

PROGRAM ALLY

Agenda



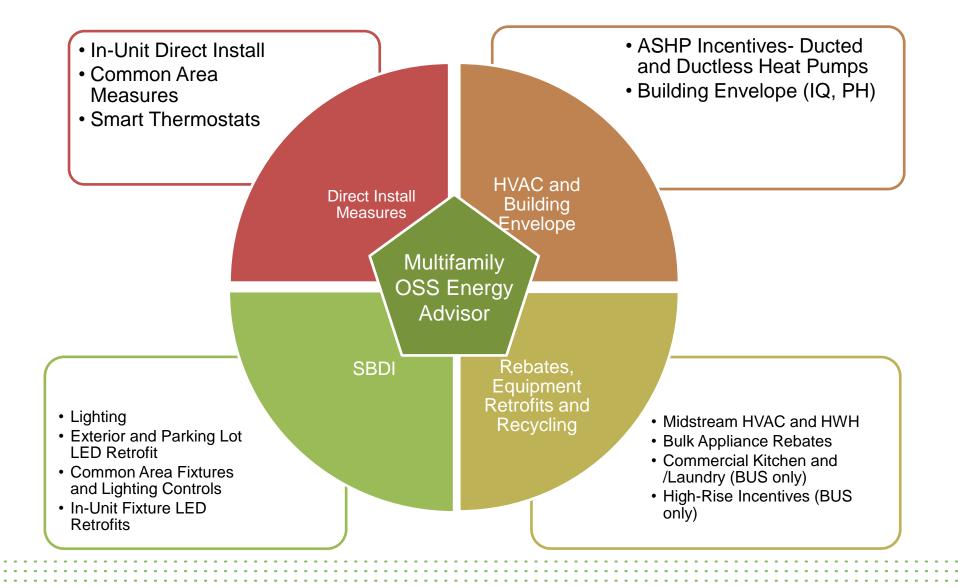
- What's Happening in PY2024
 - Multifamily Initiative
 - Midstream Initiative
 - Home Efficiency Market Rate
 - Home Efficiency Income Qualified
 - QA/QC Updates
 - Other Initiatives
- Federal Incentives and Rebates
- ICC Installer Certification
- Workforce Development
- Program Ally Relationship
- Marketing and Co-Branding
- Ameren Illinois Residential Energy Efficiency Program The People
- Questions



Multifamily One-Stop-Shop

One-Stop-Shop (OSS) Format - Working Smoothly Across Initiatives With Program Allies and Properties





Multifamily OSS Team Application and Other Assistance for Program Allies



Behind every Multifamily Market Rate, Income Qualified or Public Housing project is a dedicated team of professionals to support you.

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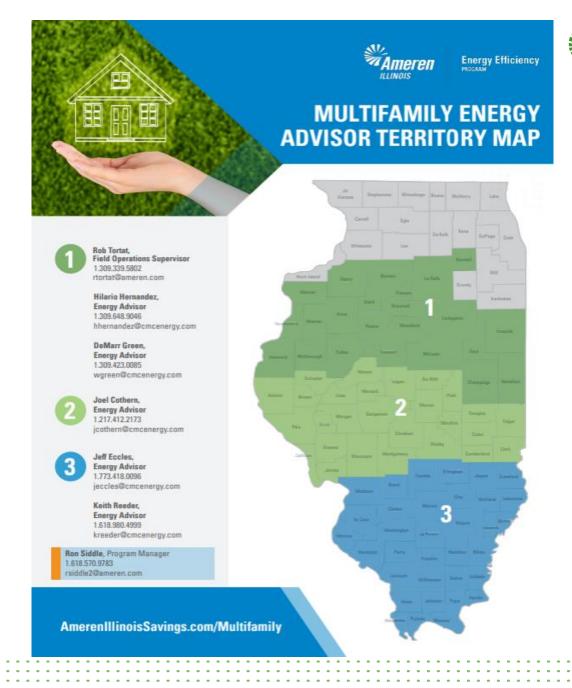
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ILLINOIS

Multifamily Building Performance for PY2024



Eligibility

- <u>Initial Condition:</u> Primary heating fuel delivered by Ameren Illinois; the attic must have an effective thermal resistance (R-value) of R-19 or less.
- Includes: Attic Insulation, Air Sealing and Health and Safety Measures.
- Health and Safety Measures:
 - Up to \$300 per unit, no greater than 50% of the total project cost.
 - Normally related to bath fan ventilation and vapor barriers if needed.
- Non-Project Audit Stipend:
 - \$100 per building (no more than three buildings per property should be audited)
 - Limit of \$300 non-project stipend per property.
 - Applies to properties that were referred to the Program
 Ally by the Program, but do not or cannot proceed due to testing, showstoppers or overqualified insulation.

MEASURE	INCENTIVE (2023)	INCENTIVE (2024)
Attic Insulation R19 – R49	\$1.55	\$1.55
Attic Insulation R11- R49	\$1.90	\$1.90
Air Sealing/cfm	\$0.95	\$0.95

*Incentives will remain the same

Multifamily Program Ally Incentives for PY2024



RES – MF IQ, PH and Market Rate Properties – Through Residential Program Property May Be Residentially or Commercially Rated – OSS Assessment Required

Measure	Incentive	Maximum
Ducted or Ductless Heat Pump – IQ or PH	Cost up to Max	\$7,500 per unit
Ducted or Ductless Heat Pump – Market Rate	Cost up to Max	\$5,000 per unit

Other Program Ally Incentive options for all Multifamily or PH Properties with Ameren Illinois accounts at the property:

Measure	Business Midstream	Standard Business (public and private sector) or SBDI	Residential
HVAC Retrofits - Gas & Electric	X (In Unit & Common Area)	X (In Unit & Common Area)	
Hot Water Heater & Boilers – Gas and Electric	X (In Unit & Common Area)	X (In Unit & Common Area)	X RES Midstream
Smart Thermostats – bulk	X (In Unit & Common Area)	X (In Unit & Common Area)	X RES Midstream
Boiler Tuneups		X	
T8 and T12 LED	X Common area	X Common Area and In Unit (SBDI)	

Multifamily Residential Program Ally Expectations



Program Ally Expectations	Multifamily Project Submission Timelines
Provide CMC project updates	Bi-weekly or when something impacts your timeline
Phasing of larger projects (greater than 24 units) into multiple opportunities – will require estimated completion dates for each phase	"Incentive Request Received" within 45 – 60 business days from "Reservation Request Approved" for each phase of the project. This allows the Program to have a better handle on budget forecasting throughout the year
Smaller OSS projects (less than 24 units)	"Incentive Request Received" within 45-60 business days from "Reservation Request Approved"
Provide Technical Reviewer (TR) with follow-up items and project return orders after QC	Within five business days





Instant Incentives

- Midstream incentive model means that the distributor provides the incentive to the HVAC/plumbing contractor at the time of receiving the end user's information.
- Incentives are available through distributors right now.
 - To find a participating distributor:
 - AmerenIllinoisSavings.com/Distributor
 - Let us know if your distributor is not yet enrolled with the Ameren Illinois Energy Efficiency Program.
- AmerenIllinoisSavings.com/Incentives



- Customer eligibility criteria:
 - Must be an Ameren Illinois electric customer.
 - Exception: Can be electric or gas Ameren Illinois customer for smart thermostats.
 - Exception: Must be Ameren Illinois gas for gas furnaces.
 - May be replacing existing equipment or installing new equipment where there was none.
- HVAC/plumbing contractor must provide the distributor with:
 - Customer account number.
 - Basic customer information (name, address, phone number, email).
 - New equipment make and model number.
 - Number of units purchase for customer location.
- Multifamily properties eligible for bulk purchase:
 - No account numbers needed.
- On-Bill Financing (OBF) available see form on the Program Ally Portal.



- Central air conditioners (CAC): Up to \$400 discount.
 - Must be 16 SEER (15.2 SEER2) and 12.5 EER (11.88 EER2) or greater.
 - Maximum capacity of up to 65 kBtu.
 - Limit two per Residential account.
- Ducted air source heat pumps (ASHP):
 - Tier 1: Up to \$750 discount.
 - Must be 16 SEER (15.2 SEER2) and 8.9 HSPF (8.1 HSPF2) or greater.
 - Tier 2: Up to \$250 discount.
 - Must be 16 SEER (15.2 SEER2) or greater.
 - Limit two per Residential account.

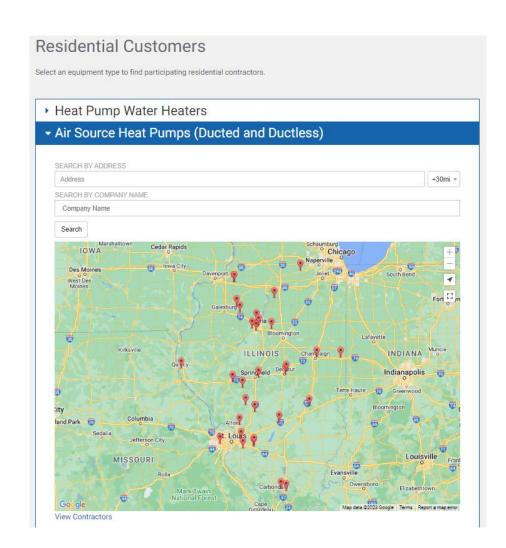


- Ductless heat pumps (DHP): Up to \$1,000 discount.
 - Must be 16 SEER (16 SEER2) and 9.0 HSPF (8.55 HSPF2) or greater.
 - Limit two per Residential account.
- Gas furnaces: Up to \$250 discount.
 - Maximum capacity of 224.9 kBtu.
 - Must be 95% AFUE efficiency or greater.
 - Limit two per Residential account.
- Heat pump water heaters (HPWH): Up to \$1,300 discount.
 - Must be ENERGY STAR® certified.
- Smart thermostat: Up to \$100 discount.
 - Must be ENERGY STAR certified.
 - Limit one per Residential account.



Become an Instant Incentives Program Ally Contractor at AmerenIllinoisSavings.com/InstantContractor.

- Get listed on website for customers to contact.
- Not required to receive discounts from distributors.
- Must be current with ICC Installer Certification.





Residential Home Efficiency – Incentive Tiers in PY2024



PY2024 Initiative will continue to feature unique incentive structure for these customers:

- Home Efficiency Income Qualified
 - Tier 1: Low Income
 - Tier 2: Moderate Income
 - Reference the income guide later in this presentation or work with your Field Energy Specialist with questions around Incentive tiers.
- Home Efficiency Market Rate
 - Tier 3: Non-Income Qualified, Market Rate



What's the same in 2024?

- Initiative with incentives for energy efficiency improvements available to any Ameren Illinois heating fuel customer, regardless of income.
 - No customer application or income criteria for this Initiative.
- Energy efficiency building envelope improvements remain the focus of eligible projects.
 - See the qualifying measures table.
- BPI Assessment to determine applicable measures and to develop the work scope.
- Simplified reservation and incentive forms to continue into 2024.
- On-Bill Financing (OBF) remains available to this tier of customers.
- Incentives are the same in 2024.
- A la carte approach:
 - Program Allies and customers may choose to implement each measure independently of other measures available such that they meet the customer's expectations in improving the energy efficiency of their home.
 - A la carte approach will allow customer the choice to maximize their energy efficiency improvement while minimizing their out-of-pocket cost.

Primary Qualifying Measures

Attic Insulation

Air Sealing

Rim Joist

Crawl Space Wall

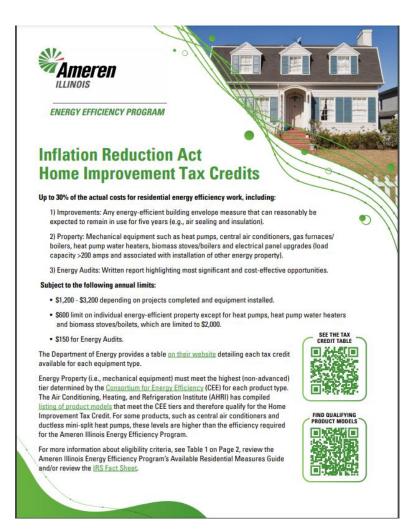
Exterior Wall Insulation

High-Efficient Continuous Ventilation



Inflation Reduction Act: Tax Credits

- Home Improvement Tax Credits
 - Any energy-efficient building envelope measure that can reasonably be expected to remain in use for five years (e.g., air sealing and insulation) can get up to 30% of the actual costs. \$1200 to \$3200 depending on projects completed.
 - Home Energy audits (30% of costs up to \$150).
- How to apply for tax credits:
 - Customer should consult a tax professional to determine all qualifying factors.
 - Additional information can be found on the Program Ally Portal.



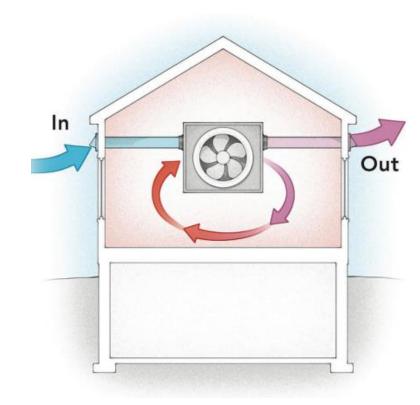


ASHRAE 62.2 - American Society of Heating and Air Conditioning Engineers

- Education Strategy
 - We will provide Program Ally education on ASHRAE 62.2 as well as focus groups on ASHRAE 62.2 as a guide.
 - Program Allies to educate customers on the benefits of proper ventilation in their home as it relates to ASHRAE 62.2.
 - Program Allies encouraged to explore and advise on alternative strategies on meeting ASHRAE 62.2.

Solutions

- Distribute Ameren Illinois Energy Efficiency Program branded materials for Program Allies to help educate customers in understanding ASHRAE ventilation solutions for a more energyefficient home.
- Customers will acknowledge their receipt of education regarding ASHRAE 62.2 standards and understanding the benefits of mechanical ventilation and the potential impacts of non-utilization.
 - Customers will be allowed to decline at the time of their project and may later choose to add ASHRAE ventilation and have it reflected on incentive applications.
- We always recommend and support ASHRAE 62.2 standards compliance.





Customer Journey

- Customer Webpage
 - Enhancing the ease of access for Ameren Illinois customers to the Home Efficiency specific page in locating information on available incentives and Program Allies that service their area.
- Customer Virtual Self-Assessment
 - Will be located on the Ameren Illinois Energy Efficiency Program website to help customers understand the benefits of energy efficiency upgrades to their home.
 - ENERGY STAR Portfolio Manager: Home Energy Yardstick
- Customer Education
 - Customers will be provided educational material on how their more energy-efficient home is impacted by ventilation and indoor air quality.
 - Ameren Illinois branded material will focus on indoor air quality and ASHRAE 62.2 ventilation guidelines and delivered to the customer by the Program Ally.
 - Program Ally is to provide a customer signature asserting they have been informed and provided this information.

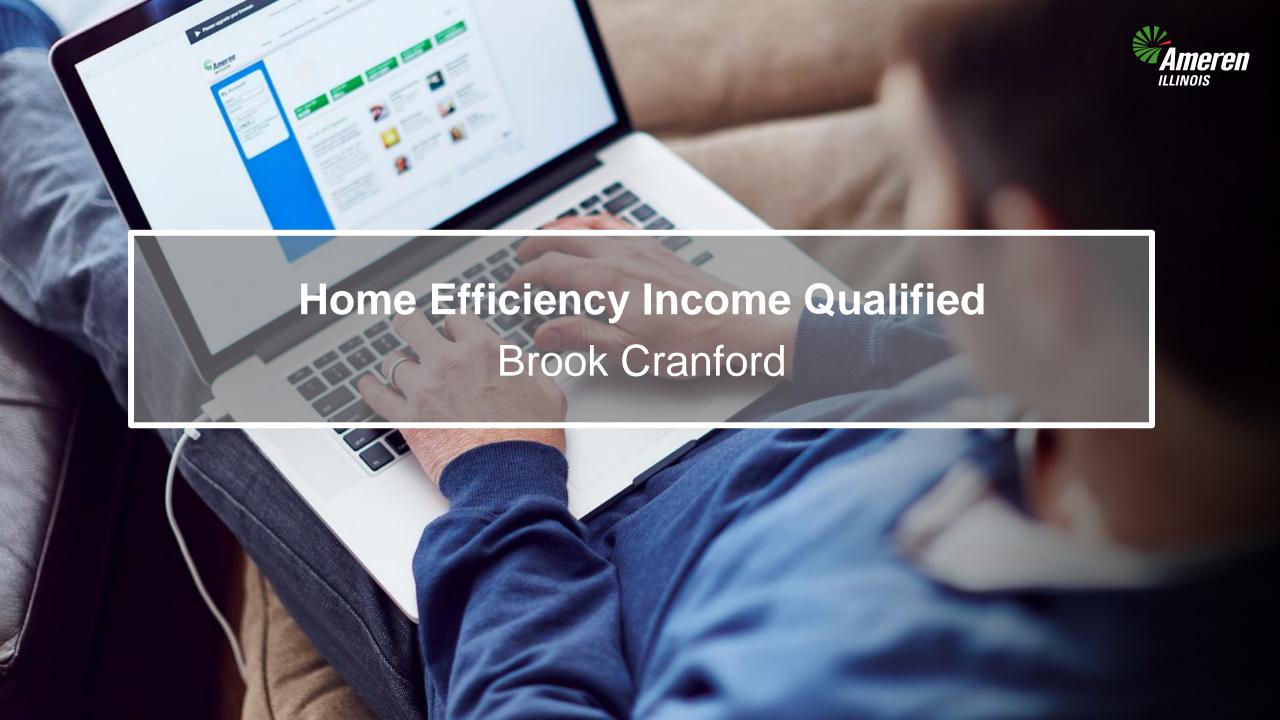




Program Ally Engagement

- Marketing and Outreach
 - Program Ally Newsletter
 - Recognition on performance to be highlighted.
 - Morning Brief Webinar
 - ASHRAE 62.2 and ventilation solutions.
 - Bill Insert and Direct Mailer
 - Targeting strategic seasonal mailing campaigns.
- Support
 - Co-branding and marketing opportunities.
 - Program Ally Marketing Portal
 - Trainings
 - Certification courses and in-field training and on-site training are available.
 - Staffing
 - Workforce development assistance with staff placements and grant opportunities available.

MEASURE	INCENTIVE
Attic Insulation - R19	\$1.10
Wall Insulation	\$1.10
Rim Joist	\$2.00
Crawl Space Wall	\$3.00
Air Sealing	\$0.70
High-Efficient ASHRAE Ventilation	\$25.00



HEIQ Overview for PY2024



- Program Ally Participation Agreement
- Estimated Completion Dates
- Program Ally Early Completion Bonus
- Savings to Investment Ratio (SIR) Tool
- Tier Level Incentives
- Energy Assessment/Audit Process
- Health & Safety Showstopper Remediation Process
- High-Need Central Air Conditioners (CAC)
- Emergency Heat Restoration Process
- Marketing Resources
- Individual Roundtable Meetings
- Electrification







Ensures that both the HEIQ Initiative and participating Program Allies are in clear agreement of the expectations of Ameren Illinois and its standards of integrity, safety and customer service.

Must be signed to participate in PY2024.

Copy will be made available following this meeting from your Field Energy Specialist and collected at individual roundtable meetings.



Participation Agreement Overview

- Who must complete the Participation Agreement?
- How will changes be made and communicated?
- What actions can be taken if the Participation Agreement is violated?

Representation Category

- Information relayed to customers is accurate and truthful.
- Customer expectations are met as stated in the customer satisfaction training.
- Marketing practices are approved and adhere to the co-branding standards of Ameren Illinois and the HEIQ Initiative.



Installation Category

- Adherence to applicable state and local laws, building codes and licensing requirements.
- Adherence to equipment manufacturer's guidelines and specifications.
- The HEIQ Initiative reserves the right to perform quality assurance pre/post inspections at any time on any project.

- Proof of the necessary insurance coverage and ICC Certified Installer status.
- Roster of all BPI Certified employees, specifying the current BPI certifications and staffing updates or changes will be submitted.
- Roster of all partnering subcontractors and staffing updates as necessary.



Communication Category

- Executed in a timely manner with applicable Program Staff.
- Utilize Field Energy Specialist (FES) as main point of contact.

Program Ally Action	Timeline	
Provide Field Energy Specialist project updates	Weekly	
Move customer from "Sent for Scheduling" to "Reservation Request Received"	Within 30 business days; Includes five business days to contact customer	
Estimated completion date	"Incentive Request Received" within 45 business days from "Reservation Request Approved"	
Provide Technical Reviewer (TR) with follow-up items	Within five business days	
Complete project return orders after QC	Within five business days	

Estimated Completion Date



- Projects will be assigned an estimated completion date 45 business days from Reservation Request Approved.
- Field Energy Specialist will seek weekly updates during check-ins with Program Ally.
- Program Ally may request extension of the estimated completion date based on extenuating circumstances related to the project.
- Project will be reassigned to another Program Ally if extension timeline is not met.

Tier Level Incentives



Qualification of incoming applicants will be based on the following thresholds specific to each county in the Ameren Illinois service territory:

- Tier 1: 200% Federal Poverty Level
- Tier 2: 201%-300% Federal Poverty Level
- Income that falls below the 80% Area Median Income (AMI).
- All households that qualify for AMI are considered a Tier 1 customer.
- Tier 1 customer 100% incentivized; no out-of-pocket cost for customer.
- Tier 2 customer 90% incentivized.
 - Supplemental bonus available.

Source: Housing and Urban Development (HUD)

Project Funding



Early Completion Bonus

- \$500 bonus per project.
 - Within Q1 any project with "Reservation Request Received" starting Dec.1,
 2023 and "Incentive Request Received" before March 31, 2024.

Savings to Investment Ratio (SIR) Tool

- A new tool that will be added to PY2024 Workbooks.
- Enter audit information as usual.
- A value will be calculated based on project expenses and anticipated savings, giving the Program Ally instant feedback on the feasibility of the project.
 - Green: Favorable savings anticipated; project will be reviewed by Technical Review for approval.
 - Yellow: Work with FES on the project to determine alternatives to turn the project "green."
 - Red: Project will be denied, too costly versus the anticipated savings.

Energy Assessments/Audit Process





- Energy Advisors will complete all initial Energy Assessments.
 - DIM installations
 - Determine if viable project.
 - Health and Safety
 - Investment of Health and Safety remediations will be reviewed to ensure a favorable savings ratio to the retrofit project.
- Program coordinator will assign to Program Ally based on rotation within each geographic area or Program Ally referral.
- Building Envelope works should be completed before mechanical installations. Please consult your FES member as needed.

Health and Safety Remediations



NEW: Health and Safety SIR Tool

If a health and safety showstopper is identified in the initial Home Energy Assessment, the customer will be placed on a health and safety hold for remediations.

- The H&S Coordinator will use a NEW H&S SIR tool to determine if the investment in remediation costs stewards the anticipated project savings.
- If approved, the H&S Coordinator will manage the remediation of issues identified as a showstopper to an energy efficiency project by providing oversight, tracking and reporting of each project while on hold for H&S remediations.

Health and Safety Measures



NEW: Health and Safety SIR Tool continued

- The objective of the H&S Coordinator is to improve the customer experience and to reduce the timeline of the H&S remediation which ultimately will reduce the lifecycle of the full project.
- Projects will be assigned to Program Ally once remediation is complete. Only viable projects
 will be assigned. If the customer is referred by a Program Ally, the PA will be notified of
 the H&S status. Projects will not start until the full remediation is complete.
- If health and safety issue is identified during a project, the Program Ally will remediate and include in the Workbook.
 - If Program Ally does not have capacity to remediate the issue, they will work with their Field Energy Specialist to coordinate.

High-Need Central Air Conditioners



Criteria for Replacement

- Seniors (60 and over).
- Expectant mothers.
- Homes with children six and under.
- People living with disabilities.
- Window AC units cannot be replaced with central AC units.

Note: All High-Need Central
Air Conditioner
Replacements will be
considered on a case-bycase basis.

Emergency Heat Restoration



Quickly restore basic heating to income-eligible <u>homeowners</u> through the repair or replacement of the primary permanent heating appliance that has fuel provided by Ameren Illinois.

The basics:

- For customers who have exhausted all other options for heating their home.
- Assistance available during a defined "season" that opens in fall and ends in early spring each year.
- Tier 1 and Tier 2 customers are eligible.
 - Renters (including contract-for-deed) and mobile homes are not eligible.
- The home's primary permanent heat system is identified and documented as inoperable or unsafe.
- Registered HVAC Program Allies have completed the training.
- Application pre-approval and heat restoration will be expedited.

Electrification



- Electrification will be a larger focus in PY2024.
- Customers who are interested in electrification will have the opportunity to switch to heat supplied through electricity instead of propane.
- The customer will apply through HEIQ and if they meet the qualifications will receive electrification upgrades as part of their home energy assessment which may include:
 - Air source heat pump
 - Electric induction stove
 - Heat pump water heater
 - Electric clothes dryer

Individual Roundtable Meetings



Following the Virtual Program Ally Kickoff, an in-person meeting will be held with HEIQ CORE Allies and HE Program Allies.

- The goal of these individual meetings is to recognize successes of each Program Ally, address questions from the Virtual Kickoff, identify barriers specific to the Program Ally as it relates to Program processes and/or their business model, build relationships with members of their "Program Ally Support Team" and overall create a foundation for continued communication.
- These meetings will be centered around the CORE Program Ally, and each will identify
 if secondary Program Allies need to attend.

Staff members attending each meeting include:

- FES team member
- EA team member
- QC team member
- Marketing

- HEIQ Program Management
- HE Program Management

Marketing Resources



- Importance of marketing to build your pipeline.
- Marketing resources are available for the Home Efficiency Income Qualified Initiative.
 - Visit the Program Ally Portal today to learn more.
 - Overview of Marketing Plan and support will be reviewed at individual roundtable meetings.







2023 Review



- Return Order Follow-up Inspections
 - 33% reduction in the need for Return Order Follow-up Inspections from 2022.
 - Your diligence in photo documentation of repairs allowed us to reduce additional customer home visits.
- Failure rate reduction
 - 24% drop in inspection failure rates from 2022 to 2023.
- Areas for technique improvements
 - Top failing items:
 - Gas leaks
 - Disclaimers missing for the presence of K&T
 - Heat shields not being installed around active chimneys
 - Holes made to dense pack left not properly sealed
 - Vapor barriers not entirely sealed
 - Filter slot covers missing

Project Documentation



- Fully assess projects after completion to ensure proper quantities and forms have been updated during the incentive request. Many return orders related to claimed savings could have been avoided in PY2023 with these internal quality steps added to your processes.
 - Correct AHRI certificates
 - A-coil substitutions
 - Adjustments to rim joist and crawl space quantities

 Complete all specified items on projects taking note of items like filter slot covers, vapor barriers and insulation. Many of these can be avoided by creating internal checklists to review as you perform your final assessment of the home.

Documentation



- **Photo documentation** allows for a fast response when the Program reaches out with additional questions.
- In PY2024, **Energy Audit Disclaimer Forms** are still required to be completed and signed on all envelope measure project reservation requests.

Quality Communications



- Always prioritize clear and accurate communication throughout the entire issue resolution process. Keeping customers informed at every stage and ensuring punctual communication for all appointments is of utmost importance, especially when numerous contractors are entering and leaving someone's home.
- Responsiveness is still strong.
- If you run into roadblocks, please contact your Field Energy Specialist or the Quality Assurance team.

Residential Technical Advisor Residential Quality Control Lead

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Quality Mindset



Take on the commitment to deliver excellence in every aspect of work within the Program.





Healthier Homes Initiative – Income Qualified Channel



What is it?

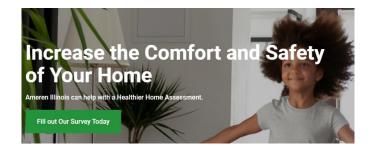
- The Healthier Homes Initiative provides eligible customers with energy efficiency projects enhanced indoor air quality improvements. This Initiative partners with local community health organizations to identify constituents that would be ideal candidates for a no-cost energy efficiency retrofit project with additional in-door air quality improvements.
 - The Initiative will use established BPI principles, combined with health-focused solutions to improve the in-home environment for residential customers.

Identified participants will be directed to the customer intake site to complete a

survey and the enrollment process.

 Qualifying customers will receive an Assessment by staff along with direct install savings measures.

 Homes identified as eligible homes after the Assessment will to be sent to participating Program Allies for energy efficiency project completion.



AmerenIllinoisSavings.com/Healthier

Unique Healthier Homes Measures

Indoor Air Quality Monitor

Hypoallergenic Bedding

Air Purifier

Duct Cleaning

Furnace Filter

Carbon Monoxide Detector

Dehumidifier (POS)

Joint Utility Initiative – Income Qualified Channel



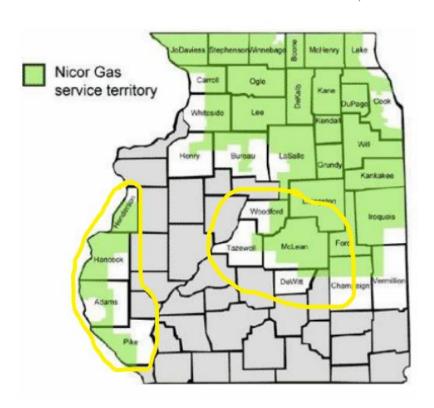
What is it?

- Joins the Ameren Illinois Energy Efficiency Program with the Nicor Gas Energy Efficiency Program to deliver the energy efficiency retrofit projects to the Single-Family Income Qualified Channel in utility shared territory.
- Partners with community-based organizations to provide outreach and enrollment to their constituents.
- Primarily building envelope improvements.
- Geographically focused to areas of dual utility representation.
 - Currently in the Bloomington/Normal area and continue to strategize expansion to western boarder and Quincy area.
- Program Ally Project Tracking Portal.
- Online customer application.
 - Energy Efficiency Savings (ee-savings.com)





Energy Efficiency Program



Mobile Home Initiative – Income Qualified Channel



What is it?

- The Mobile Home Initiative will deliver energy efficiency improvements in the way of direct install measures, select HVAC measures and building envelope measures designed for the unique housing type of manufactured and mobile homes in the Ameren Illinois service territory.
- Partners with Community Action Agencies and community-based organizations to provide outreach and enroll qualifying customers.
- Program Ally Assessments and Program Ally installations of customer leads from these community groups.
- Customers will be offered energy literacy education to help the customer actively engage in reducing their energy usage.
- Geographically expanding in PY2024.
 - Currently established presence in Champaign/Urbana area, St. Clair and Madison Counties.
 - Recruiting new and existing Program Allies as we expand.

Primary Measures

Air Sealing

Duct Sealing

Sub-Floor Insulation

Furnace Replacement

High-Efficient Continuous Ventilation

Smart Thermostat

Community Action Agency (CAA) Channel



Overview

- The Community Action Agency Channel partners with Agencies to provide no-cost weatherization projects.
- Participating customers are identified and assessed by their local agency and provided to local contractors for install.
- Eligible measures include air sealing, insulation, plumbing, building envelope/architectural mechanicals, direct install measures (DIMs) and health and safety measures.
- The Community Action Agency Channel support Agencies with recruitment.



Community Action Agency Channel





Why participate in CAA?

- The CAA Channel can provide supplemental work for weatherization crews year-round without additional advertising.
- There is no requirement to maintain an assessor on CAA projects.
- The opportunity to expand your team and business.
- Working in the CAA Channel provides the ability to improve the community you live in.

Community Action Agency Channel



Ways to Participate

- Agencies will walk through an onboarding process that includes a portion on price negotiation.
- For additional information, please contact Nikki Pacific at npacific@ameren.com.

Smart Savers Initiative



- Eligible customers choose their Program Ally to install a free smart thermostat.
- Specific zip codes with high populations of low to moderate income (LMI) customers.
- Program Allies receive leads directly from portal submissions.
- Program Ally incentive levels:
 - \$175 per Single-Family install or call back.
 - \$100 per Multifamily unit install or call back.
 - Nest or ecobee thermostats and wire adapters provided free to eligible customers.
- Participating Program Allies receive co-branded marketing toolkit including:
 - Co-branded Online Customer Portal dedicated to direct your customers and generate leads.
 - Co-branded printed marketing pieces, social media pieces and posts.



AmerenIllinoisSmartSavers.com

Interested in participating?
Contact: nbaer@staplesenergy.com

Marketplace and Retail Products



Energy-efficient products incentivized for Ameren Illinois customers.

- Online Marketplace instant rebates at AmerenIllinoisSavings.com/Marketplace:
 - Smart thermostats
 - Advanced power strips
 - Air purifiers and dehumidifiers
 - Faucet aerators and showerheads
- ENERGY STAR product rebates:
 - Large appliances including refrigerators, freezers, washers and electric dryers.



- Heat pump water heaters and gas storage water heaters.
- For full list of rebated products, visit AmerenIllinoisSavings.com/Rebates.

Marketplace and Retail Products



Energy-efficient products incentivized for Ameren Illinois customers.

- Instant Incentives at Retailers:
 - LED Bulbs and Fixtures
 - Dehumidifiers
 - Air Purifiers
 - Vent Fans
 - Water Coolers
 - Heat Pump Water Heaters
 - Smart Thermostats
 - For full list of rebated products, visit AmerenIllinoisSavings.com/Rebates

Efficient Choice Tool



The Ameren Illinois Efficient Choice Tool (ECT) is a free resource that can assist you in your purchase of energy-efficient products like appliances, smart thermostats, consumer electronics and other products for your home.

- Get help with purchasing decisions to find the right product for you. The ECT provides current retail pricing from many National Retailers as well as providing an energy efficiency score.
- The Efficient Choice Tool analyzes product data daily across major retailers to provide you with highly efficient recommendations.
- Search by type, brand and model.
- Shop and compare with other energy-efficient products.

Get started today at AmerenIllinoisSavings.com/EfficientChoice



Federal Incentives and Rebates



- Inflation Reduction Act Energy Efficiency Home Improvement Credit (no income criteria).
 - 30% of project costs, up to \$1,200 annually.
 - Insulation and Air Sealing.
 - Air Source Heat Pumps and Heat Pump Water Heaters.
 - Home Energy Audits.
- Inflation Reduction Act High Efficiency Electric Homes Rebate (up to 150% AMI).
 - Heat Pump Water Heaters: \$1,750
 - Air Source Heat Pumps: \$8,000
 - Insulation, Air Sealing: \$1,600
- Resources for incentives
 - https://www.energy.gov/policy/articles/making-our-homes-more-efficient-clean-energy-tax-credits-consumers
 - https://programs.dsireusa.org/system/program?state=TER



What is Installer Certification?



- Illinois energy legislation requires contractors who are installing energy efficiency measures to be certified with the Illinois Commerce Commission (ICC).
- Applies to any measure that requires an electrical connection.
 AND
 Applies to any measure that will receive an incentive of \$300 or more.
- Certified installers agree to comply with building and electrical codes and manufacturer's installation instructions.
- Self-installed measures (those installed by an internal employee or staff member) are excluded from the certification requirement.

Recertification Details



- Certified energy efficiency measures installers must submit a recertification report.
- Installer Recertification must be submitted to the ICC between Jan. 1 –
 June 1 annually to avoid ICC late fees.
- There are no fees to recertify, however, late fees could be high if your recertification isn't submitted by June 1 annually.
- Our Program cannot issue incentive payments until recertification is up to date.
- AmerenIllinoisSavings.com/Installer



Diverse Program Ally Incubator Program



The Diverse Program Ally Incubator Core Objectives:

- Increase opportunities for contractors who haven't traditionally participated in energy efficiency as Program providers for Ameren Illinois.
- Educate diverse contractors on the Ameren Illinois Energy Efficiency Program offerings within which there are legitimate opportunities to generate revenue.
- Offer support to cohort members in the areas of growth and development to facilitate building sustainable businesses as Program Allies.



Diverse Program Ally Incubator Program



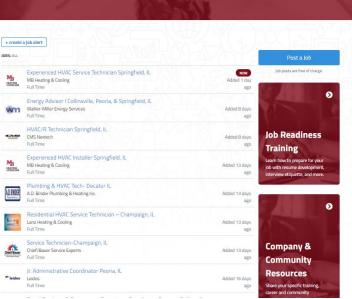
- Cohort members that meet criteria and are selected to participate in the Diverse Program Ally Incubator will develop a Business Growth Plan, participate in a Mentorship Program, receive a variety of Back-Office Support Services and meet weekly for one-on-one meetings with a Program team member to share their desired growth and business goals as well as their barriers which all aid in the development of their individual Action Plan.
- The Action Plan allows the Program team to connect cohort members to valuable resources that help them to achieve goals and remove barriers in areas that include, but are not limited to, Diverse Certification, Project Financing, Marketing, Contract Opportunities and Business Development.
- Questions? Contact Amber Anderson at <u>anderson@wmenergy.com</u>.

Workforce Development Opportunities

Ameren ILLINOIS

- The Program partners with Program Allies to train tomorrow's energy efficiency workforce.
- Energy Efficiency Jobs Board
 - Program Allies can post jobs to find talent.
 - AmerenIllinoisSavings.com/Jobs
- Job Placement Program
- Diverse Program Ally Incubator Program
- Climate and Equitable Jobs Act is creating multiple workforce efforts run by DCEO and 13 Workforce Development Hubs around the Ameren Illinois Service Territory:
 - Clean Jobs Workforce Network Program
 - Energy Transition Navigators Program
 - Energy Transition Barrier Reduction
 - Returning Residents Clean Jobs Training Program
 - Illinois Climate Works Pre-Apprenticeship Program







Meeting With Your Field Energy Specialist



- We are very receptive to in-person meetings at your office, reach out to us.
 - Marketing material review/delivery.
 - Let's review all our initiatives together in 2024 and discuss all opportunities you may be interested in.
 - If time is pressing, we can meet at job sites or over lunch.

CORE Audit Training



- Required of Program Allies participating in HEIQ. Updated in 2023.
- We are committed to helping your company by providing initial audit training to all your BPI certified staff for a consistent staff and customer experience.
- Shadowing Each current auditor once per year.
- Reach out to your Field Energy Specialist for a refresher training in 2024 and they will get the process started.

Measure Guides



- Available Residential Measures Guide.
- Health and Safety Measures Guide.
- Updated copies will be on the website on January 2, 2024.
- If there are any major changes for energy-saving measures, the team will communicate that as 2024 work scopes start to be developed.
- Health and Safety Measures Guide will contain greater details on what details we are looking for when receiving quotes and for our inspection needs.

Things to Watch



- Be mindful of HEIQ timelines.
- Be mindful of HE Reservation approval timelines.
- Manage projects to be completed in a consistent and timely fashion.
- Maintain effective communication with customers to ensure a positive and wellinformed experience.
- Request Program assistance in tracking project pipeline as necessary.
- Update your Field Energy Specialist as projects exceed expected timelines.



AmerenIllinoisSavings.com



- Website URL:
 AmerenIllinoisSavings.com
- Website always has the most up-to-date information.
- Find applications, Program guides and other necessary forms.
- Review how-to videos, previous webinars and other educational content.



Program Ally Portal



Existing Program Ally Contractors

Thank you for your continued collaboration with Ameren Illinois. Choose your customer type below to get instant access to application forms, educational resources, Program updates, and more.

Business >

Residential >

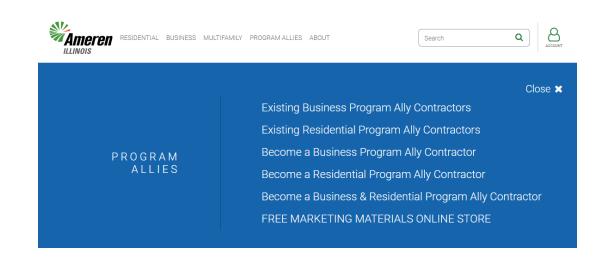
ICC Installer Certification >

AmerenIllinoisSavings.com/Ally

Program Ally Portal

Ameren

- Links to applications and forms.
- Helpful resources and training videos.
- Co-branding overview and online request forms.
- Bonus information (as applicable).



What is Co-Branding?



- Co-branding refers to your company logo or name appearing with the Ameren Illinois logo/name on certain promotional materials.
- Co-branding is a way to market your business using your Ameren Illinois Energy Efficiency Program affiliation.
- A way we "brand" together we market to customers together.

Types of Co-Branding



- Two types of co-branding materials:
 - FREE pre-designed materials on the Program Ally Marketing Portal.
 - We make materials for you to print and distribute.
 - No additional approval needed.
 - Materials using Program graphics.
 - You create your own materials and use our approved graphic.
 - Requires pre-approval from the Program.

Co-Branding Requirements



All co-branding activity must adhere to the Co-Branding Requirements document found on the Program Ally Portal.

- Approved Graphic
- Approve Usage
- Text References

CO-BRANDING REQUIREMENTS

For Ameren Illinois Registered Program Allies

Thank you for being a Registered Program Ally with the Ameren Illinois Energy Efficiency Program. When it comes to marketing, you have two options of co-branding with the Program:

1) Free, Program designed and pre-approved co-branded collateral.

 Program Ally custom designed materials with the approved Ameren Illinois Energy Efficiency graphic and/or text references.

Program pre-designed co-branded materials are designed by the Ameren Illinois Energy Efficiency Program, it includes your contact information, and are readily accessible to Program Allies for immediate use. These materials are free, pre-approved, and can be printed and/or downloaded at your convenience.

As for custom designed materials, this guide specifically addresses the requirements you MUST follow in the approval process of incorporating the approved Ameren Illinois Energy Efficiency graphic and/or any text references to your participation with our Program within your materials.

o request pre-designed materials or to submit custom materials,

AmerenIllinoisSavings.com/Ally

PROGRAM ALLY CO-BRANDING

Materials co-branded with reference to the Ameren Illinois Energy Efficiency Program are intended to support the promotion of the Progam Ally's company. Any Ameren Illinois components should be secondary and smaller than the Program Ally's company components.

Program Allies may produce marketing or promotional materials that are co-branded with the Ameren Illinois name and/or approved graphic as outlined in this guide.

APPROVED GRAPHIC

Registered Program Allies may only use the approved graphic to represent their involvement in the Ameren Illinois Energy Efficiency Program. Program Ally use of any other Ameren Illinois logo is strictly prohibited.

IMPORTANT NOTE: This graphic has its own approved uses in advertisements, marketing materials, and business cards. Please refer to the <u>APPROVED USES</u> section on page 3 for more details.



ENERGY EFFICIENCY PROGRAM
Registered Program Ally



Energy Efficiency
REGISTERED PROGRAM ALLY

Program Ally Marketing Portal

- Marketing materials to help you sell energy-efficient equipment and projects.
- Order a selection of professionally printed and downloadable pre-designed materials at <u>no charge</u> from the **Program** Ally Marketing Portal found on the Program Ally Portal.





Benefits of the Home Efficiency Income Qualified Initiative

Through the Home Efficiency Income Qualified Initiative (HEIQ), participating Ameren Illinois customers can find out where your home is losing energy, like cold air in the summer and hot air in the winter, through a Home Energy Assessment. From the Assessment, you will learn how to stop the air leaks and discover additional ways to save on your future energy costs.

Additionally, qualified customers can receive incentives to help offset the cost of projects including air sealing, insulation and for the purchase of nev equipment such as a heating and cooling unit. Program staff are also available to help assist HEIQ participants with installing energy-saving products like LED lightbuls and smart thermostats.

Home Projects With Available Incentives

Home Upgrades	Description
Air/Duct Sealing	Detecting and sealing air leaks using equipment specifically designed for this purpose.
Attic Insulation	Increasing attic insulation to the optimal levels that maximize savings and minimize costs.
Rim Joist Insulation	Stopping air leaks and insulating the exterior perimeter above the basement/crawl space wall.
Crawl Space Wall Insulation	Insulating exterior crawl space walls.
Wall Insulation	Properly insulating exterior wall cavities.
Heating and Cooling Systems	Upgrading old inefficient systems to modern, high-efficiency equipment, keeping you warm in the winter and cool in the summer.

Inneatives cover a portion of the project costs. The amount of coverage will depend upon your home's needs. In order to qualify for inneatives, your equipment must meet specific qualifications. Ameren Illinois Energy Efficiency Program inneatives are subject to change without prior notification. Homes with certain pre-existing conditions may not qualify for installation of some measures; eligibility will be determined on a case-by-case basis.

Frequently Asked Questions

Why should I participate?

A: Participants in HEIQ have lower monthly utility bills while increasing the comfort and value of their home. Additionally, available incentives help you save when planning a home project.

0: Am I eligible to participate?

A: The following criteria must be met to participate in HEIQ:

» You must be living in a single-family home.

» You must be a residential customer, heating and cooling your home with gas or electricity delivered by Ameren Illinois.

» Your Maximum Gross Annual Household Income must be at or below the amount listed for your area on the Income Qualifications Chart on

For more information or to apply online, please visit

AmerenIllinoisSavings.com/Residential or call 1.866.838.6918.

CONTACT YOUR PROGRAM ALLY:

Pre-Designed Materials

Ameren

- Available for many equipment types and customer segments.
- Input your company information into our system to have them printed directly onto the materials.



Saving energy in your home can improve comfort, manage usage and reduce costs.

The best way to start saving energy is to find out if you qualify for a FREE Home Energy Assessment. A Home Energy Assessment takes a look at your home's features and equipment performance to determine where your home might be wasting energy. Once you know how your home performs, you can start looking at ways to save by installing energy-saving products and features!

> To see if you qualify for a FREE Home Energy Assessment, visit AmerenIllinoisSavings.com/SaveMoney or call 1.866.838.6918.

To learn about easy, do-it-yourself ways to save on energy, check out the Energy Savings Guide.





Social Media Toolkit



- Social media toolkit for Program Allies.
- Pre-approved social media posts.
- Available to download on Program Ally Portal.

PROGRAM ALLY SOCIAL MEDIA TOOLKIT

LINKS TO PRE-APPROVED SOCIAL MEDIA POSTS:

Business - General Program Overview

Text for post along with graphic:

Ask us how we can help your business find ways to improve comfort, manage usage and reduce costs with incentives from the Ameren Illinois Energy Efficiency Program! Call us at 1,xxx,xxx,xxxx to get started.

Graphic Preview:



Residential - General Program Overview

Text for post along with graphic:

Ask us how we can help you improve comfort, manage usage and reduce costs with incentives from the Ameren Illinois Energy Efficiency Program! Call us at 1.xxx.xxxx to get started.

Graphic Preview:



Program Graphics

- Program graphics available for your advertising (websites, TV and radio ads, print ads, signage, etc.).
- In order to use Program graphics, you must be a Registered Program Ally.
- The Co-Branding Requirements document provides detailed standards and requirements and can be found on the Program Ally Portal.
- Your materials must adhere to the Co-Branding Requirements document and be approved in advance.



CO-BRANDING REQUIREMENTS

For Ameren Illinois Registered Program Allies

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To request pre-designed materials or to submit custom materials, visit <u>AmerenIllinoisSavings.com/Ally</u>

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ENERGY EFFICIENCY PROGRAM
Registered Program Ally



Energy Efficiency
REGISTERED PROGRAMALLY

Visit AmerenIllinoisSavings.com/Ally for more information.

Program Ally Portal



- Access the latest Co-Branding Requirements document.
- Order marketing materials, submit materials for approval.
- Download approved logos.

Marketing & Sales Resources

+ Co-branding Requirements, Requests, Online Store, & Logos



Program Staff Supporting Ameren Illinois



- Deputy Residential Program Manager
 - Alex Ng
- Home Efficiency Income Qualified
 - Brook Cranford, Channel Manager
 - Kim Petzing, Program Manager
 - Pooja Khanvilkar, Project Coordinator
 - Travis Crocker, Field Operations
- Innovative Channels
 - Robert Rusteberg, Channel Manager
 - Micheal Edwards, Channel Coordinator
 - Aasma Abdel-Azim, Joint Utility PM
 - Becky Tures, Mobile Homes PM

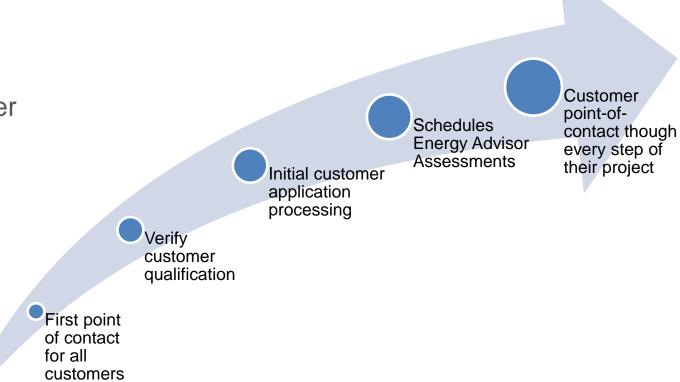
- Community Action Agency Braided Projects
 - Thomas Drea, Channel Manager
 - Nikki Pacific, Program Manager
- Multifamily Initiatives
 - Miritza Thorpe, Channel Manager
 - Ron Siddle, Program Manager
- Smart Savers Channel
 - Jim Poynton, Channel Manager
- Midstream HVAC Channel
 - TBD
- Health & Safety Coordinator
 - Lorrie Newman

Home Energy Specialist (HES) Team



Customer Care Staff:

- Stacey Appell, Customer Care Manager
- Home Energy Specialists:
 - Ashley Shettleworth
 - Torie Pickens
 - Sarah Delatore
 - Jacob Tate
 - Brittany Barefield
 - Kasani Avery
 - Anastassia Walton



Data Team & Technical Reviewers



- Technical Review Team Reviews and approves Work Scopes.
- Data Team Processes completed projects and payments.
- Dave Kilgore, Senior Engineering Manager
 - Technical Review Support Team:
 - Joe Morosko
 - Jim Johnson
 - Steve Gwinn
 - Caryn DeSignor
 - Alvina Saterfield
 - Data Support Team:
 - Heather Blumenstock
 - Hannah Merriman
 - Jalisa Raines
 - Maria Gaddis
 - Jude Perrine



Field Energy Specialists



- 1. Tucker Blum tblum@ameren.com 1.309.857.9773
- 2. Tim Huber thuber@ameren.com 1.314.302.2919
- 3. Justin Shearer jshearer@ameren.com 1.309.509.8207
- 4. John Wilson jwilson3@ameren.com 1.618.980.1272
- 5. Matt Flowers mflowers5@ameren.com 1.217.821.1111



Multifamily – IQ, PHA and Market Rate



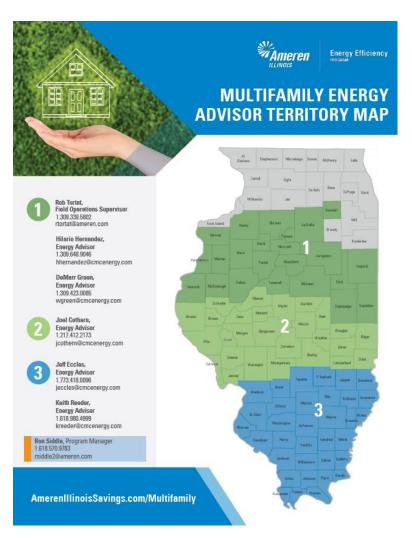
 Energy Advisors assess both in-unit and common area opportunities.

 Opportunities installed include in-unit DIMS, smart thermostats and building envelope.

Program Manager: Ron Siddle

Field Operation Supervisor: Rob Tortat

- 1. Hilario Hernandez and DeMarr Green
- 2. Joel Cothern
- 3. Jeff Eccles and Keith Reeder



HEIQ Personal Energy Advisor Team

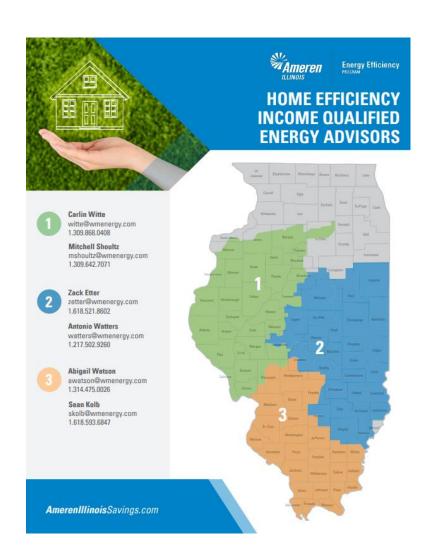


- Performs Home Energy Assessments and Virtual Assessments as Personal Energy Advisor.
- Install all direct install measures.
 - LED Bulbs, Showerhead and Faucet Aerators
 - Advanced Power Strips and Smart Thermostats
- Educates customers on additional eligible energy efficiency opportunities.

Field Ops Manager: Travis Crocker

Field Supervisor: Dave Averbeck

- Austyn Rodgers and Mitchell Shoultz
- Antonio Watters and Zack Etter
- 3. Cory Mounce and Sean Kolb



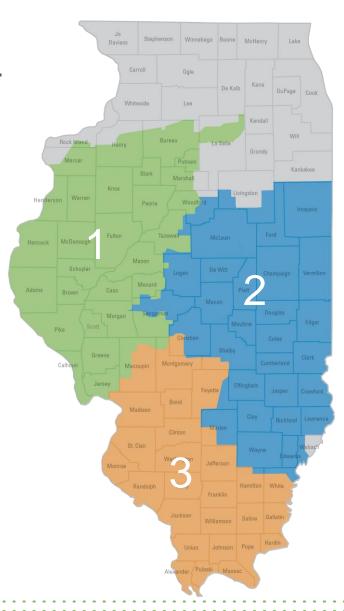
HEIQ Quality Control Team

Ameren

- Performs pre, in-progress, and post-installation inspections.
- Installs direct install measures.
- Reviews Work Scopes.
- Creates training opportunities for Program uniformity.
- Shadow opportunities with Program Allies.

QC Manager: Vernon House

- 1. Ian Colson
- 2. Trinidad Jimenez
- 3. De'Andre Hampton



HEIQ Marketing Outreach Overview

Ameren

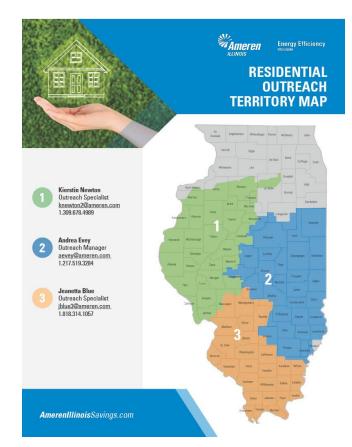
- Promotes Ameren Illinois Energy Efficiency Program.
- Programs marketed primarily through events, home shows and community groups.
- Prospective HEIQ customers are forwarded to the HES team for qualification and approval.
- CORE Program Ally assistance in identifying future outreach opportunities is welcome.

Residential Outreach Team:

- Kierstin Newton
- 2. Jaee Blue
- Andrea Evey,Outreach Manager

Residential Marketing Team:

- Jordan Nelson, Residential Marketing Manager
- TBD, Program Ally and Midstream Marketing Manager
- Claire Cooper, HEIQ Marketing Manager



Midstream Distributor Engagement Team



Manages the Midstream distributor network, recruits prospective distributors and through the distributor network engages contractors and manufacturers to drive adoption and acceptance of energy-efficient equipment through participation in the Midstream Initiative.

Midstream Distributor Engagement Team:

- Bryan Whittaker, Distributor Account Manager
- Melissa Calloway, Distributor Account Manager
- Stephanie Kulek, Distributor Account Manager



Questions?



Energy EfficiencyPROGRAM

AmerenIllinoisSavings.com