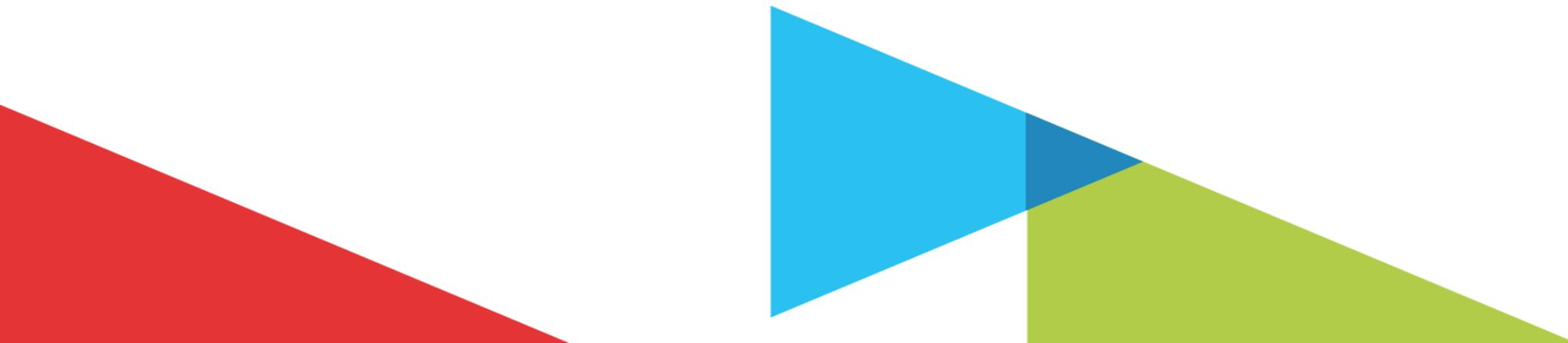


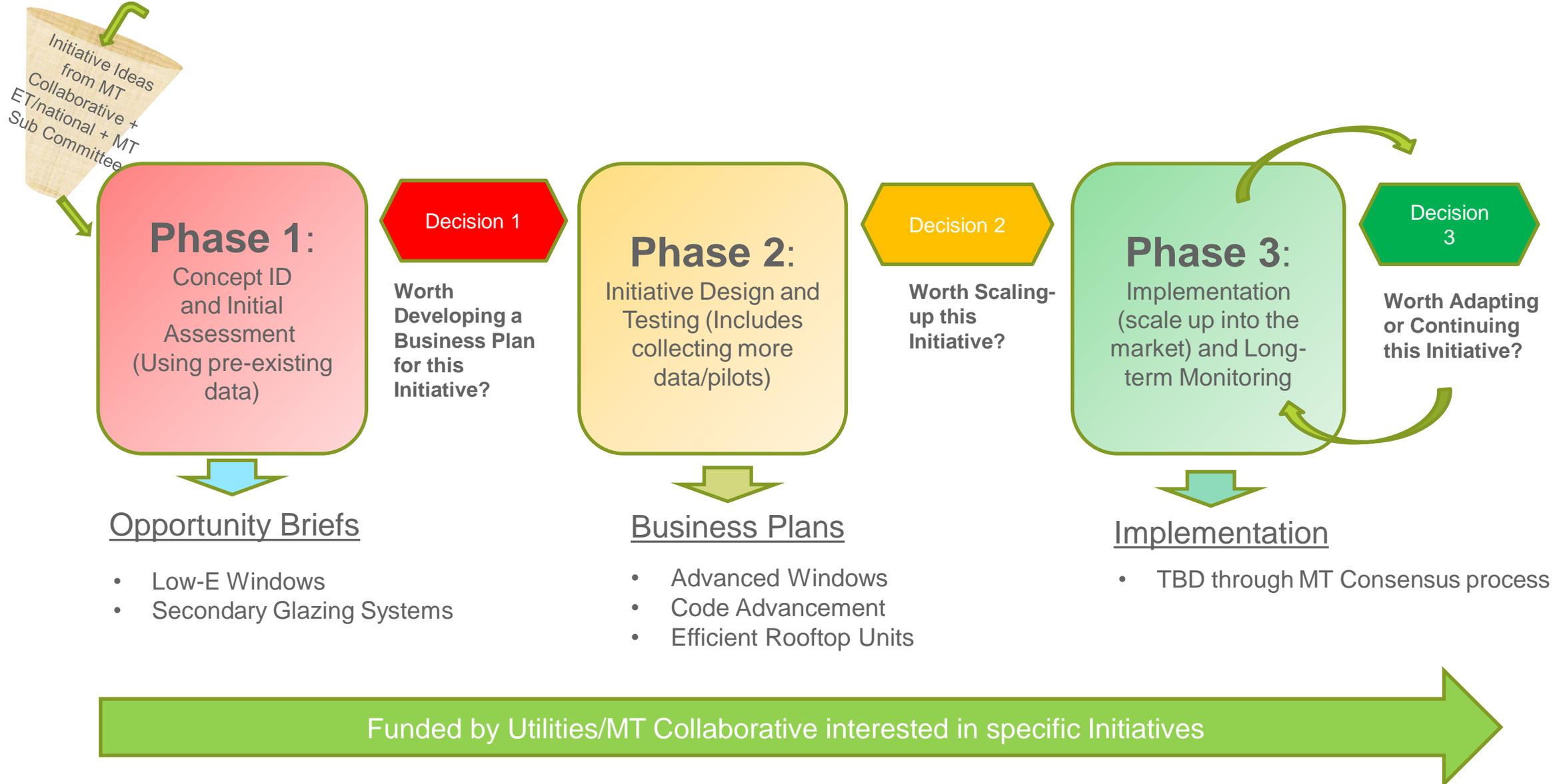
# SAG MT Savings Protocol Process Draft Recommendation

Presented by: Randy Opdyke

4/21/22



# MT Initiative Development Process and Products



# IL TRM Attachment C



- IL TRM Attachment C describes the framework for counting market transformation savings, and the differences between traditional resource acquisition saving methodologies
- Provides definitions of key terminology, outlines best practices, and defines the theoretical framework
- Provides theoretical examples of how to develop a methodology
- Provides examples of how to allocate savings by utility
- Defers to the SAG MT working group to finalize initiative specific MT savings protocols
  
- Attachment C does NOT provide:
  - Process to reach consensus on a MT savings protocol
  - Initiative or technology specific methodologies

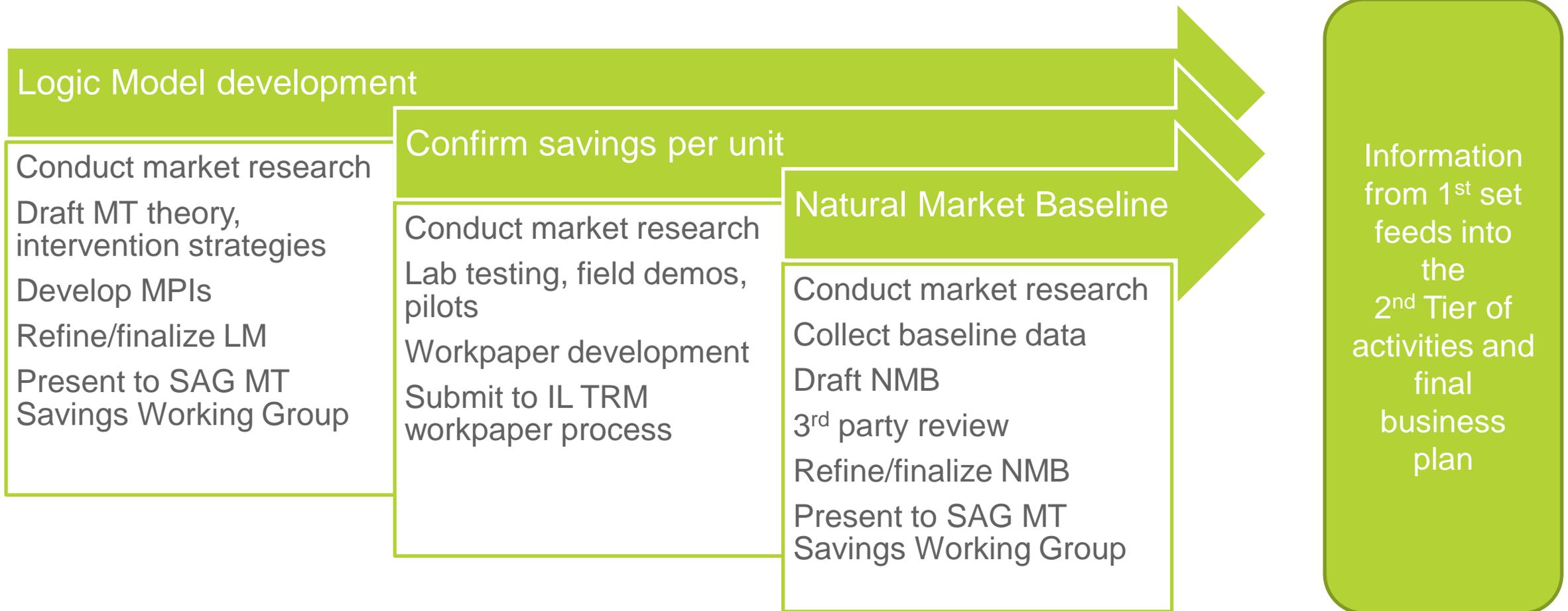
# Nicor Gas MT Process Recommendation



- Formalization of MT process to streamline activities to reach consensus on MT Savings Protocol
  - Grounded in MT best practices, IL TRM Attachment C
  - Builds on lessons learned from 2021
- Defined set of deliverables and work products to build to the final MT Savings Protocol
  - Order of operations is critical, information builds and informs future activities and design
  - Definition of waterfalls or tranches of activities and components
- Creation of dedicated smaller groups to manage the review of key MT components
- Build in status updates/dashboard into regular SAG MT Working Group meetings

# Key TRM Components - Waterfalls (or tranches) of activities

## 1<sup>st</sup> Tier



# Key TRM Components - Waterfalls (or tranches) of activities

## 2<sup>nd</sup> Tier



### Theory Based Evaluation

Draft methodology for:

- Total market unit data collection
- Total market savings calculation
- Service territory accounting
- Measuring MPIs

Evaluator review and feedback

Finalize methodology

Draft final theory-based evaluation plan

Circulate with SAG MT Savings Working Group for review

Finalize

### Duration of MT Savings Credit

Draft methodology for duration of MT savings credit

Evaluator review of methodology

Refine circulate with SAG MT Savings Working Group for review

Finalize

Final components build to MT business plan for MTI

# Nicor Gas Recommendation: MT Framework and Work Breakdown Structure



Phases		MT Process Steps	Work Product	Evaluator	SAG (MT Sub-Com /Sm Group)
Phase 1	Concept Development and Assessment	Identify internal MT ideas			
		External MT Idea Input	TBD	Input	Input - MT SC
		Gap analysis with existing data			
		MT Advancement recommendation	Development of MT decision brief	Inform	Review - MT SC
		Nicor Gas approval to move forward	Nicor Gas approval memo		
		Utility MT Progress Update to SAG	Presentation to SAG	Inform	Inform - MT SC
Phase 2	MT Strategy Development and Testing	Conduct market research	Market research reports		
		Draft MT theory - Initial Logic model	Initial Logic Model	Review	
		Draft intervention strategies		Review	
		Lab testing, pilots, field demos	Technology demo/pilot reports	Inform	
		Confirm savings per unit	if applicable, IL TRM Workpaper	Review	Review - SG / TAC
		Draft natural market baseline (NMB)	Draft NMB model	Review	
		Independent review of NMB	Evaluator memo	Advise	Review - MT SC
		Draft evaluation methodology	methodology summary	Inform	
		Develop Market progress indicators	MPI definitions (associated with LM)	Review	
		Develop preliminary evaluation plan	Evaluation plan	Review	Review - MT SC
		Refine and finalize Logic Model	Final logic model	Review	Review - MT SC
		Approval to bring to SAG	Memo/email from Nicor Gas		
			Utility MT Progress Update to SAG	Presentation to SAG	Inform
		Draft Business Plan	Business Plan	Review	Review - MT SC
		<b>Logic Model</b>	<b>Final logic model</b>	Inform	Inform - MT SC
		<b>Natural Market Baseline</b>	<b>Natural market baseline and evaluation review memo</b>	Inform	Inform - MT SC
		<b>Savings Per Unit</b>	<b>IL TRM workpaper</b>	Inform	Inform - MT SC
		<b>Theory based evaluation plan</b>	<b>Evaluation Plan</b>	Review	Review - MT SC
		Service territory accounting	Specific section	Review	
		Market Progress Indicators	Specific section	Review	
	Total market unit data collection	Specific section	Review		
	<b>Duration of any MT savings credit</b>	<b>Memo</b>	Review	Review - MT SC	
	<b>Final SAG presentation</b>	<b>Powerpoint</b>	Inform	Inform - MT SC	
	Business Plan: Complete		Inform	Inform - MT SC	
<b>Phase 3 Implementation</b>					

MT SC	SAG MT Working Group / Sub Comm
SG	Smaller Group of SAG MT Working Group
TAC	Technical Advisory Committee

Input = new idea or concept development
Review = Review and Comment
Inform = Update or informing of prior consensus
Advise = provide advice, recommend, or confirming outputs

# Example Reporting Dashboard



Phases		MT Process Steps	Advanced Windows (Thin Triple Window)	Codes	Secondary Glazing Systems
Phase 1	Concept Development and Assessment	Identify internal MT ideas	Stage complete	Stage complete	Stage complete
		External MT Idea Input	N/A	N/A	N/A
		Gap analysis with existing data	Stage complete	Stage complete	Stage complete
		MT Advancement recommendation	Stage complete	N/A	Stage complete
		Nicor Gas approval to move forward	Stage complete	Stage complete	Stage complete
		Utility MT Progress Update to SAG	N/A	N/A	N/A
Phase 2	MT Strategy Development and Testing	Conduct market research	Underway	Stage complete	Underway
		Draft MT theory - Initial Logic model	Stage complete	Underway	Not started
		Draft intervention strategies	Underway	Underway	Not started
		Lab testing, pilots, field demos	Stage complete	N/A	Not started
		Confirm savings per unit	Stage complete	Underway	Underway
		Draft natural market baseline (NMB)	Underway	Underway	Not started
		Independent review of NMB	Not started	Not started	Not started
		Draft evaluation methodology	Not started	Awaiting MT SC review	Not started
		Develop market progress indicators	Underway	Underway	Not started
		Develop theory based evaluation	Not started	Underway	Not started
		Refine and finalize Logic Model	Not started	Not started	Not started
		Approval to bring to SAG	Not started	Not started	Not started
		Utility MT Progress Update to SAG	N/A	N/A	N/A
		Draft Business Plan	Not started	Not started	Not started
		<b>Logic Model</b>	Not started	Not started	Not started
		<b>Natural Market Baseline</b>	Not started	Not started	Not started
		<b>Savings Per Unit</b>	Not started	Not started	Not started
		<b>Theory based evaluation</b>	Not started	Not started	Not started
		Service territory accounting	Not started	Not started	Not started
		Market Progress Indicators	Not started	Not started	Not started
	Total market unit data collection	Not started	Not started	Not started	
	<b>Duration of any MT savings credit</b>	Not started	Not started	Not started	
	<b>Final SAG presentation</b>	Not started	Not started	Not started	
	Business Plan: Complete	Not started	Not started	Not started	

## Status

Stage complete
Underway
In Process
Ready for MT SC
Awaiting evaluator review
Awaiting MT SC review
Awaiting TAC Review
Awaiting SG Review
N/A
Not started

# Nicor Gas MT Process Recommendation



Nicor Gas ask to the SAG MT Working Group is to consider this process recommendation

- This framework is a starting point and open to feedback
- Opportunity from continuous improvement.
- Grounded in MT best practices, IL TRM Attachment C
- Builds on lessons learned
- Provides to more clarity to the TRM Saving Protocol process
- Report Outs can be shared on the SAG MT Working Group website

Nicor Gas can provide TRM language related to this process for review, and an update to TRMv11, as a next step?

- End of May draft to distribute for August finalization.