

Agenda

Income Qualified Initiative



- 1. 2023 Program Performance
- 2. Health & Safety
- 3. Overview of IQ Initiative
- 4. Customer Touch Points and Marketing Overview
- 5. MDI Integration
- 6. Measure Offerings
- 7. Customer Journey by Channel
 - a) CAA
 - b) Single Family
 - c) Electrification
 - d) Multifamily
 - e) Joint Utility
 - f) Healthier Homes
 - g) Mobile Homes

2023 Portfolio Overview



Program Performance: Income-Qualified Initiative Channels

2023 Income-Qualified (Electric) Spend

Channel	Actuals	Plan Budget
IQ Community Action Agencies	\$ 3,654,568	\$ 3,780,196
IQ Community Kits	\$ 672,741	\$ 674,004
IQ Electrification	\$ 577,795	\$ 1,745,295
IQ Healthier Homes	\$ 35,433	\$ -
IQ Mobile Homes	\$ 1,678,616	\$ 1,089,673
IQ Multi Family	\$ 7,999,962	\$ 5,197,216
IQ Retail Products	\$ 8,649,822	\$ 2,650,746
IQ Single Family	\$ 19,991,046	\$ 13,106,051
IQ Smart Savers	\$ 2,332,747	\$ 2,085,905
Total	\$ 45,592,730	\$ 30,329,086

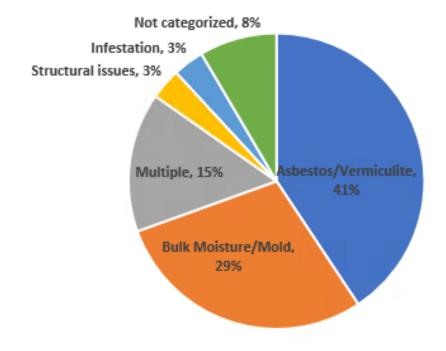
Health & Safety



Weatherization for Income Qualified Buildings:

Buildings	CAA Single Family	IQ Single Family Channels	IQ Multifamily
Total Tracked	323	1237	148
Weatherized receiving Health & Safety (H&S)	295	1019	45
Did not need H&S to Weatherize	28	218	103
Not Weatherized due to H&S	0	59	0

TYPES OF HEALTH & SAFETY ISSUES IN BUILDINGS NOT WEATHERIZED AND FREQUENCY OBSERVED





Overview (cont.)



Legend:

- **Green Boxes:** Partner with Program Allies to implement Programs and Initiatives
- White Boxes: Customer entry points into the various Programs or Initiatives
- Blue Box: Local contractors work with Community Action Agencies



Customer Entry and Marketing Overview



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MDI Integration Overview

Workforce Development

- Community Action Agency
- Program Ally support

- Internships
- Scholarships

Diverse Vendor Procurement

- Diverse Program Ally Incubator
- DVP Database

Community Based Organization Management

• HEIQ

Smart Savers

Community Kits



Customer Journey

Home Efficiency
Specialist
handles the
customer
referrals and
questions
related to
participation

Customer
eligibility
verification
includes
confirmation of
income, home
ownership and
account status

Home assessment is scheduled with Field Energy Advisors Program Allies assigned work based on geography of customer

Whole home retrofit and building envelope measures installed

QA/QC inspection of project by Program staff



Measure Offerings

Direct Install Measures

Advanced Powerstrips

LED Lighting

Showerheads

Faucet Aerators

Pipe Wrap

Light Switch Plate Gasket Covers **Health and Safety**

Moisture and Mold Remediation

Gas Line Repair

Knob and Tube

Proper Ventilation

Building Envelope

Insulation

Air Sealing

HVAC

Furnace

Central A/C

Air Source Heat Pumps

Community Action Agencies (CAA) Braided Channel



Leads into the Program via the Community Action Agency LIHEAP intake process

Assessment completed by agency staff

Project installed by local contractors or agency staff Measures
installed
according to
DCEO guidelines

Agencies apply braided funding to specific measures based on project need Program staff receive final paperwork and confirm measure eligibility

Single-Family Channel



Customer lead provided by CBO, Program-based marketing and outreach, or Program Ally Customer applies to SFIQ channel via paper application or online application. Customer Care Team reviews application. Approves based on income qualifications and ownership documentation. If health and safety concerns are identified. Approved customer is scheduled for a free home energy assessment with Program staff. The customer is notified of the needed The Energy Advisor assesses the home for a viable project, health and safety concerns, remediations and is placed on hold within and installs Direct Install Measures. the project pipeline. Program staff coordinate with Program Allies/ Customer is sent to Program Ally for home audit and Workscope submittal. Upon review and approval of Workscope from Technical Review team, the Program Ally completes specialized contractor for remediations. project. Upon completion of H&S concerns, Flagged homes receive QA/QC inspection by program staff, including customer is placed back in pipeline and referred to Program Ally with viable project. homeowner experience survey.



Electrification Channel

Propane customer lead provided by CBO, Program-based marketing and outreach, or Program Ally. Propane customer applies to SFIQ channel via paper application or online application indicating propane as their heating source.

Customer Care Team reviews application. Approves based on income qualifications, ownership documentation and propane heating source.

Approved customer is scheduled for a free home energy assessment with Program staff.

The Energy Advisor assesses the home for a viable project and measures: electrical load upgrades, health and safety concerns, and installs Direct Install Measures.

The customer is sent to the Program Ally to complete an audit of the electrical panel upgrades and assess the need for increased service load to the home.

Program Ally submits
Workscope and Bill Impact
Analysis of Electrification
upgrades customer for
approval.

Workscope submitted to Technical Review team for review and approval. Upon approvals the Program Ally completes project.

Additional Measures:

Induction stove, heat pump water heater, heat pump clothes dryer and air source heat pumps (ductless and ducted)



Multifamily Channel - One Stop Shop

Outreach

 Outreach conducted by Program staff and Program Allies

Intake

 Application submitted through outreach coordinator or website and assessed for eligibility

Assessment

 Energy Advisor completes a property energy assessment

> Planning

 Energy Advisor conducts followup meeting with property to discuss energy-saving project opportunities

Installation

 Project installed by Program Ally

Quality Assurance

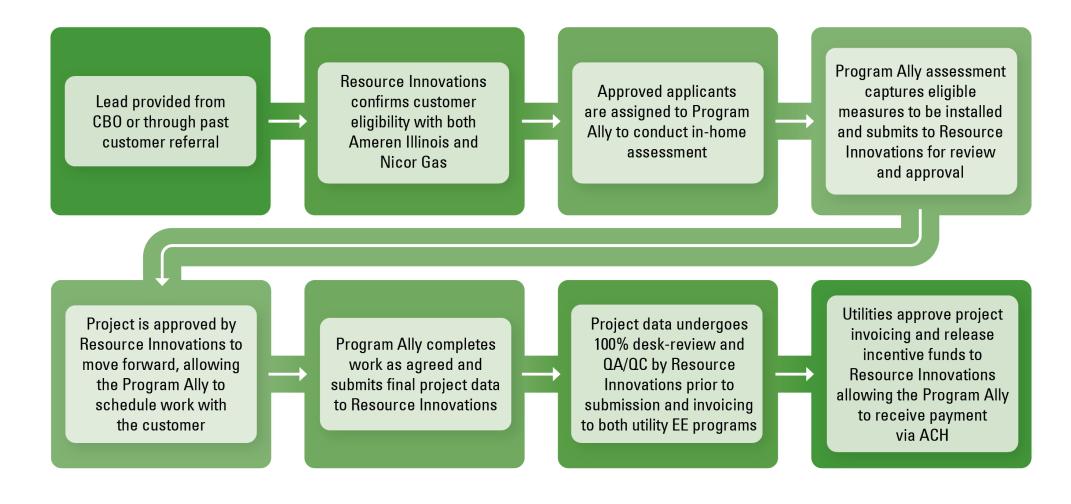
 QA inspections completed based on Program guidelines

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Joint Utility Channel



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Healthier Homes Channel

Customer referred by Health Care Organization and applies via customer application link Program staff and EIP (Energy Infrastructure Partners) review customer's account and income eligibility Approved applicants
assigned to Healthier Homes
assessment partner UEG (Uban
Efficiency Group) to perform
assessment and identify
eligible measures to
be installed

Follow up by EIP to referring Health Care Organization on customer experiences, trends and successes, where applicable Final project data submitted to Leidos/Program by EIP and reviewed by data and TR teams to release incentive funding to Program Ally via ACH UEG and CCRPC (Champaign Regional Planning Commission) review Program Ally installation and QA/QC each measure installed on 100% of measures and completed projects UEG provides scope of measures to be installed to Program Ally to then schedule and complete the work

Installed measures of focus include:

- HEPA Air Purification
- Whole Home Dehumidification and Moisture Mitigation
- Heat Recovery Ventilation (HRV)
- Targeted Air Sealing and Insulation
 - HVAC Distribution Systems Improvement

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Mobile Homes Channel

Customers are identified and qualified by local Agency partners



Income-qualified customers receive an energy efficiency kit



Interested customers receive an energy assessment from a Program Ally



Program Allies install measures for eligible customers



Measures include air sealing, belly insulation, duct repair and sealing, and furnace replacement



QA/QC for 10% of installed projects



Energy EfficiencyPROGRAM

AmerenIllinoisSavings.com

Appendix: Income-Qualified Initiative

Multifamily - One Stop Shop



Outreach Intake **Planning** Installation **Quality Assurance Assessment** • A dedicated Energy Advisor conducts Outreach is executed by Post–assessment, the Energy QA inspections, based on Program Program staff and Program Advisor schedules a followa thorough assessment, interviewing guidelines, are managed by up meeting within a week to Allies through referrals, the Energy Advisors, involving property managers or owners and lead follow-ups, events, discuss eligible energy-saving covering in-unit, common area, coordination with property contacts the website and marketing exteriors, HVAC and building envelope opportunities, incentives, funding and performed with the property portions of the community. staff after project completion. collateral. resources and project timelines. • Properties seeking a free energy assessment may apply with the outreach coordinator • Serving as a central point of contact, the Energy Advisor orchestrates project coordination. and online through the website. Additionally, tenants may also complete an assessment facilitates communication between property contacts and Program Allies, ensuring nominating their properties. satisfaction from material orders to bid/work scope evaluation and throughout the project completion. • Qualifications for MF IQ properties are determined by aligning HUD's fair market rent or QCT location criteria. Eligibility extends to properties where no more than 70% of the units • For IQ MF properties, the Program provides comprehensive weatherization measures are participating in low-income government housing programs. including attic insulation and air sealing. In addition, unit-focused measures offered include smart thermostats, LED lighting, advanced power strips, showerheads and thermostatic valves. Lastly, opportunities for heating and cooling equipment retrofits include ducted and ductless heat pumps.