

2025 SAG Plan Overview and Feedback on 2024 SAG Planning Process

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May 12, 2025 Large Group SAG Meeting

Agenda

- ▶ 2025 SAG Plan
 - ❖ SAG Plan Flexibility
 - ❖ SAG Plan Highlights
 - ❖ Facilitation
 - ❖ Large Group SAG Schedule
 - ❖ SAG Subcommittees
 - ❖ SAG Working Groups
 - ❖ SAG Process Guidance Updates
 - ❖ Next Steps
- ▶ Feedback on 2024 SAG Planning Process
 - ❖ Initial Feedback Received
 - ❖ Next Steps

Please note: Due to open EE Plan dockets and ex parte concerns, we will not discuss specifics about 2026-2029 utility EE Plans or items from a utility stipulation.

2025 SAG Plan Highlights

SAG Plan Flexibility

- ▶ Utility EE Plans for 2026-2029 were filed with the ICC for approval on Feb. 28, 2025
 - ❖ SAG takes a meeting break following EE Plan filings - regular meetings are proposed to resume in July
 - ❖ There is also a Large Group SAG meeting proposed in mid-June, for the IL-TRM Administrator to introduce policy issues
 - ❖ To avoid ex parte concerns, SAG meetings will not include items at issue in open EE Plan dockets
- ▶ If the 2025 SAG Plan requires updates following Commission approval of EE Plans, updates will be discussed with utilities, interested stakeholders, and the SAG Steering Committee

2025 SAG Plan Highlights

▶ Large Group SAG Meetings

- ❖ Mid-June meeting for IL-TRM Administrator to introduce IL-TRM policy issues
- ❖ Q3 meeting (July)
- ❖ Q4 meeting (November)
- ❖ September Net-to-Gross update process
- ❖ December Evaluation Plan meetings

▶ SAG Subcommittees

- ❖ Equity Subcommittee (5)
- ❖ Networked Lighting Controls Subcommittee (1)

▶ SAG Working Groups

- ❖ Market Transformation Savings Working Group (1)
- ❖ Non-Energy Impacts Working Group (1)
- ❖ Reporting Working Group (1)

▶ SAG Steering Committee

Facilitation

- ▶ **SAG is facilitated by [Celia Johnson Consulting](#), including:**
 - ❖ Large Group SAG
 - ❖ SAG Subcommittees
 - ❖ SAG Working Groups

- ▶ **SAG facilitation support is provided by [Inova Energy Group](#)**
 - ❖ Zoe Knaus will be providing facilitation support in 2025

Large Group SAG

Large Group SAG Schedule

<p>Monday, May 12 10:00 - 11:30 am Teleconference</p>	<ul style="list-style-type: none">• SAG Facilitator presents final draft 2025 SAG Plan and schedule; request for comments• SAG Facilitator requests feedback on 2024 SAG Planning Process
<p>Monday, June 16 10:00 - 11:30 am Teleconference</p>	<p>Introduce IL-TRM policy issues for SAG review, including:</p> <ol style="list-style-type: none">1) Review and potential update of stakeholder compromise on general service lamps: <i>(Residential) screw-based LED lamps</i> <i>LED Screw Based Omnidirectional Bulbs</i>2) New measures involving renewable / solar generation: <i>Solar as Energy Efficiency</i> <i>Solar Air Heater</i> <i>Solar Water Heating</i>3) A policy question relating to energy efficiency upgrade at a site with significant on-site generation: <i>Building with on-site generation saves more energy than the net annual energy purchased from the grid</i>4) Revisiting the Electric Vehicle as an efficiency measure issue

Large Group SAG Schedule

<p style="text-align: center;"><u>Third Quarter SAG Meeting</u></p> <p style="text-align: center;">Tues. July 22 1:00 - 4:00 pm Teleconference</p> <p style="text-align: center;">Wed. July 23 1:00 - 4:00 pm Teleconference</p>	<p>Utility report-outs on EE Portfolio progress:</p> <ul style="list-style-type: none"> • Ameren Illinois Quarterly Report-out • ComEd Quarterly Report-out <p>Proposed policy changes:</p> <ul style="list-style-type: none"> • SAG Facilitator overview of process to address policy issues • Ameren Illinois proposed reporting policy change • ComEd proposed residential New Construction income qualified eligibility guideline <p>Leveraging the Inflation Reduction Act:</p> <ul style="list-style-type: none"> • Home Energy Rebate Program Update from Illinois Environmental Protection Agency and DCEO
<p style="text-align: center;"><u>Annual Net-to-Gross (NTG) Update Process</u></p> <p style="text-align: center;">NTG values for the 2026 program year must be finalized by October 1, 2025</p> <p style="text-align: center;">All NTG meetings held by teleconference</p>	<ul style="list-style-type: none"> • Meeting 1 - Wednesday, Sept. 3: Evaluators present initial recommended NTG values for Illinois utilities. Discuss questions and follow-up. • Meeting 2 - Wednesday, Sept. 10: Follow-up discussion on recommended NTG values. Discuss consensus on recommended values. • Meeting 3 - Wednesday, Sept. 17: Follow-up discussion on recommended NTG values. Discuss consensus on recommended values. • Meeting 4 - Wednesday, Sept. 24: Final meeting to discuss follow-up and consensus on recommend values.

Large Group SAG Schedule

<p><u>Fourth Quarter SAG Meeting</u></p> <p>Wed. Nov. 12 10:30 am - 4:00 pm</p> <p>In-person (Chicago) with teleconference option</p>	<ul style="list-style-type: none">• Ameren Illinois Electrification Update• ComEd Electrification Update• Nicor Gas Quarterly Report-out• Peoples Gas & North Shore Gas Quarterly Report-out• Guidehouse evaluation study updates for ComEd• Opinion Dynamics evaluation study updates for Ameren Illinois
<p><u>Annual Evaluation Plan Review Process</u></p> <p>Tues. Dec. 2 9:30 am - 12:00 pm Teleconference</p> <p>Wed. Dec. 3 10:00 am - 12:00 pm</p>	<p>SAG meets annually each December to discuss draft evaluation plans for the next program year.</p> <ul style="list-style-type: none">• Day 1: Evaluators present an overview of draft 2026 evaluation plans for Ameren Illinois and ComEd EE programs• Day 2: Evaluators present an overview of draft 2026 evaluation plans for Nicor Gas, Peoples Gas & North Shore Gas EE programs• Written draft evaluation plans are circulated for SAG review on or before December 15

Process to Resolve IL-TRM Policy Issues

1. The IL TRM Administrator (VEIC) plans to introduce policy issues at the **Tuesday, May 13** TRM Technical Advisory Committee meeting
2. **Monday, June 16 Large Group SAG Meeting:** VEIC presents policy issues and requests feedback
 - Written comments due by *Monday, June 30*
3. **Wednesday, July 9:** Small group SAG meeting to discuss written feedback
4. **Wednesday, July 21:** Small group SAG meeting to discuss written feedback
5. Goal is to resolve policy issues before the IL-TRM August 1 deliverable

SAG Steering Committee

Purpose:

- ▶ To provide substantive feedback to the SAG Facilitator on: (1) annual SAG Plans; and (2) progress towards meeting annual SAG Plan goals to ensure that the time spent on SAG is as productive and valuable as possible
- ▶ Steering Committee launched in mid-2018

Meetings:

- ▶ Holds an annual meeting to review the SAG Plan for the upcoming year, and a mid-year check-in on progress towards meeting SAG Plan goals (if needed)

Membership is defined by Section 3.3 of the IL EE Policy Manual:

- ▶ *Members of the SAG Steering Committee include senior representatives of Program Administrators, community-based organizations, and non-financially interested stakeholder participants.*
- ▶ The Steering Committee includes representatives from each utility, and non-financially interested stakeholder organizations that signed 2022-2025 or 2026-2029 EE Plan stipulation agreements
- ▶ **Request for Members:** If you represent a community-based organization or a non-financially interested stakeholder and are interested in joining the Steering Committee, reach out to the SAG Facilitator

SAG Subcommittees

SAG Equity Subcommittee

- ▶ **Purpose:** To discuss topics related to equity in EE portfolios
 - ❖ Creation of the Equity Subcommittee is referenced in several of the 2022-2025 utility EE Plan Stipulated Agreements
 - ❖ Coordinate with Low Income Energy Efficiency Accountability Committee (LIEEAC) - IQ North Committee and /or IQ South Committee, on topics of interest to CBOs / CAAs
- ▶ **Website:**
<https://www.ilsag.info/meetings/subcommittees/equity-subcommittee/>
- ▶ **Meetings:** Five planned in 2025

SAG Equity Subcommittee (cont.)

Wednesday, July 16 10:00 am - 12:00 pm Teleconference	<ul style="list-style-type: none">• Nicor Gas MDI Assessment results• Nicor Gas presents a beta interactive mapping mechanism, to follow-up on Equity and Affordability Reporting metrics finalized in June 2024
Wednesday, July 30 10:00 am - 12:00 pm Teleconference	<ul style="list-style-type: none">• IQ North Leadership Team request to discuss procedural issue on re-launching IQ North Advisory Committee• Discuss minimum participation criteria that determines whether a home is weatherized and customer prioritization for major measures in the northern Illinois utilities' Home Energy Savings Income Eligible Single Family Upgrades Program (referenced in ComEd and PG/NSG 2026-2029 EE Plan stipulations)
Tuesday, September 23 9:30 am - 12:30 pm Teleconference	<ul style="list-style-type: none">• Follow-up discussion from July 30 meeting• Peoples Gas & North Shore Gas Market Development Initiative (MDI) Assessment Results

SAG Equity Subcommittee (cont.)

<p>Tuesday, October 28 10:00 am - 12:00 pm Teleconference</p> <p>Joint Meeting with IQ South Advisory Committee</p>	<ul style="list-style-type: none">• IQ South Advisory Committee report-out• Subject to approval by the Commission, the Ameren 2026 Plan Stipulation includes a commitment to start discussions in 2025 on whether and to what extent implementation contractors, subcontractors, trade allies, customers or community organizations face consistent and recurring challenges related to contractual work in the delivery of the EE portfolio and, if so, how Ameren Illinois might address those challenges while ensuring transparency and alignment with its approved plan
<p>Tuesday, December 9 10:00 am - 12:00 pm Teleconference</p>	<ul style="list-style-type: none">• ComEd MDI Assessment Results• Additional topics TBD

SAG Network Lighting Controls Subcommittee

- ▶ **Purpose:** To discuss measures associated with network lighting controls with Ameren Illinois, ComEd and interested stakeholders, including strategies for accelerating adoption of networked lighting controls, luminaire level lighting controls, and other related measures.
 - ❖ Referenced in both Ameren Illinois and ComEd 2022-2025 EE Plan stipulations
- ▶ **Website:** <https://www.ilsag.info/meetings/subcommittees/network-lighting-controls-subcommittee/>
- ▶ **Meetings:** One planned in 2025
- ▶ **Request for Feedback:** Is this Working Group valuable, or should SAG discontinue it after 2025?

Wednesday, August 27 10:00 - 11:30 am Teleconference	<ul style="list-style-type: none">• ComEd Network Lighting Controls update
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SAG Working Groups

SAG Market Transformation Savings Working Group

► **Purpose:**

1. To provide a forum to discuss policy issues related to market transformation (MT) savings evaluation and estimation
2. To provide an opportunity to review specific MT initiatives and the data/approach proposed to be used to develop savings, including but not limited to:
 - a. Logic Models
 - b. Savings/unit
 - c. Total market unit data collection
 - d. Natural market baseline data and projections
 - e. Service territory accounting
 - f. Market progress indicators
 - g. The duration of any MT savings credit
3. To discuss evaluation questions related to MT initiatives; and
4. To discuss, and if possible, reach consensus on savings protocols for MT initiatives that may be included in the IL-TRM

► **Website:**

https://www.ilsag.info/mt_savings_working_group/

► **Meetings:** One planned in 2025

Tuesday, October 7 10:00 am - 12:00 pm Teleconference	<ul style="list-style-type: none">• Status update on Illinois utility MT initiatives• Ameren Illinois High Performance Windows update: Resource Innovations presentation on theory-based evaluation• Additional utility MT updates TBD
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SAG Non-Energy Impacts Working Group

- ▶ **Purpose:** To discuss research plans and results from Illinois non-energy impact (NEI) studies as well as defensible methodologies to use across the state related to calculating non-energy impacts
- ▶ **Website:** <https://www.ilsag.info/nei-working-group/>
- ▶ **Meetings:** One planned in 2025

<p>Wednesday, November 5 9:30 am - 12:30 pm Teleconference</p>	<ul style="list-style-type: none">• Ameren Illinois NEI Research: Accessibility Pilot (Opinion Dynamics)• ComEd NEI Research: Updates to NEI Participant Study methodologies (Guidehouse)• Explanation of updated COBRA model (Guidehouse)
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SAG Reporting Working Group

- ▶ **Purpose:** To discuss utility reporting, as needed
- ▶ **Website:** <https://www.ilsag.info/reporting-working-group/>
- ▶ **Meetings:** One planned in 2025

<p>Wednesday, August 27 10:00 - 11:30 am Teleconference</p>	<ul style="list-style-type: none">• Follow-up discussion to July Large Group SAG meeting, to finalize the semi-annual reporting policy to be proposed by Ameren Illinois
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SAG Process Guidance Document

SAG Process Guidance

- ▶ Developed in 2018, to describe guiding principles and process rules for SAG
- ▶ This document is updated on an annual basis, as needed
- ▶ 2025 Edits
 - ❖ Removed references to 2024 Planning Process
 - ❖ Minor clarifying edits
 - ❖ Edits to reference Policy Manual language in defining various SAG groups, and provide further clarification

Next Steps

- ▶ Final comments from interested SAG participants due **Wednesday, May 28**
 - ❖ Materials to review:
 - [2025 SAG Plan \(Draft for SAG Review\)](#)
 - [2025 SAG Process Guidance \(Redline\)](#)
 - ❖ Send feedback to the SAG Facilitator, Celia Johnson (Celia@CeliaJohnsonConsulting.com)
- ▶ 2025 SAG Plan and 2025 SAG Process Guidance document finalized by **Wednesday, June 4**

Feedback on 2024 SAG Planning Process

Background

- ▶ 2024 focused on the [SAG Portfolio Planning Process](#), with the objective of reaching consensus on Illinois utility EE Portfolio Plans for 2026-2029 prior to utilities filing EE Plans for approval with the ICC
- ▶ Large Group SAG Planning Process - Jan. to Nov. 2024
 - ❖ Overview of the Planning Process presented in January
 - ❖ Utilities presented “deep dive” overviews of current EE Portfolios in February
 - ❖ Energy Efficiency ideas were submitted by interested SAG participants in March, and presented in April
 - ❖ Each utility presented a draft EE Plan overview to SAG in the fall, with an opportunity for any SAG participant to present feedback

Collecting Feedback

- ▶ SAG Facilitator has held 9 meetings to discuss initial feedback on the 2024 SAG Planning Process, including:
 - ❖ Utilities
 - ❖ Non-financially interested stakeholders that participated in negotiations
 - ❖ IQ South Advisory Committee Facilitator
 - ❖ SAG Steering Committee

- ▶ Slides 28-30 include a summary of key feedback about the 2024 Large Group SAG Planning Process and suggestions to consider for a future SAG Planning Process
 - ❖ Feedback and suggestions are shared without attribution
 - ❖ Feedback about the negotiation process was discussed with parties that participated in negotiations, and will not be summarized today
 - ❖ Based on current law, the next 4-year EE Plans will be filed March 1, 2029; a future Planning Process would occur in 2028

Summary of Feedback

1. General Process Feedback

- ❖ Process was well organized, with information clearly communicated and useful templates provided.
- ❖ The Planning Process schedule flowchart was useful; consider an online tool to edit the flowchart as it changes, with a dedicated page for meeting dates.

2. Planning Process Timeline

- ❖ Additional time is needed - start the process earlier, in order to end earlier. Kick-off a future process at least 18 months before the statutory EE Plan filing deadline.

Summary of Feedback

3. Participation

- ❖ Holding a Large Group SAG meeting in-person for EE Plan presentations was useful.
- ❖ Plan and consider up-front how to ensure process includes an opportunity for Community-Based Organizations (CBOs) and Community Action Agencies (CAAs) to provide meaningful input, without being required to participate in a large number of meetings due to time and resource constraints.
- ❖ Request process feedback from stakeholders that submitted EE Ideas in March 2024.
- ❖ Clarify the role of ICC Staff and the ICC Office of General Counsel at the beginning of a future Planning Process.

Summary of Feedback

4. Energy Efficiency Ideas Process

- ❖ Collaboration on Energy Efficiency Idea submittals was appreciated; it was useful to have joint ideas submitted.
- ❖ Submitted ideas were not overly duplicative, which was appreciated.
- ❖ There were a smaller number of ideas submitted in 2024 vs. the 2020 process, which was more manageable.
- ❖ Include normative values with EE Idea proposals whenever possible (for example - if the proposal is a about an increase of dollar amount, include the actual amount).

5. Utility EE Plan Presentations to SAG

- ❖ Utilities should present draft EE Plans earlier.
- ❖ Utilities should include additional details in draft EE Plan presentations, instead of focusing on high level information
 - ❖ What measures are included in each program for the 4-year EE Plan
 - ❖ Administrative spending, including a budget breakdown
 - ❖ Program budgets and savings associated with specific programs
 - ❖ Consider sharing summary tables with draft EE Plan presentations

Next Steps

- ▶ Interested SAG participants are invited to share feedback about the 2024 SAG Planning Process:
 - ❖ [Click here to respond to the 2024 SAG Planning Process survey](#)
 - ❖ The survey includes an option to request a meeting to discuss feedback
 - ❖ Please respond to the survey **by Wednesday, May 28**
- ▶ A final summary of feedback on the 2024 SAG Planning Process will be posted on the SAG website, circulated to the SAG Steering Committee, and considered in planning for a future process

Contact Information

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