

# 2020 SAG Portfolio Planning Process Summary

Provided by the SAG Facilitator to Request Feedback

**Background:** The objective of the SAG Portfolio Planning Process was to reach consensus on Illinois Energy Efficiency Portfolio Plans (EE Plans) for 2022-2025 prior to utilities filing Plans for approval with the Illinois Commerce Commission on or before March 1, 2021.<sup>1</sup> Key steps to the Planning Process were held jointly from March to November 2020 with the IQ North and IQ South EE Advisory Committees (IQ Committees). Planning materials for 2020 are posted on the [SAG Portfolio Planning Process website](#):

- [2020 SAG Project Plan](#)
- [2020 SAG Portfolio Planning Process Schedule Flowchart](#)

## Key Process Steps:

1. **Planning Process Kick-Off:** SAG Facilitator presented an overview of the Planning Process; utilities presented an overview of current EE Portfolios
  - [March 10](#) and [March 11](#) SAG meetings
2. **Energy Efficiency Ideas:** SAG and IQ Committee participants were invited to share Energy Efficiency Ideas for utilities to consider in developing the 2022-2025 EE Plans
  - [Energy Efficiency Ideas](#) were due April 27, 2020
  - Utilities and interested stakeholders reviewed ideas before presentations
  - Stakeholders presented EE Ideas on [May 12](#), [May 13](#) and [June 3](#); the May 13 meeting was held jointly with the IQ Committees
  - Utilities responded to EE Ideas on [June 16](#) and [June 17](#); the June 17 meeting was held jointly with the IQ Committees
3. **Draft Utility EE Plans:** Utilities presented draft EE Plans
  - [October 26](#) and [October 27](#) meetings, held jointly with the IQ Committees
4. **Initial Stakeholder Feedback on Draft Utility EE Plans:** Stakeholders were invited to share initial feedback on draft EE Plans
  - [November 16](#) and [November 17](#) SAG meetings, with the November 16 meeting held jointly with the IQ Committees
5. **Final Negotiations:** Final negotiations were held between individual utilities and non-financially interested stakeholders from December 2020 to February 2021
6. **Additional EE Planning Related Meeting Topics:**
  - *Evaluation*
    - Big Picture Evaluation: [June 16](#)
    - Leveraging Advanced Metering Infrastructure Data: [August 27](#)
  - *Potential Study Results*
    - [June 23](#), [August 26](#), [September 2](#), [November 10](#)
  - *Equity Hiring and Workforce Development*
    - [October 1](#), joint with IQ Committees
  - *Other*
    - Total Resource Cost Test (TRC) Inputs: [June 16](#)

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<sup>1</sup> See IL EE Policy Manual Version 2.0, Section 3.8 (iii) Draft Portfolio Outlines: "Program Administrators shall work in a cooperative and iterative manner with SAG participants to develop the next multi-year Plan. Such cooperation includes discussion of foundational issues to Plan development; including budgets, Portfolio objectives, Program ideas, and Program design. Program Administrators and SAG shall seek to develop and communicate such foundational assumptions in a manner that supports efficient and timely modeling of proposals for a comprehensive Plan. A primary purpose of these cooperative and iterative discussions is to reduce the number of non-consensus issues and litigation associated with the applicable Plan dockets."