

2021 SAG Update

August 30, 2021 SAG Meeting
Celia Johnson, SAG Facilitator

Agenda

- ▶ Large Group SAG Break
- ▶ New: SAG Reporting Working Group
- ▶ Upcoming SAG Meetings
- ▶ Questions?

Large Group SAG Break

- ▶ Large Group SAG did not hold meetings while EE Portfolio Plan dockets for 2022-2025 were open at the ICC
 - ▶ Utilities filed 4-year EE Plans on March 1
 - ▶ ICC approved EE Plans in July/August
- ▶ Several [SAG Working Groups](#) met during the break:
 - ▶ Fuel Conversion Working Group
 - ▶ Evaluation Working Group
 - ▶ Market Transformation Savings Working Group

New: SAG Reporting Working Group

- ▶ **Purpose:** New Working Group to discuss utility reporting items referenced in 2022-2025 EE Plan Stipulated Agreements, requested by ComEd and Nicor Gas
- ▶ **Background on Utility Reporting:** Utilities prepare Quarterly Reports and Annual Reports to provide progress updates on EE programs
 - ▶ Reports are filed with the ICC
 - ▶ Reports are posted on the [Utility Reports](#) page of SAG website + circulated to SAG
 - ▶ Utility reporting requirements come from the Policy Manual
 - ▶ See Section 6, Program Administration and Reporting
 - ▶ Any changes to reporting will need to be proposed through the next Policy Manual update process (anticipated in 2022)
 - ▶ Utility stipulated agreements for 2022-2025 include various reporting agreements, either for new reporting in 2022 or to discuss reporting changes in a future Policy Manual update: [see SAG Stipulated Agreements page](#)
- ▶ **Working Group Website:** <https://www.ilsag.info/reporting-working-group/>
- ▶ **Participation:** Open to all; SAG participants are invited to self-select into the Working Group
- ▶ **Timing:** Monthly meetings this fall; start in September

New: SAG Reporting Working Group (cont.)

- ▶ **ComEd requested SAG meet to discuss metrics for specific customer engagement efforts that are coordinated to cover both EE and financial assistance.** See ComEd 2022-2025 EE Plan Stipulation excerpts, page 8:
 - ▶ *EE and Financial Assistance Customer Engagement: Work with stakeholders to develop progress metrics for ICC-filed Quarterly Reports by January 1, 2022 and present progress on energy efficiency and financial assistance efforts described above [customer “touch points,” literature, online] at a joint IQ North Committee and SAG meeting.*
 - ▶ *For purposes of this agreement, “financial assistance” is defined as LIHEAP, PIPP, ComEd CARE programs as well as other financial assistance programs available to ComEd low income customers, such as the ComEd Bill Payment Assistance Program and any successors.*
- ▶ **Nicor Gas SAG requested SAG address reporting metrics referenced in the stipulation, to clarify metrics for Q1 2022.** See Nicor Gas 2022-2025 EE Plan Stipulation, Section G - pages 20-21 (excerpt on next slide)
- ▶ **Working Group Goals:**
 - ▶ Agree on ComEd EE and financial assistance metrics by December
 - ▶ Agree on Nicor Gas metric definitions by November for reporting that involves utility data; by February for all Q1 2022 metrics

New: SAG Reporting Working Group (cont.)

► Excerpt from Nicor Gas 2022-2025 EE Plan Stipulation:

G. Reporting

2. Nicor Gas agrees to report on the following metrics in its quarterly reports filed with the Commission, starting January 2022, outside of the Policy Manual update process:

a) IQ Multifamily Actuals (YTD)

- i. Participation – buildings by zip code and apartment units;
- ii. Spending – incentives, non-incentives, total; and
- iii. Savings (1st year) – therms.

b) EE Supplier Diversity

- i. Number and proportion of diverse vendors by category (i.e., MBE-certified, WBE-certified and VBE-certified), as well as by primary contractors and subcontractors, and trade allies;
- ii. Percent of and amount of portfolio dollars (excluding incentives) for diverse spend, by category (i.e., MBE certified, WBE-certified and VBE-certified);
- iii. Number and proportion of CBOs and non-profits, as well as by primary contractors and subcontractors, and trade allies; and
- iv. Percent of and amount of portfolio dollars (excluding incentives) for CBO and non-profit spend, by category.

3. Nicor Gas will provide status reports on joint delivery of whole-building retrofit IQ Programs with Ameren Illinois no less than twice a year, through its quarterly reporting process.

New: SAG Reporting Working Group (cont.)

▶ **Next steps:**

- ▶ If you are interested in joining, please contact Celia Johnson:
Celia@CeliaJohnsonConsulting.com
 - ▶ If there is interest from IQ Committee participants, information about this Working Group can be shared with those distribution lists
- ▶ The first meeting is anticipated in late September
- ▶ A Reporting Working Group Plan for fall 2021 is in development, and will be presented at the first Working Group meeting

Upcoming SAG Meetings

▶ Q3 2021

▶ September

- ▶ Annual process to review evaluator Net-to-Gross (NTG) recommendations for utility programs and reach consensus on ratios for the 2022 program year
 - ▶ NTG Meeting #1: Thursday, September 2
 - ▶ NTG Meeting #2: Monday, September 13
 - ▶ NTG Meeting #3: Friday, September 17
 - ▶ NTG Meeting #4: Monday, September 27
- ▶ **Reporting Working Group Kick-Off Meeting:** to be scheduled

Upcoming SAG Meetings (cont.)

▶ Q4 2021

▶ **October**

- ▶ **Evaluation Working Group:** to be scheduled
- ▶ **NEI Working Group Meeting:** to be scheduled
- ▶ **Market Transformation Savings Working Group:** to be scheduled
- ▶ **Reporting Working Group Meeting:** to be scheduled

▶ **November**

- ▶ **Nov. 16-17:** Quarterly Large Group SAG Meeting (Q4)
- ▶ **Reporting Working Group Meeting:** to be scheduled

▶ **December**

- ▶ **Dec. 1:** Market Transformation Savings Working Group Q4 Meeting
- ▶ **Dec. 7-8:** Evaluators present overview of draft Evaluation Plans for 2022 Program Year
- ▶ **Reporting Working Group Meeting:** to be scheduled

Questions?

- ▶ Each SAG Working Group has a separate distribution list
 - ▶ If you are interested in joining the new Reporting Working Group, please contact Celia Johnson: Celia@CeliaJohnsonConsulting.com