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# Ameren Illinois Quarterly Report to SAG

PY9 Q2 8-103/8-104 and 16-111.5B (IPA)

Results and Highlights

02.03.17



**8-103/8-104  
PY9 Q2 Report**

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

Energy Efficiency	PY9 Compliance Goal (MWh)	PY9 Compliance Goal (Therms)	PY9 Electric Adjusted Goals (MWh)	PY9 Gas Adjusted Goals (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	PY9 NTG and/or TRM V4.0 Adjustment Explanations *
RES-Appliance Recycling	3,329	0	3,169	0	-160	0	-5%	0%	Slight increase due to change PY9 NTG and a reduction in savings due to reversed coefficients TRM V 3
RES-Behavior Modification	0	1,887,500	0	1,887,500	0	0	0%	0%	
RES-Energy Star New Homes	791	25,663	760	32,271	-31	6,608	-4%	26%	Electric NTGRs decreased.. Gas NTGRs increased.
RES-HPWES	5,346	768,779	2,389	427,530	-2,957	-341,249	-55%	-44%	Changes to air sealing and insulation measure algorithms caused reduction to electric and gas goals.
RES-HVAC	4,492	0	4,832	0	340	0	8%	0%	NTGRs for ROB measures decreased by 5-10%; NTGRs for ER measures increased by 10-15%; NTGR for BMP blower motor increased by 10%. TRM change - Baseline for ASHP ROB measures changed to 14 SEER from 13 SEER.
RES-Lighting	4,968	0	4,513	0	-455	0	-9%	0%	Change to ISR in TRM V3.0 increased the savings recognized in PY7, causing a reduction to carryover savings in years PY8 & PY9. Midstream lighting is in IPA for PY8 and these savings are strictly carryover from PY7.
RES-Moderate Income	6,604	462,778	4,420	322,597	-2,184	-140,181	-33%	-30%	Changes to air sealing and insulation measure algorithms caused reduction to electric and gas goals.
RES-Multifamily In-Unit	5,517	112,521	5,151	98,838	-366	-13,683	-7%	-12%	Electric NTGR generally increased for most measures, offset by a reduction in HOU for CFLs (TRM change). Gas NTGRs generally remained relatively stable.
RES-School Kits	388	54,986	273	33,605	-115	-21,380	-30%	-39%	Electric or gas NTGRs generally increased with exception of CFLs which decreased. This was offset in electric by TRM changes - lighting parameter reductions in hours, WHF and ISR. Gas measures were affected by TRM changes to water heater temperature reduction methodology and ISR.
<b>RES PROGRAM TOTAL</b>	<b>31,435</b>	<b>3,312,228</b>	<b>25,506</b>	<b>2,802,342</b>	<b>-5,929</b>	<b>-509,885</b>	<b>-19%</b>	<b>-15%</b>	
BUS-Standard	93,178	851,087	82,880	744,554	-10,298	-106,532	-11%	-13%	Electric variance is primarily driven by changes to HOU in lighting measures and algorithm changes to occupancy sensors. Gas variance was the result of reduced NTG values.
BUS-Custom	32,372	1,131,575	32,111	1,271,811	-262	140,235	-1%	12%	Slight decrease in electric NTG and increase in gas NTG
BUS-RCx	17,137	134,172	16,372	129,528	-765	-4,644	-4%	-3%	Reductions in both electric and gas NTG
BUS-Large C&I	17,480	0	17,480	0	0	0	0%	0%	
<b>BUS PROGRAM TOTAL</b>	<b>160,168</b>	<b>2,116,833</b>	<b>148,843</b>	<b>2,145,893</b>	<b>-11,325</b>	<b>29,059</b>	<b>-7%</b>	<b>1%</b>	
<b>AMEREN ILLINOIS PROGRAM TOTAL</b>	<b>191,603</b>	<b>5,429,061</b>	<b>174,349</b>	<b>4,948,235</b>	<b>-17,254</b>	<b>-480,826</b>	<b>-9%</b>	<b>-9%</b>	

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

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

	PY9 Electric Adjusted Goals (MWHs)	PY9 Gas Adjusted Goals (Therms)	PY9 Electric Implementation Plan (MWHs)	PY9 Gas Implementation Plan (Therms)	Electric Variance	Gas Variance	Electric % Variance	Gas % Variance	Explanations or +/- 20% variance
<b>Energy Efficiency</b>									
RES-Appliance Recycling	3,169	0	3,312	0	143	0	5%	0%	
RES-Behavior Modification	0	1,887,500	0	1,837,000	0	-50,500	0%	-3%	
RES-Energy Star New Homes	760	32,271	121	8,464	-639	-23,807	-84%	-74%	During annual development of PY9 implementation plan and incorporation of TRM & NTG changes, on a prospective basis this program was found to be cost-ineffective for PY9. The program was terminated Aug 31, 2016.
RES-HPwES	2,389	427,530	81	17,923	-2,308	-409,607	-97%	-96%	During annual development of PY9 implementation plan and incorporation of TRM & NTG changes, on a prospective basis this program was found to be cost-ineffective for PY9. The program was terminated July 31, 2016.
RES-HVAC	4,832	0	4,326	51,631	-506	51,631	-10%	0%	
RES-Lighting	4,513	0	5,948	0	1,435	0	32%	0%	Greater participation in the PY7 lighting program resulted in larger carryover
RES-Moderate Income	4,420	322,597	3,857	649,851	-563	327,254	-13%	101%	Increase in the number of homes to be treated for Moderate Income resulting in increased gas savings.
RES-Multifamily In-Unit	5,151	98,838	6,461	156,503	1,310	57,665	25%	58%	Greater planned participation results in larger savings to offset reductions in other programs.
RES-School Kits	273	33,605	451	45,509	178	11,904	65%	35%	Increased delivery with minimal budget impact.
<b>RES PROGRAM TOTAL</b>	<b>25,506</b>	<b>2,802,342</b>	<b>24,557</b>	<b>2,766,881</b>	<b>-949</b>	<b>-35,461</b>	<b>-4%</b>	<b>-1%</b>	
BUS-Standard	82,880	744,554	67,667	2,077,737	-15,213	1,333,183	-18%	179%	Gas variance due to anticipated participation from a few large industrial customers with high pressure steam traps
BUS-Custom	32,111	1,271,811	72,617	418,000	40,506	-853,811	126%	-67%	Electric variance due to a large amount of savings expected from Large electric customers (see savings shift to Custom under Large C&I explanation). Gas variance due to less savings expected from Custom gas due to lower natural gas prices making return-on-investment less favorable to customers
BUS-RCx	16,372	129,528	9,076	275,039	-7,296	145,511	-45%	112%	Electric variance due to reduced number of eligible customers for electric retrocommissioning offers than original expected during planning. Gas variance due to more customers pursuing retrocommissioning than originally anticipated during planning.
BUS-Large C&I	17,480	0	0	0	-17,480	0	-100%	0%	No customers signed up for Large C&I offering in PY7, savings shifted to Custom to serve the same target customers
<b>BUS PROGRAM TOTAL</b>	<b>148,843</b>	<b>2,145,893</b>	<b>149,360</b>	<b>2,770,776</b>	<b>517</b>	<b>624,883</b>	<b>0%</b>	<b>29%</b>	
<b>AMEREN ILLINOIS PROGRAM TOTAL</b>	<b>174,349</b>	<b>4,948,235</b>	<b>173,917</b>	<b>5,537,657</b>	<b>-432</b>	<b>589,422</b>	<b>0%</b>	<b>12%</b>	

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

Energy Efficiency	PY9 Electric Plan Budget	PY9 Gas Plan Budget	PY9 Electric Implementation Budget	PY9 Gas Implementation Budget	Electric Variance	Gas Variance	Electric %Variance	Gas %Variance	Explanations or +/- 20% variance
RES-Appliance Recycling	\$ 1,313,788	\$ -	\$ 1,312,917	\$ -	\$ (871)	\$ -	0%	0%	
RES-Behavior Modification	\$ -	\$ 984,375	\$ -	\$ 1,070,390	\$ -	\$ 86,015	0%	9%	
RES-Energy Star New Homes	\$ 655,381	\$ 361,921	\$ 931,633	\$ 436,422	\$ 276,252	\$ 74,501	42%	21%	With closing of program in Q1, currently working to reallocate dollars to other programs.
RES-HPwES	\$ 4,004,447	\$ 2,211,350	\$ 2,016,308	\$ 474,233	\$ (1,988,139)	\$ (1,737,117)	-50%	-79%	With closing of program in Q1, currently working to reallocate dollars to other programs.
RES-HVAC	\$ 2,844,928	\$ -	\$ 2,194,425	\$ 65,180	\$ (650,503)	\$ 65,180	-23%	0%	Discontinued incentives on central air conditioners to ensure compliance with not overpromoting cost-ineffective measures.
RES-Lighting	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	
RES-Moderate Income	\$ 8,375,886	\$ 1,303,887	\$ 10,382,518	\$ 3,409,632	\$ 2,006,632	\$ 2,105,745	24%	161%	Increase in the number of homes to be treated for Moderate Income resulting in increased gas savings.
RES-Multifamily In-Unit	\$ 1,061,851	\$ 312,752	\$ 2,735,990	\$ 841,059	\$ 1,674,139	\$ 528,307	158%	169%	Greater funding to meet increased planned participation.
RES-School Kits	\$ 115,375	\$ 120,175	\$ 120,891	\$ 139,260	\$ 5,516	\$ 19,085	5%	16%	
<b>RES PROGRAM TOTAL</b>	<b>\$ 18,371,656</b>	<b>\$ 5,294,459</b>	<b>\$ 19,694,682</b>	<b>\$ 6,436,176</b>	<b>\$ 1,323,026</b>	<b>\$ 1,141,717</b>	<b>7%</b>	<b>22%</b>	
BUS-Standard	\$ 11,661,911	\$ 2,636,097	\$ 10,445,471	\$ 1,534,546	\$ (1,216,440)	\$ (1,101,551)	-10%	-42%	Anticipated participation from a few large industrial steam trap projects resulting in less expenditures for gas incentives.
BUS-Custom	\$ 5,379,948	\$ 1,989,674	\$ 9,977,786	\$ 1,802,645	\$ 4,597,838	\$ (187,029)	85%	-9%	Electric variance due to a large amount of incentives expected to go to electric customers (see savings shift to Custom under Large C&I explanation). Gas variance due to less projects expected from Custom gas due to lower natural gas prices making return-on-investment less favorable to customers
BUS-RCx	\$ 1,869,563	\$ 127,004	\$ 772,018	\$ 529,074	\$ (1,097,545)	\$ 402,070	-59%	317%	Electric variance due to reduced number of eligible customers for electric retrocommissioning offers than original expected during planning. Gas variance due to more customers pursuing retrocommissioning than originally anticipated during planning.
BUS-Large C&I	\$ 1,710,000	\$ -	\$ -	\$ -	\$ (1,710,000)	\$ -	-100%	0%	No customers signed up for Large C&I offering in PY7, budget shifted to Custom to serve the same target customers
<b>BUSINESS PROGRAM TOTAL</b>	<b>\$ 20,621,422</b>	<b>\$ 4,752,776</b>	<b>\$ 21,195,275</b>	<b>\$ 3,866,265</b>	<b>\$ 573,853</b>	<b>\$ (886,511)</b>	<b>3%</b>	<b>-19%</b>	
Ameren Illinois - Portfolio Admin costs	\$ 1,963,352	\$ 505,891	\$ 1,963,352	\$ 505,891	\$ -	\$ -	0%	0%	
Ameren Illinois - EM&V costs	\$ 1,369,780	\$ 352,947	\$ 1,369,780	\$ 352,947	\$ -	\$ -	0%	0%	
Ameren Illinois - Education	\$ 981,676	\$ 252,946	\$ 981,676	\$ 252,946	\$ -	\$ -	0%	0%	
Ameren Illinois - Marketing	\$ 981,676	\$ 252,946	\$ 981,676	\$ 252,946	\$ -	\$ -	0%	0%	
R&D Budget (Emerging Technologies)	\$ 1,369,780	\$ 352,947	\$ 1,369,780	\$ 352,947	\$ -	\$ -	0%	0%	
<b>AMEREN ILLINOIS PROGRAM TOTAL</b>	<b>\$ 45,659,342</b>	<b>\$ 11,764,912</b>	<b>\$ 47,556,221</b>	<b>\$ 12,020,118</b>	<b>\$ 1,896,879</b>	<b>\$ 255,206</b>	<b>4%</b>	<b>2%</b>	
<b>DCEO AMEREN ILLINOIS TOTAL</b>	<b>\$ 15,219,781</b>	<b>\$ 3,921,637</b>	<b>\$ 15,219,781</b>	<b>\$ 3,921,637</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>0%</b>	
<b>TOTAL PORTFOLIO</b>	<b>\$ 60,879,122</b>	<b>\$ 15,686,549</b>	<b>\$ 62,776,001</b>	<b>\$ 15,941,756</b>	<b>\$ 1,896,879</b>	<b>\$ 255,206</b>	<b>3%</b>	<b>2%</b>	

## 8-103/8-104: PY9 Implementation Plan vs Actual Q2 Activity - Savings

Energy Efficiency	PY9 Electric Implementation Plan (MWHs)	PY9 Gas Implementation Plan (Therms)	PY9 Electric Actuals * (MWHs)	PY9 Gas Actuals * (Therms)	Electric % Complete	Gas % Complete	Explanations
RES-Appliance Recycling	3,312	0	1,072	0	32%	0%	Appliance Recycling is forecasting to be at 32% of electric Implementation plan goal.
RES-Behavior Mod	0	1,837,000	0	421,486	0%	23%	
RES-ENERGY STAR New Homes	121	8,464	185	13,503	153%	160%	Energy Star New Homes is forecasting to be at 153% of the electric Implementation plan goal and 160% of the gas Implementation plan goal.
RES-HPwES	81	17,923	34	9,540	42%	53%	HEP is forecasting to be at 42% of the electric Implementation plan goal and 53% of the gas Implementation plan goal.
RES-HVAC	4,326	51,631	1,037	3,329	24%	6%	HVAC is forecasting to be at 59% of the electric Implementation plan goal and 10% of the gas Implementation plan goal.
RES-Lighting	5,948	0	5,948	0	100%	0%	This total represents the evaluated lighting carryover from PY7.
RES-Moderate Income	3,857	649,851	876	150,393	23%	23%	
RES-Multifamily	6,461	156,503	2,151	129,389	33%	83%	Multifamily is forecasting to be at 79% of the electric Implementation plan goal.
RES-School Kits	451	45,509	156	15,728	35%	35%	
<b>RESIDENTIAL PROGRAM TOTAL</b>	<b>24,557</b>	<b>2,766,881</b>	<b>11,459</b>	<b>743,368</b>	<b>47%</b>	<b>27%</b>	
BUS-Standard	67,667	2,077,737	21,883	75,558	32%	4%	Standard is forecasting to be at 67% of the gas Implementation plan goal.
BUS-Custom	72,617	418,000	7,854	120,968	11%	29%	Custom is forecasting to be at 124% of electric Implementation plan goal and 271% of the gas Implementation plan goal.
BUS-RCx	9,076	275,039	423	79,748	5%	29%	RCx is forecasting to be at 74% of electric Implementation plan goal.
BUS-Large C&I	0	0	0	0	0%	0%	
<b>BUSINESS PROGRAM TOTAL</b>	<b>149,360</b>	<b>2,770,776</b>	<b>30,161</b>	<b>276,273</b>	<b>20%</b>	<b>10%</b>	
<b>AMEREN ILLINOIS PROGRAM TOTAL</b>	<b>173,917</b>	<b>5,537,657</b>	<b>41,620</b>	<b>1,019,641</b>	<b>24%</b>	<b>18%</b>	

\* All savings values are unevaluated

## 8-103/8-104: PY9 Implementation Plan vs Actual Q2 Activity - Budget

Energy Efficiency	PY9 Electric Implementation Plan	PY9 Gas Implementation Plan	PY9 Electric Actuals	PY9 Gas Actuals	Electric % Complete	Gas % Complete	Explanations
RES-Appliance Recycling	\$ 1,312,917	\$ -	\$ 343,372	\$ -	26%	0%	Appliance Recycling is forecasting to be at 26% of its electric Implementation Plan spend.
RES-Behavior Modification	\$ -	\$ 1,070,390	\$ -	\$ 933,166	0%	87%	
RES-ENERGY STAR New Homes	\$ 931,633	\$ 436,422	\$ 197,588	\$ 86,002	21%	20%	Energy Star New Homes is forecasting to be at 21% of its electric Implementation Plan spend and 20% of its gas Implementation Plan spend.
RES-HPwES	\$ 2,016,308	\$ 474,233	\$ 176,636	\$ 52,804	9%	11%	HEP is forecasting to be at 9% of its electric Implementation Plan spend and 11% of its gas Implementation Plan spend.
RES-HVAC	\$ 2,194,425	\$ 65,180	\$ 863,641	\$ 17,834	39%	27%	HVAC is forecasting to be at 55% of its gas Implementation Plan spend.
RES-Lighting	\$ -	\$ -	\$ -	\$ -	0%	0%	
RES-Moderate Income	\$ 10,382,518	\$ 3,409,632	\$ 3,005,061	\$ 1,003,583	29%	29%	
RES-Multifamily In-Unit	\$ 2,735,990	\$ 841,059	\$ 1,502,798	\$ 472,598	55%	56%	
RES-School Kits	\$ 120,891	\$ 139,260	\$ 54,588	\$ 62,360	45%	45%	
<b>RESIDENTIAL PROGRAM TOTAL</b>	<b>\$ 19,694,682</b>	<b>\$ 6,436,176</b>	<b>\$ 6,143,684</b>	<b>\$ 2,628,348</b>	<b>31%</b>	<b>41%</b>	
BUS-Standard	\$ 10,445,471	\$ 1,534,546	\$ 4,121,030	\$ 571,233	39%	37%	
BUS-Custom	\$ 9,977,786	\$ 1,802,645	\$ 1,327,933	\$ 460,666	13%	26%	
BUS-RCx	\$ 772,018	\$ 529,074	\$ 175,814	\$ 216,377	23%	41%	
BUS-Large C&I	\$ -	\$ -	\$ -	\$ -	0%	0%	
<b>BUSINESS PROGRAM TOTAL</b>	<b>\$ 21,195,275</b>	<b>\$ 3,866,265</b>	<b>\$ 5,624,777</b>	<b>\$ 1,248,277</b>	<b>27%</b>	<b>32%</b>	
<b>AMEREN ILLINOIS PROGRAM TOTAL</b>	<b>\$ 40,889,957</b>	<b>\$ 10,302,441</b>	<b>\$ 11,768,461</b>	<b>\$ 3,876,624</b>	<b>29%</b>	<b>38%</b>	

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

Program	Measure Description	TRC	Explanations for TRC < 1
HVAC/Moderate Income	Duct Insulation & Sealing Heat Pump	1.52	
HVAC/Moderate Income	Duct Insulation & Sealing Electric w/CAC	2.11	
HVAC/Moderate Income	Duct Insulation & Sealing Electric without CAC	1.35	
HVAC/Moderate Income	Duct Insulation & Sealing Gas w/CAC	2.52	
HVAC/Moderate Income	Duct Insulation & Sealing Gas Only	1.63	



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

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



**8-103/8-104**  
**Residential Highlights**

## Residential **Appliance Recycling** Program Highlights

- Program closed 8/31/2016 and completed its last pick ups in September 2016.
- Over 75,000 appliances were recycled throughout the 8 years of the program.



## Residential HVAC Program Highlights

- Production for November outpaced previous months.
- Blower motors had a 50% increase over the average of the first 5 months.
- Early retirement ASHP activity continues to run slightly behind planned production.



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

- Program is on track to achieve both electric and gas savings goals with no significant challenges.



## Residential **HPwES** Program Highlights

- Program closed 7/31/2016 and completed its last project on 8/8/2016.



## Residential **Moderate Income** Program Highlights

- 192 retrofit projects were completed in the 2<sup>nd</sup> quarter.
- Seeing an increase in customer applications submitted.
- Currently 56 allies participating with 18 of them trained as 'core' allies.



## Residential **Multifamily** Program Highlights

- Program is on track at 55% of annual savings target and 53% of annual budget.
- Direct install measures tracking upward this quarter.
- More than 21,000 CFL's, 5,000 DHW measures and 300 thermostats installed this period.
- Over 130,000 sq. ft. attic insulation installed this quarter.





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

- The program closed 8/31/2016 and completed its last project on 8/29/2016.



## Residential **School Efficiency Kits** Program Highlights

- Program is on track to meet goal – with presentations equaling 88% of the annual goal already scheduled.
- Nearly 60 presentations at 25 schools during this quarter.
- Over 2,200 kits distributed.



**8-103/8-104**  
**Business Highlights**

## Business Program Highlights

- 18 Retro-Commissioning projects are in various stages of progress.
- Processing time for the online applications for lighting are 5 business days faster than traditional paper applications.
- Steam Trap projects have lagged in comparison to prior years.



**16-111.5B (IPA)  
PY9 Q2 Report**

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

IPA Energy Efficiency	Approved in IPA Electric Procurement Plan	IPA Plan Goal (MWh)	IPA Plan Budget (\$)**	PY9 Electric Contract (MWh)	PY9 Contract Budget (\$)	Difference		Explanations
						% Energy	% Budget	
Rural Efficiency Kits	2015	7,381	\$971,160	5,490	\$971,160	-26%	0%	Reduction to the PY9 energy savings goal driven by CLEARResult's overdelivery in PY8 and updates to TRM algorithms.
Multifamily	2015	36,498	\$14,395,090	19,798	\$10,016,520	-46%	-30%	Due to reductions in air sealing and insulation savings, CLEARResult had to remodel their program to get it to pass TRC screening.
Moderate Income Kits	2015	1,469	\$692,550	1,466	\$693,090	0%	0%	N/A
Small Business Direct Install	2015	9,173	\$3,263,754	11,641	\$3,287,814	27%	1%	Franklin revised their measure mix for PY9 which resulted in additional savings.
Behavior Modification (Electric Portion Only)	2015	37,500	\$1,013,625	37,500	\$1,013,625	0%	0%	N/A
Small Business Refrigeration	2015	16,820	\$3,283,169	8,205	\$2,632,867	-51%	-20%	Caples revised their program for PY9 after their experience in PY8. They drastically reduced the proposed savings but still have a program design that passed TRC screening.
Residential Lighting	2015	50,193	\$9,707,900	49,413	\$9,696,614	-2%	0%	CLEARResult shifted some of the participation among the bulb types from CFL to LED which resulted in a small reduction to savings.
Community-Based CFL Distribution	2016	8,402	\$1,037,531	8,401	\$1,039,500	0%	0%	N/A
Public HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	-10%	0%	60 Energy revised their program measure mix which resulted in a reduction to savings.
Private HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	-10%	0%	60 Energy revised their program measure mix which resulted in a reduction to savings.
Small Commercial Lit Signage	2016	8,480	\$1,999,999	12,884	\$2,000,000	52%	0%	GDS revised their program measure mix which resulted in an increase in energy savings.
HVAC Check-Up	2016	5,349	\$1,021,467	0	\$0	0%	0%	When reviewing all programs prior to June 1st Implementation, the TRC analysis for this program was below one (1). Nexant made multiple attempts to revise the proposed program to get the program level TRC above 1 but was not successful. AIC ceased contract negotiations.
LED Linear Lighting for Small Facilities	2016	13,281	\$2,790,000	11,467	\$2,609,976	-14%	-6%	When reviewing all programs prior to June 1st Implementation, the TRC analysis for this program was below one (1). Matrix revised their proposed program by reducing cost to get the TRC screening back above 1. Savings reductions were due to changes in the TRM.
Demand Based Ventilation Fan Control	2016	5,148	\$1,080,610	4,932	\$1,080,047	-4%	0%	Matrix made some revisions to this programs measure mix which resulted in reduced energy savings.
Public Facility Engagement Elec Only	2016 Conditional Approval	26,397	\$5,823,662	26,397	\$5,823,662	0%	0%	Program was conditionally approved by the Commission. Once DCEO received an approved budget from the State, AIC ceased contract negotiations with GDS.
STEP	2016 Conditional Approval	2,495	\$683,706	1,833	\$683,706	-27%	0%	Program was conditionally approved by the Commission. Once DCEO received an approved budget from the State, AIC ceased contract negotiations with MEEA.

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

# IPA: PY9 Q1 Plan vs Actual – Savings and Budget

IPA Energy Efficiency	Approved in IPA Electric Procurement Plan	IPA Plan Goal (MWHs)	IPA Plan Budget (\$)**	PY9 Electric Contract (MWHs)	PY9 Contract Budget (\$)	PY9 Activity (MWHs)	PY9 Spend (\$)	Difference	
								% Energy	% Budget
Rural Efficiency Kits	2015	7,381	\$971,160	5,490	\$971,160	3,319	\$579,673	60%	60%
Multifamily	2015	36,498	\$14,395,090	19,798	\$10,016,520	6,994	\$3,437,116	35%	34%
Moderate Income Kits	2015	1,469	\$692,550	1,466	\$693,090	1,046	\$484,694	71%	70%
Small Business Direct Install	2015	9,173	\$3,263,754	11,641	\$3,287,814	3,602	\$993,840	31%	30%
Behavior Modification (Electric Portion Only)	2015	37,500	\$1,013,625	37,500	\$1,013,625	19,380	\$757,845	52%	75%
Small Business Refrigeration	2015	16,820	\$3,283,169	8,205	\$2,632,867	1,682	\$558,328	20%	21%
Residential Lighting	2015	50,193	\$9,707,900	49,413	\$9,696,614	24,421	\$3,990,332	49%	41%
Community-Based CFL Distribution	2016	8,402	\$1,037,531	8,401	\$1,039,500	1,858	\$229,759	22%	22%
Public HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	-	\$0	0%	0%
Private HVAC Optimization	2016	6,926	\$1,000,000	6,257	\$1,000,000	-	\$0	0%	0%
Small Commercial Lit Signage	2016	8,480	\$1,999,999	12,884	\$2,000,000	1,383	\$330,958	11%	17%
HVAC Check-Up	2016	5,349	\$1,021,467	0	\$0	-	\$0	0%	0%
LED Linear Lighting for Small Facilities	2016	13,281	\$2,790,000	11,467	\$2,609,976	467	\$106,289	4%	4%
Demand Based Ventilation Fan Control	2016	5,148	\$1,080,610	4,932	\$1,080,047	-	\$0	0%	0%
Public Facility Engagement Elec Only	2016 Conditional Approval	26,397	\$5,823,662	26,397	\$5,823,662	-	\$0	0%	0%
STEP	2016 Conditional Approval	2,495	\$683,706	1,833	\$683,706	-	\$0	0%	0%

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



**16-111.5B (IPA)**  
**Highlights**



## 16-111.5B (IPA) Program Highlights - Residential

**Program: RESIDENTIAL LIGHTING**

**Vendor/Implementer: CLEAResult**

- 49% of the 49,414 MWh goal for PY9 was achieved in this quarter.
- Contract dollars are also tracking at 49% of goal.
- YTD, 91% of CFLs, 75% of specialty LED and 71% of standard LEDs have been exhausted.



## 16-111.5B (IPA) Program Highlights - Residential

**Program: RURAL EFFICIENCY KITS**

**Vendor/Implementer: CLEAResult**

- A total of 12,004 kits were shipped during the quarter.
- No challenges to report.



## 16-111.5B (IPA) Program Highlights - Residential

**Program: MODERATE INCOME KITS**

**Vendor/Implementer: AM Conservation Group**

- Marketing drops this quarter resulted in a response rate of 34%. The response rate while lower than in PY8, was expected.
- Kit fulfillment for these enrollments occurred in November.
- At this time it is anticipated the program will be fully subscribed for PY9 and is on track to meet goals.



## 16-111.5B (IPA) Program Highlights - Residential

**Program: MULTIFAMILY MAJOR MEASURES**

**Vendor/Implementer: CLEAResult**

- 427 reservation requests verified and 241 applications processed this quarter.
- The pipeline is continuing to develop and the program allies remain confident the goal can be achieved.



## 16-111.5B (IPA) Program Highlights - Residential

**Program: HOME ENERGY REPORTS**

**Vendor/Implementer: OPower**

- A total of 2,433 MWh achieved resulting in 52% of the PYTD goal.
- Program is on track to achieve electric savings goals with no significant challenges.
- Contract dollars are on target.



## 16-111.5B (IPA) Program Highlights - Residential

**Program: COMMUNITY BASED CFL DISTRIBUTION**

**Vendor/Implementer: CLEAResult**

- 296 MWhs achieved for the month of November, which places the program at 72% of goal to be fully subscribed.
- A slowing of enrollments in December anticipated.
- In early January a drop of 4,200 direct mail solicitations is planned.



## 16-111.5B (IPA) Program Highlights – Small Business

**PROGRAM: SMALL BUSINESS DIRECT INSTALL**

**Vendor/Implementer: Franklin Energy**

- Halfway through the program year, the program is currently 31% complete but the program is being challenged to make goal due to competition from other IPA small business programs.



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: REFRIGERATION**

**Vendor/Implementer: Staples Energy**

- Savings to date is 20% of goal.
- Various reasons for shortfall provided by implementer including desire of market allies to focus efforts on competing IPA small business programs.





## 16-111.5B (IPA) Program Highlights – Small Business

**Program: HVAC Check-Up**

**Vendor/Implementer: Nexant**

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



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: HVAC OPTIMIZATION (Public)**

**Vendor/Implementer: 360 Energy Group**

- No completed projects and little pending work.
- 360EG is working to identify systems during the cold months so projects are lined up when the weather warms up.



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: HVAC OPTIMIZATION (Private)**

**Vendor/Implementer: 360 Energy Group**

- No completed projects and little pending work.
- 360EG is working to identify systems during the cold months so projects are lined up when the weather warms up.



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: LIT SIGNAGE**

**Vendor/Implementer: GDS Associates**

- Program has achieved 16% of its goal but is reporting significant pending work.



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: DEMAND BASED VENTILATION FAN CONTROLS**

**Vendor/Implementer: Matrix Energy Services**

- No completed projects year to date and only 10% of goal in the pipeline.



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: LINEAR LED LIGHTING**

**Vendor/Implementer: Matrix Energy Services**

- At 4% of goal, however, reports indicate implementer's pipeline is filling.



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: Public Facility Engagement**

**Vendor/Implementer: GDS Associates**

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



## 16-111.5B (IPA) Program Highlights – Small Business

**Program: STEP (public only)**

**Vendor/Implementer: MEEA**

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







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