

Memorandum

Ameren Illinois Company SAVE Kits Process Findings

To: Fernando Morales, Ameren Illinois Company
From: The Opinion Dynamics Evaluation Team
Date: January 21, 2021
Re: SAVE Kits Process Evaluation Results

This memo provides results and recommendations from Opinion Dynamics' process evaluation of the Ameren Illinois Company (AIC) Safe and Virtual Energy Efficiency (SAVE) Kits. The evaluation included a review of SAVE Kits materials, AIC, and implementation staff interviews; 24 participant interviews; and an audio-only "ride-along" of a Virtually Assisted Install appointment.

This research revealed the following key findings:

- Participants are highly satisfied with the contents of SAVE Kits and the verification option they selected. However, the verification options and their associated incentives can be confusing for some participants. Several respondents were unaware of the verification options or did not know they could have received a higher incentive for completing a different verification option. Additionally, two respondents initially received half the incentive they expected, but eventually received their full incentive.
- The Installation Guide was helpful for those who used it. Participants found the product installation experience easy and half reported no issues with installing their products. While the other half of respondents had an installation or quality challenge with one or two products, safety issues were rare. The issues respondents experienced were similar across all verification options, but the Virtually Assisted Install and Verified Self-Install options appear to foster increased product installations compared to other options.
- There may be an opportunity to improve Market Development Initiative (MDI) Partner communication with customers. Three respondents who received a kit through an MDI Partner did not recall requesting the SAVE Kit from their MDI Partner. These customers reside in Charleston, Peoria, and Carrollton.
- Few customers reported any barriers to completing a verification option or installing products. Awareness was the most common barrier: half of those who did not participate in an option did not recall reading or hearing about them. A few respondents mentioned access to technology (e.g., smart phones) and renting as barriers to verification option participation and product installation.

Introduction to SAVE Kits

Beginning in June 2020, and in response to the COVID-19 pandemic, AIC began the SAVE Kits offering through the Income Qualified Initiative as a new, completely virtual way to deliver energy efficiency to Initiative customers. The initial goal of the SAVE Kits offering was to continue helping AIC's income qualified customers manage their energy costs and improve the comfort of their home while avoiding in-person contact during the pandemic. Now, AIC and its partners plan to continue offering SAVE Kits in 2021 and are interested in fine-tuning this new offering as implementation rolls out. Opinion Dynamics conducted this process evaluation to provide early feedback on lessons learned in the first few months of the offering.

The SAVE Kit includes several energy- and water-saving products (e.g., LEDs, low-flow showerheads, advanced power strips, and door sweeps), a booklet of installation instructions, and the tools customers need to install the products (e.g., a screwdriver and plumber's tape). Customers apply for kits online or through MDI Partners, and once they have received the kit, may choose from several verification options to receive an incentive:

- **Virtually Assisted Install:** A video call with an Energy Advisor who will walk the customer through product installation, verify the customer installed the products correctly, and ensure the customer installed enough products to receive the incentive; customers receive a \$150 incentive for participating in this option.
- **Verified Self-Install:** Customers attend the Virtually Assisted Install Webinar, perform the product installations themselves, and then submit photos of their installation and a verification postcard; customers receive a \$75 incentive for participating in this option.
- **Non-Verified Self-Install:** Customers submit the verification postcard and receive a \$20 Online Marketplace coupon.

In the event of technological issues, customers may complete the Virtually Assisted Install option via audio call and still receive the \$150 incentive if they submit photos of their installed products and mail in the postcard (similar to option 2 above but without the webinar). Customers may also choose not to complete a verification option.

AIC provides SAVE Kits at no cost to the customer and the contents do not vary by customer type (e.g., dual-fuel or single-fuel customers, single family, or multifamily). AIC also uses the offering to promote the core Initiative (i.e., the in-person home assessment and building shell and HVAC measures) to customers when they complete a verification option. Walker-Miller Energy Services (Walker-Miller) oversees the implementation of the SAVE Kits offering in coordination with Leidos and MDI partners, as well as other subcontractors.

Table 1, included on the following page, briefly describes each implementation partner's role in the SAVE Kits offering.

Table 1. SAVE Kit Implementation Partner Roles

Partner	Role
Walker-Miller	Oversees implementation of the SAVE Kits, including coordination with MDI Partners and AM Conservation Group, application and kit order list management, and recruitment outreach and scheduling ¹ for the Virtually Assisted Install appointments. Energy Advisors perform the Virtually Assisted Install appointment and review photos and postcards from all self-install verification options.
Leidos	Confirms customer eligibility, updates customer data in the Initiative tracking database (Amplify); Home Energy Solutions (HES) staff manage a call center and schedule Virtually Assisted Install appointments with customers, performs QA/QC on verification options.
MDI Partners	Promotes the SAVE Kit offering to clients and complete kit order forms on behalf of interested clients.
AM Conservation Group	Subcontractor of Walker-Miller; mails SAVE Kits directly to customers.
Energy Federation Incorporated (EFI)	Subcontractor of Leidos; processes and mails incentive checks to customers.

¹ Walker-Miller reaches out to customers who have not contacted the HES Call Center two to three weeks after receiving their SAVE Kit.

We developed the process map embedded below based on interviews with AIC, Leidos, and the Walker-Miller staff. The map describes the flow of operations from the marketing and outreach activities through to incentive payment. The map also highlights the responsible stakeholders for each of the various tasks and the key customer touchpoints of the offering.



AIC IQ SAVE Kits
Process Model.pdf

Evaluation Methods

Table 2 provides an overview of process evaluation activities. The evaluation covered the first five months of implementation from June to October 2020. The Initiative provided nearly 3,900 SAVE Kits during this period. While we considered a participant survey, Opinion Dynamics and AIC determined that in-depth interviews were the most appropriate data collection option for the depth of qualitative information we sought to collect. In-depth interviews also allowed us to nimbly adapt lines of questions to specific or unexpected customer situations.

Table 2. SAVE Kits Process Evaluation Activities

Evaluation Activity	Description
Initiative Staff Interviews	Conducted three interviews with staff from AIC, Walker-Miller, and Leidos to confirm key process details, inform the data request, and refine the objectives of participant interviews.
Materials and Data Review	Reviewed program materials, including promotional collateral included in the SAVE Kit, the Installation Guide, and pictures of a packaged kit; reviewed program tracking data to understand progress to date and develop the participant interview recruitment list; and attended the Virtually Assisted Install Webinar.
Process Model Development	Used staff interviews and materials review to develop a process model outlining the operations of the offering from start to finish, including responsible parties and key customer touchpoints.
Virtual Audit Ride-Along	Completed an audio-only "ride along" during a Virtually Assisted Install appointment; observed the cadence of the appointment and interactions between the Energy Advisor and the customer.
SAVE Kit Participant Interviews	Conducted interviews with 24 SAVE Kit participants, including six who completed each of the three verification options (18 total) and six who did not complete a verification option; collected feedback on their motivation for requesting a SAVE Kit and completing a verification option (where applicable), reasons for not selecting an option (where applicable), and their participation experiences (e.g., satisfaction, benefits, and drawbacks of the kit contents and the verification options).

Note: Three of the respondents flagged as completing the Verified Self-Install option informed us that they completed the Virtually Assisted Install option via audio call, completed the postcard, and submitted photos of their installed products. Because there were so few participants who completed the Verified Self-Install option and these respondents completed two out of the three steps of that option; we included their responses with the Verified Self-Install option responses.

Summary of Evaluation Findings

Entry Channel

An almost equal number of respondents entered the offering through AIC and an MDI Partner. However, some respondents did not recall requesting a SAVE Kit at all, highlighting a possible need to further support MDI partner communications with customers about the kit.

The SAVE Kits offering has two main entry channels for participants: through an MDI Partner and through AIC marketing activities. Figure 1 details the main steps for customers entering through each channel.

Figure 1. SAVE Kits Entry Channels



Overall, our interviews with SAVE Kits participants found an almost even mix of customers who entered through each channel; 10 respondents entered through AIC and 11 entered through an MDI Partner. The remaining 3 out of 24 respondents could not recall how they signed up for a SAVE Kit, even after the interviewer prompted that they may have signed up by speaking with an AIC representative or through a community organization while seeking for energy assistance or income qualified services. One respondent mentioned,

"I mean, I just don't know who sent them. That's what threw me when I got it in the mail. I couldn't figure out why it was even here."

We brought this feedback to the attention of implementation staff, who suggested these respondents may have been clients of one of the MDI Partners who signed them up for a SAVE Kit without explaining the kit. Staff also mentioned receiving similar information from customers. For example, when their team conducts follow-up calls with customers who entered through an MDI Partner, some customers cannot recall why they received the kit. Staff reported MDI Partners are sometimes unable to have detailed conversations with clients about the benefits of the SAVE Kits and the verification options available. Although the implementation team provided training and other informational resources to support these conversations, staff report that MDI Partners are having difficulty promoting the SAVE Kits to clients on top of their already heavy workload.

Satisfaction with SAVE Kit Contents

Overall, respondents are highly satisfied with the contents of their SAVE Kit, including the energy-saving products, tools, and Installation Guide.

Customers typically receive a SAVE Kit 5 to 15 days after requesting one. In addition to the energy-saving products and installation tools, the SAVE Kit includes a promotional flyer regarding verification options and incentives, an Installation Guide describing the measures and how to properly install the products, and a postcard for the Verified and Non-Verified Self-Install options, as depicted in Figure 2.

Figure 2. Photo of SAVE Kit Contents
(First 5,000 Kits)

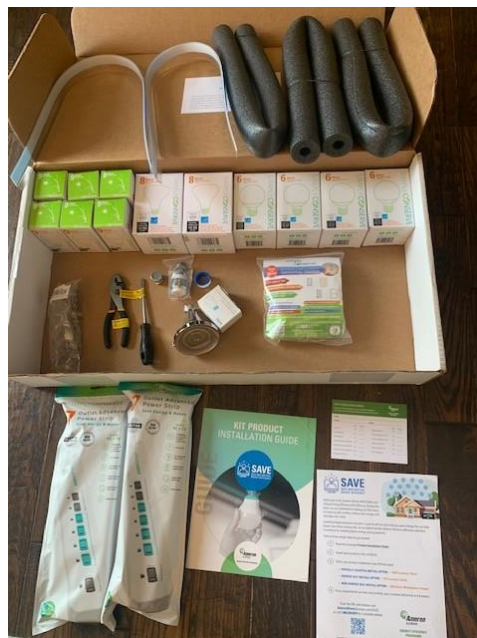


Figure 2 and our evaluation results cover the first iteration of collateral provided in the first 5,000 kits. In response to low customer uptake of the verification options, as well as customer confusion about the verification options, Walker-Miller re-designed the informational flyer to focus solely on the \$150 incentive for the Virtually Assisted Install option as opposed to all three options. Customers can still find information about all three options within the Installation Guide.

Two versions of the flyer are appended at the end of this document: the original flyer (sent in the first 5,000 kits) and the revised flyer (sent in the last 4,000 kits).

During each interview, we asked respondents what they thought of the energy-saving products, the tools, and the Installation Guide included in their SAVE Kit, and then asked them to provide a satisfaction score for the contents of their SAVE Kit overall on a scale from 1 to 5 (where 1 is not at all satisfied and 5 is very satisfied). Respondents provided an average satisfaction score of 4.7 out of 5 for the contents of the SAVE Kit (n=23; excludes one respondent who did not install any products at the time of the interview); 21 respondents provided a rating of 5 out of 5. Table 3 provides more detailed respondent feedback on the contents of the SAVE Kit.

Table 3. Customer Feedback on SAVE Kit Contents

SAVE Kit Content	Key Takeaways	Respondent Quote
Energy-saving products	<ul style="list-style-type: none"> Of the participants who installed some products (n=23), all were generally satisfied with the energy-saving products included in their kit. Seven respondents provided a suggestion for additional energy-saving products they would like to see in the kit, including: a thermostat, additional weatherstripping for windows and doors, and batteries for smoke detectors. Two respondents provided slightly lower satisfaction scores. One did not like the showerhead and the other could not use many of the products included in the kit. 	"I like it. It was cool. Bunch of light bulbs, power strips and stuff. And then stuff you don't even think of like the aerators and stuff like that. That was neat."
Tools	<ul style="list-style-type: none"> Most respondents (19 out of 23) found the tools to be helpful and several remarked that the tools were handy. Three additional respondents found the tools to be sufficient for installing their products but nothing special. 	"I had everything in there that I needed to take my plates off my switches and off my floors, and I was really glad to see that everything I needed was in there."
Installation Guide	<ul style="list-style-type: none"> Two-thirds of respondents (16 out of 23) reported using the Installation Guide and nearly all found the instructions to be clear and easy to follow. One reported the instructions were confusing, especially for the pipe wrap and faucet aerators. The other eight respondents reported they either did not need the Installation Guide, did not see instructions included in their kit, or had not yet installed any products. 	"It was really good. It told me everything I needed to know. I was able to install some of those things myself."

Note: This analysis excluded one respondent who had not yet had a chance to install the products or read the guide.

Product Installation

Respondents generally found the product installation experience to be easy and safe. While half of respondents had an installation or quality challenge with one or two products, safety issues were rare. The issues respondents experienced were similar across all verification options, but the Virtually Assisted Install and Verified Self-Install options appear to foster more product installation when compared to other options.

The Installation Guide contains information on the energy-saving products and how to install them. For those who choose the Virtually Assisted Install option, the Installation Guide encouraged them to install as many products as they could prior to the call. All six respondents who did the Virtually Assisted Install option had installed some or all products prior to their appointment.²

Respondents generally reported that their experience installing the energy-saving products was very easy overall. More than half of respondents who installed measures (12 of 23) reported no issues whatsoever with product installation, product quality, or safety. Respondents who did report some challenges (11 of 23) typically reported challenges with only a few products. Respondents most frequently reported issues with the compatibility of aerators with their kitchen or bathroom sinks (five respondents). Thermostatic valves were problematic for four respondents, including two instances in which the product broke. Two respondents expressed safety concerns about installing hot water pipe wrap or outlet and switch gaskets.

Table 4 summarizes the issues respondents faced while installing their energy-saving products, by installation option. Respondents who completed the Non-Verified Self-Install option or did no verification option at all reported the least number of issues but also installed the fewest measures; meaning there may have been fewer opportunities for these customers to encounter issues. Conversely, respondents who completed the Virtually Assisted and Verified Self-install options installed more measures and reported more issues; the Virtually Assisted and Self-Install options had similar numbers of installed products and issues. This comparison suggests that the Virtually Assisted and Verified Self-Install options are more effective at encouraging product installation, but customers will encounter similar issues across all options.

Table 4. Product Quality, Installation, and Safety Issues

Product	Installation Issue
Virtually Assisted Install Option (n=3)	
Thermostatic valve	<ul style="list-style-type: none"> Valve broke during installation (1) Valve did not fit on their shower (1)
Showerhead	<ul style="list-style-type: none"> Showerhead did not fit fixture (1)
Globe LED bulbs	<ul style="list-style-type: none"> Bulbs did not fit in their fixtures (1)
Bathroom aerator	<ul style="list-style-type: none"> Sink was not compatible (1)
Pipe wrap	<ul style="list-style-type: none"> Did not know which pipes to install the wrap onto (1)
Outlet and switch gaskets	<ul style="list-style-type: none"> Concerned about a possible electric shock (1)
Verified Self-Install Option (n=4)	
Thermostatic valve	<ul style="list-style-type: none"> Valve broke during installation (1)
Showerhead	<ul style="list-style-type: none"> Installation took longer than they expected (1)
Globe LED bulbs	<ul style="list-style-type: none"> Globe bulbs did not fit in their fixtures (1)
Kitchen faucet aerator	<ul style="list-style-type: none"> Sink was not compatible (2)
Outlet and switch gaskets	<ul style="list-style-type: none"> Difficulty seeing the screws due to a medical condition (1)
Pipe wrap	<ul style="list-style-type: none"> Could not safely access their pipes (1)
Non-Verified Self-Install Option (n=2)	
Showerhead	<ul style="list-style-type: none"> Did not like the product (1)

² During the Virtually Assisted Install appointment, the Energy Advisor will verify quality installation of the products customers have already installed.

Product	Installation Issue
Advanced power strips	<ul style="list-style-type: none"> The design did not allow for devices to be plugged into consecutive outlets (i.e., spacing too narrow) (1)
Door sweeps	<ul style="list-style-type: none"> Uninstalled the door sweeps because they were too close to the floor and pushed up their rug (1)
Kitchen and bathroom aerators	<ul style="list-style-type: none"> Sinks were not compatible (1)
Pipe wrap	<ul style="list-style-type: none"> Could not safely access their pipes (1)
No Verification Option (n=2)	
Thermostatic valve	<ul style="list-style-type: none"> Confusion about the purpose and function of the valve (1)
Advanced power strips	<ul style="list-style-type: none"> Did not work when they first installed it but worked when they installed it in a different outlet in their home (1)
Door sweeps	<ul style="list-style-type: none"> Confused about how to install the door sweeps (1)
Kitchen and bathroom aerators	<ul style="list-style-type: none"> Sinks were not compatible (1)

Compatibility issues are to be expected for any kit program; customers are not screened for compatibility for all products and, barring a cost-effectiveness issue, the Initiative would not want to disqualify them and give up the savings from the rest of the products due to compatibility issues with a few. **However, our review of the Installation Guide revealed opportunities to improve clarity in relation to some of the issues raised by respondents.**

- **Door Sweeps:** Two respondents had trouble installing the door sweeps or operating their door after installation. It can be difficult for customers—especially those with no prior experience installing door sweeps—to cut the door sweep to the correct length and place it correctly, so the door operates properly but the door sweep still seals the gap below the door. During the audio “ride-along” we participated in, the Energy Advisor informed us that the door sweeps can be difficult to install right out of the box, so they ask customers to lay out the door sweeps one day before the call to allow them to flatten out. These instructions are not reflected in the Installation Guide and are only given to participants who complete the Virtually Assisted Install option.
- **Pipe Wrap:** The instructions for installing the pipe wrap also provide an opportunity for improvement. One respondent had difficulty installing the pipe wrap because they did not know which pipes to install the wrap onto. We noted the Installation Guide is vague about which pipes customers should install the pipe wrap on or how to access these pipes. We also found the following note in the Installation Guide to be somewhat confusing, “Installing pipe wrap closer than 3” from the flue can be a potential fire concern. Please follow the manufacturer’s installation instructions.” While the warning is important, some participants may not be able to identify the flue, and there do not appear to be manufacturer’s installation instructions in the kit.

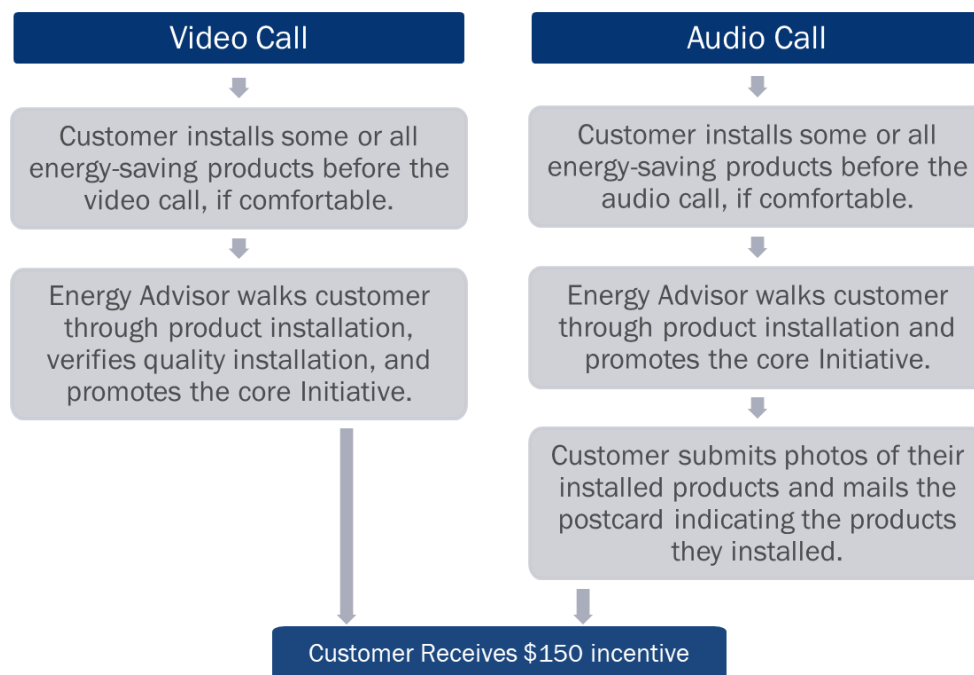
Virtually Assisted Install Option Experience

Respondents were highly satisfied with the virtually assisted install option. All found the experience to be very easy and the call with the Energy Advisor to be pleasant and appropriate. Six of the respondents interviewed completed the Virtually Assisted Install option, including a video call with an Energy Advisor. Participants who complete this option are encouraged to install some or all the energy-saving products before the call if they feel comfortable; they can also wait to install the products during the video call with the Energy Advisor. Participants receive an email and a courtesy phone call one day ahead of the scheduled appointment with preparation instructions. During the video call, Energy Advisors review safety instructions for product

installation, assist customers while installing their energy-saving products, and verify the customer has installed the products correctly. Energy Advisors also ensure that customers have met the 50% savings threshold to qualify for the \$150 incentive.³ After ensuring the customer has installed the energy-saving products correctly and the savings threshold is met, the Energy Advisor will discuss several aspects about the customer's home with them and promote the core Initiative if the customer is qualified.

In the event a customer experiences technical difficulty with the video call or does not have a smartphone, they may complete the Virtually Assisted Install option via audio call. In these cases, the customer must submit photos of their installed products and complete the verification postcard verifying the products they installed; this alternative is like the Verified Self-Install option but excludes the webinar. We spoke to three participants who completed the Virtually Assisted Install option via audio call and included their responses in the Verified Self-Install section since the two participation processes are nearly identical. Figure 3 provides a simplified process flow for both the video call and audio call options.

Figure 3. Virtually Assisted Install Option Process

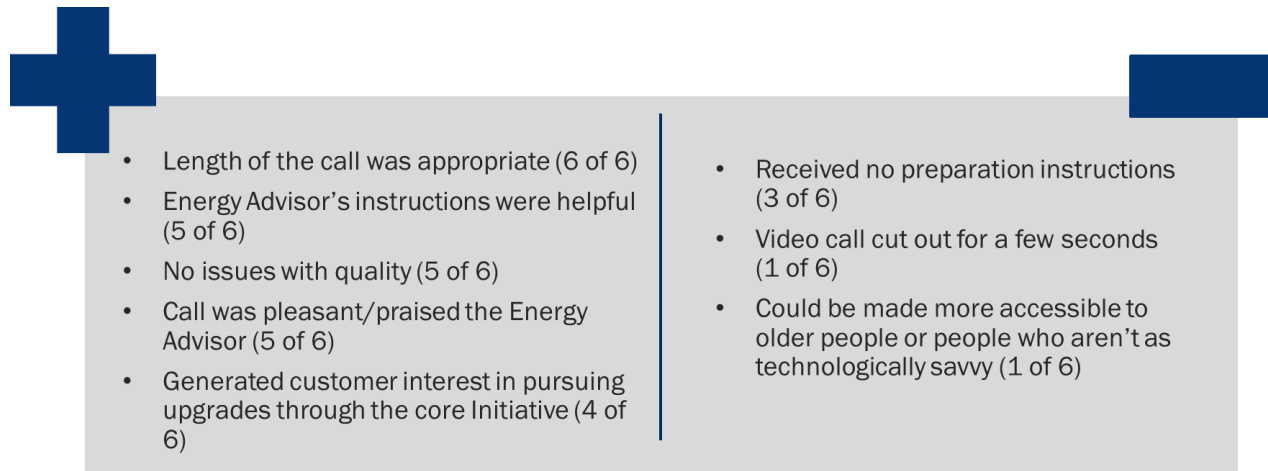


Half of respondents (three of six) chose the verification option because of the incentive, while two respondents said the option fit their schedule or was convenient for them. One respondent reported they received a card in the mail to set up the Virtually Assisted Install appointment. Respondents described their experience completing the Virtually Assisted Install option as pleasant and found the call with the Energy Advisor to be helpful. None of the respondents had negative feedback about their experience or the call with the Energy Advisor.

³ Customers must install enough energy-saving products to realize at least 50% of the SAVE Kit's deemed energy savings potential to receive the incentive. If the customer does not meet the 50% threshold, they do not qualify for the \$150 incentive.

Respondents provided an average satisfaction score of 4.8 out of 5 for their experience completing the Virtually Assisted Install option overall, with all but one respondent giving a 5 out of 5: the respondent provided a score of 4 out of 5, saying the experience was not perfect but the call was still helpful. This respondent did not provide any additional insight into why their experience was not perfect. More detail on respondent feedback for this installation option is in Figure 4.

Figure 4. Respondent Feedback on the Virtually Assisted Install Option



One of the objectives of the Virtually Assisted Install option is to generate leads for the core Initiative, since all participants are already verified as income-qualified and many already have an approved Initiative application. During the call, Energy Advisors ask participants questions about the age and condition of their home to determine if they are eligible for additional services from the Initiative. All six respondents who completed the Virtually Assisted Install option reported the Energy Advisor asked these questions, with four either interested in participating or already participating in the core Initiative. The two respondents who were not interested in the core Initiative were both renters and felt their landlords would not be interested in the program.

Additionally, we observed one Virtually Assisted Install appointment through an audio-only “ride-along.” The Energy Advisor who conducted the “ride-along” informed us that customers sometimes forget about their Virtually Assisted Install appointment, so Energy Advisors now conduct two courtesy calls in advance, the first 24 hours and the second 30 minutes before the scheduled video call. These calls remind the customer of their scheduled Virtually Assisted Install appointment and allows Energy Advisors to provide preparation instructions such as laying out the door sweeps overnight and suggesting the customers have another person available to assist with installation. The cadence of the appointment and the topics covered were highly aligned with our understanding of the process based on implementation documentation.

The customer's experience overall appeared to be extremely positive. We observed the following highlights:

- The customer had already installed most of the products before the call and did not experience any issues with installation. During the call, the customer installed the globe and standard LEDs, a door sweep, the kitchen aerator, and an advanced power strip. The customer exceeded the 50% savings threshold and the only products they did not install were the outlet and switch gaskets; the customer explained their outlet and switch covers were painted over and did not want to remove them.

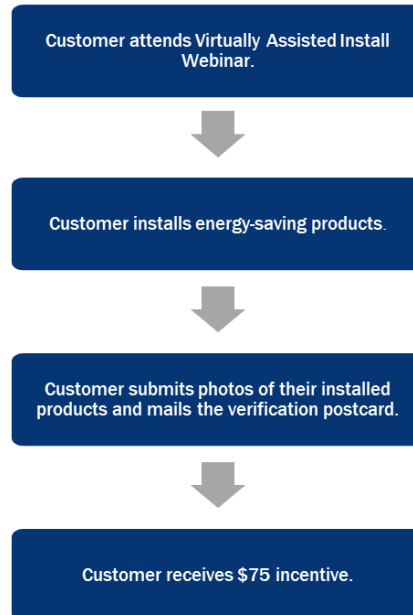
- The Energy Advisor was very friendly during the call and provided encouragement as the customer showed the products they had already installed.
- Although the customer's home was not eligible for additional upgrades from the core Initiative, the Energy Advisor informed the customer this was positive, since the customer had done a great job making their home energy efficient. The customer was not upset and agreed the house was well-insulated and efficient.

Verified Self-Install Option Experience

Although some respondents had difficulty sending in photos of their installed products, respondents generally found the Verified Self-Install option to be easy and are quite satisfied with their experience. This option appears to be a good solution for customers who are not tech-savvy or do not have the technology to complete the Virtually Assisted Install option.

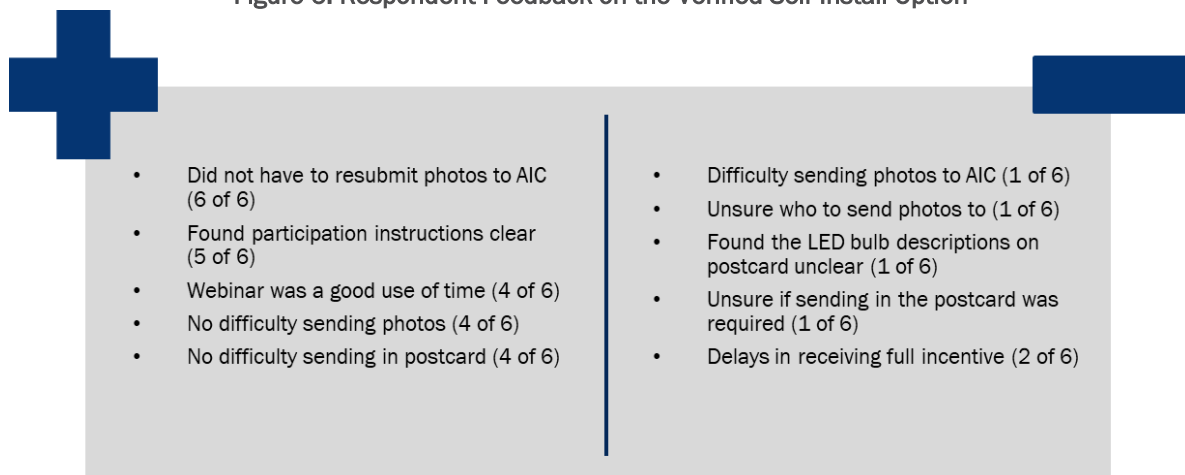
Participants who complete the verified self-install option must complete three steps: (1) attend a Virtual Savers Webinar, (2) take photos of the energy-saving products they installed and submit them to AIC, and (3) complete and mail the post-installation survey postcard indicating the quantity of each product they installed. Participants receive \$75 for completing this option. Note, some participants who attempt to do the Virtually Assisted Install appointment but have technological issues may complete an alternative version of this option and still receive \$150, if they must submit photos and a postcard after their call with the Energy Advisor. Figure 5 provides a simplified version of the participation process for the Verified Self-Install option.

Figure 5. Verified Self-Install Participation Process



We spoke to three participants who completed the Verified Self-Install option and three who opted for the audio-only Virtually Assisted Install option. Motivations respondents provided for selecting this option included the \$75 incentive (two respondents) and the ability to accommodate this option in respondents' lifestyle or schedule (two respondents). Two respondents could not recall why they decided to complete this verification option. Two respondents reported they faced technological barriers to complete the Virtually Assisted Install option and chose the Verified Self-Install option instead. One respondent did not have internet access to complete the video call with the Energy Advisor. The other respondent indicated they were not a tech-savvy person and would have had trouble completing the Virtually Assisted Install option. Overall, respondents who completed the Verified Self-Install option provided an average satisfaction score of 4.5 out of 5, with three respondents providing a score of 5 out of 5. More detail on respondent feedback is included below (Figure 6).

Figure 6. Respondent Feedback on the Verified Self-Install Option



Respondents who completed the Virtually Assisted Install option via audio call were not required to attend the webinar, however, one of these respondents recalled attending the webinar anyway.

Most respondents had no trouble taking and submitting photos and completing the postcard. Two respondents mentioned they had difficulty sending in the photos; both reached out to AIC for assistance and were able to successfully submit their photos. One of these respondents reported it might have been easier to participate if they knew how to submit the photos directly from their phone. This respondent suggested other participants with limited knowledge of technology might have a better participation experience if they used their phones to submit photos of their installed products.

Two respondents also indicated they were confused about some aspects of the postcard. One respondent did not know how many of each type of LED bulb they installed based on the description on the postcard. The other did not know if they were required to complete and submit the postcard as part of the Verified Self-Install option but sent it in anyway.

Three respondents experienced delays in receiving their entire incentive. These three had completed an audio-only Virtually Assisted Install appointment and two of these respondents understood they would receive the \$150 incentive; the third respondent seemed unaware they would receive an additional \$75 dollars and was fully satisfied with their experience. However, these three had only received \$75 at the time of the interview, despite sending the photos and postcards. We brought this issue to the attention of Initiative staff and they clarified that there may have been processing delays because the customers switched verification options midstream, but the customers would eventually receive an additional \$75 (for a total of \$150). Upon following

up with the two customers who were dissatisfied, both confirmed they had now received the second \$75 incentive.

Participants who pursue the Verified Self-Install option are required to attend the SAVE Virtually Assisted Install Webinar. As part of our evaluation, we observed one webinar in which two customers participated. The webinar provides participants with installation instructions for each energy-saving product included in the SAVE Kit and allows customers to ask questions about installation or the Verified Self-Install participation process. It covered the safety and instructional information included in the Installation Guide, but also provided additional information about energy saving tips, how energy efficiency can benefit participants, and how to avoid common scam tactics from individuals impersonating AIC. The webinar also promoted other residential energy saving opportunities and incentives from AIC, including the Smart Savers offering, heating and cooling incentives, air sealing incentives, the AIC Online Marketplace, and appliance recycling. Compared to the Virtually Assisted Install call we observed, we found that the webinar covered more topics (e.g., avoiding scams) and provided additional information about the different incentives AIC offers residential customers.

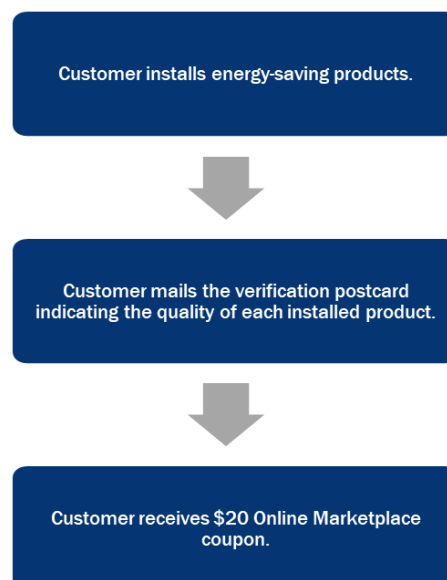
All four respondents who attended a Virtually Assisted Install Webinar indicated it was helpful and a good use of their time. One respondent even indicated it gave them more confidence to attend other webinars:

“It was just short and sweet and to the point...I was scared at first just because it says webinar. I didn't know what even that was, but I've done several since then.”

Non-Verified Self-Install Option Experience

Respondents were satisfied with the Non-Verified Self-Install option and generally found it very simple. Some customers only chose this option because of technological barriers, not because of a preference for a lighter-touch option. Participants who complete the Non-Verified Self-Install option must complete and mail back the post-installation survey postcard indicating the quantity of the energy-saving products they installed. Figure 7 outlines the participation process for the Non-Verified Self-Install option.

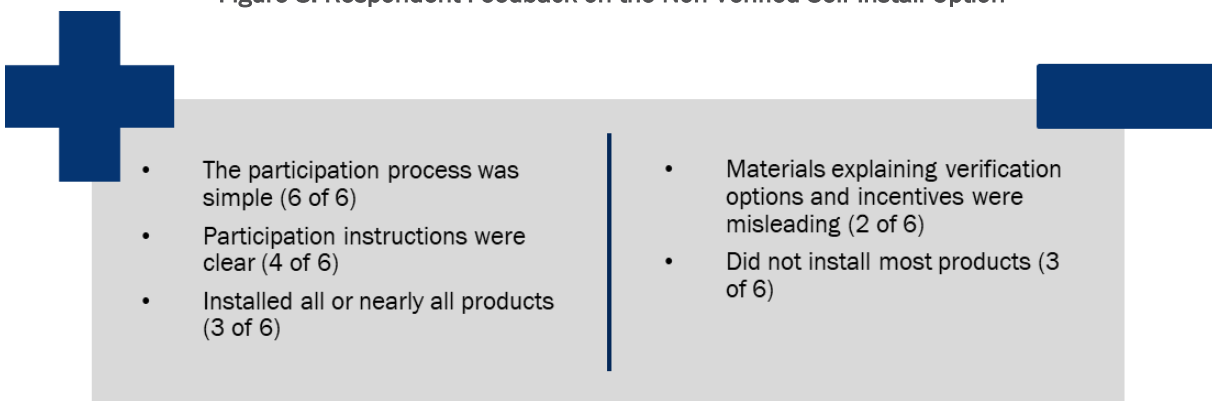
Figure 7. Non-Verified Self-Install Participation Process



We interviewed six participants who completed the Non-Verified Self-Install option. Respondents reported completing this verification option because of the \$20 Online Marketplace coupon (three of six), it fit their lifestyle (one of six), or they received a call from AIC asking them to complete the Non-Verified Self-Install option (one of six). One of the respondents could not recall why they had completed this option. Additionally, two respondents reported they did not have access to a smart phone with a camera and were unable to complete one of the other verification options. Both respondents indicated they would have otherwise liked to complete one of the other verification options for a higher incentive.

Overall, feedback was largely positive for this option, but it did receive the lowest overall satisfaction score out of the three verification options by a small margin, with an average score of 4 out of 5. Figure 8 summarizes additional respondent feedback.

Figure 8. Respondent Feedback on the Non-Verified Self-Install Option



Overall, most respondents found the experience of completing this option to be easy and self-explanatory (four of six). Two respondents could not recall completing or mailing the post-installation survey postcard because they had participated months prior to our interview, but neither respondent recalled any difficulty completing or mailing the postcard. Respondents who completed this option reported installing fewer energy-saving products compared to respondents who completed one of the other two verification options. While half of respondents (three of six) installed all or nearly all the products included in the SAVE Kit, the other half only installed one or two products. This is to be expected, as customers receive the coupon regardless of what they install, if anything.

Two respondents mentioned confusion about incentives. One said they were not aware of the higher incentives for the other verification options. Another respondent reported the flyer included in their SAVE Kit led them to believe they would receive the \$150 incentive for completing any of the options. As mentioned earlier, AIC and Walker-Miller are aware that some customers were confused about incentives and have since revised the incentive collateral to address it. The Initiative had not begun distributing kits with this new collateral at the time of the evaluation and, as such, we could not assess improvement, if any, in this area.

Barriers to Completing a Verification Option

Awareness is a key barrier to participation in verification options. Renters may face structural barriers to installing products or participating in verification options.

Initiative and implementation staff noted that verification participation was not meeting initial expectations. AIC and Walker-Miller's original goal was for 50% of participants to complete a verification option. They have since reduced that goal to 10% (approximately 1,000 verifications total). Implementation staff have also made implementation changes to address this barrier, including revising kit promotional collateral and conducting follow-up recruitment calls if they have not heard back from customers within two to three weeks of kit receipt.

To further understand potential barriers to participation in verification options, we interviewed six participants who had not yet completed a verification option. Three of these respondents were planning to complete one of the verification options soon. The other three were not aware they could receive an incentive for completing a verification option. After the interviewer explained the verification options, three respondents were interested in completing the Virtually Assisted Install option and one was interested in the Verified Self-Install Option. Two respondents were not interested in completing a verification option. One needed more information about the verification options to decide to complete one. The other was a single-family home renter and said they did not have any concerns about completing a verification option but did not want to install any additional products (aside from one LED bulb and advanced power strip they already installed) because they were not the homeowner.

Conclusions and Recommendations

Evaluation results indicate that the SAVE Kits have had a successful initial launch; customers are satisfied with the contents of the kit and the verification options and they are typically installing many or all of the products. Respondents were grateful for the energy-saving products and tools included; some even reported already seeing savings on their utility bills. About half of respondents encountered some difficulty with one or two products but, overall, found product installation to be easy and the Installation Guide instructions to be clear. The SAVE Kits have provided immediate energy management support to Initiative customers during the COVID-19 pandemic, as AIC intended. Respondent feedback indicates that the Virtually Assisted Install option is effective and encouraging quality installation as well as building interest in further upgrades through the core Initiative. The diverse set of verification options appear to provide needed flexibility based on customers' availability, lifestyle, and comfort level with technology.

As with any new offering, there were important lessons from the first few months of implementation; most importantly, lack of awareness and confusion about incentive levels may explain lower-than-expected verification option participation. AIC and implementation staff have already made changes to collateral and customer communications to address the awareness issues, although the timeframe of this evaluation could not capture the effects of these changes. Further, now that SAVE Kits will be a part of the 2021 offerings, AIC and Walker-Miller are adding new entry channels, including promotion on FreshEBT (a phone app for food stamp account management) and direct distribution through foodbanks. Finally, staff are considering changing the incentive structure of the offering, including possibly changing the incentive amounts or offering just one incentive for all verification options. Further research is warranted to assess the impacts of these changes on the participation experience, as well as energy savings.

We propose the following recommendations for SAVE Kit improvement as AIC plans for 2021 implementation.

- **Finding:** In total, nearly one-third of respondents were confused about or unaware of the different incentives available to them for completing a verification option. The audio-only Virtually Assisted Install option was particularly challenging for two customers because of the delay in full incentive receipt. The Initiative has made, or is considering, several changes to design and implementation to increase verification participation rates in 2021.
 - **Recommendation 1:** Proactively communicate the incentive payment process for customers who choose the audio-only Virtually Assisted Install option. Ensure they clearly understand that there will be a delay; they will receive an initial \$75 check after the call and then an additional \$75 check once the Initiative has reviewed their photos and postcard. If possible, give them an estimated timeframe for receiving the second check.
 - **Recommendation 2:** Consider separately identifying participants who complete the Virtually Assisted Install option via audio call. The tracking data we reviewed shows these customers as receiving two Verified Self-Install incentives. For internal use and evaluation purposes, it would be helpful to track these participants distinctly.
 - **Recommendation 3:** Consider further participant survey research to monitor the impacts of design and implementation changes on participant experiences. Note, Opinion Dynamics has proposed including SAVE Kit participants in the 2021 Initiative participant survey.
- **Finding:** Three respondents did not recall requesting the SAVE Kit from either AIC or an MDI Partner. All three of these respondents insisted they had not been contacted by anyone from AIC or a

community organization about the kits; it just showed up at their door. These customers reside in Charleston, Peoria, and Carrollton.

- **Recommendation 4:** Remind MDI Partners generally, or specifically those who operate in these cities, to fully inform participants about the benefits of the SAVE Kit and discourage them from ordering SAVE Kits for clients who do not know what they are.
- **Finding:** There were some opportunities to improve the clarity of Installation Guide related to feedback from customers about installation issues.
 - **Recommendation 5:** Consider adding an illustrative picture or diagram depicting the proper placement of the pipe wrap, including the appropriate pipes to insulate, a description of a flue, and safe placement of the wrap at least three inches from the flue.
 - **Recommendation 6:** Consider including a suggestion to lay out the door sweeps for one day before installation to allow them to flatten out; this makes installation easier. Some Energy Advisors provide this suggestion to virtually assisted customers ahead of the appointment, but other participants do not receive this guidance and several respondents mentioned difficulties installing the product.
- **Finding:** While lack of awareness is the most common barrier, access to technology and renting may be other important barriers to verification and product installation for some customers. Evaluation results found that customers who had technological issues with the Virtually Assisted Install option were able to participate in a different option, although it may not have been their first preference. Single-family home renters, however, may face more difficult barriers to installing products in their home, such as needing to secure permission.
 - **Recommendation 7:** Leverage MDI Partners, the HES call center, and follow-up recruitment calls to specifically discuss issues renters may be experiencing. Consider offering support securing permission from their landlord or property manager; or possibly offer a permission letter template that explains the benefits of the SAVE Kit to the landlord or property manager.

Appendix A: SAVE Kit Original Flyer



Welcome to the Ameren Illinois SAVE (Safe and Virtual Energy Efficiency) Kit Offering. During this time, we are committed to helping you find ways to improve your comfort, reduce your usage, and manage your costs.



Installing these products included in your kit will not only help you save energy, but can help lower your future energy bills. As an added benefit, Ameren Illinois is offering customers incentives for installing these energy-saving products.

Follow these simple steps to get started:

- 1 Read the enclosed **Product Installation Guide**.
- 2 Install each product in the SAVE Kit.
- 3 Verify your product installation one of three ways:
 - **VIRTUALLY ASSISTED INSTALL OPTION** — **\$150 Incentive Check***
 - **VERIFIED SELF-INSTALL OPTION** — **\$75 Incentive Check***
 - **NON-VERIFIED SELF-INSTALL OPTION** — **\$20 Online Marketplace Coupon***
- 4 Once requirements are met and verified, your incentive will arrive in 4-6 weeks.

Scan the QR code below, visit
AmerenIllinoisSavings.com/SAVE,
or call **1.866.838.6918** for complete details.



**ENERGY EFFICIENCY
PROGRAMS**

*Incentives are available until funds are depleted.

Appendix B: SAVE Kit Revised Flyer



SAVE

SAFE AND VIRTUAL
ENERGY EFFICIENCY

ACT FAST — EARN \$150

During this time, Ameren Illinois is committed to helping customers find ways to improve comfort, manage usage, and reduce costs.

Ameren Illinois is offering customers a **\$150 cash incentive check** for installing the enclosed energy-saving products.

Engage with an Energy Advisor — virtually! You will be shown how to install all items in your SAVE Kit during a personal and virtual installation appointment. It doesn't take long to get cash in your pocket!

Scan the QR code below, visit AmerenIllinoisSavings.com/SAVE, or call **1.866.838.6918** for complete details.



**ENERGY EFFICIENCY
PROGRAMS**

*Hurry! Incentives are available until funds are depleted.