

SAG Reporting Policy Proposal

July 23, 2025



Reporting Policy Proposal

Background on Report Drivers

•State Law



- Electric (8-103B)
 - Implement reporting procedures to assist in determining how low-income procurement and expenditure requirements are met
 - Communicate progress toward ensuring implementation contractors and installation vendors promote workforce equity and quality jobs
- Gas (8-104)
 - Report status of implementation and expenditures

•State Policy



- Illinois Energy Efficiency Policy Manual
 - Purpose of reporting is to share info on successes and challenges such that others can learn from successes, and stakeholders can provide recommendations on addressing challenges
 - Section 6 contains extensive reporting required of program administrators, which includes quarterly reports

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Rationale for Change



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EE Policy Manual Section 6.5 – Language Revisions

6.5 Program Administrator Quarterly **Template and Semi-Annual Narrative** Reports

Program Administrator quarterly **template and semi-annual narrative reports** are generally provided to the SAG within forty-five (45) days after the close of each **quarter-reporting period** and are also filed with the Commission in the Program Administrator's Energy Efficiency Plan docket. Quarterly **templates and semi-annual narrative reports** are circulated to the SAG and discussed as needed, so interested stakeholders can ask about information in the reports. Information in the ~~quarterly~~ reports may be based on preliminary results and is subject to revision and evaluation adjustment. Program Administrators shall provide quarterly reports using a common template.

~~Quarterly reports shall contain the following information for Sections 8-103B and 8-104 Programs:~~

**Quarterly templates shall contain the following information for Sections 8-103B and 8-104 programs:
Subsections i-iii, vii.g and vii.i**

**Semi-annual narrative reports shall contain the following information for Sections 8-103B and 8-104 programs:
Subsections iv-vi, vii.a-f, vii.h, viii, and final item i**

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EE Policy Manual Section 6.5, Subsections i-iii – Continue to report in quarterly template

- i. Program, Sector⁴¹ and Portfolio-Level Ex Ante Results, including:⁴²
 - a. Net energy savings achieved;
 - b. Original Energy Efficiency Plan savings goals;
 - c. Approved net energy savings goals;
 - d. Implementation plan savings goals;
 - e. Percent savings achieved compared to implementation plan savings goals;
 - f. Costs year-to-date, using the cost categories set forth in Section 5.3 of this Policy Manual;
 - g. Original Plan budgets;
 - h. Approved budgets; and
 - i. Percent of costs year-to-date compared to approved budgets.
- ii. Portfolio-Level Costs (charged to the Energy Efficiency riders only), including:
 - a. Program costs by sector for C&I Programs (Private Sector), Public Sector Programs, Residential Programs, Income Qualified Programs, Market Transformation Programs, and Third Party Programs;
 - b. Portfolio-level costs, using the cost categories set forth in Section 5.2 of this Policy Manual; and
 - c. Cumulative Persisting Annual Savings (CPAS) Goal Progress and Applicable Annual Incremental Goal (AAIG) Progress for Section 8-103B Portfolios.
- iii. Historical Energy Efficiency Costs beginning with Program Year 1 for Utility and DCEO Sections 8-103, 8-103B, 16-111.5B and 8-104 Portfolios.

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EE Policy Manual Section 6.5, Subsections iv-vii a. through f. – Report in semi-annual narrative

- iv. Program-Level Narratives⁴³ on Program Successes and Challenges. Each Program-level narrative shall include:
 - a. Brief (2-3 sentences) description of the Program and key Measures (including delivery approach and any past Program names associated with the current Plan).
 - b. Key Program changes, which may include:
 - i. New marketing channels;
 - ii. Significant and widespread changes to Program incentive levels;
 - iii. New Measures (including major changes to efficiency levels, size, or discontinuation of Measures), with Measure-level TRC results;
 - iv. Change to Program Implementation Contractor; and/or
 - v. New state or federal standards that will impact Program savings.
- v. Description of Program Successes, which may include:
 - a. Participation or savings significantly higher than forecast;
 - b. Successes in marketing/outreach campaigns;
 - c. Successes in coordination efforts with local, regional or national efforts;
 - d. Program awards and recognitions; and/or
 - e. Notable Trade Ally feedback.
- vi. Description of Program Challenges, which may include:
 - a. Program not on track to meet goal, explanation of why and how Program Administrator plans to get it back on track or alternatively fund-shift to a more successful Program;
 - b. Lack of a sufficient pipeline such that Program goals may not be achieved;
 - c. Challenges in coordination efforts;
 - d. Description of Measures that are not receiving uptake; and/or
 - e. Notable Trade Ally feedback.
- vii. Portfolio-Level Narrative. Key portfolio-level changes and updates, including:
 - a. All Measures that are demonstrated as successful through a Program Administrator Breakthrough Equipment and Devices Program;
 - b. Fund-shifts meeting threshold of Section 6.1, above;
 - c. Key changes to marketing strategies, such as new marketing channels or marketing campaigns;
 - d. List of market research studies conducted by consultants, if study costs exceed \$25,000 and are not protected by license agreements or other proprietary arrangements;
 - e. Brief description of new pilots and Programs, including target market, delivery strategy, and key Measures;
 - f. Any discontinued Programs;

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EE Policy Manual Section 6.5, Subsections vii g. and vii i. – Continue to report in quarterly template EE Policy Manual Section 6.5, Subsections vii h. and viii – Report in semi-annual narrative

- g. Portfolio Summary Table setting forth evaluation status (ex ante, verified, or ICC approved), net energy savings achieved, original Plan savings goal, and net energy savings goal by Program Year and Plan cycle, starting with Program Year 1, with percent of net energy savings goal achieved, at the Portfolio level; and
- h. Low income energy efficiency accountability committee reporting, including tracking and reporting on how input from the committee has led to new approaches and changes in Energy Efficiency Portfolios.⁴⁴
- i. Portfolio Summary Table setting forth:
 - i. Net energy savings achieved;
 - ii. Carbon reductions (tons);
 - iii. Cars removed from road;
 - iv. Acres of trees planted;
 - v. Number of homes powered for one year;
 - vi. Direct Portfolio jobs;
 - vii. Low Income homes served (to the extent Program tracks low income participation) by Program Year, starting with Program Year 1, at the Portfolio level.
- viii. Appendix: For each Program, include a chart showing monthly or quarterly cumulative savings forecast versus achieved. The forecast should only be provided if the Program Administrator develops it in the course of Program administration.

EE Policy Manual Section 6.5 Final Item – Report in semi-annual narrative

Quarterly reports may also contain the following information:

- i. If applicable, any current or planned activities or investments to develop, support and grow a diverse and inclusive Energy Efficiency workforce.



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EE Policy Manual Sections 6.8 through 6.11 Reporting Principles

- Propose that Reporting Working Group updates Reporting Metrics Documents to
 - Change frequency from Quarterly to Semi-Annual (as applicable)
 - Specify Delivery Method (Quarterly Template or Semi-Annual Narrative)

Reporting Principle	Type of Reporting	Current Frequency	Current Delivery Method
Diverse Contracting	# of Diverse Contractors and spending	Bi-Annual	Q2 and Q4 Reports
Diverse Contracting	# of Diverse Trade Allies by specialty	Annual	Q2 Report
Equity and Affordability	IQSF participants by zip code	Annual	Q2 Report
Equity and Affordability	IQSF participants and measures adopted	Annual	Impact Report
Equity and Affordability	Cross referral study	Once	SAG
Health and Safety	H&S spending by channel and narrative	Quarterly	All Quarterly Reports
Health and Safety	Projects with H&S remediation	Annual	Q2 Report
Multifamily	Mix of buildings treated	Annual	Q2 Report
Multifamily	Joint program delivery	Quarterly	All Quarterly Reports
Multifamily	Funding leveraging	Annual	Q2 Report
Multifamily	Comprehensiveness spreadsheet	Annual	Impact Report
Multifamily	Geographic distribution of projects	Annual	Q2 Report

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Considerations and Next Steps

Considerations

- Path Forward – If consensus is reached, can this be an interim policy without opening the Policy Manual? Commission notification?
- Effective Date – Can we work toward an effective date of September 30, 2025, so that only Q3 templates (no narrative report) is required?

Next Steps

- Ameren to draft redlines of Policy Manual and Reporting Metrics Documents for circulation
- Celia to request comments on proposed redlines and Considerations
- Comments to be reviewed by Reporting Working Group on August 20



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Preliminary information for SAG discussion purposes only; subject to Section 3.1 of the EE Policy Manual



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AmerenIllinoisSavings.com