



Process Proposal for SAG Market Transformation Savings Working Group

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October 6, 2026 SAG Market Transformation Savings Working
Group Meeting

Working Group Background

Established in 2019 to reach agreement on a framework for market transformation savings; this framework was included in IL-TRM Version 8; since 2019, MT Working Group meetings have focused on discussing MT policy issues, progress on MT initiatives, and MT evaluation

- **IL-TRM Attachment C:** See [Volume 4](#), Cross-Cutting Measures and Attachment, Attachment C: Framework for Counting Market Transformation Savings in Illinois
 - ❖ If edits to Attachment C are needed, edits will be discussed and finalized by the Working Group and shared with VEIC (IL-TRM Administrator) by September 1 each year
 - ❖ There are no MT initiative-specific savings protocols documented in IL-TRM Attachment C at this time
- **Working Group Website:** https://www.ilsag.info/mt_savings_working_group/
- **Process Protocols:** Illinois market transformation “process protocols” were [finalized in 2022](#) by the Working Group

MT Savings Protocol

The following is excerpted from Section 2 of the [2022 MT process recommendations document](#):

Defined in the May 2020 SAG MT Working Group meeting and updated in the March 2021 SAG MT Working Group meeting, the MT Savings Protocol is the set of components necessary to calculate MT savings. These include, but are not limited to:

- Logic model
- Savings per unit
- Natural market baseline
- Total market unit data collection
- Service territory accounting
- Market progress indicators
- Duration of any MT savings credit

Stakeholders in the MT SAG Working Group expressed an interest in providing feedback on MT initiatives and the inputs listed above. The March 2021 SAG MT Working Group meeting outlined the process to reach and document consensus on MT Savings in the IL-TRM, which was defined as follows:

1. Review business plan + data/approach proposal for individual MT initiatives; discuss what information should be included in the IL-TRM (if any)
2. Circulate draft savings protocol to non-financially interested parties for review for comments (15 business days); schedule follow-up discussion, if needed
3. Submit final/consensus savings protocol(s) to IL-TRM Administrator for IL TRM v.10

This process meets the needs of the annual IL-TRM review and update process.

MT Savings Protocol

- The process recommendations document assumes there will be numerous rounds of review for each MT initiative, which may include discussing and sharing feedback about:
 - ❖ Logic Models
 - ❖ Savings/Unit
 - ❖ Total market unit data collection
 - ❖ Natural market baseline data and projections
 - ❖ Service territory accounting
 - ❖ Market progress indicators
 - ❖ The duration of any MT savings credit
- While the Working Group typically meets several times per year, all of the deliverables above have historically not been discussed by this group - doing so could result in a significant number of meetings and many rounds of written comments

Process Proposal

Suggested approach for future MT Working Group meetings:

1. Annual meeting (Q1) for IL utilities to give a status update on each MT initiative
2. Opportunity for IL utilities (or evaluators) to give additional MT-initiative specific update(s) throughout the year, if needed, including any MT component that a utility is interested in feedback on
3. MT-initiative specific evaluation plan - a draft will be presented for each MT initiative, when ready, with an opportunity for discussion and written feedback

Are stakeholders interesting in previewing any of the components related to MT savings for a specific MT initiative, or are stakeholders comfortable waiting until the draft evaluation plan is ready?

- 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

Request for Feedback

Feedback on the proposed approach for future SAG MT Savings Working Group meetings **due by Wednesday, October 21**

- A written comment template will be circulated
- Comments will be posted on the MT Savings Working Group page and circulated to the distribution list

Contact Information

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