

**April Morning Brief  
Home Efficiency Income  
Qualified (HEIQ) Initiative**



# Agenda



- Welcome and Overview
- Program Ally Communication
- Energy Advisors and Field Work
- Inaccessible Spaces and Creating Access
- Questions?



Program Ally Communication  
Brook Cranford, HEIQ Initiative Manager  
Kim Petzing, HEIQ Program Manager

# Program Ally Communication



- Roundtable Results
  - Thank you!
  - Takeaways
    - Improved Communication
    - Timelines and Assessment feedback

# Program Ally Communication

## Continued

- Communication Plan
  - Goal: Increase communication between Program Allies, Field Energy Specialist (FES), Energy Advisors and QA/AC staff.
    - Shadowing opportunities – assessment and inspection.
    - Sharing information and feedback in preferred method.
    - Written, email, reporting, newsletter, verbal.
  - Quarterly or semi-annual meetings.
  - Always looking for new opportunities!



# Program Ally Communication

## Continued



- Notification template for Program Allies.
  - A way to share significant Program updates to all Program Allies.
- Updates on health and safety projects.
- New letter will be shared with Program Allies when referred by customer goes on a health and safety hold.
- Adding stages within health and safety opportunities to better identify where the project is in the process.



Energy Efficiency  
PROGRAM

### Home Efficiency Income Qualified (HEIQ) Initiative Update

**Information Update:**

*[Insert Text and description of update with as much detail as possible.]*

**Impacted Allies:**

*[Insert Allies impacted by this update. If it pertains to all Allies, insert "All" ]*

**Effective Date:** *[00.00.0000]*

**End Date of Changes:** *[Insert end date, or "No end date"]*

**Supporting Documentation or Marketing Collateral:** *[Insert supporting documentation if necessary.]*

For additional information please reach out to your Field Energy Specialist.

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# Program Ally Communication

## Customer Referral and Application Assistance

- The goal is to make the application process as simple as possible for increased approval conversions.
- Online Application/Paper Application
  - Supporting Documentation
    - Tax documentation or alternatives
      - Income based Proxy Programs
      - Alternative for tax filing
    - Homeownership Documents
      - Assistance from the Home Energy Specialist (HES) Team.



Energy Advisors and Field Work  
Travis Crocker, Field Operations Manager



# Energy Advisors and Field Work

## “If Then” Chart



ISA – IF THEN REFERENCE CHART		V.02.20.24
COMPLETE DISCLAIMER ON EVERY HOME – check all items that apply.		
Management Approval Signature _____		Approval Date _____
Project Lead	The home may be eligible for an insulation upgrade and possible associated work. This potential project will be sent to a Program Ally who will be in contact regarding next steps. The Program Ally will determine which incentives, if any, the home is eligible for.	
H&S – No Access	It is undetermined if the home is eligible for a project due to limited access to spaces within the home. A Program Ally will be in contact regarding next steps. <i>Internal Note: This includes No Access to attic or crawl space areas.</i> <u>Ally will provide access/proposal for review/approval by TR.</u>	

# Energy Advisors and Field Work

## “If Then” Chart Continued



<p>H&amp;S – Height Limit (Only Item Present) FES to find ally</p>	<p>Home may not be eligible for a project due to limited working height to spaces within the home.</p> <ul style="list-style-type: none"><li>• Crawl Space Height 16” to 18” – sent to FES to find ally who can complete</li></ul> <p>NOTE: A Program representative will be in contact regarding potential next steps. This could take additional time.</p>
<p>H&amp;S – Items Need Addressed</p>	<p>The home may be eligible for energy efficiency upgrades upon completion of remediation from the following, but not limited to:</p> <ul style="list-style-type: none"><li>• Minor Bulk Moisture (simple \$\$ fix)</li><li>• 1-Story w/active Knob &amp; Tube Wiring or Remnants</li><li>• Mold Like Substance &gt; 10 Square Feet</li><li>• Minor Suspect Asbestos Containing Materials that will be disturbed by work</li></ul> <p>HSC will review applications for possible remediation and will reach out to assist upon available funding. Once remediation is completed, a project will move forward as defined on the disclaimer form.</p>

# Energy Advisors and Field Work

## “If Then” Chart Continued



<p>Non-Viable Project</p>	<p>The home is <u>not</u> eligible for a project through the Home Efficiency Income Qualified Initiative due to one or more of the following:</p> <ul style="list-style-type: none"><li>• No Access (attic/crawl) + any additional item(s) below</li><li>• Attic Insulation above Program Standard of an R-19 + walls are insulated</li><li>• Attic Height Limitation - not able to insulate to R49 + walls are insulated</li><li>• Vermiculite Insulation Present</li><li>• Standing Water in Basement or Crawl Space (electrical hazard caution)</li><li>• Bulk Moisture (Includes Plumbing Leaks) + Mold &gt;10 Sq. Ft.</li><li>• Plumbing/Sewage Leak</li><li>• Crawlspace Height 16" or Less (Over 16" FES Shop for Ally)</li><li>• Attached/Tuck Under Garages - open framing not drywalled</li><li>• 2-Story Home w/active K&amp;T Wiring (Unless White Paper Applicable)</li><li>• Asbestos on Ductwork interfering w/work + Any Other H&amp;S Issue</li><li>• Structural Concerns</li><li>• Under heavy construction or renovation (must call people leader)</li><li>• Vacant/not occupied by owner (empty, no furniture)</li><li>• For Sale (under active contract)</li><li>• Heavy content (hoarding) that prevents work completion</li></ul>
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# Energy Advisors and Field Work

## “If Then” Chart Continued



MISCELLANEOUS INFORMATION:	
Mold Like Substance < 10 Square Feet	Customer or ally can remediate this to move the project forward
Suspect Asbestos Siding	Send to Ally - Siding cannot be drilled
Storage Removal	Must be completed by customer before project will move forward
Interior Drill & Fill	This applies where the wall insulation is the sole qualifier and can't be drilled and filled from the exterior. Customer must agree with pursuing this invasive work
Combustion Safety Non-Project Issues <ul style="list-style-type: none"> <li>• Gas Leaks Not Fixed</li> <li>• Failed Spillage</li> <li>• Failed CO</li> <li>• Unvented Space Heater Does Not Meet – ANSI Z21.11.2</li> </ul>	<p>If a customer expresses, with no coaching, they are not able to remedy this or they are expressing emotional concern, send to program for consideration with no promises.</p> <p>EA/QC to reach out to people leader with full details to contact FES to review for approval with FOM.</p> <p>If approved FES will send to Ally with Details for repairs and invoicing.</p>
Smart Stat Installs	Non-Projects, HVAC does not qualify for incentives, customer receiving Heat Restoration assistance (this is not always known), Projects with H&S Items Need Addressed.



# Inaccessible Spaces and Creating Access

Tim Huber, Field Energy Specialist Manager

# Creating Access: For Inspection and/or Work Completion

## Purpose

- Determine measure/project viability.
- Establish safe conditions for diagnostic testing and proposed work scope.
- Create the access necessary to complete proposed work.
- Leave the customer with an access that is a finished product.



# Creating Access

## Due diligence



- Remember, we are an energy efficiency program, that's the focus.
- Prior to [seeking approval for] creating access, always:
  - Check for knob and tube (K&T) wiring throughout the home. K&T is the most common showstopper, potentially lurking in inaccessible attic spaces.
    - Assess age of home for likelihood of K&T (pre 1950s +/-).
    - Include wiring check behind ceiling fixture light switch(es) if needed.
  - Check for bulk moisture – the most common showstopper potentially lurking in inaccessible crawlspaces.
    - Survey customer.
    - Check for signs of leakage at plumbing fixtures.
    - Check for indicators around the perimeter of the foundation.
  - Thoroughly check the home for 'showstoppers' or other significant health and safety related expenses.

# Creating Access

## Updated Health and Safety Measures

- Cut and close rough access measure has been removed and these new measures added.
- 'Standard' measures will allow for quick pre-approval while 'unique' measures provide flexibility.

Confined/Inaccessible Spaces - Access necessary for inspection and/or completion of work.			
Horizontal Access 'Standard'	\$325	Each	Includes creating an access and installing an air-tight, insulated, operable door or panel into a horizontal surface such as a ceiling or floor. Includes finish trim or transition, framing, and damming around the opening. Refer to the Building Envelope Field Guide - 4.1.5.2. Damming not required for floor accesses. Floor access insulation not required if crawlspace is/will be encapsulated.
Horizontal Access 'Unique'	*	Each	Includes creating an access in a horizontal surface such as a ceiling or floor. Provide detailed proposal for necessary work.
Vertical Access 'Standard'	\$250	Each	Includes creating an access and installing an air tight, insulated, operable door or panel into a vertical surface such as a wall. Includes finish trim, framing, and damming around the opening. Refer to the Building Envelope Field Guide - 4.1.5.2.
Vertical Access 'Unique'	*	Each	Includes creating an access in a vertical surface such as a wall. Provide detailed proposal for necessary work.



# Creating Access

## When is pre-approval required?

- There are times when expanded access is needed to be able to complete proposed work.
  - Put your reservation request together and submit it normally if you can safely and confidently complete your audit. Include any additional cost(s) for creating access in the health and safety section of the work scope and reference the project score on the Work Scope Tab.
  - **Green** and **Yellow** scored projects can be submitted for review.
- Access needed prior to audit completion.
  - Discuss with your Field Energy Specialist (FES) on a case-by-case basis.
  - Confirm due diligence is done, the potential project exists, health and safety barriers are minimal or non-existent.
  - Your Field Energy Specialist will provide approval or denial.
- 'Standard' measures do not require pre-approval, 'Unique' measures do.

# Creating Access

## Multiple Accesses

- When multiple accesses are needed; start with one and assess the space before creating additional accesses.
- When concerns are observed, discuss with your Field Energy Specialist.
- We need to limit investment when a project is not viable.

# Creating Access

## Continued



- Once access is created:
  - If a project isn't viable:
    - Submit invoice, updated disclaimer and photos of the space(s) and completed access work via email to [residentialeeapplications@ameren.com](mailto:residentialeeapplications@ameren.com).
    - Use subject line "HEIQ – H & S Payment Request – AMIL #."
  - If a project is viable:
    - Proceed with your reservation request as normal, adding access costs to the work scope in the health and safety section. Submit **Green** and **Yellow** scored projects for review.
- If you're unsure about project viability, discuss with your Field Energy Specialist.



Questions?



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**[AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com)**