy efficiency awareness in underserved communities



Connects small businesses to Ameren Illinois incentives, while building supplier diversity



Illinois Black Chamber referral leads to **\$5,064** in annual energy savings for Community Storage

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Options for Increasing Ameren MWh Savings

NRDC IDEAS & RECOMMENDATIONS PRESENTED AT ICC-AMEREN WORKSHOP #2

Chris Neme and Laura Goldberg

May 13, 2019





Context

- Focus on increasing electric EE savings in next 4-year plan (2022-2025)
 - With goal of achieving statutory goals
 - Note: many ideas could be applied sooner, to affect latter part of current plan cycle
- **Ameren 2018 actual savings only 4% below 2018-2021 statutory goals**
 - Ameren achieved 381 GWh (no VO)
 - Would have needed average of 397 GWh/year to meet 2021 CPAS goals (without VO)
 - Ameren goal reduced to average of 346 GWh/year
- **Assume all options for increasing savings to be “on the table”**
 - except for reducing 2018-2021 electric IQ budget (~\$15.7 million/year)
- **Raising questions/ideas as much as providing recommendations**
 - Have gotten lots of helpful info/data from Ameren, but still have only partial understanding of how programs are being delivered so can't always draw definitive conclusions
- **Can't go into depth on all recommendations or ideas, or answer all questions Ameren has posed**
 - That would require level of analysis/planning not possible in this process
 - It would also require lots more Q&A, data from Ameren (per bullet above)
 - This needs to be start of conversation, not the end... (again, per bullet above)
 - NRDC is here as a resource, and is willing to continue helping develop more detailed ideas and approaches



Areas of NRDC Focus

- IQ Program
 - whole building retrofit components
- Custom C&I and/or Larger Customers (1 to 10 MW)
- Midstream/Upstream product incentives
 - Especially C&I, but also Res
- Other



Income Qualified Program



IQ Program 2+ Times More Expensive than Planned

Program Category	Compliance Filing Plan for 2018			2018 Actuals			
	1st Year Net Savings (MWh)	Electric Budget (millions \$)	\$/kWh (1st Year)	1st Year Net Savings (MWh)	Electric Spending (millions \$)	\$/kWh (1st Year)	% Change from Plan \$/kWh
Direct Electric Savings							
IQ electric measures	25,314	\$15.42	\$0.61	11,108	\$23.75	\$2.14	???
IQ Retail Lighting	9,796	\$1.62	\$0.17	<i>already excluded from totals above</i>			???
IQ whole bldg retrofits only	15,518	\$13.80	\$0.89	11,108	\$23.75	\$2.14	???
DCEO New Construction	1,011	\$0.70	\$0.69	807	<i>included above?</i>	<i>???</i>	???
Total Whole Building	16,529	\$14.50	\$0.88	11,915	\$23.75	\$1.99	227%
Gas Conversion Savings							
IQ whole bldg retrofits	12,922	<i>included in IQ above</i>		11,816	<i>included in IQ above</i>		n.a.
Totals							
Total excluding gas conversions	16,529	\$14.50	\$0.88	11,915	\$23.75	\$1.99	227%
Total including gas conversions	29,451	\$14.50	\$0.49	23,731	\$23.75	\$1.00	203%

Note: comparisons to plan are complicated because different things included in plan than in Ameren reported actual results (IQ retail lighting, DCEO new construction, gas conversions, etc.). This table endeavors to present “apples-to-apples” comparison by removing MWh and \$ for retail lighting from plan and comparing to evaluator reported IQ 2018 savings excluding retail lighting.



Potential Issue #1: Major \$ on Central A/C Replacements

- 61% of 2018 low income participants got central A/C replacements
- \$5 to \$6 million* for just ~1100 MWh savings
 - ~\$5/kWh
 - ~30% of IQ incentives for ~4% of IQ savings
- Reallocating spending could generate much greater savings
 - Whether on other IQ measures...
 - Same \$ on ductless heat pumps in IQ MF buildings: ~6700 MWh (gain of ~5600)
 - Going deeper generally in MF, not just DI
 - ...or to other programs
 - Same \$ on C&I prescriptive rebates: ~50,000 MWh

* Assumes that the vast majority of \$4.2 million electric “mechanical bonus” incentive associated with central A/C replacements, as this was included in electric incentives and 90% of electric HVAC equipment replaced in Ameren tracking system was central A/C (rest was heat pumps)



Potential Issue #2: Under-utilization of IHWAP Leveraging

- Only ~150 IHWAP leveraged jobs
 - At least partially a function of time lag for contracting
 - Not clear extent to which this will change for 2019 and beyond
- IHWAP leveraging should lower costs per unit
 - If that's not the case, it is important to show data/analysis
- Potential to leverage IHWAP on the IQ MF side too
- Also potential concern about parallel infrastructure for <200% of poverty
 - Could this create sense of “competition” between Ameren and IHWAP/CAAs?
 - How is this managed?
 - Why not just run as one program (for <200%), blending all the funds with IHWAP/CAAS?
- Difficult to estimate, w/o more info, how much \$ savings possible
 - Or therefore how much more MWh savings could be acquired within budget cap

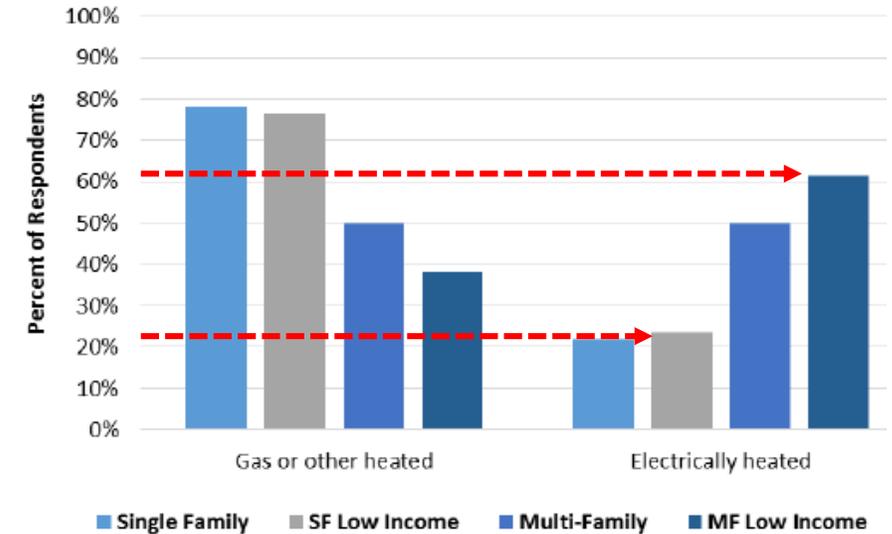


Potential Issue #3: Substantial Non-Incentives Spend

- Non-incentives spend of \$5.7 million
 - Excludes admin payments to CAAs, market development outreach \$
 - Appears related to very limited IHWAP piggy-backing in 2018 and related investment in ramping up non-IHWAP delivery
 - Can it be reduced, at least over time? How? Will more IHWAP jobs help?
 - Are there related issues of “competition” between Ameren and CAAs?

Potential Issue #4: less than proportional electric heat participants

- Ameren has lots of electric heat, especially among low income customers
 - ~25% of low income SF are electrically heated
 - ~60% of low income MF are electrically heated
- But much smaller portion of IQ homes appear to be electrically-heated
 - Only 9% of ceiling insulation jobs
 - Only 10% of air sealing jobs
- Electric heat weatherization provides 4 to 6 times more kWh savings per \$



Source: Ameren 2016 Potential Study, Volume 2, Figure 3-2



Potential Issue #5: not enough multi-family participants

- ~1000 MF housing units treated...
- ...but only ~150 MF housing units got anything other than DI measures
- A lot of affordable housing left to serve (see below) – 107,491 total affordable MF Ameren electric units
- 60% electric heat in IQ MF suggests more electric savings opportunities
 - significant benefits of targeting such buildings
 - important to treat whole building (including common areas), not just DI
 - major opportunity for ductless heat pump retrofits
- Hopefully new approaches to streamlining MF eligibility will help

Affordable Multifamily Unit Count in Buildings of 5+ Units” subtitle “Statewide and St. Louis Metro Area Utility Totals						
			Affordability Types			
	Type of Service Territory	Utility	Total Affordable (units)	Unsubsidized Affordable (units)	Subsidized Affordable (HUD, LIHTC, Rural, etc.) (units)	PHA-Owned Affordable (units)
Illinois (Statewide total—not a sum of items below)			605,865	326,270	219,479	60,116
Illinois	Electric	Ameren IL	107,491	46,172	42,970	18,349
Illinois	Gas	Ameren IL	118,857	50,433	49,596	18,828
Illinois	Gas Electric	Ameren IL Electric-Gas overlap	96,142	43,073	37,260	15,809

Potential Issue #5 (continued): not enough multi-family participants

Additional IQ MF program design improvements

- Whole-building, one-stop shop approach
 - See EEFA one stop shop fact sheet
- Build relationship w/IHDA
 - to find owners going through the re-financing process – ready to make capital investments and do deeper EE work
 - IHDA has energy and water requirements in their Low Income Housing Tax Credit (LIHTC) application process, so IHDA can help connect those owners with Ameren to make those EE improvements.

ONE STOP SHOP

3x  One-stop-shop, whole-building programs can lead to **three times** as much savings in energy costs

7x  **AND** **seven times** the uptake rate as other energy-efficiency programs.*

- A single point of contact
- A universal intake application
- Comprehensive technical assistance
- Streamlined access to all multifamily



Custom C&I, Large Customers



Not Getting Great Traction w/C&I Custom & Large Customers

- C&I Custom program got only ~1/3 of planned savings
 - 2018 plan: 68.5 GWh
 - 2018 actuals: 23.3 GWh
- C&I Custom DS-4 (large) customers “less than planned”
 - Per Ameren workshop #1 presentation (p. 77)



C&I Custom Program Ideas

- Many good program design elements, but some possible enhancements:
 - Greater use of specialized industrial expertise for individual customers/segments
 - Consider separate specialized Ag sub-program
 - Consider other specialized offers, perhaps initially as pilots
 - Lighting as a service to more comprehensively address lighting options (including controls)
- Hard to judge how well “account management” is being implemented
 - Need more info, insight than possible from a few Q&As
 - Experience in other jurisdictions suggests there should be higher uptake
 - Consider EE performance incentives (or enhancing them) for account managers
- Tackling “installer certification” barrier
 - Invest in getting key customers’ trade allies approved (to extent not done yet)



Mid-Stream/Up-Stream Incentives



Context

- Ameren currently only using for lighting (correct?)
 - All Residential lighting
 - Some C&I lighting products
- Lots of discussion in past (e.g. SAG) about doing more, but not pursued
- Evidence from other jurisdictions that large participation increase possible
 - At least for some measures or measure categories
- **Other benefits too**
 - Improved relationships with distributors/contractors
 - Reduced rebate fulfillment costs
 - Reduced paper work



Potential Added EE Measures for Mid-Stream/Upstream

- Heat pump water heaters
- Circulation pumps
- Residential Retail Products
- C&I lighting (broader application)
- HVAC equipment (res and C&I)
- Food service equipment

Partial List of Other Electric Utilities w/Non-Lighting Mid-Stream

Full Scale Programs

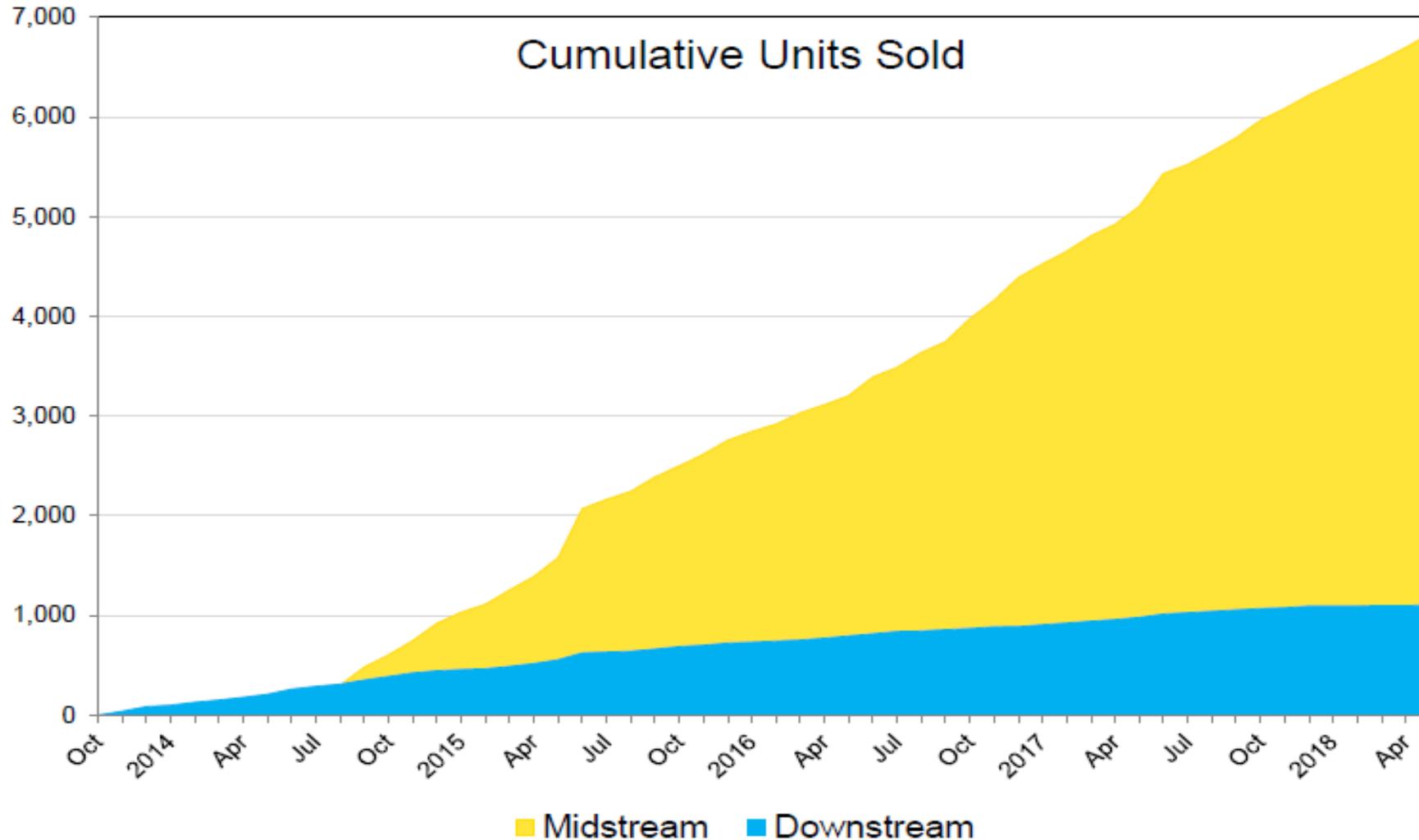
- CA utilities
- CT utilities
- Duke Carolinas
- Duke Ohio
- Efficiency Vermont
- MA/RI utilities
- Northwest Energy Efficiency Alliance
- Public Service New Mexico
- Rocky Mountain Power
- Xcel Energy Colorado

Pilot Programs

- ComEd
 - Food service (w/Nicor, NSG/PG)
 - Considering HPWH, circ pumps
- DTE
 - Food service
- AEP Ohio
 - Circ pumps

Examples of results from above jurisdictions in following slides

Vermont Heat Pump Water Heater Results

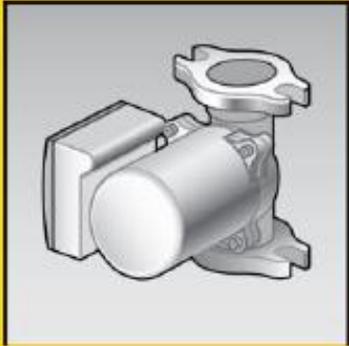


Nearly 60% market share!

(ACEEE 2019 Exemplary Programs Report)

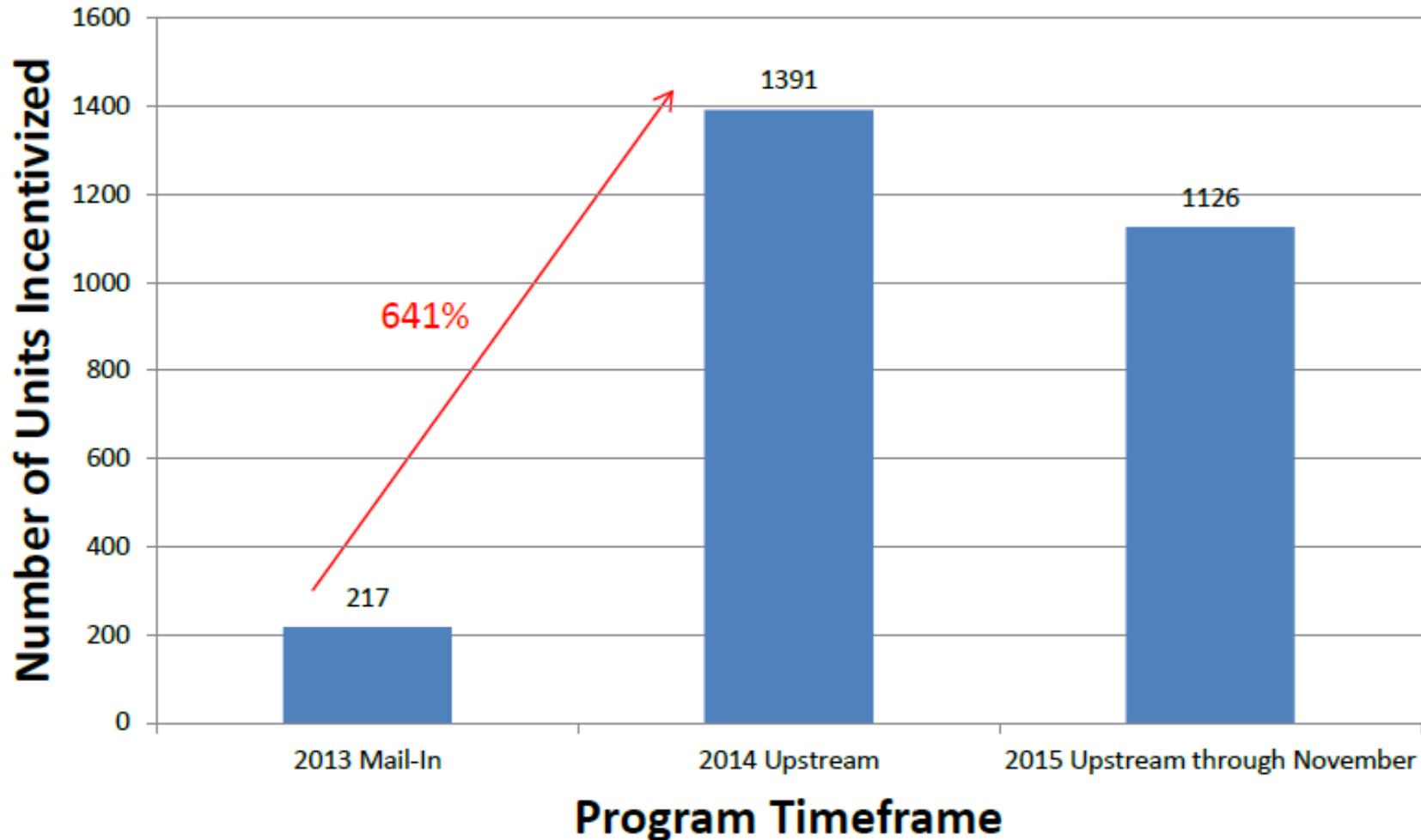
Graph Source: Howard Merson, VEIC, *“Five Years and Beyond with Supply Chain Engagement: What’s Next with Midstream and Upstream”*, August 2018 ACEEE Summer Study presentation.

Vermont 2017 Mid-steam Program Results

	HPCP	HPWH	CCHP
			
Increase in Sales	+10,000%	+750%	+100%

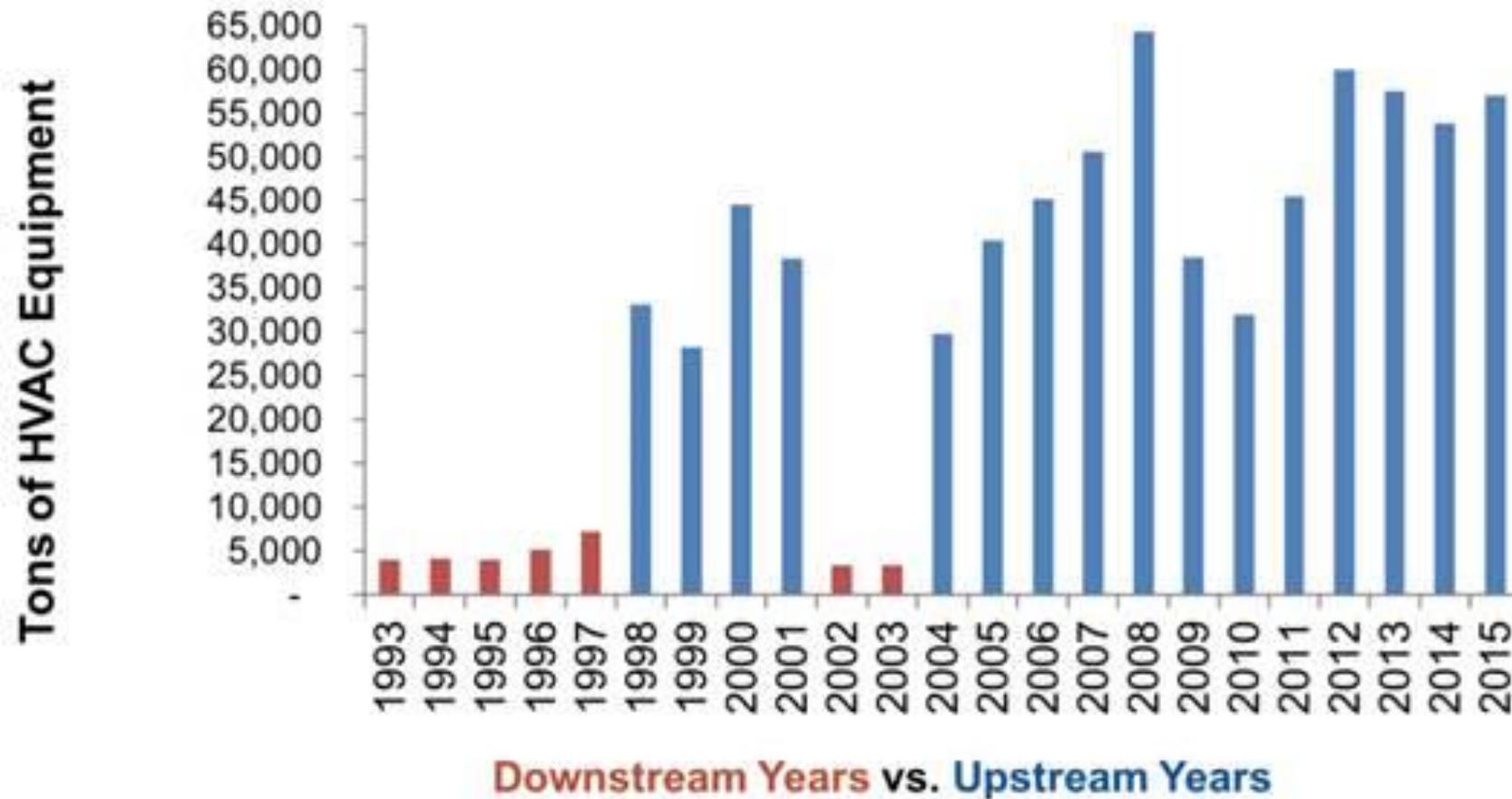
Source: Howard Merson, VEIC, "Five Years and Beyond with Supply Chain Engagement: What's Next with Midstream and Upstream", August 2018 ACEEE Summer Study presentation

CT Utilities Results from Transition to Upstream for HPWHs



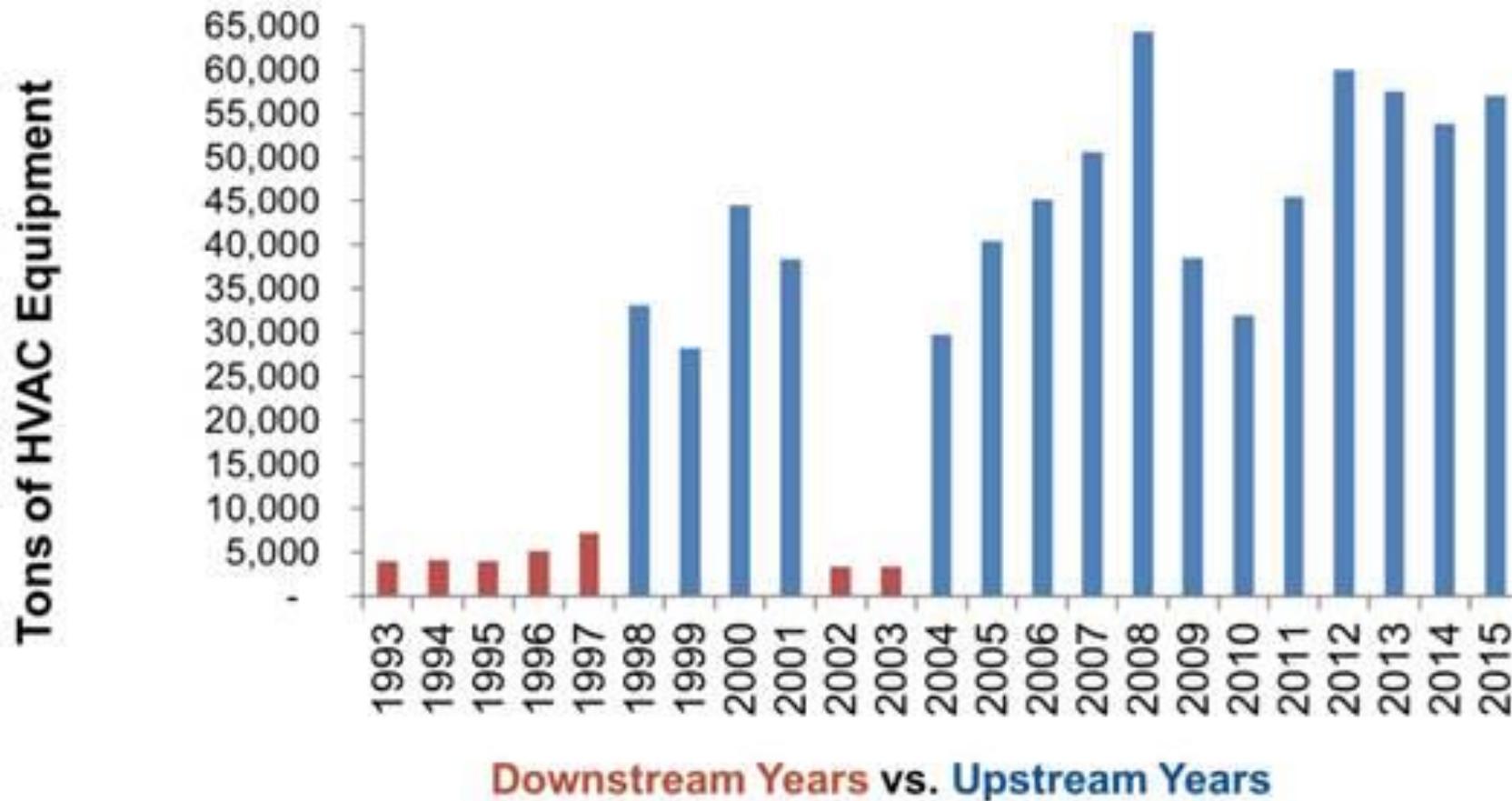
Source: Jennifer Parsons, United Illuminating, “Energy Connecticut Upstream Residential HVAC and Water Heating Program”, January 21, 2016 presentation to SAG.

CA Utilities Commercial HVAC Upstream vs Downstream



Similarly, Xcel Colorado reports 350% increase in high efficiency commercial HVAC sales after shift from downstream to upstream rebates (2015 to 2016).

CA Utilities Commercial HVAC Upstream vs Downstream



Source: Jennifer Parsons, United Illuminating, "Energy Connecticut Upstream Residential HVAC and Water Heating Program", January 21, 2016 presentation to SAG.





Other Potential Options for Increasing Savings

- Create separate Commercial New Construction program
 - Needs targeted focus to get high participation rates
 - Leading jurisdictions influencing 50%+ of new floor space
- Invest in Market Transformation initiatives
- Strategically consider joint program delivery where it can cut costs
 - Should be potential in some programs to get economies of scale, without losing focus on unique aspects of different service territories
 - Pursued in a variety of leading jurisdictions
 - Need to examine this program by program to identify most logical candidates
- Shift some market development budget to more C&I (starting 2022)
 - After four years of initiative, not clear same level of annual funding would be needed



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To: The Staff of the Illinois Commerce Commission and Interested Stakeholders
From: Ameren Illinois Company, d/b/a Ameren Illinois
RE: The Ameren Energy Savings Goals Workshops.

Dear Staff of the Illinois Commerce Commission:

As noted in the March 5 and April 17, 2019 Notices of Energy Efficiency Workshops regarding Ameren Achieving Statutory Energy Savings Goals:

[t]he Illinois Commerce Commission's September 11, 2017 Final Order in ICC Docket No. 17-0311 ("Ameren EE Plan Order") directed the Staff of the Illinois Commerce Commission ("ICC Staff") to initiate a minimum of three workshops "involving Ameren Illinois and interested stakeholders to develop a path to achieving the [cumulative persisting annual savings goals] set out in the statute for future plans, with a focus on reduction of the cost/kWh in the Ameren Illinois service territory subject to the objectives and requirements of the Act."¹

In accordance with the Ameren EE Plan Order, ICC Staff scheduled three workshops² and facilitated a robust information sharing process that provided Ameren Illinois and other stakeholders the opportunity to present, review, learn, comment and assess the first year of Ameren Illinois' 2018-2021 Energy Efficiency Plan approved in ICC Docket No. 17-0311 (EE Plan). The workshop and information sharing process included both formal presentations, question and answer sessions and informal discussions between interested parties.³

¹ Ameren Illinois Co. d/b/a Ameren Illinois, ICC Final Order Docket No. 17-0311, 45 (September 11, 2017) ("Ameren EE Plan Order"). See also page 71 of the Ameren EE Plan Order which states: "IT IS FURTHER ORDERED that the Staff is directed to convene a minimum of three workshops, and Ameren Illinois is directed to participate. At the workshops, stakeholders may offer proposals to aid Ameren Illinois in achieving statutory savings goals. The Staff shall compile a summary of the alternatives so offered and shall submit a report on the same to the Commission."

² The workshops were scheduled for: March 29, 2019 (for Ameren Illinois to present on its first year of implementation); May 13, 2019 (rescheduled to accommodate stakeholders who wanted to present ideas, comments and recommendations for Ameren Illinois to consider for future implementation); and May 30, 2019 for the Ameren Illinois response to the stakeholder presentation).

³ The formal presentations, questions and answers can be found at the following address:
<https://icc.illinois.gov/Electricity/workshops/AmerenEnergySavings.aspx>.

In preparing for the final workshop presentation, which reflects consideration of, and responses to, the ideas, comments and recommendations presented by stakeholders on May 13, 2019, Ameren Illinois appreciated the efforts made by all parties to identify potential ways to achieve more savings in future plan years. In this regard, Ameren Illinois would particularly like to thank the ICC Staff for its leadership and facilitation of the workshops and information sharing process, which led to a successful and collaborative dialogue that benefited Ameren Illinois and its customers.

Finally, as reflected in the attached presentation, Ameren Illinois remains open and committed to exploring ways with interested stakeholders to increase savings in a manner consistent with the EE Plan objective. While the market conditions encountered during 2018 were generally in line with, if not even more difficult than, those assumed during the planning stage, challenges were encountered in 2018 and will continue to be faced in the future. Ameren Illinois welcomes the opportunity to continue the collaborative discussions started during this workshop and information sharing process, so that it can continue down a path of overcoming any market challenges, deliver meaningful savings to its eligible customers and exceed its Commission-approved energy savings goals.

Sincerely,

A handwritten signature in black ink that reads "Kristol Simms". The signature is written in a cursive, flowing style.

Kristol Simms, Director of Energy Efficiency



ENERGY SAVINGS GOALS WORKSHOP

SPRINGFIELD, ILLINOIS

MAY 30, 2019

AmerenIllinoisSavings.com

Workshop Process Scope and Goals

#1: “The Illinois Commerce Commission’s September 11, 2017 Final Order in ICC Docket No. 17-0311 (“Ameren EE Plan Order”) directed the Staff of the Illinois Commerce Commission (“ICC Staff”) to initiate workshops ‘involving Ameren Illinois and interested stakeholders to develop a path to achieving the [cumulative persisting annual savings goals] set out in the statute for future plans, with a focus on reduction of the cost/kWh in the Ameren Illinois service territory subject to the objectives and requirements of the Act.’” ICC Notice of Energy Efficiency Workshops regarding Ameren Achieving Statutory Energy Savings Goals (Mar. 5, 2019).

#2: Provide information regarding PY2018 performance to assess market conditions, successes, challenges and impact on path to achieving cumulative persisting annual savings goals.

#3: Receive collaborative, innovative, concrete ideas and suggestions from interested stakeholders to assist with path towards future portfolio success.



Overview

- Summary of Workshop Process to Date
- Home Efficiency Income Qualified Offering
- Business Custom Commercial and Industrial Customers
- Midstream and Upstream Product Incentives
- Other
 - Commercial New Construction
 - Market Transformation
 - Joint Program Delivery
 - Market Development Initiative



Summary of Workshop Process to Date

- On March 29, 2019, Ameren Illinois presented a comprehensive review of the implementation of its energy efficiency plan (EE Plan) in 2018.
- Ameren Illinois also responded to inquiries from stakeholders, including subparts, in order to provide information to stakeholders to assess the EE Plan in 2018 and "provide proposals to aid Ameren Illinois in achieving statutory savings goals." (ICC May 5, 2019 Notice of Workshops)
- On April 17, 2019 ICC Staff rescheduled the second workshop to accommodate stakeholders' schedules, and provided a list of "Information Requested from Stakeholders Providing Recommendations at the Ameren Illinois Commission Facilitated Workshops". (ICC April 17, 2019 Notice)
- On May 13, 2019 the Natural Resources Defense Council provided a written and oral presentation reflecting NRDC's "Ideas & Recommendations" and the Office of the Attorney General provided oral comments.
- Ameren Illinois responded to additional inquiries during and after the May 13, 2019 presentation.
- Today, Ameren Illinois provides its responses to the ideas, recommendations and comments provided while providing a path forward to continuing its work with stakeholders pursuant to the traditional Stakeholder Advisory Group (SAG) process.



HOME EFFICIENCY INCOME QUALIFIED OFFERING



IQ Topic #1: A/C Replacements

- **Topic:** Reallocate Home Efficiency Income Qualified (HEIQ) Offering spend on replacement air conditioner measure to other Offerings and measures such as ductless heat pumps in the IQ Multifamily Offering or prescriptive incentives in the Standard Business Offering to garner more savings.
- **Response:** It is important to engage and encourage our customers in comprehensive energy efficiency adoption and savings, as well as address health and safety issues identified in the home. Air conditioning is a health issue for many of our customers, especially those living in the central and southern part of the state. People with respiratory issues and allergies, as well as senior citizens, require air conditioning to maintain proper humidity, temperature, and air filtration during the summer months. We follow the BPI standard practices for sizing HVAC equipment. If the current HVAC system meets the criteria for replacement, a whole house load calculation is performed to identify properly sized new equipment. Proper sizing based on actual cooling load helps to ensure new air conditioners function effectively. Of the 2,671 2018 HEIQ projects, only 1,344 received an A/C measure and all A/C units installed were appropriate and in line with the objectives of the plan.
- **Action:** Ameren Illinois will explore the possibility of adding a window A/C replacement measure pilot for applicable situations as early as a 2019.
- **Topics for Future Discussions:**
 1. What health and safety conditions should be considered related to replacement A/C units?
 2. When is installation of an A/C unit appropriate?
 3. What is an acceptable criteria for a window A/C measure versus a central A/C measure?
 4. Is there a particular customer segment that should be targeted for the window A/C measure?
 5. What are the anticipated additional savings and costs of adding the window A/C measure?
 6. What is the impact of achieving long term CPAS goals? (Further discussion needed regarding the short term vs. long term impact of CPAS goals related to the window A/C measure.)



IQ Topic #2: IHWAP Leveraging

- **Topic:** Leverage IHWAP funding, single family and multifamily, to lower average project costs and potentially run as one for <200%.
- **Response:** As a statewide approach, it has not been determined that more funding or running as one program will address the issues raised. The low income customers served by Ameren Illinois Registered Program Allies are those customers that are unable to receive weatherization services through IHWAP, for a variety of reasons (prioritization, availability of funds, etc.), however, Ameren Illinois does not promote to those customers. Referrals (see appendix for referral process) come from Community Action Agencies (CAAs) and community outreach efforts.
- **Actions:** Ameren Illinois commits to continue to lead statewide discussions about serving low income customers and to having further discussions with stakeholders regarding the process a single family customer follows to receive the greatest benefit and how best to serve multifamily properties. Ameren Illinois is also open to entering into an agreement with stakeholders regarding measures provided in the CAA channel.
- **Topics for Future Discussions:**
 1. Can examples of competition between the channels be provided?
 2. What is average project cost for statewide CAA braided projects?
 3. What measures are eligible to be offered by agencies through IHWAP statewide?
 4. What measures are offered by utility-parallel programs statewide?
 5. Is there any data that supports the belief that IHWAP leveraging should lower costs per unit?
 6. What potential constraints or risks exist due to the IHWAP process (state training requirements, funding cycles, staffing, prioritization of customers, etc.)?
 7. What is the appropriate customer referral process and how should the pipeline be managed and prioritized?
 8. How should Ameren Illinois, CAAs and Program Allies (if applicable) address the barrier of wage issues (Davis Bacon Act, etc.)?



IQ Topic #3: Non-Incentive Spend

- **Topic:** Review of non-incentive spend and potential increase in leveraging IHWAP.
- **Response:** Upon review of available Illinois utilities reports, the \$5.7 million non-incentive spend appears to be in line, particularly in consideration of the related activities. Non-incentive spend for HEIQ includes outreach and education, data management and tracking, post-inspections, call center, Program Ally and Community Action Agency management, incentive processing costs, marketing, and mileage. Labor costs, as incurred by the implementation contractor, for conducting the audit and installing measures during the audit are also categorized as non-incentive costs.
- **Actions:** Ameren Illinois has continually and will continue to monitor non-incentive costs to ensure that they are managed appropriately to deliver these important and complicated programs through available market channels.
- **Topics for Future Discussions:**
 1. When can statewide reviews and conversations be held about the IHWAP leveraging framework?
 - a. Ameren Illinois made this request last year through the SAG process.
 - b. Renewed focus at last large SAG meeting in May 2019.
 2. What is the most useful way to calculate and compare costs between IQ delivery channels?
 - a. Varying approaches can lead to different inferences and conclusions (e.g. characterization that IQ budget is 2x larger than planned).
 3. How can a fair feedback process be set up to allow for ongoing review and adjustments, as needed?
 - a. Stakeholders must ensure that all information is known from key participants, including Ameren Illinois and CAAs, before drawing conclusions.



IQ Topic #4: Electric Heat Participants

- **Topic:** Increase participation of single family and multifamily electric heat customers to garner more savings.
- **Response:** Ameren Illinois believes there may be enough potential for a dedicated offering and will design an offering to target high use electric resistance space heat customers in the Ameren Illinois service territory and assess the ability of this effort to obtain higher savings at lower cost. Ameren Illinois will consider the design of the offering for both the rural and metropolitan markets.
- **Actions:** Ameren Illinois will evaluate existing resistance space heating and resistance water heating utilizing AMI data with potential to begin opportunities in this area in 2020. Additionally, Ameren Illinois will analyze actual savings and impact on customers for 12 mini splits installed in 2018.
- **Topics for Future Discussions:** None at this time until after digesting and cross-referencing regional and end use data as it becomes available through AMI.



IQ Topic #5: Multifamily Participation

- **Topic:** Streamline multifamily eligibility criteria, increase multifamily participation beyond direct install measures, implement a “one-stop-shop” approach and build a relationship with Illinois Housing Development Authority (IHDA).
- **Response:** Ameren Illinois agrees that identifying Income Qualified properties is challenging. A new multifamily marketing outreach coordinator was hired in 2019, with a focus on MF IQ properties. In 2019, over 100 properties have already completed participation agreements.
- **Actions:** Ameren Illinois will adopt expanded eligibility requirements for multifamily properties consistent with the Illinois Policy Manual and agreements with stakeholders. Ameren Illinois will explore the “one-stop-shop” option. In parallel, Ameren Illinois is working to build relationships with IHDA to align program design with their energy/water requirements.
- **Topics for Future Discussions:** None at this time.

10 ICC Ameren Workshop #2 – NRDC Presentation
May 13, 2019




Potential Issue #5: not enough multi-family participants

- ~1000 MF housing units treated...
- ...but only ~150 MF housing units got anything other than DI measures
- A lot of affordable housing left to serve (see below) – 107,491 total affordable MF Ameren electric units
- 60% electric heat in IQ MF suggests more electric savings opportunities
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Affordable Multifamily Unit Count in Buildings of 5+ Units			Statewide and St. Louis Metro Area Utility Totals			
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Scaling up Energy Efficiency in Missouri and Illinois Multifamily Affordable Housing, EEFA Study, 2015



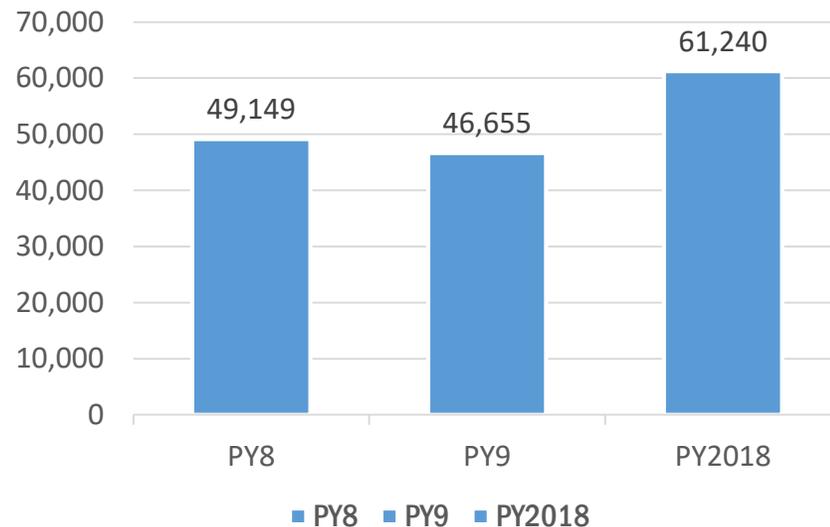
**BUSINESS CUSTOM
COMMERCIAL & INDUSTRIAL
CUSTOMERS**



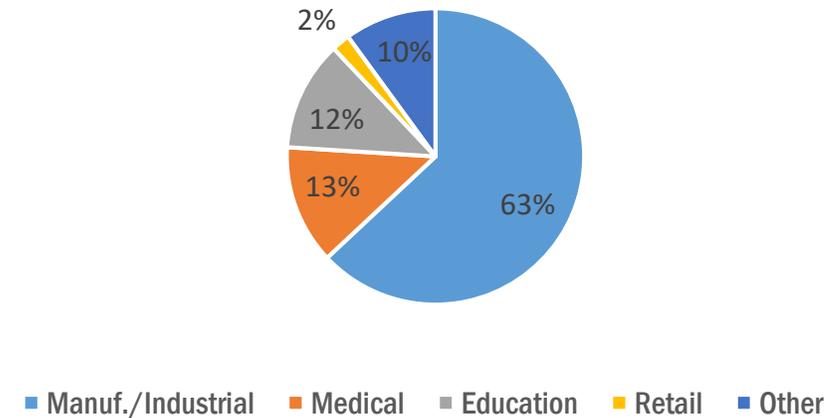
Participation From Large Customers

- **Topic:** While there are many good design elements, enhance the custom offering to increase participation closer to filed savings by greater use of customer segmentation specialists, implementation of specialized sub-offerings and specialized offers, such as agriculture and lighting as a service, enhancing the account management structure and tackling the installer certification barrier.
- **Response:** Ameren Illinois agrees participation from large customers is an important focus area and continues to make modifications to gain participation. The Custom Offering will continue to push to get as much participation and as many measures under Standard due to ease for customers and mitigating the risk of achieving savings associated with custom projects.

1 to 10MW Participation by Program Year
(all Business Initiatives)



1 to 10MW Custom Participation by Sector



Participation From Large Customers

- **Actions:** Ameren Illinois will launch enhanced efforts in 2019 to increase participation from large customers. Elements may include, but are not limited to:
- Enhanced marketing efforts to all personnel levels including facility managers, plant supervisors, finance departments and executives. Outreach and account management staff (Energy Advisors) will increase their focus on the Custom Offering and marketing and outreach emphasis will be placed on large projects.
 - Strategic funding increases to encourage more projects, adding engineering and industry expertise, and enhanced Feasibility Study and/or Staffing Grant incentives.
 - Expansion of sector engagement, increase partnerships with industry groups, and the continuation of sector specific trainings and webinars*. The creation of a specialized agriculture offering to combine custom and prescriptive measures adopting aspects of the Michigan Farm Energy Program and associated utility incentives, as applicable, in 2020 with target to evaluate the usefulness of a pilot in 2021.
 - Access opportunities to pursue lighting as a service, including lighting controls. While a relatively new concept/idea and is premature to determine impact to savings, we will continue to assess the applicability to increase savings. Ameren Illinois recommends elevating this opportunity to SAG for discussion.
 - Utilization of case studies* as done in the past. Ameren Illinois welcomes new ideas, sectors and best practice information.
 - Consider performance incentives for Energy Advisors, beyond limited performance incentives in place. Again, Ameren Illinois welcomes new ideas and best practice information.
 - Additional work with national accounts on Installer Certification - plan to continue work in this arena with dedicated national account outreach and a well-documented process.

* Additional information included in Appendix



Participation From Large Customers

➤ **Topics for Future Discussions:**

1. What incentives have been offered and effective with other utilities?
2. What is the statewide impact of the loss of 10 MW+ customers?
3. Can examples of effective case studies produced by other utilities be provided?
4. Are there specific examples of account management incentive structures that have been successful in other markets?



MIDSTREAM & UPSTREAM PRODUCT INCENTIVES



Expand Midstream and Upstream Measures

- **Topic:** Expand midstream and upstream beyond lighting to include measures such as heat pump water heaters, circulations pumps, a broader application of commercial & industrial lighting, business and residential HVAC equipment, and food service equipment. Implementation examples were given for [Connecticut](#) and [Vermont](#).
- **Response:** Ameren Illinois is willing to explore the applicability of expanding midstream and upstream measures.
- **Actions:** Ameren Illinois proposes a working group, including stakeholders and evaluators, to research and identify measures consistent with the persistent savings structure. Discussions from this working group will hopefully lead to a statewide pilot and the ability to claim savings across all fuels. The working group should also include a stated goal of identifying measures that will allow utilities to claim higher electric savings at lower cost.
- **Topics for Future Discussions:**
 1. Is program design from other regions, climate zones, demographics, fuels, environments and service territories applicable to Ameren Illinois?
 2. Would deemed and/or agreed upon NTG values, leakage, fuel switching, attribution and other EM&V/policy considerations be an issue in the early years of a potential pilot?
 3. Will the Illinois Policy Manual establish consistent terminology for midstream and upstream programs?
 4. How will the market potential for these measures be determined?
 5. What is the impact of Certified Installer requirements on midstream measures?



OTHER



Commercial New Construction

- **Topic:** Create a separate commercial new construction offering with a targeted focus to develop high participation rates.
- **Response:** Ameren Illinois believes this is a viable recommendation. The potential study projects approximately 20 million square feet of new construction per year and represents limited new customer growth.
- **Actions:** Ameren Illinois commits to have a focused discussion on this potential opportunity and will attempt to incorporate a pilot, as early as 2020. Additionally, Ameren Illinois will create a separate commercial new construction application.
- **Topics for Future Discussions:**
 1. Are there successful utility new construction programs that can be referenced to learn best practices?
 2. Do lending institutions or property developers have a role in leveraging a joint program?
 3. How does the modified New Construction Offering make the business portfolio generate more CPAS savings as compared to other business offerings?

New Construction Incentives



Savings From the Ground Up

Build energy efficiency into your New Construction project with a little help from the Ameren Illinois Energy Efficiency Program. When you incorporate energy-saving measures into your non-residential construction project, you may qualify for cash incentives that will reduce project costs and lower energy bills for years to come!

Cash incentives are available for a variety of New Construction projects, including:

- High-performance lighting
- Custom projects, unique to your facility

New Construction Lighting Resources

It is recommended to use the [Amplify Online Lighting](#) application for faster submittal and processing. If using the PDF version, you must submit the Lighting Calculator document below with the application.

[Download Lighting Calculator](#)

Need help? [View the recorded training session on the Lighting Calculator](#)

The Incentive Estimation Tool can quickly provide you with an approximation of your project incentive and a comparison of multiple project scopes.

[Download Incentive Estimation Tool](#)

How to Get Cash Incentives

▶ [Expand For More Details](#)

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Our online application for lighting projects- now optimized for web and mobile devices!

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Have Questions?

 [1.866.800.0747](tel:18668000747)

 [Email Us](#)



Market Transformation

- **Topic:** Invest in market transformation initiatives.
- **Response:** Ameren Illinois believes this is a viable recommendation.
- **Actions:** Ameren Illinois will engage with the Midwest Market Transformation Collaborative and will look for opportunities to work jointly with other Illinois utilities on strategies that will yield increased savings and increased savings at lower cost.
- **Topics for Future Discussions:**
 1. Has a gauge for potential savings been identified?
 2. What is the timing for realization of savings from market transformation efforts?



Joint Program Delivery

- **Topic:** Strategically consider joint program delivery where it can cut costs.
- **Response:** Ameren Illinois believes this is a viable recommendation and will work to expand joint program delivery beyond OBF, statewide retail products implementer and implementation of the Community Action Agency channel.
- **Actions:** Ameren Illinois will explore launching a pilot before the end of this cycle to jointly deliver incentives to customers with other Illinois utilities.
- **Topics for Future Discussions:**
 1. How well are Illinois utility joint programs working from a stakeholder perspective?
 2. Do we understand where the economies of scale are and are the programs with the greatest impacts being prioritized?



Market Development Initiative

- **Topic:** Shift some of the market development budget to the Business Program.
- **Response:** Ameren Illinois believes it is premature to begin considering a shift in market development funding levels at this time. There is a clearly identified need for this effort, and Ameren Illinois has not seen indications that the need will subside in the immediate or near future.



**ENERGY EFFICIENCY
INTERNSHIPS**

Connecting the future workforce with opportunities in the energy efficiency industry.

Ameren Illinois is helping local companies and organizations in the energy efficiency field identify potential candidates that would benefit from participating in a summer internship program. Through these connections, interns will be able to learn about employment opportunities in energy efficiency, receive mentorship from professionals in the industry, and learn skills relevant to obtaining a full-time position in energy efficiency.

Key points of this program

- The program anticipates providing internships to 10–15 candidates
- Internships are offered for 10–12 weeks, during May through August
- Selected interns will work full-time during the internship period, and no less than 30 hours per week
- Internships are paid positions, commensurate with experience and the responsibilities of the position
- Internships are being offered throughout central and southern Illinois, specifically within the Ameren Illinois service territory

Internships will be granted, as available, to candidates who demonstrate a strong work ethic, commitment to the position and a willingness to learn about working in the energy efficiency field.

Learn more at:
AmerenIllinoisSavings.com/Internships
or call 1.844.494.1225



Who is eligible for an internship through this program?

We are seeking high school upperclassmen or college undergraduate students to participate in this program. Interested candidates must be eligible to work in the United States, complete a job application, and commit to actively participate in the internship program as required for the position's entire duration.




**AMEREN ILLINOIS OPPORTUNITIES
SCHOLARSHIP PROGRAM**

As part of Ameren Illinois' mission to bring diverse candidates into the energy efficiency industry, Ameren Illinois created the Opportunities Scholarship to help train the next generation of Construction Management and HVAC professionals.

The program provides a total of **36 scholarships** per school year at six community colleges in Illinois. Scholarship winners receive a \$3,000 stipend to defray the costs of their training.

Looking beyond a student's GPA, Ameren Illinois works closely with school instructors to identify promising diverse candidates based on attitude, performance, and work ethic — students like Bryan Payton.

After his mother's death when he was just 11 years old, Payton navigated life's challenges — and Chicago's south side — with the help of meaningful mentorships. Eventually, he found a home at Heartland Community College and a **passion for HVAC work**. He plans to pay it forward via a youth advocate program.

"I found a love for HVAC. There is joy in what I do, and nothing can stop me. This is the start of my legacy."

— Bryan Payton,
HVAC Student,
Ameren Illinois Scholar

To date, the Ameren Illinois Opportunities Scholarship program has provided **over \$100,000** to support the promises of the future energy efficiency workforce in central and southern Illinois.

\$
\$100,000+
in scholarship dollars awarded

🌍
Aims to bring diverse candidates into the energy efficiency industry

📖
Changes the lives of **36** promising students every year

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Next Steps

- Continue to collaboratively engage with interested stakeholders on topics raised during the workshop process.
 - Engage with the Office of the Attorney General to plan for and participate in statewide discussions regarding low income programs.
 - Engage NRDC for further discussion on developing best practices related to the business ideas and recommendations.
- Work with the SAG facilitator to determine which topics can be incorporated into the 2020 SAG plan, as appropriate.
- Maintain an open dialogue with interested parties in an effort to identify potential ways to increase savings, when appropriate.

QUESTIONS?

APPENDIX



Achieved Savings Compared to Unmodified Savings Goals

➤ Topic:

- Premise from NRDC: Ameren Illinois only fell 4% below the unmodified statutory goal in 2018, so with just a few changes, the unmodified statutory CPAS goals could be met.
- Data provided: Ameren achieved 381 GWh savings in 2018; would need 397 GWh per year to hit the unmodified CPAS goals; and Ameren Illinois' modified goal is 346 GWh per year.

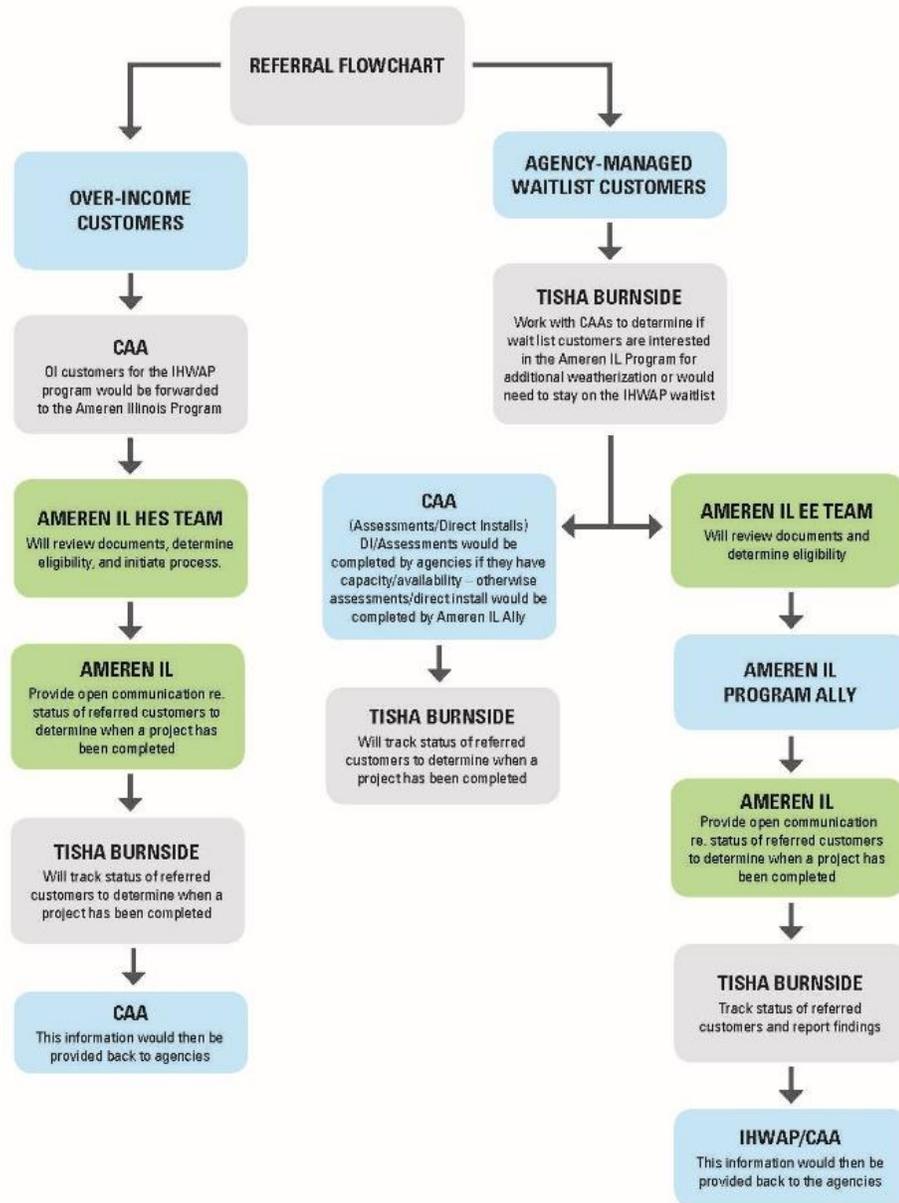
➤ Response:

- Ameren Illinois exceeded goal in 2018, but given market conditions and changing policy scheme those savings levels are not sustainable, particularly with baseline shifts due to federal lighting standards expected in 2021.
- A successful 2018, especially in key offerings like Retail Products, does not increase the ability to achieve the 2021 unmodified statutory CPAS goal.
- Expiring savings, mainly due to lighting baseline shifts, have a major role in achievement of annual CPAS goals.
 - The EE Plan projected expired savings of approximately 35 GWh in 2021 from measures installed in 2018.
 - Due to 2018 portfolio achievements, the expired savings in 2021 from measures installed in 2018 is approximately 58 GWh, an increase of over 20 GWh, which is about 6% of the CPAS goal.
 - In addition to expiring savings from measures installed in 2019 and 2020, expired savings in 2021 could be over 90 GWh.
- The 397 GWh per year, referenced above, only accounts for expired savings beyond expired savings in the original filing. In order to fully account for all savings required to meet unmodified CPAS goals, expired savings that occur from the compliance filing and 2018 actuals need to be accounted for.



INCOME QUALIFIED REFERRAL PROCESS

Attachment C



Examples of Ongoing Sector Specific Trainings and Webinars

- Combined Heat and Power (CHP)
- Wastewater Treatment Plant (WWTP)
- HVAC in Warehouses
- Industrial Assessment Center (IAC)
- DOE Better Plants
- Industrial Internet of Things
- Public Sector Customer Case Studies
- Compressed Air Challenge
- Power Over Ethernet (POE)
- EPA ENERGY STAR[®] Industrial and Commercial Tools

Case Studies

➤ All case studies, including those specific to the Custom Offering, can be found [HERE](#).



ENERGY EFFICIENCY PROGRAM



"We are one of the first printers in the country to adopt this technology — and the incentives definitely made a difference."

— Steve Gillespie, Plant Manager

CUSTOM PROJECT PUTS KINGERY PRINTING ON CUTTING EDGE

Celebrating 50 years of business in 2016, Kingery Printing has survived and thrived through changing times. When they founded the business back in 1968, John and Dolores Kingery could not have imagined the advanced technology that today puts the company one step ahead of competitors.

"We are a commercial printer based in Effingham, Illinois. We print magazines, maps — anything you could think of — for customers across the U.S.," says Business Manager Jeff Htoon.

Until recently, the company dealt daily with a problem that has plagued all printers: fresh ink. Presses were equipped with an infrared lighting bar to dry the ink as the paper passed through. However, this traditional lighting never completely dried the ink, so printed materials had to sit for as long as 24 hours before handling. Even with lengthy dry times, protective coatings, and setting powders, issues with scuffing and smudging were a daily concern.

In 2016, Kingery Printing learned about a promising solution: an LED UV curing module from AMES Spectral UV. The state-of-the-art technology sets a new standard by using a blue LED curing light to instantly dry ink (not unlike the fast-drying gel manicures popular in your neighborhood nail salon).

There was only one downside: cost.

"We were looking at trying to retrofit an existing press with the new LED technology," says Htoon. But with a price tag of \$275,000, "it was cost prohibitive without support."

The support they needed would come from the Ameren Illinois Energy Efficiency Program. The technology was so fresh it was not covered by any of Ameren Illinois' standard energy efficiency programs. It was, however, a perfect fit for the utility's custom incentive.

"We understand that a cookie-cutter approach does not work for every project. Our Custom offering provides incentives for unique projects or emerging technologies that save energy and money," says Keith Martin, Director of Energy Efficiency Operations for Ameren Illinois. "Once Ameren Illinois learned about this energy-saving LED technology for the printing industry, we were pleased to provide an incentive that covered a significant portion of Kingery Printing's project costs."

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ENERGY EFFICIENCY PROGRAMS



"In this economy, all types of organizations are trying to squeeze every dollar they can from their budget. And for nonprofit groups, every dollar saved goes to provide a needed service in the community."

— Mark Steinmetz, Energy Advisor

CONVENT'S NEW BOILER SYSTEM IS TESTAMENT TO EFFICIENCY

Sacred Heart Convent is home to the Dominican Sisters of Springfield, Illinois, a group of women who have committed their lives to both prayer and action. Their desire to take action on behalf of the environment led the sisters to the Ameren Illinois Energy Efficiency Program in 2011.

"As a congregation, we are committed to restoring wholeness to the planet and living in a more sustainable way," says Sister Linda Hayes, who serves as administrator of the 104,000 square-foot campus.

"We became concerned about our greenhouse gas emissions and wanted to reduce our impact on the environment. Considering the size of this place, we knew there had to be some inefficiencies."

An energy audit conducted by Trane helped pinpoint those inefficiencies and provided an action plan to eliminate energy waste.

The audit found that the convent's 1965 vintage boiler system — which provides heat and hot water for the entire campus — was operating at less than 60% efficiency. That energy waste was compounded by unstable temperature controls and energy losses from steam traps in the centralized distribution system.

"The boiler had many issues. One boiler was really supporting the steam and hot water needs of five stand-alone buildings," says Hayes.

She turned to Ameren Illinois to help fund a major project to decentralize the boiler plant and install five modular boilers and high-efficiency hot water heating systems in each of the convent's five buildings.

"This decentralized approach allowed the convent to heat each individual building as needed and tie into an energy management system that accurately matches energy use with needs," says Mark Steinmetz, Energy Advisor for Ameren Illinois.

Ameren Illinois provided Sacred Heart more than \$161,000 in cash incentives to complete the improvements. That included a \$46,500 Staffing Grant that helped pay the salary of a Trane employee who acted as project manager.

Along with adding new, high-efficiency boilers and hot water heaters, the project upgraded the convent's energy management system with digital controls.

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ENERGY EFFICIENCY PROGRAMS



SEDAC Helps Organizations Use Energy Wisely

The Smart Energy Design Assistance Center, or SEDAC, provides free advice and analyses to improve the economic viability of private and public facilities in Illinois through the efficient use of energy resources. SEDAC is sponsored by the Illinois Department of Commerce and Economic Opportunity, in partnership with Ameren Illinois and Commonwealth Edison. SEDAC is managed by the School of Architecture at the University of Illinois at Urbana-Champaign and the 380 Energy Group.

For more information, visit snaatenergy.arch.uiuc.edu

GROUNDBREAKING EFFICIENCY PROJECT GIVES MAHOMET IGA AN EDGE

As he planned to expand his grocery store from 24,000 to 39,000 square feet in 2009, Mahomet IGA President Brooks Marsh saw an opportunity to shrink his energy budget. And he tapped into some "groundbreaking" technology to do so.

Marsh made plans to install a cutting-edge heating and cooling system powered by geothermal heat pump technology — one of several energy efficiency recommendations made by the Smart Energy Design Assistance Center at the University of Illinois. He turned to the Ameren Illinois Energy Efficiency Program for help and received more than \$25,500 in grants.

"We needed to take greater control of our energy usage. The incentive payment made this project affordable," says Marsh. In fact, the funding paid for nearly 17% of project costs and took a bite out of the project payback period.

"Geothermal is by far the best heating and cooling technology available," says Jason Brevde, Energy Engineer for the Ameren Illinois Energy Efficiency Program. "Geothermal systems take heat energy from one place and put it somewhere else — it's the same principle as your central air conditioning system, but you're using the ground instead of outside air and it works to both cool and heat your building."

Geothermal technology relies on the relatively constant temperature beneath the earth's surface, so there is no need to use combustion as the heating method. In the



Mahomet IGA President Brooks Marsh shows reporters the store's new geothermal unit at a media event held March 20, 2010.

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