

Stakeholder Interactions during DSM Potential Study

There was significant communication with Stakeholders regarding the development of the Ameren Missouri Demand Side Market Potential Study. Stakeholder feedback was considered and where applicable used in the development of the Ameren Missouri DSM Portfolios that are analyzed within the IRP.

June 28, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team requesting review and comments of the Bidders List and RFP to complete a DSM Potential Study for Ameren Missouri. Only one correspondence with comments was submitted. Andrew Linhares of Renew Missouri (in conjunction with Hale Powell) provided comments July 6, 2012. Adam Bickford of Missouri Department of Natural Resources confirmed that they did not have any comments July 10, 2012.

July 6, 2012: Andrew Linhares of Renew Missouri submitted comments in conjunction with their energy efficiency expert, Hale Powell. Note: Renew Missouri was the only Stakeholder to submit comments to the RFP.

July 10, 2012: An email was sent to Andrew Linhares of Renew Missouri in response to the review and comments submitted by Renew Missouri (in conjunction with Hale Powell) to the Bidders List and RFP to complete a DSM Potential Study for Ameren Missouri. An additional email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team expressing gratitude for considering review of the Bidders List and RFP to complete a DSM Potential Study for Ameren Missouri.

August 27, 2012: A 4-hour meeting with Ameren and the Ameren Missouri EE Regulatory Stakeholder Advisory Team included a presentation by Ameren summarizing the anticipated schedule, summary of bidder responses, and Ameren recommendations regarding the Ameren Missouri DSM Potential Study RFP.

August 29, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team in response to Stakeholder requests, concerning the Ameren Missouri DSM Potential Study RFP, expressed during the August 27, 2012 DSM Stakeholder meeting. The email included the bid from EnerNOC, status of asking bidders to consider rebidding, and the proposed re-bid schedule. John Rogers of Staff provided a response that Staff does not support a variance from the April 1, 2014 compliance date for the Ameren Missouri IRP. Ryan Kind of the Department of Economic Development provided a response that OPC would support an alternative recommendation (to the Ameren recommendation presented during the August 27 meeting) in favor of proceeding with a rebidding process and delaying the April 1, 2014 Ameren Missouri IRP compliance date.

August 30, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team requesting comments and input from remaining Stakeholders regarding the rebidding process and delaying the April 2014 IRP filing schedule. Phil Mosenthal of Optimal Energy (in conjunction with Hale Powell) provided a response that the April 2014 IRP compliance date isn't accurate, the EnerNOC bid is too expensive, and that the Potential Study isn't needed at that time.

September 13, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team requesting availability in an effort to schedule a follow-up meeting to the August 27th Stakeholder discussion regarding EnerNOC rebidding for the DSM Potential Study.

September 18, 2012: The purpose of the meeting was to have a discussion regarding Ameren recommending to proceeding with finalizing a contract with EnerNOC, acknowledging the fact that the Study will not be completed in time for the April 2014 IRP filing and recommending a solution. The consensus between Ameren and the Ameren Missouri EE Regulatory Stakeholder Advisory Team was that there were no additional concerns with hiring EnerNOC for the Potential Study and Ameren would follow up with EnerNOC to report that EnerNOC won the bid.

September 21, 2012: An email was sent to Stakeholders with the timeline discussed in the September 18th meeting, MS Project file with a Gantt chart, and MS Excel file showing a cut-and-paste of the tasks and dates from the MS Project file.

September 25, 2012: The purpose of the meeting was to discuss the draft schedule, developed by Matt Michels in conjunction with Rick Voytas, showing the timeline for the expected completion of the 2012 Ameren Missouri DSM Potential Study, the 2014 IRP filing and the December 2014 MEEIA filing. No decisions were made or recommended.

October 11, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team requesting available meeting times for October 31 to present the initial discussion of the Ameren Missouri DSM Potential Study. John Rogers of Missouri Public Service Commission responded that Staff was available to meet.

A meeting invitation for October 31 was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team for a kickoff meeting to the Potential Study project where Stakeholders can discuss and inquire any issues or comments pertaining to the Potential Study with EnerNOC or Ameren.

October 31, 2012: An Introductory Stakeholder Workshop was held that identified the study team members, the study objectives, and tasks to be performed in the study. Stakeholder comments and suggestions were requested and a list of action items was developed and addressed in the following weeks.

November 5, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team as a supplement to the October 31, 2012 meeting. The meeting summary draft, initial measure lists of energy efficiency and emerging technologies, TVA Potential Study, and demand side rates presentation was attached to the email.

November 14, 2012: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team with the final meeting notes of the October 31, 2012 meeting.

November 19, 2012: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team as a follow-up to the EE measure list with emerging technologies. The initial measure lists of Distributed Generation and Combined Heat & Power (DG/CHP), Demand Response (DR), and demand-side rate measures were attached.

November 20, 2012: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Group proposing meeting dates and times to discuss Demand-side Rates and Market Research. Additional meeting date and times to discuss the sample design/selection and survey design for the Ameren Missouri DSM Electric Potential Study were proposed.

November 28, 2012: Ameren Missouri held its quarterly Ameren MO DSM Stakeholder Group meeting where updates on the Potential Study were presented.

November 29, 2012:

An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team, as requested during the November 28, 2012 meeting, with comments from Hale Powell regarding inverted block rates and distributed generation technology.

Adam Bickford (MDNR) sent an email with MDNR's comments to the measure list.

November 30, 2012: Ryan Kind sent an email in response to the November 19, 2012 email. OPC supported including behavior modification measures in the Potential Study so a comprehensive assessment of all significant measures that can contribute to achieving all cost effective DSM savings were included. Randy Gross sent an email with comments pertaining to DG/CHP and demand-side rates measures.

December 3, 2012:

John Rogers sent an email supporting Ryan Kind's email sent November 30, 2012 and that the "spillover" effect should be evaluated during the Potential Study. Henry Robertson forwarded an email from Phil Mosenthal regarding NRDC's review of the measure lists to add measures for compressed air, commercial laundry and street lighting.

December 7, 2012: Ryan Kind sent an email supplemental to the email he sent November 30. OPC supported the comments from NRDC (sent December 3, 2012) that pointed out the need to add measures that cover compressed air, commercial laundry and street lighting. OPC also commented on the DG, Demand-Side rates and DR measure designs.

December 12, 2012: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team cancelling the December 17, 2012 webinar due to a conflict in schedules and requesting the best times to reschedule.

December 14, 2012: Ameren Missouri sent a meeting request for a demand-side rates webinar scheduled for December 20, 2012.

December 10, 2012: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team reporting that EnerNOC accepted the majority of the recommendations for additional measures to be included in the Potential Study and that Ameren Missouri was in the process of completing an economic analysis of a conversion of the existing Ameren Missouri street lighting stock to LED technology.

December 19, 2012:

Ameren and EnerNOC hosted a discussion regarding the sample design/selection and survey design for the Ameren Missouri DSM Electric Potential Study.

Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team with the program interest and saturation market research surveys for residential and business customers. The email also included the market research plan.

December 20, 2012:

The Brattle Group led a demand-side rates webinar. Ameren Missouri sent a subsequent email to the Stakeholders with the PowerPoint presentation from the demand-side rates webinar and information to complete a survey regarding demand-side rates.

Andrew Linhares (Renew Missouri) sent an email to SAG members summarizing the conclusion of a conversation between Phil Mosenthal and Hale Powell regarding "opt out" customers. Both agreed that opt out customers should be included in the market research surveying and that on-site information should be collected as EnerNOC originally envisioned, but program participation of opt out customers should not be included in the estimate of achievable savings potential.

John Rogers (MPSC) sent a responding email stating that the concerns raised by some Stakeholders regarding the treatment of opt out customer in the Potential Study are not conducive for a good use of limited Potential Study resources.

December 21, 2012:

Phil Mosenthal (Optimal Energy) sent an email with comments on the business program interest survey.

Hale Powell (Renew Missouri) sent an email with comments on the business survey.

December 27, 2012: Per the request of The Brattle, Ameren sent an email to Stakeholders and Ameren as a reminder to complete the demand-side rates survey.

January 7, 2013:

Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team as a follow-up from the market research webinar with EnerNOC December 19, 2012. An attachment to the email responded to concerns raised regarding the market research plan and the survey questionnaires in a memo issued by EnerNOC January 4, 2013.

Adam Bickford (MDNR) sent a responding email with comments to EnerNOC's January 4, 2013 memo.

Phil Mosenthal (Optimal Energy) sent a responding email with comments to the January 4 memo.

January 9, 2013: John Rogers of Staff sent an email to Rick Voytas requesting that Rick ensure EnerNOC is aware of the ACEEE Report Number U131 - Frontiers of Energy Efficiency: Next Generation Programs Reach for High Energy Savings. Rogers also inquired if EnerNOC would be incorporating the programs' designs and approaches (described in the attached ACEEE report) that can gain higher customer participation and achieve high savings per customer in the near future through innovative technologies, program designs and marketing. Voytas sent a subsequent email responding to Rogers with an overview of the program design plans for the Ameren Missouri DSM Potential Study.

January 17, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team subsequent to the email sent January 7, 2013 with attachments of the comments submitted by Phil Mosenthal and Adam Bickford on the behalf of Missouri Department of Natural Resources. The email also provided EnerNOC's response to Phil's comments and Adam's comments received regarding the market research plan and the survey questionnaires.

January 24, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team with a presentation summarizing the results of the demand-side rates survey created by The Brattle Group.

January 29, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team requesting feedback indicating acceptance or rejection to the recommendations by The Brattle Group regarding the demand-side rates aspect of the 2013 Ameren Missouri Potential Study.

February 8, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team with an attached memo providing a response addressing stakeholder concern of reaching owners of rental property during the market research aspect of the 2013 Ameren Missouri Demand Side Management Potential Study. The memo reports the efforts explored by Ameren Missouri to ensure the Potential Study identifies and includes owner input and Ameren Missouri's recommendation.

February 14, 2013: Phil Mosenthal sent an email supporting EnerNOC's focus group proposal sent to Stakeholders February 8, 2013.

February 20, 2013: Adam Bickford sent an email supporting the focus group proposal sent to Stakeholders February 8, 2013 but suggested the focus groups be held in St. Louis, Jefferson City, and Cape Girardeau. Ryan Kind sent an email supporting DNR's recommendations to have 4 focus groups held in St. Louis, Jefferson City, and Cape Girardeau.

February 22, 2013: Ameren Missouri sent an email accepting the request by DNR and Ryan Kind to have 4 focus groups held in St. Louis, Jefferson City, and Cape Girardeau. The email also addressed Ryan Kind's concern with the low match rate between the DataRaker database on County Assessor information and the Ameren MO customer accounts.

March 6, 2013: Ameren Missouri held its quarterly Ameren MO DSM stakeholder Group Meeting where updates on the Potential Study were presented.

March 27, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team with the confirmed dates and locations of the focus groups facilitated by YouGov|Definitive Insights to explore input from rental property owners.

July 26, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Group requesting feedback of preferences for the four (4) proposed meeting times to discuss the results of the primary market research of the 2013 DSM Ameren Missouri Potential Study.

August 16, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Group as a follow-up to the email sent July 26, 2013 requesting feasible meeting times to discuss the results of the primary market research because only one Stakeholder responded.

September 10, 2013: Presentation discussing the primary market research results and potentials of the Ameren Missouri DSM Potential Study.

September 13, 2013: Ameren Missouri sent an email to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team with an attached memo providing a response addressing some concerns raised by stakeholders to address a subset of the questions from the meeting held September 10, 2013 to discuss the primary market research results and EE potentials.

September 18, 2013: Ameren Missouri sent an email to Stakeholders with the presentation and updated bid revision from EnerNOC to complete the Ameren Missouri Potential Study.

September 19, 2013: Ameren Missouri sent a request to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Group to discuss the EE program level, DR, and CHP/DG analyses results and potentials of the current Ameren Missouri DSM Potential Study.

September 20, 2013: Ameren Missouri sent an email to the Ameren Missouri EE Regulatory Stakeholder Advisory Team addressing concerns raised by stakeholders pertaining to the presentation given September 10, 2013, discussing the primary market research results and EE potentials of the Ameren Missouri DSM Potential Study.

September 27, 2013: Ameren Missouri sent an email to the Ameren Missouri EE Regulatory Stakeholder Advisory Group proposing to change the October 2, 2013 date to present the results of the 2013 DSM Ameren Missouri Potential Study since only 2 Stakeholders responded and there were resource constraints and project schedule variations from original plans. Geoff Marke

responded to the September 27, 2013 email apologizing for not responding to the meeting request sent September 19, 2013.

October 4, 2013: Geoff Marke sent an email with comments from Missouri Division of Energy responding to the September 10, 2013 presentation and subsequent responses. Andrew Linhares resent the comments submitted by Renew Missouri and NRDC.

October 25, 2013:

Ameren Missouri sent a request to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Group to select from the proposed dates and times to discuss the EE program level, DR, and CHP/DG analyses results and potentials of the current Ameren Missouri DSM Potential Study. MPSC and Renew Missouri responded with preferences for the proposed dates and times.

Ryan Kind (OPC) responded stating he was unavailable for all of the proposed dates and times to discuss the EE program level, DR, and CHP/DG analyses results and potentials.

October 28, 2013: Ameren responded to Ryan Kind's email expressing efforts to accommodate all parties and emphasized that all material, as usual, would be available to all stakeholders in electronic format. Ameren offered to meet separately with Ryan Kind at a convenient time.

October 29, 2013:

Ryan Kind (OPC) responded stating he was disappointed that Ameren could not schedule a meeting at a time when he was available given his ongoing interest and participation in the project and asked Ameren to provide a recording of the meeting.

Ameren responded to Ryan Kind's request stating that provisions to record the meeting and make it available to Stakeholders were made.

October 30, 2013: Ameren and EnerNOC hosted a meeting to present and discuss the EE program level, DR, and CHP/DG analyses results and potentials of the current Ameren Missouri DSM Potential Study.

November 1, 2013: An email was sent to the Ameren Missouri EE Regulatory Stakeholder Advisory Team with a link to access the recording of the presentation given October 30, 2013, discussing the EE, DR, and CHP/DG analyses of the Ameren Missouri DSM Potential Study. The email also included an offer to schedule a meeting to discuss any concerns or to review the meeting materials.

November 8, 2013: Ameren sent an email to Stakeholders with four (4) draft volumes of the Potential Study report and responses to prior stakeholder questions, concerns and comments with the DSM Potential study.

November 11, 2013: Ameren sent an email to Stakeholders as a follow-up from the email sent to Stakeholders November 8, 2013. Another volume of the Potential Study report was attached. A revised PowerPoint presentation from the October 30th Ameren Missouri DSM Potential study webinar was attached.

November 14, 2013: Ameren Missouri held its quarterly Ameren MO DSM Stakeholder Group meeting attended by Ameren, MPSC Staff, Office of Public Council, MO Department of Natural Resources, Renew Missouri, MO Industrial Interveners, Sierra Club, and NRDC. Rick Voytas discussed the Potential Study with Stakeholders for about 2 hours.

November 15, 2013:

Geoffrey Marke (MPSC) sent an email to Rick Voytas (Ameren) expressing gratitude of the information presented during the November 14, 2013 quarterly Ameren MO DSM Stakeholder Group meeting, requesting the research by YouGov Definitive Insights on “say-do” take rates that informed the residential and business sector methodologies, and requesting market research segmentation information.

Ameren Missouri sent a request to the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Team to select from the proposed dates and times to discuss/review comments pertaining to the Potential Study.

November 19, 2013:

Rick Voytas (Ameren) sent an email to Geoffrey Marke (MPSC) requesting clarification of Marke’s request sent November 15, 2013 regarding segmentation information for Ameren Illinois.

Geoffrey Marke (MPSC) sent an email to Rick Voytas (Ameren) clarifying a request of figures that show the demographics, perceptions of Ameren Missouri, and Household EE (and DR) usage as seen in the Ameren Illinois Potential Study.

November 20, 2013: Ameren Missouri sent a meeting request for December 4, 2013 to participate in the discussion of the final report for the current Ameren Missouri DSM Potential Study.

November 25, 2013: Ameren sent the final volume, Volume 1: Executive Summary, of the draft volumes for the 2013 Ameren Missouri DSM Potential Study report to Stakeholders.

November 26, 2013: Andrew Linhares sent an email to the Stakeholders and Ameren with comments from Renew Missouri and the Natural Resources Defense Council (NRDC). The email also contained attachments of a report referenced within the comments and the documentation request submitted by Renew MO and NRDC.

November 27, 2013: Geoff Marke sent an email with comments/questions of Staff pertaining to the volumes of the Ameren Missouri DSM Potential Study report.

December 2, 2013:

Ameren sent an email to the Ameren Missouri EE Regulatory Stakeholder Advisory Group addressing comments submitted to Ameren November 15, 2013 by Andrew Linhares for Renew Missouri and NRDC and Geoff Marke for Missouri Public Service Commission. Due to email size constraints, the responses were delivered via four (4) emails.

Geoffrey Marke sent an email responding to Ameren and the Stakeholders requesting a copy of the white paper that outlines the methodology of the development of the adjustment factors by YouGov.

Andrew Linhares sent an email responding to Ameren and the Stakeholders with joint comments of Renew MO and NRDC concerning the Vol. 1 Executive Summary of the Ameren Missouri Potential Study.

December 3, 2013: Ameren sent an email to Stakeholders stating the intent to provide a white paper that outlines the methodology of the development of the adjustment factors.

December 4, 2013: Ameren hosted a conference call with the Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Group to discuss stakeholder’s concerns with the draft reports for the 2013 Ameren MO DSM Potential Study.

December 5, 2013: Ameren sent an email to Stakeholders as a follow-up to the September 4, 2013 teleconference with the whitepaper from YouGov Definitive Insights describing the “Say/Do”

adjustment factor for take rates. Adam Bickford sent an email with comments of Missouri Department of Natural Resources regarding DG, CHP and Rate Design measure lists for the Ameren Missouri Potential Study.

December 9, 2013: Ameren sent an email to Stakeholders responding to comments submitted by Renew Missouri, NRDC and Staff that served as the basis for discussion during the December 4, 2013 teleconference.

December 18, 2013: Ameren sent an email to Stakeholders with an updated version of EnerNOC and Ameren responses to comments provided by Ameren Missouri Energy Efficiency Regulatory Stakeholder Advisory Group regarding the review of the draft volumes of the Ameren Missouri 2013 DSM Potential Study.

February 3, 2014: Ameren hosted a meeting with Stakeholders at the GOB with telecommunication access to discuss the 2014 Integrated Resource Plan (IRP). The presentation included a discussion pertaining to demand-side resource analysis including the preliminary portfolios for residential and business EE programs for implementation during 2016, 2017, and 2018.