

Introduction to SAG Reporting Working Group Meeting

September 8, 2025 SAG Reporting Working Group Meeting

Celia Johnson, SAG Facilitator

Administrative Reminders

Meeting Materials

- Meeting materials are posted on the [September 8 meeting page](#) of the SAG website

Meeting Notes

- SAG meetings are not recorded - discussion will be captured in written notes
- Meeting notes will identify follow-up items

Meeting Discussion

- There will be an opportunity for questions and discussion during each presentation
- If you have a question or comment, please raise your hand or add a question to the chat

Webex Name

- Update your name in the Webex participant list to include your first + last name, and company or organization



Meeting Best Practices

Listen and speak with an open mind

- Seek first to understand, then to be understood
- Collaboration and inclusive participation are goals of the SAG
- Keep your phone or computer audio muted if you are not engaging in the discussion
- Be patient when listening to others speak; do not interrupt
- Avoid using acronyms or phrases that may be misunderstood
- Use professional and respectful language when participating

Reminder: The September 8 meeting is a follow-up discussion on two policy proposals - compromise may be needed from participants to reach agreement on final policy language

Purpose of September 8 Meeting

1. To discuss follow-up on Ameren Illinois' reporting policy proposal; and
2. To discuss follow-up on ComEd's New Construction Eligibility Policy Proposal.

SAG Process for Addressing Policy Issues

Background

- Policy issues are typically resolved through the **SAG Policy Manual Subcommittee update process**
- Policy Manual is updated every 3-4 years
- Policy questions may arise that require discussion and resolution while the Policy Manual Subcommittee is inactive
- Policy Manual Subcommittee is currently inactive, since Policy Manual Version 3.0 and IL-TRM Policy Document Version 4.0 were approved by the Commission in December 2023

SAG Process for Addressing Policy Issues

- Included in the [SAG Process Guidance 2025 Update \(Final 6/4/2025\)](#) - see pages 6-7
- Referenced on the [Policy page](#) of the SAG website

SAG Process for Addressing Policy Issues

1. The SAG Facilitator will review policy requests and schedule for SAG discussion as needed.
2. Background on the policy request will be presented to interested SAG participants.
3. Proposed policy resolution will be circulated to SAG for review, including a request for edits or questions, with a minimum of ten (10) Business Days provided for review.
4. If the SAG Facilitator receives substantive edits, questions or concerns regarding proposed resolution of an open policy issue, a follow-up SAG discussion will be held with interested SAG participants.
5. Final resolution will be documented on the [Policy page](#) of the SAG website.
6. The SAG Facilitator will maintain a “Policy Tracker” describing any policies to be considered in a future update to the Policy Manual or IL-TRM Policy Document.

Policy resolution may require a [Stipulated Agreement](#). Whether or not a stipulated agreement is required will be determined by utilities and non-financially interested stakeholders.

Reporting Policy Proposal

- Ameren Illinois is proposing a change to existing reporting policy for all Illinois utilities - introduced at the July 23 Large Group SAG meeting
- To follow-up on the July 23 discussion, Ameren Illinois prepared redline edits to the following documents:
 - ❖ [IL EE Policy Manual Section 6, Program Administration and Reporting \(redline 7/29/25\)](#)
 - ❖ [Equity and Affordability Reporting Metrics \(redline 7/29/25\)](#)
 - ❖ [Diverse Contracting Reporting Metrics \(redline 7/29/25\)](#)
 - ❖ [Income Qualified Health and Safety Reporting Metrics \(redline 7/29/25\)](#)
 - ❖ [Income Qualified Multi-Family Reporting Metrics \(redline 7/29/25\)](#)

Comments received on proposed policy edits (due August 15, 2025):

- [Community Investment Corp.](#)
- [ICC Staff](#)
- [NRDC](#)
- [Peoples Gas and North Shore Gas](#)

Today's meeting: Ameren is presenting an overview of and responses to feedback received

- Updated redline policy documents will be circulated for review **Tuesday, September 9**
- Additional comments due **Tuesday, September 23**
- Ameren will follow-up directly with stakeholder(s) regarding additional feedback submitted. If needed, a follow-up SAG meeting will be scheduled with interested parties.

New Construction Eligibility Policy Proposal

- ComEd is proposing eligibility verification pathways for income eligible new construction EE programs - introduced at the July 23 Large Group SAG meeting
- To follow-up on the July 23 discussion, ComEd prepared proposed policy language:
 - ❖ [Income Eligibility Verification Guidelines for Electric Homes New Construction \(EHNC\) Program](#)

Comments received on proposed policy edits (due August 20, 2025):

- [Ameren Illinois](#)
- [ICC Staff](#)
- [Illinois Office of the Attorney General](#)
- [Joint Comments from Community Investment Corp., Natural Resources Defense Council, and People for Community Recovery](#)

Today's meeting: ComEd is presenting an overview of and responses to feedback received

- Additional comments due **Tuesday, September 23**
- ComEd will follow-up directly with stakeholder(s) regarding additional feedback submitted. If needed, a follow-up SAG meeting will be scheduled with interested parties.

Questions?

SAG Facilitation: [Celia Johnson Consulting](#)

- *Celia Johnson, Lead Facilitator*
- Email: Celia@CeliaJohnsonConsulting.com
- Phone: (312) 659-6758