

# Illinois Energy Efficiency Stakeholder Advisory Group

2020 Meetings:  
Tracking Open Issues (updated 11/25/2020)

**Purpose:** This is a tracking document to summarize open issues and follow-up items from large group SAG meetings in 2020. Follow-up is organized in reverse chronological order, with the most recent meetings listed first.

## November 2020 Meetings

### **November 16 SAG Meeting: Initial Feedback on Preliminary Draft 2022-2025 Utility EE Portfolios**

- Meeting page link: <https://www.ilsag.info/event/monday-november-16-sag-meeting/>

Follow-up items:

- IQ Feedback for All Utilities
  - EEFA/NRDC to share examples of income qualified solar activity in other states/by other utilities.
  - On tiered contracting feedback, it would be helpful for utilities to understand the perceived benefits of a vendor being tier 1 vs tier 2.
  - ComEd: Further discussion needed on targeting vs. eligibility.
  - Ameren IL: Interested in understanding the suggestion to reduce kits. CBOs and CAAs see kits as an opportunity to connect with their customers and communities.
  - Ameren Illinois to follow-up on actions to connect EE and disconnections.
- Peoples Gas/North Shore Gas Non-IQ Feedback from Stakeholders
  - May need further discussion on a possible joint small business offering in northern IL.
  - PG/NSG to provide an update on feedback to increase the MF budget, shared at Oct. meeting.

### **November 17 SAG Meeting: Initial Feedback on Preliminary Draft 2022-2025 Utility EE Portfolios**

- Meeting page link: <https://www.ilsag.info/event/tuesday-november-17-sag-meeting/>

Follow-up items:

- Ameren IL Non-IQ Feedback from Stakeholders
  - May need further discussion on leveraging future federal funding
  - Further discussion with negotiating stakeholders
- ComEd Non-IQ Feedback from Stakeholders
  - Whole building- ComEd is looking into this and will discuss with gas utilities.
  - ComEd to follow-up with Ameren IL on Ameren's pilot proposal to look at discretionary income as a measure of income eligibility.
  - Further discussion with negotiating stakeholders
- Nicor Gas Non-IQ Feedback from Stakeholders
  - Discussion with all utilities may be needed on gas conversion question
  - Further discussion with negotiating stakeholders
- All Utilities:
  - CUB questions: Are there efforts on self-certification for MBEs? Is there potential for inter-utility collaboration on best practices towards expanding contractor access?

## **November 10 SAG Meeting: Nicor Gas EE Portfolio Potential Report-Out**

- Meeting page link: <https://www.ilsag.info/event/tuesday-november-10-sag-meeting/>

### Follow-up items:

1. Presentation Slide 16: Provide the total therms per household, per year for the six residential sector categories, for income qualified and non-income qualified.
2. Presentation Slide 31: Split out income qualified and non-income qualified, for categories where it may have an impact (ex: furnaces, air sealing, insulation).

## **October 2020 Meetings**

### **October 26 SAG Meeting: ComEd and Nicor Gas Presented Preliminary 2022-2025 EE Portfolios**

- Meeting page link: <https://www.ilsag.info/event/monday-october-26-sag-meeting/>

#### Summary of Questions for ComEd

1. Chris Neme: Is ComEd doing anything similar to IQ South (for IQ North) regarding CBO and CAA feedback?
2. Phil Mosenthal: Interested in talking more about Third Party process.
3. ComEd to follow-up with Chris Neme for deeper dive on networked lighting controls
4. ComEd to breakdown portfolio therms conversion in more detail; Karen Lusson and Phil Mosenthal raised questions
5. Phil Mosenthal: Is small business dominated by tubular LED replacement or is ComEd trying to get new fixtures and controls?
6. Jim Jerozal: For residential smart technologies, does that include fuel conversions for heat pumps?

#### Summary of Questions for Nicor Gas

1. Chris Neme and Phil Mosenthal: Interested in building envelope breakdown within programs, both single family and multi-family.
2. Laura Goldberg: Interested in a breakdown for IQ weatherization, for single family and multifamily.
3. Follow-up needed with NRDC:
  - a. Discuss how Nicor came to the analytical conclusions (related to responding to NRDC's recommendation on increasing non-IQ weatherization spend).
  - b. Follow-up on policy proposal to convert unclaimed electricity savings.
  - c. How many assessments were done in the early years where there was no follow through on deeper projects?
4. Karen Lusson: Interested in an update on equity hiring / diversity. Looking for real, tangible commitments on how to increase contracting opportunities. Not just multiple layers of contracting, but real opportunities to access tier 1 contracts.
5. Jennifer Morris:
  - a. What is the collar Nicor is proposing for the NTG policy?
  - b. Clarification needed on what it means by "Apply HEER HVAC as one offering" on their Adjustable Savings Goals for NTG slide. In particular, can they provide a mathematical example?

### **October 27 SAG Meeting: Ameren IL and PG/NSG Presented Preliminary 2022-2025 EE Portfolios**

- Meeting page link: <https://www.ilsag.info/event/tuesday-october-27-sag-meeting/>

#### Summary of Questions for Ameren Illinois

1. Karen Lusson: Interested in whether Ameren has looked at reducing smart t-stat rebate.
2. Chris Neme questions:
  - a. Interested in why the small number of IQ MF heat pumps; half of Ameren's MF housing units are electrically heated.

- b. Follow-up on internal tracking of diversity spend and vendor spend; also, metrics for Market Development Initiative.
- c. Request to discuss proposed policy items further.
- d. Interested in more information on the NW approach for market effects.
3. Laura Goldberg: Interested in follow-up conversation on why MF is small portion of overall budget. NRDC suggested larger increases.
4. Cate York: Is there supplemental information available on CCRPC analysis?
5. Jennifer Morris, ICC Staff: For Ameren IL gas, provide for which programs are being requested for adjustable savings goals for NTG and the specific collar being requested.

#### Summary of Questions for Peoples Gas & North Shore Gas

1. Cate York and Chris Neme: Interested in more follow-up on portfolio diversity and metrics; barriers to certification.
2. Chris Neme: Interested in IQ EE Kit follow through; are the kits driving customers to participate in other comprehensive programs?
3. Cate York: Interested in PG/NSG considering a new definition for 'single family', due to the prevalence of 3-flats in Chicago. Single family participation could be defined as 3 or less units.
4. Jennifer Morris: Provide for which programs PG/NSG is requesting adjustable savings goals for NTG and the specific collar they are requesting.

#### **October 1 SAG Meeting: Equity Hiring and Workforce Development**

- Meeting page link: <https://www.ilsag.info/event/thursday-october-1-sag-meeting/>

#### **October 1<sup>st</sup> follow-up items:**

1. Questions for ComEd:
  - a. Does ComEd have a breakdown geographical where your [workforce development] programs work in IL? Where are your contractors located from for example? What is the % of these opportunities are located?
  - b. Can more information be provided on the ComEd Youth Interns Program?
2. SAG Facilitator to follow-up with NRDC regarding question on CBO engagement in SAG processes, and ability to influence program design directly.
3. Question for all utilities: Since the cannabis law was enacted in IL, does it affect the recruitment drive [for workforce development programs?] Do you test before entrance into the program? If test become positive do you work with that person or dropped them from the programs?
  - a. SAG Facilitator to add this question/topic to a future discussion on workforce development.
4. SAG Facilitator will review comments and suggestions raised during the meeting to consider how to further conversations on equity and workforce development at SAG. SAG Facilitator will also coordinate with IQ North Advisory Committee and IQ South Advisory Committee Facilitators.

#### **September 2020 Meetings**

##### **September 2 SAG Meeting: Ameren Illinois Market Potential Study Results**

- Meeting page link: <https://www.ilsag.info/event/wednesday-september-2-sag-meeting/>

#### **September 2<sup>nd</sup> follow-up item:**

1. A few questions were raised at the meeting. AEG will share follow-up information soon.
2. The final study report will be posted on the website/circulated to SAG.

#### **August 2020 Meetings**

##### **August 27 SAG Meeting: ComEd Mid-Year Budget Update + AMI Data Use (Ameren IL and ComEd)**

- Meeting page link: <https://www.ilsag.info/event/thursday-august-27-sag-teleconference/>

**August 27<sup>th</sup> follow-up item:** SAG Facilitator will add the topic of leveraging Demand Response with EE to the 2021 potential topics list.

**August 26 SAG Meeting: Peoples Gas & North Shore Gas Potential Study Results**

- Meeting page link: <https://www.ilsag.info/event/wednesday-august-26-sag-teleconference/>

**August 26<sup>th</sup> follow-up items:**

1. AEG will share follow-up information from this meeting within two weeks. When follow-up information is circulated to SAG, a due date for any additional feedback will be shared.
2. The final study report will be posted on the website/circulated to SAG.

**August 24 Small Group SAG Meeting: Follow-up on COVID-19 Evaluation Impacts**

- Meeting page link: <https://www.ilsag.info/event/monday-august-24-small-group-sag-meeting/>

**August 24<sup>th</sup> follow-up items:**

1. Additional comments or feedback on the options proposed by the evaluation teams for counting custom savings in 2020 due by Tuesday, September 1.
2. Consensus next steps:
  - a. If the SAG does not reach consensus on this evaluation question, a comparison exhibit will be prepared that identifies the issue, different opinions, and the basis for those opinions.
  - b. If resolution is reached, it will be documented on the Policy page of the SAG website: <https://www.ilsag.info/policy/>

**July 2020 Meetings**

No large group SAG meetings

**June 2020 Meetings**

**June 23 Meeting: ComEd Potential Study Results**

- Meeting page link: <https://www.ilsag.info/event/tuesday-june-23-sag-meeting/>

**June 23<sup>rd</sup> follow-up items:**

1. Additional comments or questions on the ComEd potential study results due by Monday, June 29.
2. Dunsy provided follow-up information to respond to questions raised during the meeting (included in meeting notes).
3. The final study report will be posted on the website/circulated to SAG.

**June 17 SAG Meeting (joint with Income Qualified EE Advisory Committee)**

- Meeting page link: [June 17 SAG Meeting](#)

**June 17<sup>th</sup> follow-up items:**

1. **Income Qualification Guidelines Policy**
  - Utilities and non-financially interested stakeholders will have a follow-up discussion on policy language.
2. **Initial Energy Efficiency Idea Responses from Utilities:**
  - Energy Efficiency Portfolio Plans are currently in development by utility teams. If there are specific questions about EE Idea proposals, utilities will follow-up directly with idea submitters.
  - IHWAP and Weatherization Recommendations –
    - In July, utilities will meet with non-financially interested stakeholders to discuss refined weatherization recommendations.
    - A follow-up discussion on IHWAP is planned for later this summer (anticipated in August).

- NRDC Health Building Proposal: NRDC will share modified proposal on healthy building material reporting.
- SAG Facilitator will follow-up with EE idea submitters to understand whether there are any additional questions on utility responses.

## June 16 SAG Meeting

- Meeting page link: [June 16 SAG Meeting](#)

### June 16<sup>th</sup> follow-up items:

#### 1. Initial Energy Efficiency Idea Responses from Utilities:

- Energy Efficiency Portfolio Plans are currently in development by utility teams. If there are specific questions about EE Idea proposals, utilities will follow-up directly with idea submitters.
- On Bill Financing (OBF) will be scheduled for future discussion at SAG (anticipated 2021).
- Follow-up discussion to be scheduled at SAG on multi-family considerations, including % of comprehensive project participation for current multi-family programs (anticipated August 13).
- SAG plans to discuss equity hiring later this summer (anticipated in late August).
- Nicor Gas + PG/NSG to review and provide a response to the NRDC Affordable Housing New Construction idea; the idea was inadvertently tagged as “electric only.”
- SAG Facilitator will follow-up with EE idea submitters to understand whether there are any additional questions on utility responses.

#### 2. Market Effects:

- Further discussion on market effects will be scheduled in the SAG Market Transformation Savings Working Group, if needed.

#### 3. Big Picture Evaluation:

- SAG Facilitator to follow-up with evaluation teams to share evaluation cost category breakdowns with stakeholders.

#### 4. TRC Inputs:

- Ameren IL to add carbon adder citation to TRC inputs chart.
- ICC Staff is interested in the utilities considering using the same source on future avoided greenhouse gas emissions / carbon adder.
- If there are further questions about inputs, discussion will be scheduled with non-financially interested parties.

## June 11 Small Group SAG Meeting – Evaluation Impacts Due to COVID-19

- Meeting page link: [June 11 SAG Meeting](#)

### June 11<sup>th</sup> follow-up items:

1. **Next steps on estimating savings due to COVID:** Three options for estimating savings in CY2020 due to the COVID-19 pandemic were circulated, presented during the June 11 meeting – the evaluation teams recommend option #1.

- **Feedback is due by Friday, July 10.** Send comments to Carly Olig, Guidehouse ([carly.olig@guidehouse.com](mailto:carly.olig@guidehouse.com)) and Zach Ross, Opinion Dynamics ([zross@opiniondynamics.com](mailto:zross@opiniondynamics.com)). Please CC me: [Celia@CeliaJohnsonConsulting.com](mailto:Celia@CeliaJohnsonConsulting.com).
- A follow-up discussion will be scheduled, if needed.

2. **Next steps for business closure policy issue:** Evaluators will prepare a memo summarizing business closure potential scenarios, options, and pros/cons. The memo will be circulated for review and comment. A follow-up policy discussion will be scheduled.

#### 3. Next steps for Potential COVID Impacts to NTG:

1. SAG Facilitator will follow-up with VEIC and Energy Solutions about whether there is midstream / upstream data that could be shared with utilities.
2. SAG Facilitator will follow-up with ODC on timing for potential Ameren IL survey results.
3. Further discussion is anticipated during the annual SAG NTG update process in September.
  - **Reminder on NTG Process:** Evaluators will provide NTG ratio recommendations for the 2021 program year by September 1, 2020. There are four meetings scheduled in

September to discuss consensus on NTG ratios. NTG values for the 2021 program year must be finalized by October 1, 2020.

- It may be useful for evaluators to highlight which programs were impacted by COVID when providing NTG recommendations this year; and whether there are any NTG recommendations that relate to COVID impacts.

### **June 3 SAG Meeting**

- Meeting page link: [June 3 SAG Meeting](#)

### **June 3<sup>rd</sup> follow-up items:**

1. SAG Facilitator to plan a follow-up conversation on equity hiring during SAG Planning Process; tentatively late summer.
2. Utilities will provide an initial response to EE ideas during the June 16-17 SAG meetings.

## **May 2020 Meetings**

### **May 12-13 SAG Meetings**

- May 12 Meeting page link: [May 12 SAG Meeting](#)
- May 13 Meeting page link (joint with IQ EE Advisory Committee): [May 13 SAG Meeting](#)

### **May 12-13 follow-up items:**

1. Utilities may follow-up directly with EE Idea presenters.
2. A third meeting will be scheduled to finish EE Idea presentations.
3. Utilities will provide an initial response to EE ideas during the June 16-17 SAG meetings.

## **April 2020 Meetings**

### **April 14 SAG Meeting**

- Meeting page link: [April 14 SAG Meeting](#)
- Notes document: [Attendee List and Notes from April 14 Meeting](#)

### **April 14<sup>th</sup> follow-up items:**

1. ComEd will follow-up on NRDC suggestion to create a one-pager than can be shared on virtual auditing, opportunities, vendors, etc.
2. SAG Facilitator to follow-up with ICC Staff on whether the Commission is considering action related to EE/workforce development.
3. SAG Facilitator to schedule a follow-up discussion on evaluation impacts for persisting savings.
4. If any SAG participants have questions that we did not have time to address during the April 14<sup>th</sup> meeting, please reach out: [Celia@CeliaJohnsonConsulting.com](mailto:Celia@CeliaJohnsonConsulting.com).

## **March 2020 Meetings**

### **March 10-11 SAG Meetings**

- Meeting page links: [March 10 SAG Meeting](#) and [March 11 SAG Meeting](#)
- Notes document:
  - [Attendee List and Notes from March 10-11 SAG Meetings](#)
  - [Open SAG Cannabis Questions \(updated March 19, 2020\)](#)

### **March 10-11 follow-up items:**

- Due to the number of follow-up items, a separate document was prepared to summarize follow-up: [March 10-11 SAG Meetings: Summary of Follow-Up Items](#)

## **February 2020 Meetings**

### **February 10 SAG Teleconference: Cumulative Persisting Annual Savings (CPAS) + Cannabis Follow-Up**

- Meeting page link: [February 10 SAG Teleconference](#)
- Notes document: [Attendee List and Notes from Feb. 10 Meeting](#)

#### ***February 10<sup>th</sup> follow-up items:***

- CPAS Next Steps
  1. SAG Facilitator to follow-up with IL-TRM Administrator on venue for discussing CPAS recommendations related to the IL-TRM.
  2. SAG Facilitator to follow-up with Ameren Illinois and ComEd on next steps for remaining CPAS topics – anticipated for discussion in the April 14-15 SAG meetings.
- Cannabis Next Steps: MEEA Presentation
  1. SAG Facilitator to follow-up with IL-TRM Administrator on next steps for discussing cannabis baseline measures.
  2. SAG Facilitator to follow-up with MEEA on engaging Dept. of Ag to further discuss cannabis opportunities at SAG.
  3. If you have questions for MEEA on their research, reach out to Molly Graham: [mgraham@mwalliance.org](mailto:mgraham@mwalliance.org)
- Cannabis Next Steps: Guidehouse Presentation
  1. Several questions were submitted through the webinar that we did have time to address – SAG Facilitator to follow-up with Guidehouse for responses to these questions.
  2. If you have questions for Guidehouse about their research, reach out to Wayne Leonard: [wayne.leonard@guidehouse.com](mailto:wayne.leonard@guidehouse.com)
  3. Opinion Dynamics is also completing research on cannabis; SAG Facilitator to follow-up on whether a summary should be scheduled at a future meeting.

### **February 6 SAG Teleconference: ComEd Baseline Study Results**

- Meeting page link: [February 6 SAG Teleconference](#)
- Notes document: [Attendee List and Notes from Feb. 6 Meeting](#)

#### ***February 6<sup>th</sup> follow-up items:***

- SAG Facilitator to circulate final ComEd baseline study report to SAG, when available.
- Draft Potential Study results will be presented to SAG on Tuesday, June 23 (teleconference).

## **January 2020 Meetings**

### **January 28 SAG Meeting (Springfield) – Utility-Braided IHWAP Programs**

- Meeting page link: [January 28 SAG Meeting](#)
- Notes document: [Attendee List and Notes from Jan. 28, 2020 Meeting](#)

Topics that may require additional discussion include:

1. Multifamily IHWAP-braided weatherization opportunities
2. Addressing the acute need for contractors, including recruiting diverse contractors
3. Consistent market pricing for contractors across regions of the state
4. Understanding the process for reviewing and commenting on the State of Illinois Weatherization Plan
5. Understanding deferrals – how large of an issue are deferrals and are there resources that can be leveraged?
6. Inspection process – are multiple inspections needed (for example, inspections by both IHWAP and utilities)?
7. Surveying Community Action Agencies on increasing their capacity
8. Understanding utility-only weatherization initiatives

Specific follow-up items on Agency Capacity Building:

1. *Discussion Question:* Are there Non-Energy Impacts of IHWAP-braided programs that should be taken into account in planning the next utility EE Plan portfolios?
  - Additional discussion on non-energy impacts will take place in the [SAG Non-Energy Impacts Working Group](#), including if and how to incorporate results from NEI studies.
2. *Discussion Question:* Are there income qualified/income eligible-specific baselines that could be considered for weatherization measures in the IL-TRM?
  - If there is interest, the IL-TRM Administrator will establish a TRM Working Subgroup focused on discussing income qualified measures during the TRM Version 9.0 update process that will kick-off this spring.
3. *Discussion Question:* Are there other funding sources that can support non-energy saving (health and safety) improvements (e.g., existing sources and opportunities to leverage funding for the necessary improvements that facilitate EE weatherization projects)?
  - The SAG Facilitator will follow-up with ComEd on when research on leveraging other funding sources will be completed. This will be scheduled for a future SAG discussion.

**January 17 SAG Teleconference**

- Meeting page link: [January 17 SAG Meeting](#)
- Notes document: [Attendee List and Notes from Jan. 17 Meeting](#)

**January 17<sup>th</sup> follow-up items:**

- All comments, questions and/or proposed edits to the 2020 SAG Plan and updated SAG Process Guidance document are due by COB on Monday, January 27.
  - **Resolution:** Final SAG planning materials are posted on the [SAG Planning page](#).