

A close-up photograph of a person wearing a white lab coat, focused on adjusting a large, white, circular surgical light fixture. The person's hands are visible, and the background is softly blurred, showing the profile of another person's face in the lower right corner.

**Ameren Illinois Energy Efficiency Program  
HEIQ Snapshot Tool & Ancillary Cost Overview  
June 2021**

# Agenda

- Health and Safety Update
  
- Monthly Program Ally Snapshots
  - Snapshot Communication Plan
  - Overview of Snapshot Metrics
  - Overview of Snapshot Customer Experience Data
  
- Ancillary Costs Update
  
- Q & A

# Program Health and Safety Update

- Regarding the CDC's announcement for fully vaccinated people on May 13, 2021, CDC recommendations generally apply to individuals for private, personal, and recreational activities
- The CDC's newest interim recommendations state that "fully vaccinated people no longer need to wear a mask or physically distance...*except where required by federal, state, local...laws, rules, and regulations, including local business and workplace guidance*"
- **Employers are guided by OSHA standards, which have not yet changed.** Accordingly, at this time, **there is no change to Ameren Illinois workplace COVID-19 masking protocols**
- Ameren Illinois COVID-19 Incident Support Team is awaiting an update from OSHA, but timing and precise content are undetermined at this time
- Program Staff is currently reviewing the options and actions, which may include potential differentiation in COVID-19 safety protocols for those who are fully vaccinated, subject to OSHA guidance

# HEIQ Program Ally Snapshot

- **What is a Program Ally Snapshot?**
  - Tool used to measure overall progress to quarterly allocation benchmarks and total allocations
  - This is not a Scorecard
  - You are not being scored/graded by the program and the information included is not punitive
  - The Snapshot is simply a communication tool for you and your Field Energy Specialist to assess your progress on a monthly basis
  
- **Why use a Program Ally Snapshot?**
  - Communication of savings and incentive targets produced for HEIQ
  - Assessment of project cycle time for adherence to best practices
  - Review of failed inspections and discussion of improvement opportunities
  - Track progress to quarterly allocation benchmarks
  - Review pipeline to ensure realization of full allocation
  
- **Who delivers a Program Ally Snapshot and when?**
  - Snapshots are emailed on or around the 15<sup>th</sup> of each month
  - FES will follow up to discuss

# HEIQ Snapshot

- Key areas of Snapshot
  - Metrics
  - YTD Progress to Quarterly Benchmark Budget Tier 1 and Tier 2
  - YTD Progress to Tier 1 Bonus allocation
  - CE data

Parameters	Values
Net kWh saved	76,960
Net Electric Incentives	\$ 132,731.88
Net Therms saved	7,524
Net Gas Incentives	\$ 138,738.73
Completed Project Count	16
Percent to TIER 1 Budget Benchmark	179%
Percent to TIER 2 Budget Benchmark	35%
Total Failed Inspections	0
Average Project Cycle Time*	46
Projects over 60 days	1
Ally Engagement and Communication (5.0 Scale)	5
Project Installation and Completion Rating (5.0 Scale)	5

Ally	
<b>YTD Updates</b>	
Q2 TIER 1 budget benchmark	\$ 63,263.25
Q2 Tier 1 Budget Used	\$ 113,156.90
Q2 Tier 1 Budget Left	\$ (49,893.65)
PY21 Tier 1 Budget Remaining	\$ 18,685.60

Ally	
<b>YTD Updates</b>	
Q2 TIER 2 budget benchmark	\$ 22,448.25
Q2 Tier 2 Budget Used	\$ 7,896.69
Q2 Tier 2 Budget Left	\$ 14,551.56
PY21 Tier 2 Budget Remaining	\$ 36,814.80

PROGRAM ALLY	
<b>YTD Updates</b>	
Alloted Bonus	\$ 36,400.00
Sum of Bonus Used	\$ 12,638.90

Ally Rating	A Rating	Cleanup Rating
5 ? Excellent	Excellent	4 ? Very Good
4 ? Very Good	Excellent	5 ? Excellent
5 ? Excellent	Excellent	5 ? Excellent
5 ? Excellent	Excellent	5 ? Excellent
5 ? Excellent	Excellent	4 ? Very Good
5 ? Excellent	Excellent	5 ? Excellent
5 ? Excellent	Excellent	5 ? Excellent



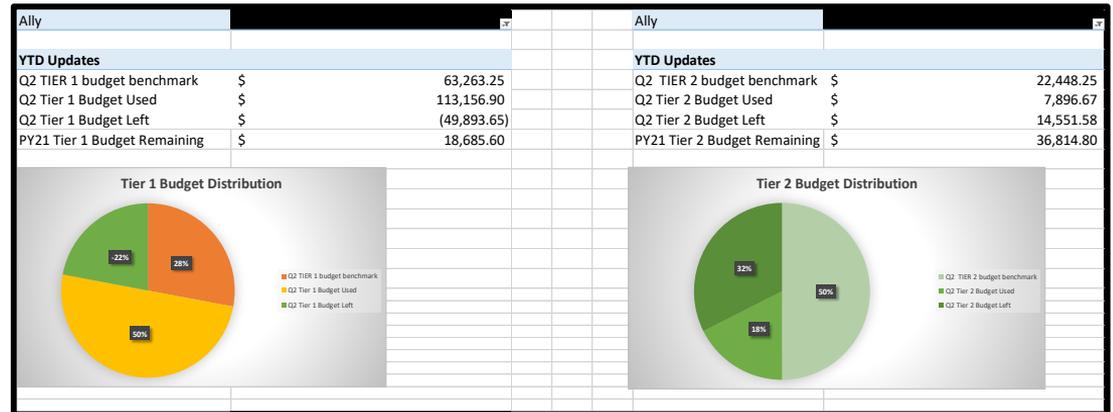
# HEIQ Snapshot Metrics

ABC Company Snapshot	
Parameters	Values
Net kWh saved	76,960
Net Electric Incentives	\$ 132,731.88
Net Therms saved	7,624
Net Gas Incentives	\$ 138,738.73
Completed Project Count	16
Percent to TIER 1 Budget Benchmark	179%
Percent to TIER 2 Budget Benchmark	35%
Total Failed Inspections	0
Average Project Cycle Time*	46
Projects over 60 days	1
Ally Engagement and Communication (5.0 Scale)	5
Project Installation and Completion Rating (5.0 Scale)	5
*Time is calculated from Reservation Request Received to Incentive Request Approved stage	
**Time is calculated from Reservation Request Approved to Incentive Request Received stage	



# HEIQ Snapshot: Quarterly Benchmark Progress

- **Discussion:** management of Tier 1 & Tier 2 budget allocation to meet quarterly benchmarks and not exceed total allocation
  
- How Many Tier 1 & Tier 2 projects do you have left to complete to meet Q2 benchmarks?
  - Average project cost / total project allocation remaining
  
- How are you trending?
  - 4 weeks left in the quarter vs. how many projects left to complete for each Tier
  - What is within your pipeline?
    - Is there threat to exceed total allocation?
    - Is your pipeline empty and you need leads?
    - Is there a threat for an allocation drawdown at the end of the quarter?



# HEIQ Quarterly Benchmarks and Lead Generation

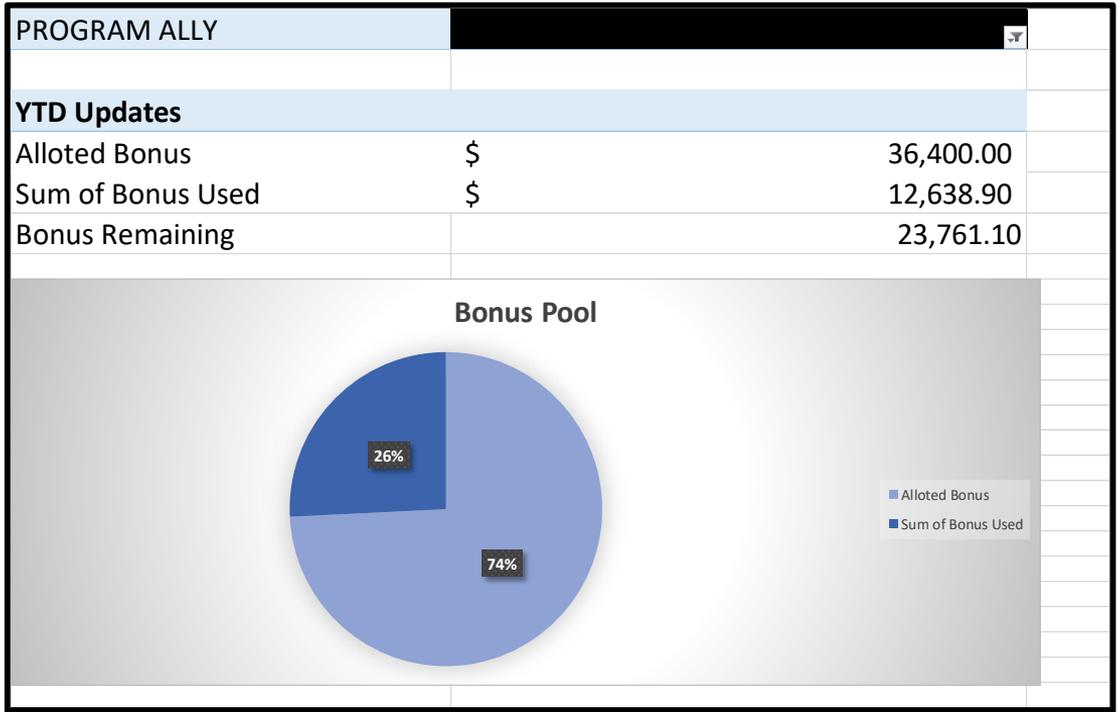
## **Program Lead Generation Support:**

- Program Staff is working to support Program Allies with lead generation through a variety of channels including: direct mail and email to targeted customers, geotargeted social media promotion, IQ application distribution through partnerships with community-based organizations, Ameren Illinois bill inserts, and promotion/qualification of 3,900+ SAVE Kit recipients

## **Program Ally Specific Lead Generation Support:**

- Additional resources
  - Co-branded materials on Program Ally Portal
- Program Staff Marketing Support
  - Jordan Nelson: Program Ally Marketing Manager
  - Outreach Staff
- Direct mailings funded by Program

# HEIQ Snapshot Bonus Allocation



## Discussion:

Management of bonus funds to stay within bonus allocation

- How many Tier 1 projects do you have left to complete?
  - Average project cost / total project allocation remaining
  
- How many projects can you support with the remaining bonus
  - Average bonus used per Tier 1 Project

# HEIQ Snapshot Customer Experience Tab

## What is the Customer Experience Initiative?

- The goal of this initiative is to fully understand the experience of the Ameren Illinois Energy Efficiency Program customer by collecting feedback on the benefits and drawbacks of the participation process from beginning to end
- This conversational interview will be structured as a relational experience and not a transactional survey experience
- The conversational interview will explore how well prepared, safe, and able the customer felt when having a project completed in their home by a Program Ally, satisfaction with the work, the common motivators, and barriers to participating in the Program
- We ultimately want to identify any holes in the Program process, edit process if needed, and work collectively to make the customer experience the best one possible

# HEIQ Snapshot Customer Experience Tab

## What information is included?

- The customer experience interview consists of multiple questions divided up into the following topic areas to gauge total customer satisfaction:
  - Application Process
  - Program Ally Engagement and Communication
  - Project Installation and Completion
  - QC Inspection Process
- Each topic section consist of multiple questions and concludes with a satisfaction score for that topic area
  - 5 Excellent
  - 4 Very Good
  - 3 Satisfactory/Average
  - 2 Less than Acceptable
  - 1 Unacceptable/Poor

# HEIQ Snapshot Customer Experience Tab

## How is this information collected?

- This information is collected via a phone interview with the assigned Personal Energy Advisor once the project is complete
- The information, scores, and all customer comments are entered into Amplify
- Monthly reports are pulled and included in your Program Ally Snapshot

# HEIQ Snapshot Customer Experience Tab

## How to use this information

- All information collected for the following topic areas are included in your monthly Program Ally Snapshot on the CE tab
  - Program Ally Engagement and Communication
  - Project Installation and Completion
- Review the responses monthly with your FES to celebrate the successful responses and gauge/discuss any opportunities for improvements related to customer satisfaction
  - What are you doing well?
  - Do you have exceptional staff to recognize with these responses?
  - What needs do you have that the Program can support to ensure we are providing the best customer service possible?
  - Do you have specific Program Staff who may need additional training to support enhanced customer service?

# Ancillary Costs Update

In order to better serve income qualified customers, and to continually evaluate the customer costs which could be covered by Program funding, a number of measures which have been defined as "ancillary costs" will now be defined as necessary work and can be included within the HEIQ "Workbook" tab.

## Measures which can now be included:

- **Return Ductwork Repair \$450** – needed to right-size airflow system to ensure proper functioning of HVAC
- **Additional Ductwork \$375/room** – example: adding duct run and drops to 2 new rooms to more evenly distribute conditioned air
- **Relocate Water Heater \$300** – example: better position the DHW when new equipment is installed, to make it easier to properly exhaust
- **Sump Pump \$400** – to mitigate moisture in a crawlspace so that a vapor barrier/full project can be initiated and completed

# Ancillary Costs Update

- **Power-Vented Water Heater Replacement \$2,000** – to replace natural draft DHW with failed drafting
- **Power-Vented Draft Assist Kit \$680** – to ensure existing natural draft water heater is modified to properly exhaust
- **Interior Wall Drill and Blow Repair \$4/penetration** – to properly patch plaster or drywall after an internal wall insulation drill and blow
- **Upgrade Electrical Panel \$TBD\*** – to accommodate installation of new ASHP or HPWH; must seek permission from program for pricing on this measure
- **Minisplit Heat Pump \$TBD\*** – example: 2nd or 3rd story of home, where existing HVAC cannot be modified to properly condition living space that was previously underconditioned
- **Garage Ceiling Insulation \$TBD\*** – to ensure proper insulation and air sealing between garage and living space above
- **Interior Garage Door Replacement \$325** – to ensure proper air sealing between garage and adjacent living space (where door meets minimum requirements of International Residential Code)

*\*Costs marked as TBD must seek Program approval for pricing.*



# Ancillary Costs Update

- The Program will continue to evaluate additional ancillary costs for consideration on a case-by case basis
  - If you are submitting an item that does not appear on this list but is being submitted as a special request, please include that item on the "Ancillary Costs" tab
  - Overarching guidance for considering additional measures: "is this measure critical to the installation of an incentivized energy efficiency measure?"
- A complete list of these measures which are now defined as "additional measures" can be found within the "Program Pricing" spreadsheet
- If you have submitted an ancillary cost that has previously been approved but does not appear on the above list, that measure should still be included on the "Ancillary Costs" tab until it receives blanket approval as an "additional measure" and has been added to the above list

# QUESTIONS?

