

# **2026 Illinois Statewide Technical Reference Manual for Energy Efficiency Version 14.0**

## **Volume 1: Overview and User Guide**

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January 1, 2026**

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# 1 Purpose of the TRM

The purpose of the Illinois Statewide Technical Reference Manual (TRM or IL-TRM) is to provide a transparent and consistent basis for calculating energy (electric kilowatt-hours (kWh) and natural gas therms) and capacity (electric kilowatts (kW)) savings generated by the State of Illinois’ energy efficiency programs,<sup>1</sup> which are administered by the state’s largest electric and gas Utilities (collectively, Program Administrators or the Utilities).<sup>2</sup>

The TRM is a technical document that is filed with the Illinois Commerce Commission (Commission or ICC) and is intended to fulfill a series of objectives, including:

- “Serve as a common reference document for all... stakeholders, [Program Administrators], and the Commission, so as to provide transparency to all parties regarding savings assumptions and calculations and the underlying sources of those assumptions and calculations.
- Support the calculation of the Illinois Total Resource Cost test (“TRC”),<sup>3</sup> as well as other cost-benefit tests in support of program design, evaluation, and regulatory compliance. Actual cost-benefit calculations and the calculation of avoided costs will not be part of this TRM.
- Identify gaps in robust, primary data for Illinois, that can be addressed via evaluation efforts and/or other targeted end-use studies.
- [Provide] a process for periodically updating and maintaining records, and preserve a clear record of what deemed parameters are/were in effect at what times to facilitate evaluation and data accuracy reviews.
- ...[S]upport coincident peak capacity (for electric) savings estimates and calculations for electric utilities in a manner consistent with the methodologies employed by the utility’s Regional Transmission Organization (“RTO”), as well as those necessary for statewide Illinois tracking of coincident peak capacity impacts.”<sup>4</sup>

## 1.1 Acknowledgments

This document was created through collaboration among the members of the Illinois Energy Efficiency Stakeholder Advisory Group (SAG). The SAG is an open forum where interested parties may participate in the evolution of Illinois’ energy efficiency programs. Parties wishing to participate in the SAG process may do so by visiting <http://www.ilsag.info/questions.html> and contacting the Independent Facilitator, Celia Johnson, at [celia@celiajohnsonconsulting.com](mailto:celia@celiajohnsonconsulting.com). Parties wishing to participate in the Technical Advisory Committee (TAC), a subcommittee of the SAG, may do so by contacting the TRM Administrator at [iltrmadministrator@veic.org](mailto:iltrmadministrator@veic.org).

SAG/TAC Stakeholders <sup>5</sup>
Ad Hoc Group
ADM Associates
Ameren Illinois Company (Ameren)
Apex Analytics
Applied Energy Group
Cadmus
Brightline Group
Brubaker and Associates, Inc (BAI)
Citizen's Utility Board (CUB)
CAMI Energy
Cascade Energy

<sup>1</sup> 220 ILCS 5/8-103B and 220 ILCS 5/8-104.

<sup>2</sup> The Program Administrators include: Ameren Illinois, ComEd, Peoples Gas, North Shore Gas, and Nicor Gas (collectively, the Utilities).

<sup>3</sup> The Illinois TRC test is defined in 220 ILCS 5/8-104(b) and 20 ILCS 3855/1-10.

<sup>4</sup> Illinois Statewide Technical Reference Manual Request for Proposals, August 22, 2011, pages 3-4, [http://ilsag.org/yahoo\\_site\\_admin/assets/docs/TRM\\_RFP\\_Final\\_part\\_1.230214520.pdf](http://ilsag.org/yahoo_site_admin/assets/docs/TRM_RFP_Final_part_1.230214520.pdf)

<sup>5</sup> Being an open forum, this list of SAG stakeholders and participants may change at any time.

SAG/TAC Stakeholders <sup>5</sup>
City of Chicago
CLEAResult
Commonwealth Edison Company (ComEd)
Community and Economic Development Association Cook County
CNT Energy
DNV GL
Driftless Energy
Ecometric
Elevate Energy
Energy Futures Group
Energy Resources Center at the University of Illinois, Chicago (ERC)
Environment IL
Environmental Law and Policy Center (ELPC)
First Tracks Consulting Service, Inc.
Franklin Energy
Frontier Energy
Future Energy Enterprises LLC
GDS Associates
GTI Energy
Guidehouse
ICF
Illinois Association of Community Action Agencies
Illinois Attorney General's Office (AG)
Illinois Commerce Commission Staff (ICC Staff)
Illume Advising
International Energy Conservation Consultants (IECC)
Leidos
Metropolitan Mayor's Caucus (MMC)
Michaels Energy
Midwest Energy Efficiency Association (MEEA)
Morehead Energy
National Energy Foundation
Natural Resources Defense Council (NRDC)
Nicor Gas
Opinion Dynamics
Optimal Energy
Peoples Gas and North Shore Gas
Resource Innovations
SCS Analytics
Slipstream
Southern Gas Company
Sustain Rockford
Walker Miller Energy
WEC Energy
360 Energy Group

**Table 1.1: Document Revision History**

Document Title	Applicable to PY Beginning
Illinois_Statewide_TRM_Effective_060112_Version_1.0_091412_Clean.doc	6/1/12
Illinois_Statewide_TRM_Effective_060113_Version_2.0_060713_Clean.docx	6/1/13
Illinois_Statewide_TRM_Effective_060114_Version_3.0_022414_Clean.docx	6/1/14
Illinois_Statewide_TRM_Effective_060115_Final_022415_Clean.docx	6/1/15
IL-TRM_Effective_060116_v5.0_Vol_1_Overview_021116_Final IL-TRM_Effective_060116_v5.0_Vol_2_C_and_I_021116_Final IL-TRM_Effective_060116_v5.0_Vol_3_Res_021116_Final IL-TRM_Effective_060116_v5.0_Vol_4_X-Cutting_Measures_and_Attach_021116_Final	6/1/16
IL-TRM_Effective_010118_v6.0_Vol_1_Overview_020817_Final IL-TRM_Effective_010118_v6.0_Vol_2_C_and_I_020817_Final IL-TRM_Effective_010118_v6.0_Vol_3_Res_020817_Final IL-TRM_Effective_010118_v6.0_Vol_4_X-Cutting_Measures_and_Attach_020817_Final	1/1/18
IL-TRM_Effective_010119_v7.0_Vol_1_Overview_092818_Final IL-TRM_Effective_010119_v7.0_Vol_2_C_and_I_092818_Final IL-TRM_Effective_010119_v7.0_Vol_3_Res_092818_Final IL-TRM_Effective_010119_v7.0_Vol_4_X-Cutting_Measures_and_Attach_092818_Final	1/1/19
IL-TRM_Effective_010120_v8.0_Vol_1_Overview_101719_Final IL-TRM_Effective_010120_v8.0_Vol_2_C_and_I_101719_Final IL-TRM_Effective_010120_v8.0_Vol_3_Res_101719_Final IL-TRM_Effective_010120_v8.0_Vol_4_X-Cutting_Measures_and_Attach_101719_Final	1/1/20
IL-TRM_Effective_010121_v9.0_Vol_1_Overview_092420_Final IL-TRM_Effective_010121_v9.0_Vol_2_C_and_I_092420_Final IL-TRM_Effective_010121_v9.0_Vol_3_Res_092420_Final IL-TRM_Effective_010121_v9.0_Vol_4_X-Cutting_Measures_and_Attach_092420_Final	1/1/21
IL-TRM_Effective_010122_v10.0_Vol_1_Overview_09242021_Final IL-TRM_Effective_010122_v10.0_Vol_2_C_and_I_09242021_Final IL-TRM_Effective_010122_v10.0_Vol_3_Res_09242021_Final IL-TRM_Effective_010122_v10.0_Vol_4_X-Cutting_Measures_and_Attach_09242021_Final	1/1/22
IL-TRM_Effective_010123_v11.0_Vol_1_Overview_09232022_Final IL-TRM_Effective_010123_v11.0_Vol_2_C_and_I_09232022_Final IL-TRM_Effective_010123_v11.0_Vol_3_Res_09232022_Final IL-TRM_Effective_010123_v11.0_Vol_4_X-Cutting_Measures_and_Attach_09232022_Final	1/1/23
IL-TRM_Effective_010124_v12.0_Vol_1_Overview_09222023_Final IL-TRM_Effective_010124_v12.0_Vol_2_C_and_I_09222023_Final IL-TRM_Effective_010124_v12.0_Vol_3_Res_09222023_Final IL-TRM_Effective_010124_v12.0_Vol_4_X-Cutting_Measures_and_Attach_09222023_Final	1/1/24
IL-TRM_Effective_010125_v13.0_Vol_1_Overview_09202024_Final IL-TRM_Effective_010125_v13.0_Vol_2_C_and_I_09202024_Final IL-TRM_Effective_010125_v13.0_Vol_3_Res_09202024_Final IL-TRM_Effective_010125_v13.0_Vol_4_X-Cutting_Measures_and_Attach_09202024_Final	1/1/25
IL-TRM_Effective_010126_v14.0_Vol_1_Overview_09192025_Final IL-TRM_Effective_010126_v14.0_Vol_2_C_and_I_09192025_Final IL-TRM_Effective_010126_v14.0_Vol_3_Res_09192025_Final IL-TRM_Effective_010126_v14.0_Vol_4_X-Cutting_Measures_and_Attach_09192025_Final	1/1/26

## 1.2 Summary of Measure Revisions

The following tables summarize the evolution of measures that are new, revised or errata. This version of the TRM contains 153 measure-level changes as described in the following table.

**Table 1.2: Summary of Measure Level Changes**

Change Type	# Changes
Errata	7
Revision	133
New Measure	11
Retired	2
Total Changes	153

The ‘Change Type’ column indicates what kind of change each measure has gone through. Specifically, when a measure error was identified and the TAC process resulted in a consensus, the measure is identified here as an ‘Errata’. In these instances, the measure code indicates that a new version of the measure has been published, and that the effective date of the measure dates back to January 1, 2025. Measures that are identified as ‘Revised’ were included in the twelfth edition of the TRM and have been updated for this edition of the TRM. Both ‘Revised’ and ‘New Measure(s)’ have an effective date of January 1, 2026.

The following table provides an overview of the 153 measure-level changes included in this version of the TRM.

**Table 1.3: Summary of Measure Revisions**

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
Volume 1: Overview	N/A	3.11 Discount Rates, Inflation Rates, and O&M Costs	N/A	Revision	Update to the current TRM discount rates.	N/A
Volume 2: Commercial and Industrial Measures	Agricultural	4.1.1 Engine Block Timer for Agricultural Equipment	CI-AGE-EBLT-V04-260101	Revision	Measure cost update.	No change
		4.1.11 Commercial LED Grow Lights	CI-AGE-GROW-V08-260101	Revision	Updated DLC Horticultural Specifications to v4.0. Measure cost update. Greenhouse hours added. Nomenclature updated.	No change
		4.1.19 ENERGY STAR Dairy Water Heater	CI-AGE-ESWH-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.1.21 Indoor Agriculture Dehumidifier	CI-AGE-DEHU-V01-260101	New	New measure	N/A
	Kitchen Equipment	4.2.1 Combination Oven	CI-FSE-CBOV-V07-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.2 Commercial Solid and Glass Door Refrigerators & Freezers	CI-FSE-CSDO-V04-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.3 Commercial Steam Cooker	CI-FSE-STMC-V10-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.5 ENERGY STAR Convection Oven	CI-FSE-ESCV-V07-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.6 ENERGY STAR Dishwasher	CI-FSE-ESDW-V09-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to measure cost, ENERGY STAR calculator inputs and resulting savings	Dependent on inputs
		4.2.7 ENERGY STAR Fryer	CI-FSE-ESFR-V07-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.8 ENERGY STAR Griddle	CI-FSE-ESGR-V08-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to dual fuel system calculations.	Dependent on inputs
		4.2.9 ENERGY STAR Hot Food Holding Cabinets	CI-FSE-ESHH-V06-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.10 Ice Maker	CI-FSE-ESIM-V08-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.2.11 High Efficiency Pre-Rinse Spray Valve	CI-FSE-SPRY-V09-260101	Revision	Updated measure cost.	No change
		4.2.21 On-Demand Package Sealers	CI-FSE-ODPS-V02-260101	Revision	Updated measure cost.	No change
		4.2.22 Automatic Conveyor Broiler	CI-FSE-ACBL-V04-260101	Revision	Updated measure cost.	No change
		4.2.25 Efficient Cooktops	CI-FSE-INDC-V02-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
Hot Water	4.3.1 Water Heater	CI-HWE-STWH-V12-260101	Revision	Updates to default heating and cooling efficiency assumptions based upon GDS Baseline Study data, including 95% distribution efficiency.	Dependent on inputs	

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
		4.3.2 Low flow Faucet Aerators	CI-HWE-LFFA-V13-260101	Revision	Update to %Electric v %Fossil DHW.	No change
		4.3.3 Low Flow Showerheads	CI-HWE-LFSH-V10-260101	Revision	Update to %Electric v %Fossil DHW.	No change
		4.3.8 Controls for Central Domestic Hot Water	CI-HWE-CDHW-V08-260101	Revision	Update to %Electric v %Fossil DHW.	No change
	HVAC	4.4.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner	CI-HVC-ESRA-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement.	No change
		4.4.9 Air and Water Source Heat Pump Systems (Centrally Ducted and Ductless)	CI-HVC-HPSY-V13-250101	Errata	Fix of error in ASHPsiteHeatingImpact algorithm for non-fuel switch measures >60kBtuh. Edits to unit conversions when using COP efficiency ratings.	Dependent on inputs
			CI-HVC-HPSY-V14-260101	Revision	Updated measure costs for residential sized units and avoided replacement costs based on new inflation rate	No change
		4.4.11 High Efficiency Furnace	CI-HVC-FRNC-V15-260101	Revision	Updated measure costs for residential sized units and avoided replacement costs based on new inflation rate	No change
		4.4.13 Package Terminal Air Conditioner (PTAC) and Package Terminal Heat Pump (PTHP)	CI-HVC-PTAC-V14-260101	Revision	Update to loadshape and coincidence factors. Update to avoided replacement costs based on new inflation rate. Update to EERexist value	Dependent on inputs
		4.4.14 Pipe Insulation	CI-HVC-PINS-V10-260101	Revision	Update to default heating efficiencies	Dependent on inputs
		4.4.15 Single-Package and Split System Unitary Air Conditioners	CI-HVC-SPUA-V12-250101	Errata	Corrected SEER2 value and compliance date from Code of Federal Regulations for split systems <65,000 Btu/h. Transitioning the SEER/EER metrics for systems <65,000 Btu/h to SEER2/EER2	Dependent on inputs
		4.4.16 Steam Trap Replacement or Repair	CI-HVC-STRE-V12-260101	Revision	Update to default heating efficiencies	Dependent on inputs
		4.4.21 Linkage-Less Boiler Controls for Space Heating	CI-HVC-LBC-V07-260101	Revision	Re-worked excess air savings factors.	Dependent on inputs
		4.4.22 Oxygen Trim Controls for Space Heating Boilers	CI-HVC-O2TC-V03-260101	Revision	Re-worked excess air savings factors.	Dependent on inputs
		4.4.24 Small Pipe Insulation	CI-HVC-SPIN-V05-260101	Revision	Update to default heating efficiencies	Dependent on inputs
		4.4.26 Variable Speed Drives for HVAC Supply and Return Fans	CI-HVC-VSDF-V11-260101	Revision	Updated measure costs.	N/A
		4.4.27 Energy Recovery Ventilator	CI-HVC-ERVE-V08-260101	Revision	Removed "heat pipes" from tables, as they are sensible-only devices	N/A
4.4.33 Commercial & Industrial Air Curtain	CI-HVC-AIRC-V08-260101	Revision	Updates to default heating and cooling efficiency assumptions based upon GDS Baseline Study data	Dependent on inputs		

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
		4.4.34 Destratification Fan	CI-HVC-DSFN-V09-260101	Revision	Updates to default heating and cooling efficiency assumptions based upon GDS Baseline Study data	Dependent on inputs
		4.4.36 Multi-Family Space Heating Steam Boiler Averaging Controls	CI-HVC-SBAC-V04-260101	Revision	Added second equation option to estimate boiler load.	Dependent on inputs
		4.4.41 Advanced Rooftop Controls	CI-HVC-ARTC-V04-260101	Revision	Addition of multi-speed motor.	Dependent on inputs
		4.4.43 Packaged RTU Sealing	CI-HVC-PRTU-V03-260101	Revision	Updated measure costs.	N/A
		4.4.44 Commercial Ground Source and Ground Water Source Heat Pump	CI-HVC-GSHP-V10-260101	Revision	Addition of language on possible ENERGY STAR retirement. Updated measure costs for residential sized units and avoided replacement costs based on new inflation rate	N/A
		4.4.46 Server Room Temperature Set Back	CI-HVC-SRSB-V02-260101	Revision	Minor updates	N/A
		4.4.48 Small Commercial Thermostats	CI-HVC-THST-V08-260101	Revision	Updates to default HSPF2, SEER2, EER2 and AFUE assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.4.51 Advanced Rooftop Controls with High Rotor Pole Switch Reluctance Motors	CI-HVC-HSRM-V07-260101	Revision	Updates to default SEER2 and EER2 assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.4.55 Commercial Gas Heat Pump	CI-HVC-GFHP-V05-260101	Revision	Fuel switch example updated	N/A
		4.4.56 Commercial Duct Sealing	CI-HVC-DSEAL-V03-260101	Revision	Updates to default HSPF2, SEER2, EER2 and AFUE assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.4.57 Condensate Recovery System	CI-HVC-CNDR-V03-260101	Revision	Removed hot water as only steam systems produce condensate. Fixed example calculation. Update to default heating efficiencies.	N/A
		4.4.58 Steam Trap Monitoring System	CI-HVC-STMS-V2-250101	Errata	Correct deemed table results for process heating based on variable inputs provided.	Dependent on inputs
			CI-HVC-STMS-V3-260101	Revision	Clarifications to Sa calculation section headers to clarify that the space heating formula is for systems ≤ 5psig and the process heating formula is for all other systems > 5 psig. Addition of high pressure steam category. Adjustments to Heat of Vaporization table, average steam trap inlet pressure. Update to default heating efficiencies.	Dependent on inputs
		4.4.60 Variable Refrigerant Flow HVAC System	CI-HVC-VFFY-V4-250101	Errata	Energy saving algorithm for units >65 kBtu/hr should use IEER rather than EER.	Dependent on inputs
			CI-HVC-VFFY-V5-260101	Revision	Incorporated the new efficiency metrics for systems <65,000 Btu/h, SEER2/EER2/HSPF2	Increase

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings	
		4.4.63 Boiler Blowdown Heat Recovery	CI-HVC-BBHR-V02-260101	Revision	Update to default heating efficiencies	Dependent on inputs	
		4.4.64 Steam Vent Condensers	CI-HVC-STVC-V02-260101	Revision	Update to default heating efficiencies	Dependent on inputs	
		4.4.66 Steam Leak Repair	CI-HVC-SLKR-V02-260101	Revision	Update to default heating efficiencies	Dependent on inputs	
		4.4.67 CRAC/CRAH Electronically Commutated Plug Fans	CI-HVC-CRPF-V01-260101	New	New measure	N/A	
		4.4.68 Turbulators	CI-HVC-TRBLR-V01-260101	New	New measure	N/A	
		4.4.69 Waterless HVAC Condensate Trap	CI-HVC-WCNDT-V01-260101	New	New measure	N/A	
	Lighting	4.5 Lighting End Use	N/A	Revision	Added reference to new excel reference document that provides default wattages for baseline fixture types.	N/A	
		4.5.2 Linear Delamping	CI-LTG-DLMP-V04-260101	Revision	Renamed measure. Removed restriction to only allow T12 and T8 fluorescent lamp delamping. Updated baseline mix based on GDS Nonresidential Baseline Study. Default T5 and LED wattages added.	Dependent on inputs	
		4.5.3 High Performance and Reduced Wattage T8 Fixtures and Lamps	N/A	Retire	Measure retired	N/A	
		4.5.4 LED Bulbs and Fixtures	CI-LTG-LEDB-V19-260101	Revision	Addition of language on possible ENERGY STAR retirement. Measure therefore is now written as DI only with 2 year measure life.	N/A	
		4.5.6 LED Traffic and Pedestrian Signals	CI-LTG-LEDT-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A	
		4.5.9 Multi-Level Lighting Switch	CI-LTG-MLLC-V07-260101	Revision	Updated measure cost. CF calculation updated to be consistent with Occupancy Controls.	Dependent on inputs	
		4.5.11 Solar Light Tubes	CI-LTG-STUB-V04-260101	Revision	CF calculation updated to be consistent with Occupancy Controls.	Dependent on inputs	
		4.5.12 T5 Fixtures and Lamps	N/A	Retire	Measure retired	N/A	
		4.5.15 LED Open Sign	CI-LTG-OPEN-V03-260101	Revision	Removed 20% eligibility criteria. Updated measure savings.	Dependent on inputs	
		4.5.18 Ultra-Efficient LED Lighting	CI-LTG-ULED-V02-260101	Revision	Update of measure to use baseline lu/watt assumptions to estimate baseline wattage. Addition of DI application with mid-life adjustment.	Dependent on inputs	
		Refrigeration	4.6.2 Beverage and Snack Machine Controls	CI-RFG-BEVM-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
		4.6.5 ENERGY STAR Refrigerated Beverage Vending Machine	CI-RFG-ESVE-V06-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A
		4.6.13 Add Doors to Open Refrigerated Display Cases	CI-RFG-DOOR-V03-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.6.14 Floating Head Pressure Control	CI-RFG-FHP-V02-260101	Revision	Measure cost updated.	N/A
	Compressed Air	4.7.13 Compressed Air Leak Repair	CI-CPA-CALR-V03-260101	Revision	Addition of methodology for estimating CFM leakage based on ultrasonic leak detection decibel readings.	Dependent on inputs
	Shell	4.8.1 Roof Insulation for C&I Facilities	CI-SHL-RINS-V10-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.8.2 Spring-Loaded Garage Door Hinge	CI-SHL-SLDH-V02-260101	Revision	Added algorithm and resulting savings outputs for electric heating	Dependent on inputs
		4.8.4 C&I Air Sealing	CI-SHL-CAIR-V05-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.8.5 High Speed Overhead Doors	CI-SHL-HSOD-V02-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.8.6 Dock Door Seals and Shelter	CI-SHL-DDSS-V02-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.8.7 Commercial Wall Insulation	CI-SHL-WINS-V05-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.8.8 Commercial Secondary Windows	CI-SHL-CSW-V02-250101	Errata	Fixed Fossil Fuel algorithm to divide by heating system efficiency, not multiply.	Increase
			CI-SHL-CSW-V03-260101	Revision	Updates to default cooling and heating efficiency assumptions based upon GDS Baseline Study data.	Dependent on inputs
		4.8.9 Efficient Windows	CI-SHL-CEFW-V01-260101	New	New measure	N/A
	Miscellaneous	4.9.5 ENERGY STAR Computers	CI-MSC-COMP-V04-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to ENERGY STAR specification Version 9.0 and resultant default savings.	Dependent on inputs
		4.9.6 Advanced Power Strip – Tier 1 Commercial	CI-MSC-APSC-V06-260101	Revision	Added clarification that midstream should use same ISR as kit programs. Update to assumption of office open hours	Decrease
		4.9.7 High Efficiency Transformer	CI-MSC-TRNS-V04-260101	Revision	Updated load factor and source	Decrease
		4.9.15 ENERGY STAR Low Wattage Uninterruptible Power Supply	CI-MSC-UPSE-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A
		4.9.25 Virtual AMI Driven Commissioning (VCx)	CI-MSC-VCx-V01-260101	New	New measure	N/A

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
Volume 3: Residential Measures	Appliances	5.1.1 ENERGY STAR Air Purifier/Cleaner	RS-APL-ESAP-V08-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to ENERGY STAR Version 3.0, hours of use and measure cost. Default savings updated.	Dependent on inputs
		5.1.2 ENERGY STAR Clothes Washer	RS-APL-ESCL-V14-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to %Electric_Dryer, %Electric_DHW assumptions based on GDS Baseline Study and recalculation of all deemed savings.	Dependent on inputs
		5.1.3 ENERGY STAR Dehumidifier	RS-APL-ESDH-V12-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to ENERGY STAR specification v6.0 effective 10/01/2025, and resulting deemed savings results.	Dependent on inputs
		5.1.4 ENERGY STAR Dishwasher	RS-APL-ESDI-V12-260101	Revision	Addition of language on possible ENERGY STAR retirement. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study. Recalculation of deemed savings.	Dependent on inputs
		5.1.5 ENERGY STAR Freezer	RS-APL-ESFR-V06-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A
		5.1.6 ENERGY STAR, CEE Tier 2 or CEE Tier 3 Refrigerator	RS-APL-ESRE-V12-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to future avoided replacement costs based on 2026 inflation rate.	N/A
		5.1.7 ENERGY STAR and CEE Tier 2 Room Air Conditioner	RS-APL-ESRA-V12-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to future avoided replacement costs based on 2026 inflation rate. Update to CEERexist assumptions.	Decrease
		5.1.9 Room Air Conditioner Recycling	RS-APL-RARC-V05-260101	Revision	Addition of separate assumptions for IQ Room AC units recycled reflecting usage assumptions consistent with the Room AC measure. Update to CEERexist assumptions.	Increase for IQ
		5.1.10 ENERGY STAR Clothes Dryer	RS-APL-ESDR-V08-260101	Revision	Addition of language on possible ENERGY STAR retirement. Clarification to use Actual CEFeff if unknown.	N/A
		5.1.11 ENERGY STAR Water Coolers	RS-APL-WTCL-V03-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A
		5.1.12 Ozone Laundry	RS-APL-OZNE-V08-260101	Revision	%Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs
		5.1.14 Residential Induction Cooking Appliances	RS-MSC-INDC-V04-260101	Revision	Update to measure to apply prescriptive consumption values. Measure cost update. %cooling assumptions provided by market type based on GDS baseline study. %Electric_Heat and %Fossil_Heat provided by market and utility based on GDS baseline study.	Increase
		5.1.17 ENERGY STAR All-in-One Clothes Washer-Dryer	RS-APL-ACWD-V02-260101	Revision	Addition of language on possible ENERGY STAR retirement. Algorithms for fossil DHW added to both non-fuel switch and fuel switch sections. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings	
	Consumer Electronics	5.1.18 Residential Refrigerator Seal Replacement	RS-APL-RRSR-V01-260101	New	New measure	N/A	
		5.2.3 ENERGY STAR Televisions	RS-CEL-TVS-V03-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A	
		5.2.4 Smart Sockets	RS-CEL-SSOC-V02-260101	Revision	Updated measure costs	N/A	
	HVAC		5.3.1 Centrally Ducted Air Source Heat Pump (Central, Ductless and Portable)	RS-HVC-ASHP-V16-260101	Revision	Addition of Room AC being appropriate baseline for mobile homes when the existing condition. Addition of Electric Furnace Fan Savings calculation when appropriate. Updated measure costs. Update to Room AC existing efficiency assumptions.	Dependent on inputs
			5.3.3 Central Air Conditioning	RS-HVC-CAC1-V14-260101	Revision	Replacing efficient specifications from ENERGY STAR (which is being sunset in February 2026) with the Consortium for Energy Efficiency (CEE). Update to capacity assumptions now by market sector, based on GDS Baseline Study. Update to mobile home Room AC baseline efficiency assumptions. Updated measure costs.	Dependent on inputs
			5.3.4 Duct Insulation and Sealing	RS-HVC-DINS-V14-260101	Revision	Addition of savings for electric furnaces. %Electric v %Fossil Heat, unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
			5.3.6 Gas High Efficiency Boiler	RS-HVC-GHEB-V13-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to measure cost.	N/A
			5.3.7 Gas High Efficiency Furnace	RS-HVC-GHEF-V15-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to measure cost. Update to deemed capacity based on GDS Baseline study.	Decrease
			5.3.8 Ground Source Heat Pump	RS-HVC-GSHP-V16-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to measure cost.	N/A
			5.3.9 High Efficiency Bathroom Exhaust or Radon Mitigation Fan	RS-HVC-BAFA-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A
			5.3.10 HVAC Tune Up (Central Air Conditioning)	RS-HVC-TUNE-V10-260101	Revision	Adding distribution efficiency to cooling efficiency assumptions.	Increase
			5.3.11 Programmable Thermostats	RS-HVC-PROG-V10-260101	Revision	Fan savings algorithm adjusted to allow kWh or therm savings depending on furnace fuel.	N/A
5.3.15 ENERGY STAR Ceiling Fan	RS-HVC-CFAN-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement. Updates to fan assumption based on ENERGY STAR QPL. Update assumption to 100% LED lamps.	Decrease			

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
		5.3.16 Advanced Thermostats	RS-HVC-ADTH-V11-260101	Revision	Update to Heating_Reduction assumption when existing thermostat is unknown – applying weighting of manual and programmable thermostats. New values provided by market sector based on GDS Baseline Study. Fan savings algorithm adjusted to allow kWh or them savings depending on furnace fuel. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.3.17 Gas High Efficiency Combination Boiler	RS-HVC-COMB-V06-260101	Revision	Update to Unknown Household Type based on 2020 RECS data.	Dependent on inputs
		5.3.20 Residential Energy Recovery Ventilator (ERV)	RS-HVC-ERVS-V05-260101	Revision	Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat provided by market and utility based on GDS baseline study. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.3.21 Air Handler Filter Cleaning/ Replacement	RS-HVC-AHFR-V02-260101	Revision	Updated EFLHs to match other measures. %Electric_Heat and %Fossil_Heat and %Cooling provided by market and utility based on GDS baseline study.	Dependent on inputs
		5.3.22 High Efficiency Kitchen Exhaust Fans	RS-HVC-KEXF-V02-260101	Revision	Addition of language on possible ENERGY STAR retirement.	N/A
		5.3.23 Gas Heat Pump	RS-HVC-RGPHP-V01-260101	New	New measure	N/A
	Hot Water	5.4.1 Domestic Hot Water Pipe Insulation	RS-HWE-PINS-V10-260101	Revision	%Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs
		5.4.2 Gas Water Heater	RS-HWE-GWHT-V13-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to future avoided replacement costs based on 2026 inflation rate. Update to Unknown Household Type based on 2020 RECS data. Addition of gas instantaneous baseline.	Dependent on inputs
		5.4.3 Heat Pump Water Heaters	RS-HWE-HPWH-V15-260101	Revision	Addition of language on possible ENERGY STAR retirement. Update to measure costs. Addition of algorithm for ThermsHeatImpact. %Electric_Heat and %Fossil_Heat provided by market and utility based on GDS baseline study. Update to Unknown Household Type based on 2020 RECS data. Addition of gas instantaneous baseline.	Dependent on inputs
		5.4.4 Low Flow Faucet Aerators	RS-HWE-LFFA-V16-260101	Revision	Update to Unknown Household Type based on 2020 RECS data. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs
		5.4.5 Low Flow Showerheads	RS-HWE-LFSH-V15-260101	Revision	Update to Unknown Household Type based on 2020 RECS data. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
		5.4.8 Thermostatic Restrictor Shower Valve	RS-HWE-TRVA-V10-260101	Revision	Update to Unknown Household Type based on 2020 RECS data. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs
		5.4.9 Shower Timer	RS-DHW-SHTM-V08-260101	Revision	Update to Unknown Household Type based on 2020 RECS data. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs
		5.4.11 Drain Water Heat Recovery	RS-DHW-DWHR-V06-260101	Revision	Update to Unknown Household Type based on 2020 RECS data.	Dependent on inputs
		5.4.12 Recirculating Pump Controls	RS-HWE-CDHW-V03-260101	Revision	Update to Unknown Household Type based on 2020 RECS data.	Dependent on inputs
		5.4.13 Auto-Diverting Tub Spout System	RS-HWE-ADTS-V02-260101	Revision	Added secondary equation to calculate savings for tub-only systems. Update to Unknown Household Type based on 2020 RECS data. %Electric_DHW and %Fossil_DHW updated based on GDS baseline study.	Dependent on inputs
		5.4.14 Residential Solar Water Heater	RS-HWE-RSWH-V01-260101	New	New measure	N/A
	Lighting	5.5.6 LED Specialty Lamps	RS-LTG-LEDD-V18-260101	Revision	Addition of language on possible ENERGY STAR retirement. Measure now DI only with 2 year measure life. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value).	Decrease
		5.5.7 LED Exit Signs	RS-LTG-LEDE-V05-260101	Revision	Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value).	N/A
		5.5.8 LED Screw Based Omnidirectional Bulbs	RS-LTG-LEDA-V17-260101	Revision	Addition of language on possible ENERGY STAR retirement. Measure now DI only with 2 year measure life. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value).	Decrease
		5.5.9 LED Fixtures	RS-LTG-LDFX-V08-260101	Revision	Addition of language on possible ENERGY STAR retirement. Measure now DI only with 2 year measure life. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value).	Decrease
		5.5.10 Holiday String Lighting	RS-LTG-LEDH-V05-260101	Revision	Clarification that resistance heat is both baseboard and electric furnace.	N/A
		5.5.11 LED Nightlights	RS-LTG-NITL-V04-260101	Revision	Clarification that resistance heat is both baseboard and electric furnace. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value). Update to lifetime ISR using new Real Discount Rate.	N/A
		5.5.12 Connected LED Lamps	RS-LTG-LEDC-V05-250101	Errata	Fixing heat penalty algorithms to reflect savings calculation. Updating assumptions to use either Omnidirectional or Specialty versions.	N/A

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
			RS-LTG-LEDC-V06-260101	Revision	Update to measure life. Clarification that resistance heat is both baseboard and electric furnace. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value). Update to lifetime ISR using new Real Discount Rate.	N/A
		5.5.13 EISA Exempt LED Lighting	RS-LTG-LEDE-V4-260101	Revision	Addition of language on possible ENERGY STAR retirement. Additional linear options added. Clarification that resistance heat is both baseboard and electric furnace. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value). Update to lifetime ISR using new Real Discount Rate.	Dependent on inputs
		5.5.14 Ultra-Efficient LED Lighting	RS-LTG-ULED-V2-260101	Revision	Addition of language on possible ENERGY STAR retirement. Clarification that resistance heat is both baseboard and electric furnace. Adding distribution efficiency to cooling efficiency assumptions (no change to WHF value). Update to lifetime ISR using new Real Discount Rate.	N/A
	Shell	5.6.1 Air Sealing	RS-SHL-AIRS-V15-260101	Revision	Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. New terms added to calculate savings for spray foam. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.6.2 Basement Sidewall Insulation	RS-SHL-BINS-V16-260101	Revision	Clarification of conditioned v semi-conditioned. Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. Update to cooling EFLH assumption (for Coincident peak demand savings) to provide proportionately lower EFLH for semi-conditioned spaces. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.6.3 Floor Insulation Above Crawlspace	RS-SHL-FINS-V17-250101	Errata	CDD and HDD values updated to reflect conditioned space	Increase
			RS-SHL-FINS-V18-260101	Revision	Clarification of conditioned v semi-conditioned. Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. New assumptions for R_old and framing factor for mobile homes added. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs

Volume	End Use	Measure Name	Measure Code	Change Type	Explanation	Impact on Savings
		5.6.4 Wall Insulation	RS-SHL-WINS-V15-260101	Revision	Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.6.5 Ceiling/Attic Insulation	RS-SHL-AINS-V09-260101	Revision	Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.6.6 Rim/Band Joist Insulation	RS-SHL-RINS-V08-260101	Revision	Clarification of conditioned v semi-conditioned. Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. Update to cooling EFLH assumption (for Coincident peak demand savings) to provide proportionately lower EFLH for semi-conditioned spaces. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.6.7 Low-E Storm Window	RS-SHL-LESW-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement	N/A
		5.6.8 High Performance Windows	RS-SHL-TTWI-V06-260101	Revision	Addition of language on possible ENERGY STAR retirement	N/A
		5.6.9 Insulated Cellular Shades	RS-SHL-INCS-V04-260101	Revision	Measure life and cost update. Adding distribution efficiency to cooling efficiency assumptions.	Increase
		5.6.11 Insulated Concrete Forms	RS-SHL-ICF-V03-260101	Revision	Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.6.12 Energy Efficient Doors	RS-SHL-EEDR-V01-260101	New	New measure	N/A
	Miscellaneous	5.7.1 High Efficiency Pool Pumps	RS-MSC-RPLP-V05-260101	Revision	Addition of language on possible ENERGY STAR retirement	N/A
		5.7.3 Level 2 Electric Vehicle Charger	RS-MSC-L2CH-V04-260101	Revision	Addition of language on possible ENERGY STAR retirement	N/A
		5.7.5 Tree Planting	RS-MSC-TREE-V02-260101	Revision	Addition of savings for room AC cooled homes. %Electric_Heat and %Fossil_Heat, Unknown efficiency and %cooling assumptions provided by market type based on GDS baseline study. Update to DUA factor. Adding distribution efficiency to cooling efficiency assumptions.	Dependent on inputs
		5.7.6 Smart Irrigation Controls	RS-MSC-IRGN-V01-260101	New	New measure	Dependent on inputs

**Table 1.4: Summary of Attachment A: IL-NTG Methods Revisions**

IL-TRM Volume	Sectors	Protocol Name	Change Type	Explanation
Vol. 4	Commercial, Industrial, and Public Sector	N/A	Revision	Revision to Table 3-1 regarding timing horizon for Midstream programs and text preceding the table.
Vol. 4	Commercial, Industrial, and Public Sector	Core Non-Residential Protocol	Revision	Revision to Consistency Checks subsection
Vol. 4	Commercial, Industrial, and Public Sector	C&I New Construction Protocol	Revision	Formatting revision to cross-reference of Figure 3-2 in the text
Vol. 4	Residential and Low Income Sector Protocols	Residential New Construction Protocol	Revision	Formatting revision – removed extra space
Vol. 4	Cross-Sector Protocols	Midstream FR Protocol	Revision	Revision to the Midstream FR algorithm

### 1.3 Enabling ICC Policy

This Illinois Statewide Technical Reference Manual (TRM) was developed to comply with the Illinois Commerce Commission (ICC or Commission) Final Orders from the electric and gas Utilities’ Energy Efficiency Plan dockets.<sup>6</sup> In the Final Orders, the ICC required the utilities to work with the Illinois Department of Commerce and Economic Opportunity (DCEO) and the Illinois Energy Efficiency Stakeholder Advisory Group (SAG) to develop a statewide TRM. See, e.g., ComEd’s Final Order (*Docket No. 10-0570, Final Order<sup>7</sup> at 59-60, December 21, 2010*); Ameren’s Final Order (*Docket No. 10-0568, Order on Rehearing<sup>8</sup> at 19, May 24, 2011*); Peoples Gas/North Shore Gas’ Final Order (*Docket No. 10-0564, Final Order<sup>9</sup> at 76, May 24, 2011*), and Nicor’s Final Order (*Docket No. 10-0562, Final Order<sup>10</sup> at 30, May 24, 2011*).

As directed in the Utilities’ Efficiency Plan Orders, the SAG had the opportunity to, and also participated in, every aspect of the development of the TRM. Interested members of the SAG participated in weekly teleconferences to review, comment, and participate in the development of the TRM. The active participants in the TRM were designated as the “Technical Advisory Committee” (TAC). The TAC participants include representatives from the following organizations:

- the Utilities (ComEd, Ameren IL, Nicor Gas, Peoples Gas/North Shore Gas),
- Implementation contractors,
- Illinois Department of Commerce and Economic Opportunity (DCEO),
- the independent evaluators,
- ICC Staff,
- the Illinois Attorney General’s Office (AG),
- Natural Resources Defense Council (NRDC),
- the Environmental Law and Policy Center (ELPC),
- the Citizen’s Utility Board (CUB),
- The University of Illinois at Chicago,
- Future Energy Enterprises,
- Issue-specific invited participants, including; Geothermal Alliance of Illinois, the Geothermal Exchange Organization, Embertec, Trane, TrickleStar, Oracle, Google Nest, Ecobee, and US EPA ENERGY STAR.

### 1.4 Development Process

Each version of the IL-TRM is approved by the Commission in the ICC Dockets listed below, and can all be found on the ICC webpage; <https://www.icc.illinois.gov/programs/illinois-statewide-technical-reference-manual-for-energy-efficiency>. Errata to the IL-TRM versions may also be found on that ICC IL-TRM webpage.

TRM Version	ICC Docket Number
Version 1.0	12-0528
Version 2.0	13-0437
Version 3.0	14-0189

<sup>6</sup> The Illinois Utilities subject to this TRM include: Ameren Illinois Company d/b/a Ameren Illinois (Ameren), Commonwealth Edison Company (ComEd), The Peoples Gas Light and Coke Company and North Shore Gas Company, and Northern Illinois Gas Company d/b/a Nicor Gas.

<sup>7</sup> <http://www.icc.illinois.gov/docket/files.aspx?no=10-0570&docId=159809>

<sup>8</sup> <http://www.icc.illinois.gov/docket/files.aspx?no=10-0568&docId=167031>

<sup>9</sup> <http://www.icc.illinois.gov/docket/files.aspx?no=10-0564&docId=167023>

<sup>10</sup> <http://www.icc.illinois.gov/docket/files.aspx?no=10-0562&docId=167027>

TRM Version	ICC Docket Number
Version 4.0	15-0187
Version 5.0	16-0171
2018 Version 6.0	17-0106
2019 Version 7.0	18-1605
2020 Version 8.0	19-0954
2021 Version 9.0	20-0741
2022 Version 10.0	21-0751
2023 Version 11.0	22-0603
2024 Version 12.0	23-0709
2025 Version 13.0	

The policies surrounding the applicability and use of the IL-TRM in planning, implementation, and evaluation were originally established by the Commission in ICC Docket No. 13-0077,<sup>11</sup> and most recently in ICC Docket Nos. 17-0270<sup>12</sup> and 19-0983.<sup>13</sup>

This document represents the 14th version of the IL-TRM and applies to Section 8-103B and Section 8-104 energy efficiency programs. It contains a series of new measures, as well as a series of errata items<sup>14</sup> and updates to existing measures already present in the first 13 versions. Like the previous versions, it is a result of an ongoing review process involving the Illinois Commerce Commission (ICC) Staff (Staff or ICC Staff), the Utilities, the Evaluators, the SAG TAC, and the SAG. VEIC meets with the SAG and/or the TRM TAC at least once each month to create a high level of transparency and vetting in the development of this TRM.

Measure requests that are submitted by interested parties are ranked based on the following criteria to determine the approximate priority level for order of inclusion in the TRM:

1. High Priority
  - a. For those existing measures that make up a significant portion of a utilities’ portfolio and/or where the impact of the requested change is high
  - b. For new measures where plans are in place to implement in the next program year
2. Medium Priority
  - a. For existing measures that are a less significant percent of a utilities’ portfolio and value change will not have a significant impact
  - b. For new measures where a savings value is estimated but implementation plans not yet developed
3. Low Priority
  - a. For existing measures that represent a very small percent of a utilities’ portfolio
  - b. For new measures that are just beginning to be explored and will not be implemented in the next program year

These rankings are used to align budget and schedule constraints with desired updates from the TRM.

As measure requests are finalized leading up to the next update of the TRM, weekly TAC meetings are often scheduled to maximize collaboration and visibility into the measure characterization process. Where consensus does

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<sup>11</sup><http://www.icc.illinois.gov/docket/files.aspx?no=13-0077&docid=203903>;  
<http://www.icc.illinois.gov/docket/files.aspx?no=13-0077&docid=195913>;  
<http://www.icc.illinois.gov/downloads/public/edocket/339744.pdf>

<sup>12</sup> <https://www.icc.illinois.gov/docket/files.aspx?no=17-0270&docid=257523>

<sup>13</sup> <https://icc.illinois.gov/docket/P2019-0983/documents/292186> Please see IL-TRM Policy Document Version 3.0 available at <https://icc.illinois.gov/docket/P2019-0983/documents/292186/files/509718.pdf>

<sup>14</sup> Errata as well as links to the official IL-TRM documents, dockets, and policy documents are available on the following ICC webpage: <http://www.icc.illinois.gov/Electricity/programs/TRM.aspx>

not emerge on specific measures or issues, those items are identified in a memo. As a result, this TRM represents a broad consensus amongst the SAG and TAC participants. In keeping with the goal of transparency, all of the comments and their status to date are available through the TAC SharePoint web site, <https://portal.veic.org>.

For each measure characterization, this TRM includes engineering algorithm(s) and a value(s) for each parameter in the equation(s). These parameters have values that fall into one of three categories: a single deemed value, a lookup table of deemed values or an actual value such as the capacity of the equipment. The TRM makes extensive use of lookup tables because they allow for an appropriate level of measure streamlining and customization within the context of an otherwise prescriptive measure.

Accuracy is the overarching principle that governs what value to use for each parameter. When it is explicitly allowed within the text of the measure characterization, the preferred value is the actual or on-site value for the individual measure being implemented. The *deemed values*<sup>15</sup> in the lookup tables are the next most accurate choice, and in the absence of either an actual value or an appropriate value in a lookup table, the single, *deemed value* should be used. As a result, this single, *deemed value* can be thought of as a default value for that particular input to the algorithm.

A single *deemed savings estimate* is produced by any given combination of an algorithm and the allowable input values for each of its parameters. In cases where lookup tables are provided, there is a range of deemed savings estimates that are possible, depending on site-specific factors such as equipment capacity, location and building type.

Algorithms and their parameter values are included for calculating estimated:

- Gross annual electric energy savings (kWh)
- Gross annual natural gas energy savings (therms)
- Gross electric summer coincident peak demand savings (kW)

To support cost-effectiveness and cumulative persisting annual savings (CPAS) calculations, parameter values are also included for:

- Incremental costs (\$)
- Measure life (years)
- Operation and maintenance costs (\$)
- Water (gal) and other resource savings where appropriate.

### 1.4.1 Reliability Review

The process of incorporating new and better information into the TRM occurs annually as new measures and errors are identified, program designs change, old measures are dropped from programs, or other external events (such as code and standard changes or new evaluations and other data) warrant a review of assumptions. However, not all measures have updates triggered by such events, and some measures continue to appear in the TRM without ongoing review. Short of proactively identified issues that would trigger an update to a TRM characterization, a regular reliability review should be undertaken to assess that the information in older measures is still relevant and reliable. This review will include a general appraisal of reasonableness and continued program relevancy and an update of any assumptions to reflect new information.

To ensure that measures initially developed in the past and not recently revisited are updated and retired as needed, each measure is given a Review Deadline – a date that triggers a reliability review. This Review Deadline is established for each measure based on factors such as expected revisions to energy codes or federal standards; knowledge of upcoming evaluation or research efforts; knowledge of rapidly changing technology, cost, baselines, or other factors; or expected shifts in current customer practices. No Review Deadline is longer than six years from the date of the

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<sup>15</sup> Emphasis has been added to denote the difference between a “deemed value” and a “deemed savings estimate”. A deemed value refers to a single input value to an algorithm, while a deemed savings estimate is the result of calculating the end result of all of the values in the savings algorithm.

initial characterization or last update of a measure. The TRM Administrator will propose Review Deadlines for each measure, and they are reviewed and approved by the TAC. The Review Deadline for each measure is indicated in the measure characterization within the TRM. For example, a Review Deadline specified as 1/1/2027 means that the measure will be reviewed no later than the annual IL-TRM update process that occurs in 2026, in advance of the 1/1/2027 Review Deadline. Following a review and/or update, a new Review Deadline will be assigned to that measure.

## 2 Organizational Structure

The organization of this document follows a three-level format. These levels are designed to define and clarify what the measure is and where it is applied.

### 1. Market Sectors Volumes<sup>16</sup>

- This level of organization specifies the type of customer the measures apply to, either Commercial and Industrial (provided in Volume 2), Residential (provided in Volume 3), or cross-cutting measures, such as Behavior Persistence (provided in Volume 4, together with Attachments including the documentation of Illinois Statewide Net-to-Gross Methodologies, Guidelines for EULs for Custom Measures, and Framework for Counting Market Transformation Savings in Illinois).
- Answers the question, “What category best describes the customer?”

### 2. End-use Category

- This level of organization represents most of the major end-use categories for which an efficient alternative exists. The following table lists all of the end-use categories in this version of the TRM.
- Answers the question, “To what end-use category does the measure apply?”

**Table 2.1: End-Use Categories in the TRM<sup>17</sup>**

Volume 2: Commercial and Industrial Market Sector	Volume 3: Residential Market Sector	Volume 4: Cross-Cutting Measures and Attachments
Agricultural Equipment	Appliances	Behavior
Food Service Equipment	Consumer Electronics	System Wide
Hot Water	Hot Water	
HVAC	HVAC	
Lighting	Lighting	
Refrigeration	Shell	
Compressed Air	Miscellaneous	
Shell		
Miscellaneous		

### 3. Measure & Technology

- This level of organization represents individual efficient measures such as CFL lighting and LED lighting, both of which are individual technologies within the Lighting end-use category.
- Answers the question, “What technology defines the measure?”

This organizational structure is silent on which fuel the measure is designed to save; electricity or fossil fuels. By organizing the TRM this way, measures that save on both fuels do not need to be repeated. As a result, the TRM will be easier to use and to maintain.

## 2.1 Measure Code Specification

In order to uniquely identify each measure in the TRM, abbreviations for the major organizational elements of the TRM have been established. When these abbreviations are combined and delimited by a dash ('-') a unique, 18-character alphanumeric code is formed that can be used for tracking the measures and their associated savings estimates. Measure codes appear at the end of each measure and are structured using five parts.

<sup>16</sup> Note that the Public sector buildings and low income measures are not listed as a separate Market Sector. The Public building type is one of a series of building types that are included in the appropriate measures in the Commercial and Industrial Sector.

<sup>17</sup> Please note that this is not an exhaustive list of end-uses and that others may be included in future versions of the TRM.

**Code Structure = Market + End-use Category + Measure + Measure Version # + Effective Date**

For example, the commercial boiler measure is coded: “CI-HVC-BLR\_-V01-120601”

**Table 2.2: Measure Code Specification Key**

Market (@@)	End-use (@@@)	Measure (@@@@)	Version (V##)	Effective Date
CI (C&I)	AGE (Agricultural)	BLR_	V01	YYMMDD
RS (Residential)	APL (Appliances)	T5FX	V02	YYMMDD
CC (Cross-Cutting)	BEH (Behavior)	T8FX	V03	YYMMDD
	CEL (Consumer Electronics)	...	...	...
	CPA (Compressed Air)			
	FSE (Food Service)			
	HVC (HVAC)			
	HWE (Hot Water)			
	LTG (Lighting)			
	MSC (Miscellaneous)			
	RFG (Refrigeration)			
	SHL (Shell)			
	SYS (System-wide)			

## 2.2 Components of TRM Measure Characterizations

Each measure characterization uses a standardized format that includes at least the following components. Measures with a higher level of complexity may have additional components, but also follow the same format, flow and function.

### DESCRIPTION

Brief description of measure stating how it saves energy, the markets it serves and any limitations to its applicability.

### DEFINITION OF EFFICIENT EQUIPMENT

Clear definition of the criteria for the efficient equipment used to determine delta savings. Including any standards or ratings if appropriate.

### DEFINITION OF BASELINE EQUIPMENT

Clear definition of the efficiency level of the baseline equipment used to determine delta savings including any standards or ratings if appropriate. If a Time of Sale measure the baseline will be new base level equipment (to replace existing equipment at the end of its useful life or for a new building). For Early Replacement or Early Retirement measures the baseline is the existing working piece of equipment that is being removed.

### DEEMED LIFETIME OF EFFICIENT EQUIPMENT

The expected duration in years (or hours) that the measure is expected to provide savings. Please see “Measure Life” in Section 3.5 Glossary. This is often based on the rated technical life of the equipment but may also be adjusted in consideration of the potential for users to remove or remodel and to allow for breakages or imperfect operation. If the savings of a population is expected to *decline* due to outcomes such as the overriding of settings or poorly maintaining equipment, a midlife adjustment should be used to reduce the lifetime savings<sup>18</sup>; however, the measure lifetime should still reflect the technical lifetime (i.e. total years any savings are expected to occur).

<sup>18</sup> In rare cases, for example residential Home Energy Report (HER) type programs, it may be appropriate to have savings decay each year throughout the measure life rather than in a midlife adjustment.

If an early replacement measure, the assumed Remaining Useful Life (RUL) of the existing unit is also provided.

**DEEMED MEASURE COST**

For time of sale measures, incremental cost from baseline to efficient is provided. Installation costs should only be included if there is a difference between each efficiency level. For Early Replacement the full equipment and install cost of the efficient installation is provided in addition to the full deferred hypothetical baseline replacement cost. See ‘3.9 Measure Incremental Cost Definition’ for more detailed information concerning incremental cost calculations.

**LOADSHAPE**

The appropriate loadshape to apply to electric savings is provided.

**COINCIDENCE FACTOR**

The summer coincidence factor is provided to estimate the impact of the measure on the utility’s system peak – defined as 1PM to hour ending 5PM on non-holiday weekdays, June through August.

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**Algorithm**

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**CALCULATION OF ENERGY SAVINGS**

Algorithms are provided followed by list of assumptions with their definition.

If there are no Input Variables, there will be a finite number of Output values. These will be identified and listed in a table. Where there are custom inputs, an example calculation is often provided to illustrate the algorithm and provide context.

**ELECTRIC ENERGY SAVINGS**

**SUMMER COINCIDENT PEAK DEMAND SAVINGS**

**FOSSIL FUEL SAVINGS**

**WATER IMPACT DESCRIPTIONS AND CALCULATION**

**DEEMED O&M COST ADJUSTMENT CALCULATION**

Only required if the operation and maintenance cost for the efficient case is different to the baseline. See ‘3.9 Measure Incremental Cost Definition’ for information on the appropriate treatment of O&M costs.

**MEASURE CODE**

**REVIEW DEADLINE**

If not otherwise updated as part of an identified new TRM issue request before this Review Deadline, the measure will undergo a reliability review for reasonableness, continued program relevancy, and update of material assumptions during the update cycle prior to this deadline.

## 2.3 Variable Input Tables

Many of the measures in this TRM require the user to select the appropriate input value from a list of inputs for a given parameter in the savings algorithm. Where the TRM asks the user to select the input, look-up tables of allowable values are provided. For example, a set of input parameters may depend on building type; while a range of values may be given for each parameter, only one value is appropriate for any specific building type. If no table of alternative inputs is provided for a particular parameter, then the single deemed value will be used, unless the

measure has a custom allowable input.

### 2.3.1 C&I Custom Value Use in Measure Implementation

This section defines the requirements for capturing Custom variables that can be used in place of defaults for select assumptions within the prescriptive measures defined in this statewide TRM. This approach is to be used when a variable in a measure formula can be replaced by a verifiable and documented value that is not presented in the TRM. This approach assumes that the algorithms presented in the measure are used as stated and only allows changes to certain variable values and is not a replacement algorithm for the measure. A custom variable is when customer input is provided to define the number, or the value is measured at the site. Custom values can also be supplied from product data of the measure installed. In certain cases, the custom data can be provided from a documented study or report that is applicable to the measure. Custom variables and potential sources are clearly defined in the specific measures where “Actual”, or “Custom” is noted.

In exceptional cases where the participant, program administrator, and independent evaluator all agree that the TRM algorithm for a particular energy efficiency measure does not accurately characterize the energy efficiency measure within a project due to the complexity in the design and configuration of the particular energy efficiency project, a more comprehensive custom engineering and financial analysis may be used that more accurately incorporates the attributes of the measure in the complex energy efficiency project. In such cases and consistent with Commission policy adopted in ICC Docket No. 17-0270, Program Administrators are subject to retrospective evaluation risk (retroactive adjustments to savings based on ex post evaluation findings) for such projects using customized savings calculations.

## 2.4 Program Delivery & Baseline Definitions

The measure characterizations in this TRM are not grouped by program delivery type. As a result, the measure characterizations provided include information and assumptions to support savings calculations for the range of program delivery options commonly used for the measure. The organizational significance of this approach is that multiple baselines, incremental costs, O&M costs, measure lives and in-service rates are included in the measure characterization(s) that are delivered under two or more different program designs. Values appropriate for each given program delivery type are clearly specified in the algorithms or in look-up tables within the characterization.

Care has been taken to clearly define in the measure’s description the types of program delivery that the measure characterization is designed to support. However, there are no universally accepted definitions for a particular program type, and the description of the program type(s) may differ by measure. Nevertheless, program delivery types can be generally defined according to the following baseline definitions. These are the definitions used in the measure descriptions, and, when necessary, individual measure descriptions may further refine and clarify these definitions of program delivery type.

### Baseline Definitions

The energy savings for an efficiency measure is derived, in significant part, by estimating the difference between baseline efficiency and the efficiency of the measure in question. Baselines are the standard practices regarding investment in efficiency (whether measures or operations) that efficiency programs are designed to change. They address the first (gross savings) component of the question “what would have occurred absent the efficiency program?” The answer to that question is completed when making net-to-gross adjustments.

Specific measure baselines are to be covered in the TRM; however, general descriptions and guidance regarding baselines are included here.

Baselines for calculating gross savings can differ depending on the type of efficiency initiative:<sup>19</sup>

- **Time of Sale (TOS)**

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<sup>19</sup> Note that best efforts should be made to ensure that net-to-gross adjustments shall be estimated relative to the specific gross savings baselines for a given product or program.

This type of initiative is designed to influence the decision of a customer who is going to purchase a new product independent of an efficiency program, with the program only influencing the *efficiency level* of the product purchased (not whether a product would be purchased). In most cases, the baseline for time of sale initiatives is the least efficient product the customer is permitted to purchase by law (i.e. complies with state and federal product efficiency standards). However, when there is no equipment available at those legal minimums the baseline shall be adjusted to the TAC agreed efficiency that represents the least efficient products that would be commonly purchased in the Illinois market absent efficiency programs. For products for which there are no legal minimum efficiency requirements, the baseline should be the TAC agreed efficiency that represents the least efficient products that would be commonly purchased in the Illinois market absent efficiency programs.

- **New Construction (NC)**

This type of initiative is designed to influence the design and construction of new buildings and major renovations to existing buildings, including decisions regarding which products will be installed in such buildings. Note that it only covers cases in which the independent evaluator concludes that the customer was planning the new construction or major renovation project independent of an efficiency program; cases in which an efficiency program was what triggered a customer to renovate an existing building are treated under the Retrofit or Early Replacement program discussions below. The default baseline for new construction initiatives shall be the applicable efficiency codes (including state or local building codes) and/or product efficiency standards in effect at the time a permit was issued. However, if and when the TAC accepts an assessment of baseline construction practices documenting typical construction practice different than code, whether lower or higher, the results of such study will become the baseline for estimating new construction project savings.<sup>20</sup> A baseline that is lower than code can be estimated and used only when the TAC accepts study results demonstrating that the typical industry practice in some geographic regions or market segments is for construction or renovation at a level of efficiency below code.<sup>21</sup>

- **Early Replacement (EREP)**

This type of initiative is designed to convince customers to replace functional equipment earlier than they otherwise would. In such cases there shall be a dual baseline, with the existing equipment efficiency (i.e., the efficiency of the equipment being replaced) being the baseline for the remaining useful life of the equipment and a potentially different (typically higher) efficiency for standard *new* products (consistent with the time of sale baselines, as adjusted for any known changes to future codes or standards) being used as baseline for the remaining life of the efficiency measure. Note that for a measure to be treated as “early replacement”, the existing equipment being replaced early must be in good functioning condition or require minimal repair (i.e., it is reasonable to conclude that it could have continued to function in the absence of the program).

Additional requirements may be developed by the TAC and applied to certain measures to ensure appropriate use of early replacement assumptions, such as a maximum existing unit age, and/or to help ensure a positive cost-effectiveness result is achieved, such as requiring maximum existing unit efficiency eligible for early replacement.

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<sup>20</sup> Baseline efficiency levels set above (i.e., more efficient) than a code/standard baseline are only possible for measures or measure bundles with efficiency alternatives that fall between the relevant code/standard and the efficiency requirement of the program (i.e., an “intermediate efficiency” level), and are only possible in cases where the independent evaluator determines that NTG is not capturing the impact of these intermediate efficiency levels.

<sup>21</sup> This would include cases in which utility programs endeavor to improve code compliance and can measure such improvement. It would also include situations in which a compelling case could be made that a utility initiative was necessary to enable a more efficient state or local code to be adopted (at least sooner than it otherwise would have been).

Note that in addition to the above criterion, the independent evaluator must conclude that the program caused the customer to replace their existing equipment before the end of its useful life to award the additional net savings from the early replacement. Any adjustment related to this concept is handled in the net-to-gross ratio and is not addressed in gross savings.

- **Early Retirement (ERET)**

This type of initiative is designed to convince customers to remove (and not replace) equipment that would otherwise continue to remain functional (and consume energy). In such cases, the baseline is the existing efficiency of the equipment being removed. Note that for a measure to be treated as “early retirement”, the existing equipment being removed must be in good functioning condition.

- **Retrofit (RF)**

This type of initiative is designed to convince customers to add efficiency features and/or practices to energy consuming products, systems, or buildings. For such measures, the baseline is the existing level of efficiency of the products, systems or buildings to which efficiency features are being added. This is the case even if the act of adding efficiency features and/or practices triggers application of a state or local code because such a trigger would not have occurred absent the efficiency program.

**Other Program Delivery Types**

Additional program delivery types may have their own distinct assumptions (e.g., In Service Rates) provided within a measure characterization, for example:

- **Direct Install (DI)** - A program where measures are installed by a program representative during a site visit.
- **Efficiency Kits (KITS)** - A program where measures are provided to customers and in an Efficiency Kit and may be distributed through a number of channels (e.g. online ordering, schools, community events, trade shows, etc.).

**2.4.1 Default Measure Type for Program Delivery Methods**

The decision as to whether a measure is a Time of Sale or Early Replacement measure is critical to ensure the appropriate baseline is used to calculate the measure savings and the appropriate costs are applied. This decision could include consideration of:

- The functionality of or required repair cost of the existing equipment
- The age of the existing equipment and it’s estimated remaining useful life
- The role of the Program Administrator or a representative / contractor (referred herein as PA) in the decision to replace the equipment
- The importance of the incentive and/or contact with the PA in the decision to replace the equipment
- The timing of replacement in relation to regular maintenance or recapitalization upgrade schedules

The default position for measures in some common program designs are provided below, however diverging from this default is possible.

Program Type	Default Measure Type
Direct Install	Early Replacement
Audits	Early Replacement if results in replacing functioning equipment
Standard Rx Lighting Program (one-to-one fixture replacement)	Time of Sale
Standard Rx Lighting Program (lighting system redesign or delamping)	Early Replacement or Early Retirement

Program Type	Default Measure Type
Other Standard Rx Programs	Time of Sale or Retrofit
Downstream	Time of Sale
Midstream	Time of Sale
Upstream	Time of Sale

Diverging from the default could be based upon either:

- A unit by unit site specific basis as governed by guidance established by the TAC and clearly documented in the TRM, for example Residential HVAC early replacement measures require verifying the unit is functional or that required repairs cost less than 20% of the cost of a new baseline unit.
- A TAC agreed divergence could be established on a program/measure level supported by an independent evaluation to demonstrate that the presence of the incentive and/or contact with the Program (for example via targeted marketing material), was significant enough to result in the participants replacing functioning equipment that they would not otherwise have done.

It may be appropriate to apply a deemed percent split of Time of Sale and Early Replacement assumptions based on these evaluation results, noting that it may be observed that different markets or participant groups have very different deemed percentages of early replacements (e.g., low income populations are less likely to replace functioning units early without program involvement).

It is also possible that a project within a property may include both Early Replacement *and* Time of Sale measures. Classification of part of a project as Early Replacement, as defined above, does not preclude classification of another portion of the project as Time of Sale and vice versa.

## 3 Assumptions

The information contained in this TRM contains VEIC's recommendations for the content of the Illinois TRM. Sources that are cited within the TRM have been chosen based on two priorities, geography and age. Whenever possible and appropriate, VEIC has incorporated Illinois-specific information into each measure characterization. The Business TRM documents from Ameren and ComEd were reviewed, as well as program and measure specific data from evaluations, efficiency plans, and working documents.

The assumptions for these characterizations rest on our understanding of the information available. In each case, the available Illinois and Midwest-specific information was reviewed, including evaluations and support material provided by the Illinois Utilities.

When Illinois or region-specific evaluations or data were not available, best practice research and data from other jurisdictions were used, often from west- and east-coast states that have allocated large amounts of funding to evaluation work and to refining their measure characterization parameters. As a result, much of the most-defensible information originates from these regions. In every case, VEIC used the most-recent, well-designed, and best-supported studies and only if it was appropriate to generalize their conclusions to the Illinois programs.

### 3.1 Footnotes & Documentation of Sources

Each new and updated measure characterization is supported by a work paper, which is posted to the SharePoint web site (<https://portal.veic.org>).<sup>22</sup> Both the work paper and the measure characterizations themselves use footnotes to document the references that have been used to characterize the technology. The reference documents are too numerous to include in an Appendix and have instead been posted to the TRM's SharePoint website. These files can be found in the 'Sources and Reference Documents' folder in the main directory, and are also posted to the SAG's public web site (<http://www.ilsag.info/technical-reference-manual.html>).

### 3.2 General Savings Assumptions

The TRM savings estimates are expected to serve as average, representative values, or ways to calculate savings based on program-specific information. All information is presented on a per-measure basis. In using the measure-specific information in the TRM, it is helpful to keep the following notes in mind.

- All estimates of energy (kWh or therms) and peak (kW) savings are for first-year savings, not lifetime savings. Note all fossil fuel savings are presented in therms, but may be converted to other fuels using the conversion factors provided in section 3.12.1.
- Unless otherwise noted, measure life is defined by the detailed definition provided in 3.5 Glossary.
- Where deemed values for savings are provided, they represent the average energy (kWh or therms) or peak (kW) savings that could be expected from the average of all measures that might be installed in Illinois in the program year.
- In general, the baselines included in the TRM are intended to represent average conditions in Illinois. Some are based on data from the state, such as household consumption characteristics provided by the Energy Information Administration. Some are extrapolated from other areas, when Illinois data are not available.

### 3.3 Shifting Baseline Assumptions

The TRM anticipates the effects of changes in efficiency codes and standards on affected measures. When these changes take effect, a shift in the baseline is usually required. This complicates the measure savings estimation somewhat and will be handled in future versions of the TRM by describing the choice of and reasoning behind a shifting baseline assumption. In this version of the TRM, this applies to CFLs and T5/T8 Linear Fluorescents, Furnaces and Early Replacement Measures.

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<sup>22</sup> To gain access to the SharePoint web site, please contact the TRM Administrator at [iltrmadministrator@veic.org](mailto:iltrmadministrator@veic.org).

### 3.3.1 Linear Fixture Baseline Assumptions

#### Linear LED Fixtures

In July 14, 2012, Federal Standards were enacted that were expected to eliminate T-12s as an option for linear fluorescent fixtures. Through v3.0 of the TRM, it was assumed that the T-12 would no longer be baseline for retrofits from 1/1/2016. However, due to significant loopholes in the legislation, T-12 compliant product is still freely available, and in Illinois T-12s continue to hold a significant share of the existing market. Therefore, measures allow T12 as an existing fixture for early replacements, with a midlife adjustment to an assumed new baseline fixture after the assumed burn out of the existing fixture.

### 3.3.2 Early Replacement Baseline Assumptions

A series of measures have an option to choose an Early Replacement Baseline if the following conditions are met:

- The existing unit is operational when replaced, or
- The existing unit requires minor repairs<sup>23</sup>
- All other conditions will be considered Time of Sale.

Maximum efficiencies for measures to be considered early replacement should be determined by the program to ensure cost-effectiveness.

### 3.3.3 Furnace Baseline

The prior national standard for residential oil and gas furnaces was 78% AFUE. DOE raised the standard in 2007 to 80% AFUE, effective 2015. However, virtually all furnaces on the market have an AFUE of 80% or better, which prompted states and environmental and consumer groups to sue DOE over its 2007 decision. In April 2009, DOE accepted a “voluntary remand” in that litigation. In October 2009, manufacturers and efficiency advocates negotiated an agreement that, for the first time, included different standard levels in three climate regions: the North, South, and Southwest. DOE issued a direct final rule (DFR) in June 2011 reflecting the standard levels in the consensus agreement. The DFR became effective on October 25, 2011 establishing new standards: In the North, most furnaces will be required to have an AFUE of 90%. The 80% AFUE standard for the South and Southwest will remain unchanged at 80%. Oil furnaces will be required to have an AFUE of 83% in all three regions. The amended standards will become effective in May 2013 for non-weatherized furnaces and in January 2015 for weatherized furnaces. DOE estimates that the standards will save about 3.3 quads (quadrillion Btu) of energy over 30 years and yield a net present value of about \$14 billion at a 3 percent discount rate.

Update: On January 14<sup>th</sup>, 2013, the U.S. Department of Energy (DOE) proposed to settle a lawsuit brought by the American Public Gas Association (APGA) that seeks to roll back gas furnace efficiency standards. As a result, the new standards, completed in 2011 and slated to take effect in May 2013, would be eliminated in favor of yet another round of DOE hearings and studies.

A 2021 Final Interpretive Rule (“2021-01-15 Energy Conservation Program for Appliance Standards: Energy Conservation Standards for Residential Furnaces and Commercial Water Heaters; Notification of final interpretive rule”) provides the following language:

*“..in the context of residential furnaces, commercial water heaters, and similarly-situated products / equipment, use of non-condensing technology (and associated venting) constitute a performance-related “feature” under the Energy Policy and Conservation Act (EPCA) that cannot be eliminated through adoption of an energy conservation standard.”*

Since setting a standard of 90% would require a condensing furnace and this language indicates that non-condensing units cannot be eliminated through a standard – it is assumed that a future 90% AFUE standard is unlikely. Therefore in v10, a prior assumption that the 90% standard would be in place following the remaining useful life of an existing

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<sup>23</sup> The Technical Advisory Committee agreed that if the cost of repair is less than 20% of the new baseline replacement cost it can be considered early replacement.

furnace has been removed.

### 3.4 Carryover Savings / Deferred Installs

Carryover savings, or savings from deferred installs, are defined as savings counted in the current year from measures bought or distributed in previous years. Please see the measure specific sections of the TRM to determine if the relevant lighting measure and program delivery calls for deferred installations (year 2 and year 3 installations).

Deferred installations from lighting measures are characterized in relevant sections of the TRM (currently only applicable to TLEDs in ‘4.5.4 LED Bulbs and Fixtures’). Broadly, the characterization is as follows:

*The characterization assumes that a percentage of bulbs purchased are not installed until Year 2 and Year 3 (see ISR assumption). The Illinois Technical Advisory Committee has determined the following methodology for calculating the savings of these future installs.*

**Year 1 (Purchase Year) installs:** *Characterized using assumptions active in the year current program year (assumptions from the year of purchase/current TRM).*

**Year 2 and 3 installs:** *Characterized using delta watts assumption, hours of use and interactive effects from the Install Year i.e. the actual deemed (or evaluated if available) assumptions active in Year 2 and 3 should be applied.*

*The NTG factor from the Purchase Year should be applied.*

Carryover savings for the current program year are derived from second year installations of program measures sold or distributed in the prior program year and third year program measure installations from two years prior to the current program year. For example, CY 2022 carryover savings result from second year installation of CY2021 lighting measures and 3<sup>rd</sup> year installations of CY2020 lighting measures.

Parameters estimates used to determine the share of carryover lamps installed in the current program year should be taken from the TRM version relevant to the actual purchase year of the carryover lamp. These parameters include in-service rate, leakage, and res/non res splits. All other gross savings parameter estimates should be taken from version of the TRM for year which the program measure was installed. (For claimed carryover in the current program year, this is the current version of the TRM).

### 3.5 Provisional Measures Savings Assumptions

As defined in the Glossary below, the term Provisional Measures refers to energy-efficient technologies, measures, projects, programs, and/or services that are generally nascent in Illinois or nationally, for which energy savings have not been validated through robust evaluation, measurement and verification (EM&V) efforts, and/or for which there is substantial uncertainty about their cost-effectiveness, performance, and/or customer acceptance. Because, by definition, information on savings for such measures or services is lacking, is based on limited information, or is currently subject to uncertainties, the development of robust assumptions for the TRM challenging. In order to provide calculations for use as the final applicability of these measures is being determined, the TRM can include such measures on a provisional basis, with savings estimates based on the best currently available data or approach, as determined by the IL-TRM Administrator in consultation with the TAC. In such a case, the identifying tag “Provisional Measure” will be added to the TRM measure name. Provisional Measures will be given a one-year Review Deadline, meaning that the measure will undergo a review for reasonableness, continued program relevancy, and update of material assumptions during the following TRM update cycle. The tagging of a measure in the TRM as “Provisional Measure” will ultimately be a TAC decision, and any TRM measure which the TAC determines falls into this category may be assigned.

Expectations are that the Program Administrator will work with evaluators and the TRM Administrator to design and undertake pilot studies, evaluations, or other relevant activities on an appropriate number of installations of the Provisional Measure within that year, with the goal of informing the development of more-robust and Illinois-specific savings assumptions. Including savings estimates in the TRM for such Provisional Measures provides a benchmark to assess effectiveness and allows for tracking and reporting on their value to the programs and customers, even as they are being studied. Savings from any Provisional Measure will be verified by the evaluators as per the characterization included in the TRM for up to 1% of a Program Administrator’s portfolio of savings. If savings for any single Provisional Measure rises above 1% of portfolio savings, the additional savings above 1% would be subject to retroactive evaluation risk.

### 3.6 Glossary

**Baseline Efficiency:** The assumed standard efficiency of equipment, absent an efficiency program.

**Building Types:**<sup>24</sup>

Note where a measure installation is within a building or application that does not fit with any of the defined building types below, the user should apply custom assumptions where it is reasonable to estimate them, else the building of best fit should be used.

Building Type	Definition
Assisted Living Multifamily	Applies to residential buildings of three or more units with staff to assist the occupants. Gross Floor Area should include all fully-enclosed space within the exterior walls of the building(s) including individual rooms or units, wellness centers, exam rooms, community rooms, small shops or service areas for residents and visitors (e.g. hair salons, convenience stores), staff offices, lobbies, atriums, cafeterias, kitchens, storage areas, hallways, basements, stairways, corridors between buildings, and elevator shafts.
Auditorium/Assembly	Applies to any performance space such as a theater, arena, or hall. Gross Floor Area should include all space within the building(s), including seating, stage and backstage areas, food service areas, retail areas, rehearsal studios, administrative/office space, mechanical rooms, storage areas, elevator shafts, and stairwells.
Auto Dealership	Applies to facility space used for the retail sale of new or used cars or other vehicles. The total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas (refrigerated and non-refrigerated), and administrative areas.
Childcare/Pre-school	Applies to any building providing childcare to pre-kindergarten age children.
College/University	Applies to facility space used for higher education. Relevant buildings include administrative headquarters, residence halls, athletic and recreation facilities, laboratories, etc. The total gross floor area should include all supporting functions such as kitchens used by staff, lobbies, atria, conference rooms and auditoria, fitness areas for staff, storage areas, stairways, elevator shafts, etc.
Convenience Store	Applies to facility space used for the retail sale of a limited selection of food and beverage products. The total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas (refrigerated and non-refrigerated), and administrative areas.
Drug Store	Applies to facility space used for the retail sale of a pharmaceutical products, toiletries, and a limited selection of food and beverage products. The total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas (refrigerated and non-refrigerated), and administrative areas.
Elementary School	Applies to a school serving children in any grades from Kindergarten through sixth grade.

<sup>24</sup> Source: US EPA, [www.energystar.gov](http://www.energystar.gov), Space Type Definitions, or definitions as developed through the Technical Advisory Committee.

Building Type	Definition
	The total gross floor area should include all supporting functions such as administrative space, conference rooms, kitchens used by staff, lobbies, cafeterias, gymnasiums, auditoria, laboratory classrooms, portable classrooms, greenhouses, stairways, atria, elevator shafts, small landscaping sheds, storage areas, etc.
Emergency Services	Applies to a building representing office, administrative, and functional space for Police/Fire/EMT style buildings. The building borrows many elements from the Low Rise Office definitions for size, envelope, occupant density, etc., but includes expanded occupancy schedules and increased equipment loads.
Exterior	Applies to unconditioned spaces that are outside of the building envelope.
Garage	Applies to unconditioned spaces either attached or detached from the primary building envelope that are not used for living space.
Grocery	Applies to facility space used for the retail sale of food and beverage products. It should not be used by restaurants. The total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas (refrigerated and non-refrigerated), administrative areas, stairwells, atria, lobbies, etc.
Healthcare Clinic	Applies to a facility space used to provide diagnosis and treatment for medical, dental, or psychiatric outpatient care. Gross Floor Area should include all space within the building(s) including offices, exam rooms, laboratories, lobbies, atriums, conference rooms and auditoriums, employee break rooms and kitchens, rest rooms, elevator shafts, stairways, mechanical rooms, and storage areas.
High School/Middle School	Applies to facility space used as a school building for 7th through 12th grade students. This does not include college or university classroom facilities and laboratories, vocational, technical, or trade schools. The total gross floor area should include all supporting functions such as administrative space, conference rooms, kitchens used by staff, lobbies, cafeterias, gymnasiums, auditoria, laboratory classrooms, portable classrooms, greenhouses, stairways, atria, elevator shafts, small landscaping sheds, storage areas, etc.
Hospital	Applies to a general medical and surgical hospital (including critical access hospitals and children’s hospitals) that is either a stand-alone building or a campus of buildings. Spaces more accurately characterized as a Healthcare Clinic should use that definition. The definition of Hospital accounts for all space types that are located within the Hospital building/campus, such as medical offices, administrative offices, and skilled nursing. The total floor area should include the aggregate floor area of all buildings on the campus as well as all supporting functions such as: stairways, connecting corridors between buildings, medical offices, exam rooms, laboratories, lobbies, atria, cafeterias, storage areas, elevator shafts, and any space affiliated with emergency medical care, or diagnostic care.
Hotel/Motel Combined (All Spaces)	Applies to buildings that rent overnight accommodations on a room/suite basis, typically including a bath/shower and other facilities in guest rooms. The total gross floor area should include all interior space, including guestrooms, halls, lobbies, atria, food preparation and restaurant space, conference and banquet space, health clubs/spas, indoor pool areas, and laundry facilities, as well as all space used for supporting functions such as elevator shafts, stairways, mechanical rooms, storage areas, employee break rooms, back-of-house offices, etc. Hotel does not apply to fractional ownership properties such as condominiums or vacation timeshares. Hotel properties should be owned by a single entity and have rooms available on a nightly basis. Where distinction between Hotel and Motel is necessary: Hotel: Room entrances and Corridors are located in the <i>interior</i> of the building. Corridors are conditioned spaces. Building can be significantly larger in size/height. Motel: Room entrances and Corridors are located on the <i>exterior</i> of the building.

Building Type	Definition
	Corridors are not conditioned spaces. Buildings tend to be two to three stories in height.
Hotel/Motel Common Areas	All the common areas open to guests of the hotel such as the lobby, corridors and stairways, and other spaces that may have continuous or large lighting and HVAC hours.
Hotel/Motel Guest Room	Applies to the guest rooms of the hotel or motel. These spaces are occupied intermittently.
Low-use Small Business	Any business type with low (<3000) operating hours (provided as option in lighting measures).
Manufacturing	Applies to buildings that are dedicated to manufacturing activities. Includes light industry buildings characterized by consumer product and component manufacturing and heavy industry buildings typically characterized by a plant that includes a main production area that has high-ceilings and contains heavy equipment used for assembly line production. These building types may be distinguished by categorizing NAICS (SIC) codes according to the needs of the Program Administrator.
Miscellaneous	Applies to spaces that do not fit clearly within any available categories should be designated as “miscellaneous”.
Mobile Home	A mobile home is a prefabricated structure, built in a factory on a permanently attached chassis before being transported to site. Use single family assumptions throughout the TRM unless otherwise specified.
Movie Theater	Applies to buildings used for public or private film screenings. Gross Floor Area should include all space within the building(s), including seating areas, lobbies, concession stands, bathrooms, administrative/office space, mechanical rooms, storage areas, elevator shafts, and stairwells.
Multifamily-Mid Rise	Applies to residential buildings with up to four floors, including all public and multiuse spaces within the building envelope. Small Multifamily buildings best described as a house should use the residential measure characterizations.
Multifamily-High Rise Combined (All Spaces)	Applies to residential buildings with five or more floors, including all public and multiuse spaces within the building envelope. Gross Floor Area should include all fully-enclosed space within the exterior walls of the building(s) including living space in each unit (including occupied and unoccupied units), interior common areas (e.g. lobbies, offices, community rooms, common kitchens, fitness rooms, indoor pools), hallways, stairwells, elevator shafts, connecting corridors between buildings, storage areas, and mechanical space such as a boiler room. Open air stairwells, breezeways, and other similar areas that are not fully-enclosed should not be included in the Gross Floor Area.
Multifamily-High Rise Common Areas	All the common areas open to occupants of the building such as the lobby, corridors and stairways, and other spaces that may have continuous or high lighting and HVAC hours.
Multifamily-High Rise Residential Units	Applies to the residential units in the building only.
Office-Low Rise	Applies to facility spaces in buildings with four floors or fewer used for general office, professional, and administrative purposes. The total gross floor area should include all supporting functions such as kitchens used by staff, lobbies, atria, conference rooms and auditoria, fitness areas for staff, storage areas, stairways, elevator shafts, etc.
Office-Mid Rise	Applies to facility spaces in buildings with five to nine floors used for general office, professional, and administrative purposes. The total gross floor area should include all supporting functions such as kitchens used by staff, lobbies, atria, conference rooms and auditoria, fitness areas for staff, storage areas, stairways, elevator shafts, etc.
Office-High Rise	Applies to facility spaces in buildings with ten floors or more used for general office, professional, and administrative purposes. The total gross floor area should include all supporting functions such as kitchens used by staff, lobbies, atria, conference rooms and auditoria, fitness areas for staff, storage areas, stairways, elevator shafts, etc.
Religious	Applies to buildings that are used as places of worship. This includes churches, temples,

Building Type	Definition
Worship/Church	mosques, synagogues, meetinghouses, or any other buildings that primarily function as a place of religious worship. Gross Floor Area should include all areas inside the building that includes the primary worship area, including food preparation, community rooms, classrooms, and supporting areas such as restrooms, storage areas, hallways, and elevator shafts.
Restaurant	Applies to a subcategory of Retail/Service space that is used to provide commercial food services to individual customers, and includes kitchen, dining, and common areas.
Retail/Service- Department store	Applies to facility space used to conduct the retail sale of consumer product goods. Stores must be at least 30,000 square feet and have an exterior entrance to the public. The total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas, administrative areas, elevators, stairwells, etc. Retail segments typically included under this definition are: Department Stores, Discount Stores, Supercenters, Warehouse Clubs, Dollar Stores, Home Center/Hardware Stores, and Apparel/Hard Line Specialty Stores (e.g., books, clothing, office products, toys, home goods, electronics). Retail segments excluded under this definition are: Grocery, Drug Stores, Convenience Stores, Automobile Dealerships, and Restaurants.
Retail/Service- Strip Mall	Applies to facility space used to conduct the retail sale of consumer product goods. Stores must less than 30,000 square feet and have an exterior entrance to the public. The total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas, administrative areas, elevators, stairwells, etc. Retail segments excluded under this definition are: Grocery, Drug Stores, Convenience Stores, Automobile Dealerships, and Restaurants.
Warehouse	Applies to unrefrigerated or refrigerated buildings that are used to store goods, manufactured products, merchandise or raw materials. The total gross floor area of Refrigerated Warehouses should include all temperature-controlled area designed to store perishable goods or merchandise under refrigeration at temperatures below 50 degrees Fahrenheit. The total gross floor area of Unrefrigerated Warehouses should include space designed to store non-perishable goods and merchandise. Unrefrigerated warehouses also include distribution centers. The total gross floor area of refrigerated and unrefrigerated warehouses should include all supporting functions such as offices, lobbies, stairways, rest rooms, equipment storage areas, elevator shafts, etc. Existing atriums or areas with high ceilings should only include the base floor area that they occupy. The total gross floor area of refrigerated or unrefrigerated warehouse should not include outside loading bays or docks. Self-storage facilities, or facilities that rent individual storage units, are not eligible for a rating using the warehouse model.

**Coincidence Factor (CF):** Coincidence factors represent the fraction of connected load expected to be coincident with a particular system peak period, on a diversified basis. Coincidence factors are provided for summer peak periods.

**Commercial & Industrial:** The market sector that includes measures that apply to any of the building types defined in this TRM, which includes multifamily common areas and public housing.<sup>25</sup>

**Connected Load:** The maximum wattage of the equipment, under normal operating conditions.

**Deemed Value:** A value that has been assumed to be representative of the average condition of an input parameter.

**Default Value:** When a measure indicates that an input to a prescriptive saving algorithm may take on a range of values, an average value is also provided in many cases. This value is considered the default input to the algorithm

<sup>25</sup> Measures that apply to the multifamily and public housing building types describe how to handle tenant versus master metered buildings.

and should be used when the other alternatives listed in the measure are not applicable.

**End-use Category:** A general term used to describe the categories of equipment that provide a service to an individual or building. See Table 2.1 for a list of the end-use categories that are incorporated in this TRM.

**Energy Efficiency:** "Energy efficiency" means measures that reduce the amount of electricity or natural gas consumed in order to achieve a given end use. "Energy efficiency" includes voltage optimization measures that optimize the voltage at points on the electric distribution voltage system and thereby reduce electricity consumption by electric customers' end use devices. "Energy efficiency" also includes measures that reduce the total Btus of electricity, natural gas and other fuels needed to meet the end use or uses (20 ILCS 3855/1-10). For purposes of this Section, "energy efficiency" means measures that reduce the amount of energy required to achieve a given end use. "Energy efficiency" also includes measures that reduce the total Btus of electricity and natural gas needed to meet the end use or uses (220 ILCS 5/8-104(b)).

**Equivalent Full Load Hours (EFLH):** The equivalent hours that equipment would need to operate at its peak capacity in order to consume its estimated annual kWh consumption (annual kWh/connected kW) or therms.

**High Efficiency:** General term for technologies and processes that require less energy, water, or other inputs to operate.

**Lifetime:** Two important distinctions fall under this definition:

**Technical Lifetime:** The number of years (or hours) that the new high efficiency equipment is expected to function.

**Measure Lifetime:** The number of years (or hours) that the new high efficiency equipment is expected to provide the savings characterized in the measure. This is the value provided in the "Deemed Lifetime of Efficient Equipment" section of each characterization. The measure lifetime is generally based on the technical lifetime but should represent an estimate of the median number of years that the measures installed under a program are still in place and operable. This may include consideration of the potential for users to remove or remodel and to allow for breakages or imperfect operation, resulting in a shorter measure life. If the savings of a population is expected to *decline* due to issues such as the overriding of settings or poorly maintaining equipment, a midlife adjustment should be used to reduce the lifetime savings;<sup>26</sup> however, the measure lifetime should still reflect the technical lifetime (i.e., the total years any savings are expected to occur). The Measure Lifetime should be used in lifetime savings and cost benefit calculations as well as in Weighted Average Measure Life (WAML) calculations.

Two additional terms used when describing a Measure Lifetime are:

**Effective Useful Life (EUL)** – EUL is consistent with the Measure Lifetime described above.

**Remaining Useful Life (RUL)** – Applies to retrofit or replacement measures. For example, if an existing working refrigerator is replaced with a high efficiency unit, the RUL is an assumption of how many more years the existing unit would have lasted. As a general rule, the RUL is usually assumed to be 1/3 of the EUL.

**Load Factor (LF):** The fraction of full load (wattage) for which the equipment is typically run.

**Measure Cost:** The incremental (for time of sale measures) or full cost (both capital and labor for retrofit measures) of implementing the High Efficiency equipment. See Section 3.8 Measure Incremental Cost Definition for full definition.

**Measure Description:** A detailed description of the technology and the criteria it must meet to be eligible as an energy efficient measure.

**Measure:** An efficient technology or procedure that results in energy savings as compared to the baseline efficiency.

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<sup>26</sup> In rare cases, for example residential Home Energy Report (HER) type programs, it may be appropriate to have savings decay each year throughout the measure life rather than in a midlife adjustment.

**Residential:** The market sector that includes measures that apply only to detached, residential buildings or duplexes.

**Operation and Maintenance (O&M) Cost Adjustments:** The dollar impact resulting from differences between baseline and efficient case Operation and Maintenance costs.

**Operating Hours (HOURS):** The annual hours that equipment is expected to operate.

**Provisional Measures:** Energy-efficient technologies, measures, projects, programs, and/or services that are generally nascent in Illinois or nationally, for which energy savings have not been validated through robust evaluation, measurement, and verification (EM&V) efforts, and/or for which there is substantial uncertainty about their cost-effectiveness, performance, and/or customer acceptance.

**Program:** The mode of delivering a particular measure or set of measures to customers. See Section 2.4 for a list of program descriptions that are presently operating in Illinois.

**Rating Period Factor (RPF):** Percentages for defined times of the year that describe when energy savings will be realized for a specific measure.

**Stakeholder Advisory Group (SAG):** The Illinois Energy Efficiency Stakeholder Advisory Group (SAG) was first defined in the electric utilities’ first energy efficiency Plan Orders to include “... the Utility, DCEO, Staff, the Attorney General, BOMA and CUB and representation from a variety of interests, including residential consumers, business consumers, environmental and energy advocacy organizations, trades and local government... [and] a representative from the ARES (alternative retail electric supplier) community should be included.”<sup>27</sup> A group of stakeholders who have an interest in Illinois’ energy efficiency programs and who meet regularly to share information and work toward consensus on various energy efficiency issues. The Utilities in Illinois have been directed by the ICC to work with the SAG on the development of a statewide TRM.

### 3.7 Electrical Loadshapes (kWh)

Loadshapes are an integral part of the measure characterization and are used to divide energy savings into appropriate periods using Rating Period Factors (RPFs) such that each have variable avoided cost values allocated to them for the purpose of estimating cost effectiveness.

For the purposes of assigning energy savings (kWh) periods, the TRM TAC has agreed to use the industry standards for wholesale power market transactions as shown in the following table.

**Table 3.2: On- and Off-Peak Energy Definitions**

Period Category	Period Definition (Central Prevailing Time)
Winter On-Peak Energy	8AM - 11PM, weekdays, Oct – Apr, No NERC holidays
Winter Off-Peak Energy	All other hours
Summer On-Peak Energy	8AM - 11PM, weekdays, May – Sept, No NERC holidays
Summer Off-Peak Energy	All other hours

Loadshapes have been developed for each end-use by assigning Rating Period Factor percentages to each of the four periods above. Three methodologies were used:

1. Itron eShapes data for Missouri, provided by Ameren and reconciled to Illinois loads, were used to calculate the percentage of load into the four categories above.
2. Where the Itron eShapes data did not provide a particular end-use or specific measure load profile, loadshapes that have been developed over many years by Efficiency Vermont and that have been reviewed by the Vermont Department of Public Service were adjusted to match Illinois period definitions. Note – no weather sensitive loadshapes were based on this method. Any of these load profiles that relate to High Impact Measures should be an area of future evaluation.

<sup>27</sup> ICC Docket No. 07-0540, Final Order at 32-33, February 6, 2008.  
<http://www.icc.illinois.gov/downloads/public/edocket/215193.pdf>

3. Loadshapes have also been developed from primary research studies conducted in Illinois or other jurisdictions if robust datasets were available to support hourly analysis of end use consumption.

The following pages provide the loadshape values for most measures provided in the TRM.<sup>28</sup> The source of the loadshape is also provided.

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<sup>28</sup> All loadshape information has been posted to the VEIC SharePoint site and is publicly accessible through the Stakeholder Advisory Group's web site. <http://www.ilsag.info/technical-reference-manual.html>  
[http://ilsagfiles.org/SAG\\_files/Technical\\_Reference\\_Manual/Residential\\_Loadshapes\\_References.zip](http://ilsagfiles.org/SAG_files/Technical_Reference_Manual/Residential_Loadshapes_References.zip)  
[http://ilsagfiles.org/SAG\\_files/Technical\\_Reference\\_Manual/Commercial\\_Loadshapes\\_References.zip](http://ilsagfiles.org/SAG_files/Technical_Reference_Manual/Commercial_Loadshapes_References.zip)  
[http://ilsagfiles.org/SAG\\_files/Technical\\_Reference\\_Manual/Version\\_3/Final\\_Draft/Sources%20and%20References%20-%20Loadshapes/TRM\\_Version\\_3\\_Loadshapes\\_2.24.zip](http://ilsagfiles.org/SAG_files/Technical_Reference_Manual/Version_3/Final_Draft/Sources%20and%20References%20-%20Loadshapes/TRM_Version_3_Loadshapes_2.24.zip)  
[http://ilsagfiles.org/SAG\\_files/Technical\\_Reference\\_Manual/2018\\_Loadshape\\_Files.zip](http://ilsagfiles.org/SAG_files/Technical_Reference_Manual/2018_Loadshape_Files.zip)

**Table 3.3: Loadshapes by Season**

	Loadshape Reference Number	Winter Peak	Winter Off-peak	Summer Peak	Summer Off-peak	Loadshape Source
		Oct-Apr, M-F, non-holiday, 8AM - 11PM	Oct-Apr, All other time	May-Sept, M-F, non-holiday, 8AM - 11PM	May- Sept, All other time	
Residential Clothes Washer	R01	30.1%	27.1%	23.1%	19.7%	Guidehouse MA Baseline Study <sup>29</sup>
Residential Dish Washer	R02	32.2%	28.5%	20.6%	18.7%	Guidehouse MA Baseline Study
Residential Electric DHW	R03	33.8%	31.0%	18.2%	17.1%	Guidehouse MA Baseline Study
Residential Freezer	R04	23.3%	30.2%	20.4%	26.0%	Guidehouse MA Baseline Study
Residential Refrigerator	R05	23.7%	28.7%	21.7%	25.9%	Guidehouse MA Baseline Study
Residential Indoor Lighting	R06	35.1%	26.1%	22.0%	16.8%	Opinion Dynamics IL Metering Study <sup>30</sup>
Residential Outdoor Lighting	R07	18.0%	44.1%	9.4%	28.4%	Efficiency Vermont
Residential Cooling	R08	4.1%	0.7%	71.3%	23.9%	Itron eShapes
Residential Electric Space Heat	R09	57.8%	38.8%	1.7%	1.7%	Itron eShapes
Residential Electric Heating and Cooling	R10	35.2%	22.8%	31.0%	11.0%	Itron eShapes
Residential Ventilation	R11	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Residential - Dehumidifier	R12	12.9%	16.2%	31.7%	39.2%	Efficiency Vermont
Residential Standby Losses - Entertainment Center	R13	28.3%	30.3%	19.7%	21.7%	Guidehouse MA Baseline Study
Residential Standby Losses - Home Office	R14	28.8%	28.3%	21.4%	21.4%	Guidehouse MA Baseline Study
Residential Pool Pumps	R15	0%	0%	58.9%	41.1%	Efficiency Vermont
Residential Holiday String Lighting	R16	43.1%	56.9%	0%	0%	Estimate <sup>31</sup>
Residential Electric Dryer	R17	34.0%	26.0%	22.3%	17.7%	Guidehouse MA Baseline Study
Residential Heat Pump DHW	R18	32.8%	31.1%	18.2%	17.9%	Guidehouse MA Baseline Study
Residential Electric Vehicle Charger	R19	25.6%	34.7%	16.7%	23.1%	Guidehouse Vehicle Analytics and Simulation Tool (TM), 2020
Residential Induction Cooktop	R20	18.0%	23.4%	26.0%	32.6%	Estimate

<sup>29</sup> See “RES 1 Baseline Loadshape Study” Prepared for the Electric and Gas Program Administrators of Massachusetts, Guidehouse, July 27, 2018, and corresponding Excel Appendix files.

<sup>30</sup> See ‘IL Res Indoor LED Lighting Load Shape\_2018-06-06’ and ‘IL Res Indoor LED Lighting Load Shape Development Methodology\_2018-05-18’ for details.

<sup>31</sup> Based on average of Residential Indoor and Outdoor lighting winter usage only.

		Winter Peak	Winter Off-peak	Summer Peak	Summer Off-peak	
	Loadshape Reference Number	Oct-Apr, M-F, non-holiday, 8AM - 11PM	Oct-Apr, All other time	May-Sept, M-F, non-holiday, 8AM - 11PM	May- Sept, All other time	Loadshape Source
Commercial Electric Cooking	C01	40.6%	18.2%	28.7%	12.6%	Itron eShapes
Commercial Electric DHW	C02	40.5%	18.2%	28.5%	12.8%	Itron eShapes
Commercial Cooling	C03	4.9%	0.8%	66.4%	27.9%	Itron eShapes
Commercial Electric Heating	C04	53.5%	43.2%	1.9%	1.4%	Itron eShapes
Commercial Electric Heating and Cooling	C05	19.4%	13.5%	47.1%	19.9%	Itron eShapes
Commercial Indoor Lighting	C06	30.1%	27.5%	22.8%	19.7%	Guidehouse EmPOWER study <sup>32</sup>
Grocery/Conv. Store Indoor Lighting	C07	28.0%	30.2%	20.3%	21.5%	Guidehouse EmPOWER study
Health Indoor Lighting	C08	29.1%	28.9%	21.6%	20.3%	Guidehouse EmPOWER study
Office Indoor Lighting	C09	29.9%	28.2%	22.3%	19.6%	Guidehouse EmPOWER study
Restaurant Indoor Lighting	C10	32.1%	25.7%	23.4%	18.8%	Efficiency Vermont
Retail Indoor Lighting	C11	32.6%	25.4%	24.2%	17.9%	Guidehouse EmPOWER study
Warehouse Indoor Lighting	C12	26.0%	29.0%	22.4%	22.6%	Guidehouse EmPOWER study
Education Indoor Lighting	C13	34.7%	26.2%	23.6%	15.5%	Guidehouse EmPOWER study
Indust. 1-shift (8/5) (e.g., comp. air, lights)	C14	50.5%	7.2%	37.0%	5.3%	Efficiency Vermont
Indust. 2-shift (16/5) (e.g., comp. air, lights)	C15	47.5%	10.2%	34.8%	7.4%	Efficiency Vermont
Indust. 3-shift (24/5) (e.g., comp. air, lights)	C16	34.8%	23.2%	25.5%	16.6%	Efficiency Vermont
Indust. 4-shift (24/7) (e.g., comp. air, lights)	C17	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Industrial Indoor Lighting	C18	44.3%	13.6%	32.4%	9.8%	Efficiency Vermont
Industrial Outdoor Lighting	C19	18.0%	44.1%	9.4%	28.4%	Efficiency Vermont
Commercial Outdoor Lighting	C20	16.8%	44.6%	9.3%	29.3%	Guidehouse EmPOWER study
Commercial Office Equipment	C21	37.7%	20.9%	26.7%	14.7%	Itron eShapes
Commercial Refrigeration	C22	38.5%	20.6%	26.7%	14.2%	Itron eShapes
Commercial Ventilation	C23	38.1%	20.6%	29.7%	11.6%	Itron eShapes
Traffic Signal - Red Balls, always changing or flashing	C24	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Traffic Signal - Red Balls, changing day, off night	C25	37.0%	20.9%	27.1%	14.9%	Efficiency Vermont
Traffic Signal - Green Balls, always changing	C26	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Traffic Signal - Green Balls, changing day, off night	C27	37.0%	20.9%	27.1%	14.9%	Efficiency Vermont
Traffic Signal - Red Arrows	C28	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont

<sup>32</sup> See '3.5 Electrical Load Shapes\_IL TRM Workpape\_CI\_Ltg\_2018-06-28' and 'IL Commercial Lighting Load Shape Development Methodology\_2018-06-28' for details.

		Winter Peak	Winter Off-peak	Summer Peak	Summer Off-peak	
	Loadshape Reference Number	Oct-Apr, M-F, non-holiday, 8AM - 11PM	Oct-Apr, All other time	May-Sept, M-F, non-holiday, 8AM - 11PM	May- Sept, All other time	Loadshape Source
Traffic Signal - Green Arrows	C29	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Traffic Signal - Flashing Yellows	C30	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Traffic Signal - "Hand" Don't Walk Signal	C31	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Traffic Signal - "Man" Walk Signal	C32	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Traffic Signal - Bi-Modal Walk/Don't Walk	C33	25.8%	32.3%	18.9%	23.0%	Efficiency Vermont
Industrial Motor	C34	47.5%	10.2%	34.8%	7.4%	Efficiency Vermont
Industrial Process	C35	47.5%	10.2%	34.8%	7.4%	Efficiency Vermont
HVAC Pump Motor (heating)	C36	38.7%	48.6%	5.9%	6.8%	Efficiency Vermont
HVAC Pump Motor (cooling)	C37	7.8%	9.8%	36.8%	45.6%	Efficiency Vermont
HVAC Pump Motor (unknown use)	C38	23.2%	29.2%	21.4%	26.2%	Efficiency Vermont
VFD - Supply fans <10 HP	C39	38.8%	16.1%	28.4%	16.7%	Efficiency Vermont
VFD - Return fans <10 HP	C40	38.8%	16.1%	28.4%	16.7%	Efficiency Vermont
VFD - Exhaust fans <10 HP	C41	34.8%	23.2%	20.3%	21.7%	Efficiency Vermont
VFD - Boiler feedwater pumps <10 HP	C42	42.9%	44.2%	6.6%	6.3%	Efficiency Vermont
VFD - Chilled water pumps <10 HP	C43	11.2%	5.5%	40.7%	42.6%	Efficiency Vermont
VFD Boiler circulation pumps <10 HP	C44	42.9%	44.2%	6.6%	6.3%	Efficiency Vermont
Refrigeration Economizer	C45	36.3%	50.8%	5.6%	7.3%	Efficiency Vermont
Evaporator Fan Control	C46	24.0%	35.9%	16.7%	23.4%	Efficiency Vermont
Standby Losses - Commercial Office	C47	8.2%	50.5%	5.6%	35.7%	Efficiency Vermont
VFD Boiler draft fans <10 HP	C48	37.3%	48.9%	6.4%	7.3%	Efficiency Vermont
VFD Cooling Tower Fans <10 HP	C49	7.9%	5.2%	54.0%	32.9%	Efficiency Vermont
Engine Block Heater Timer	C50	26.5%	61.0%	4.1%	8.5%	Efficiency Vermont
Door Heater Control	C51	30.4%	69.6%	0.0%	0.0%	Efficiency Vermont
Beverage and Snack Machine Controls	C52	10.0%	48.3%	7.4%	34.3%	Efficiency Vermont
Flat	C53	36.3%	21.8%	26.2%	15.7%	Itron eShapes
Religious Indoor Lighting	C54	26.8%	31.4%	18.9%	22.8%	Efficiency Vermont
Commercial Clothes Washer	C55	47.0%	11.1%	34.0%	8.0%	Itron eShapes <sup>33</sup>
Dairy Farm Combined End Uses	C56	34.2%	23.9%	24.9%	17.0%	Efficiency Vermont
Milk Pump	C57	29.5%	28.9%	21.3%	20.3%	Efficiency Vermont
Farm Plate Cooler / Heat Recovery Unit	C58	22.8%	16.7%	32.4%	28.1%	Efficiency Vermont

<sup>33</sup> Assumed equal to R01 Residential Clothes Washer loadshape.

		Winter Peak	Winter Off-peak	Summer Peak	Summer Off-peak	
	Loadshape Reference Number	Oct-Apr, M-F, non-holiday, 8AM - 11PM	Oct-Apr, All other time	May-Sept, M-F, non-holiday, 8AM - 11PM	May- Sept, All other time	Loadshape Source
Agriculture and Water Pumping	C59	23.7%	36.0%	18.3%	22.0%	DEER 2008
Non-Residential Agriculture Lighting – 6 Hours	C60	42%	16%	30%	12%	Franklin Energy
Non-Residential Agriculture Lighting – 8 Hours	C61	36%	22%	26%	16%	Franklin Energy
Non-Residential Agriculture Lighting – 12 Hours	C62	38%	20%	27%	15%	Franklin Energy
Non-Residential Dairy Long Day Lighting – 17 Hours	C63	34%	24%	25%	17%	Franklin Energy
Non-Residential Agriculture Lighting – 24 Hours	C64	26%	33%	19%	22%	Franklin Energy
Non-Residential Indoor Agriculture Vegetative Room	C65	32%	26%	23%	19%	Franklin Energy
Non-Residential Indoor Agriculture Flowering Room	C66	31%	27%	23%	19%	Franklin Energy
Voltage Optimization – Ameren	C67	26%	30%	22%	22%	2017-2019 average utility system load for MISO Central region
Voltage Optimization – ComEd	C68	27%	29%	22%	22%	2017-2019 average utility system load for PJM ComEd region

### 3.8 Summer Peak Period Definition (kW)

To estimate the impact that an efficiency measure has on a utility’s system peak, the peak itself needs to be defined. Because Illinois currently is a summer peaking state, only the summer peak period is defined for the purpose of this TRM.

Note that Illinois spans two different electrical control areas, the Pennsylvania – Jersey – Maryland (PJM) Interconnection (which includes ComEd), and the Midcontinent Independent System Operator (MISO) (which includes Ameren). As a result, there is some disparity in the actual system peak across the state. However, only PJM has a forward capacity market where an efficiency program can potentially participate. Because ComEd is part of the PJM control area, their definition of the summer peak period is typically used in this TRM to support accurate quantification of demand savings for PJM Forward Capacity Market purposes.

That coincident summer peak period is defined as 1:00-5:00 PM Central Prevailing Time on non-holiday weekdays, June through August.

Summer peak coincidence factors can be found within each measure characterization. The source is provided and is based upon evaluation results, analysis of load shape data, or through a calculation using stated assumptions.

For measures that are not weather-sensitive, the summer peak coincidence factor is estimated whenever possible as the average of savings within the peak period defined above. For weather sensitive measures such as cooling, the summer peak coincidence factor is provided in two different ways. The first method is to estimate demand savings during the utility’s peak hour (defined as 3-4pm on June 20<sup>th</sup>, as provided by Ameren). This is likely to be the most indicative of actual peak benefits. The second way represents the average savings over the summer peak period, consistent with the non-weather sensitive end uses, and is presented so that savings can be bid into PJM’s Forward Capacity Market.

### 3.9 Heating and Cooling Degree-Day Data

Many measures are weather sensitive. Because there is a range of climactic conditions across the state, VEIC engaged the Utilities to provide their preferences for what airports and cities are the best proxies for the weather in their service territories. The result of this engagement is in the table below. All of the data represents 15-year normals from the NCEI National Climactic Data Center (NCDC).<sup>34</sup> Note that the base temperature for the calculation of heating degree-days in this document does not follow the historical 65F degree base temperature convention. Instead VEIC used several different temperatures in this TRM to more accurately reflect the outdoor temperature when a heating or cooling system turns on.

Residential heating is based on 60F, in accordance with regression analysis of heating fuel use and weather by state by the Pacific Northwest National Laboratory.<sup>35</sup> Residential cooling is based on 65F in agreement with a field study in Wisconsin.<sup>36</sup> These are lower than typical thermostat set points because internal gains, such as appliances, lighting, and people, provide some heating. In C&I settings, internal gains are often much higher; the base temperatures for both heating and cooling is 55F.<sup>37</sup> Custom degree-days with building-specific base temperatures are recommended for large C&I projects.

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<sup>34</sup> 15-year normals have been used instead of Typical Meteorological Year (TMY) data due to the fact that few of the measures in the TRM are significantly affected by solar insolation, which is one of the primary benefits of using the TMY approach.

<sup>35</sup> Belzer and Cort, Pacific Northwest National Laboratory in “Statistical Analysis of Historical State-Level Residential Energy Consumption Trends,” 2004.

<sup>36</sup> Energy Center of Wisconsin, May 2008 metering study; “Central Air Conditioning in Wisconsin, A Compilation of Recent Field Research”, p. 32 (amended in 2010).

<sup>37</sup> This value is based upon experience, and it is preferable to use building-specific base temperatures when available.

**Table 3.5: Degree-Day Zones and Values by Market Sector**

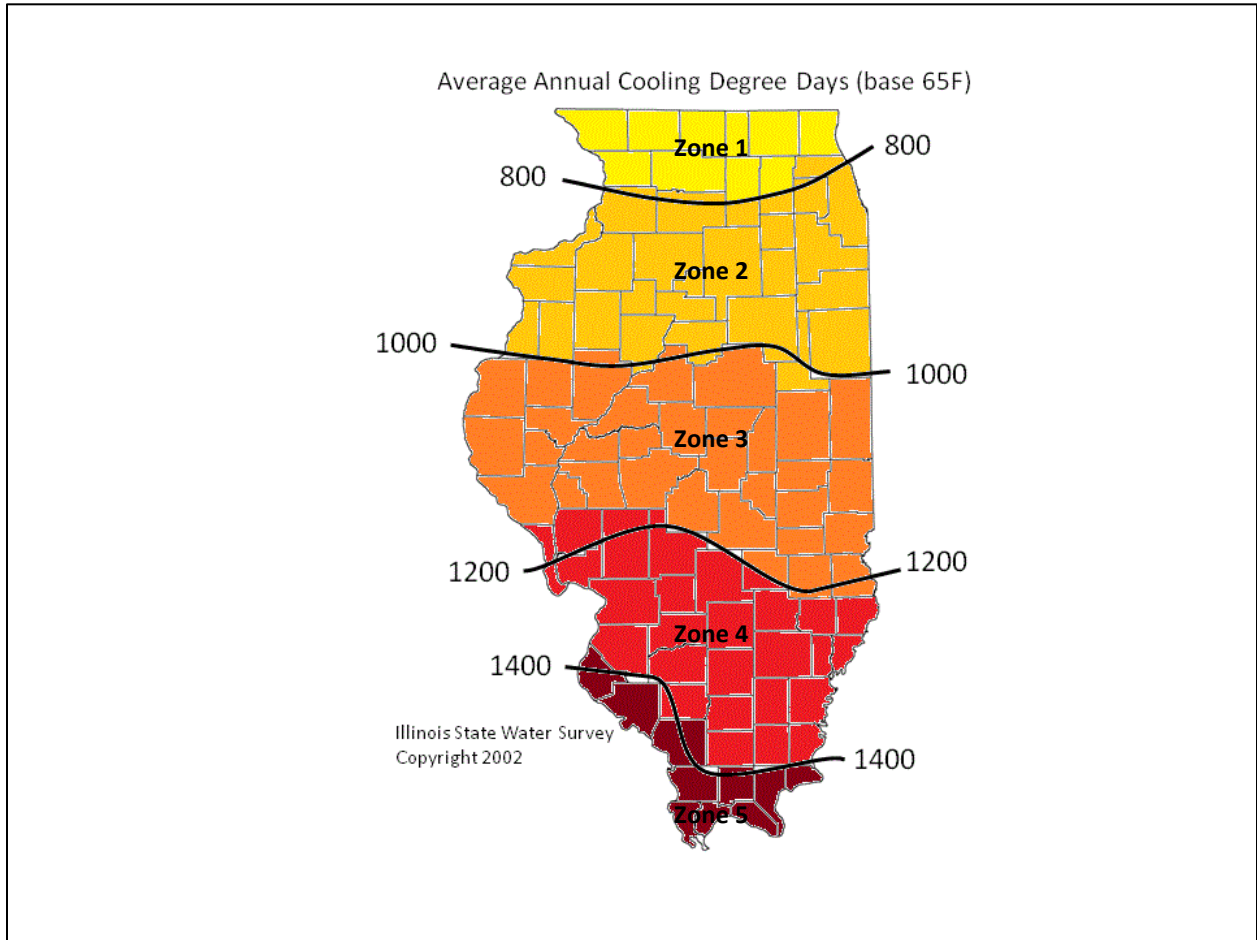
Zone	Residential		C&I		Weather Station / City	Station ID
	HDD	CDD	HDD	CDD		
1	5,230	877	4,171	2,284	Rockford AP / Rockford	USW00094822
2	4,798	1,047	3,760	2,494	Chicago O'Hare AP / Chicago	USW00094846
3	4,266	1,183	3,296	2,761	Springfield #2 / Springfield	USC00118186
4	3,188	1,641	2,351	3,480	Belleville SIU RSCH / Belleville	USW00013802
5	3,390	1,450	2,499	3,186	Carbondale Southern IL AP / Marion	USW00093810
Average	4,631	1,098	3,619	2,596	Weighted by occupied housing units	
Base	60F	65F	55F	55F	15 year climate normals, 2006-2020	

The above assumptions based on 15-year climate normals are appropriate for use where annual consumption values are being estimated. For any peak load calculations, consideration of climate extremes or where hourly climate variations are modeled, the TAC agreed to utilize TMYx data (2007-2021) to develop variable assumptions. The specific TMYx files that are utilized is provided below:

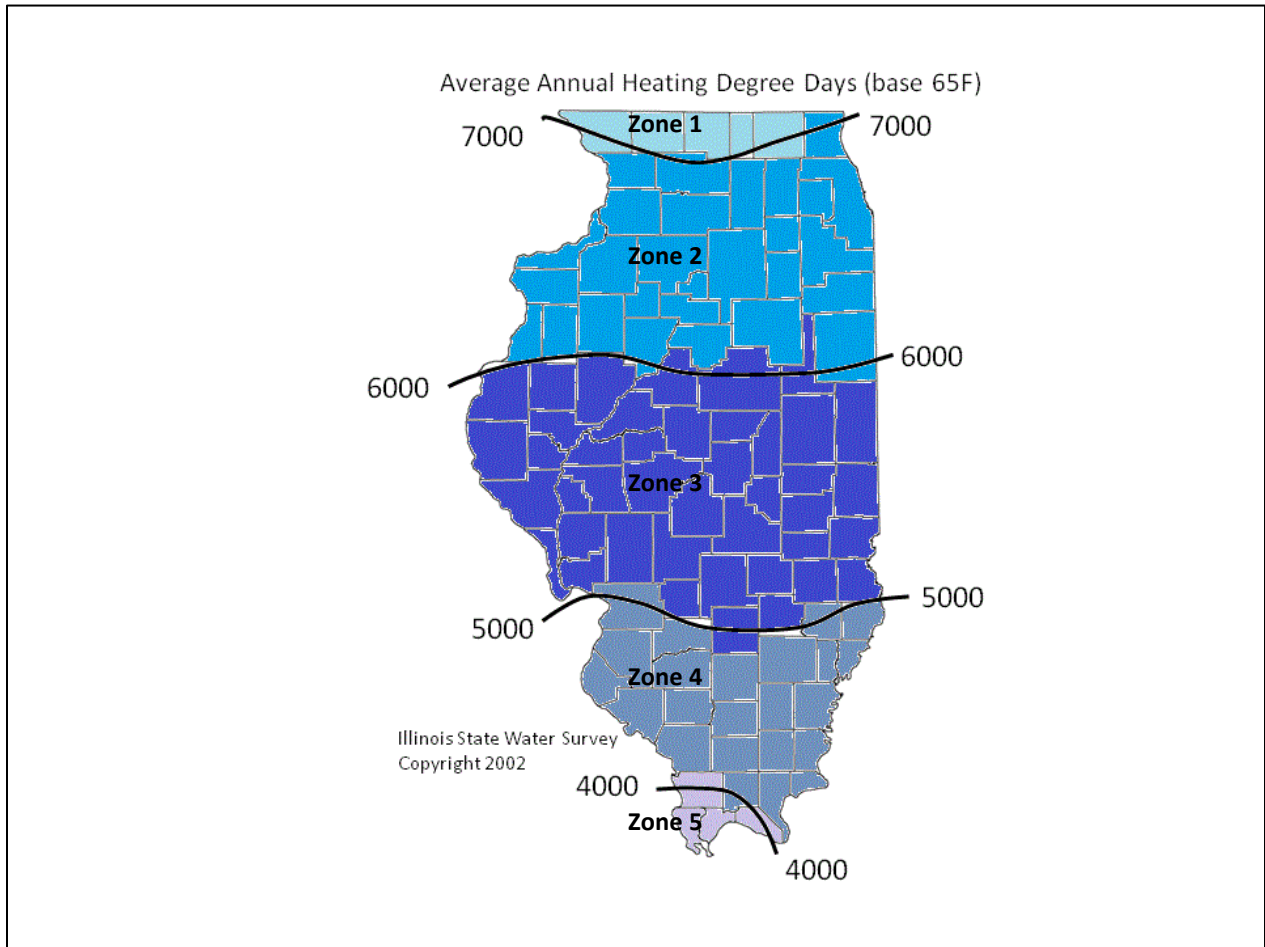
- Zone 1: USA\_IL\_Rockford-Chicago.Rockford.Intl.AP.725430\_TMYx.2007-2021
- Zone 2: USA\_IL\_Chicago.OHare.Intl.AP.725300\_TMYx.2007-2021
- Zone 3: USA\_IL\_Springfield-Lincoln.Capital.AP.724390\_TMYx.2007-2021
- Zone 4: USA\_IL\_Belleville.AP.724338\_TMYx.2007-2021
- Zone 5: USA\_IL\_Marion-Williamson.County.Rgnl.AP.724339\_TMYx.2007-2021

This table assigns each of the proxy cities to one of five climate zones. The following graphics from the Illinois State Water Survey show isobars (lines of equal degree-days), and we have color-coded the counties in each of these graphics using those isobars as a dividing line. Using this approach, the state divides into five cooling degree-day zones and five heating degree-day zones. Note that although the heating and cooling degree-day maps are similar, they are not the same, and the result is that there is a total of 10 climate zones in the state. The counties are listed in the tables following the figures for ease of reference. In addition, an Excel file containing all Illinois Zip Codes with the corresponding Heating and Cooling Degree-day zones is provided on the SharePoint site within the 'TRM Reference Documents' section.

**Figure 3.1: Cooling Degree-Day Zones by County**



**Figure 3.2: Heating Degree-Day Zones by County**



**Table 3.6: Heating Degree-Day Zones by County**

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Boone County	Bureau County	Adams County	Clinton County	Alexander County
Jo Daviess County	Carroll County	Bond County	Edwards County	Massac County
Stephenson County	Cook County	Brown County	Franklin County	Pulaski County
Winnebago County	DeKalb County	Calhoun County	Gallatin County	Union County
	DuPage County	Cass County	Hamilton County	
	Grundy County	Champaign County	Hardin County	
	Henderson County	Christian County	Jackson County	
	Henry County	Clark County	Jefferson County	
	Iroquois County	Clay County	Johnson County	
	Kane County	Coles County	Lawrence County	
	Kankakee County	Crawford County	Madison County	
	Kendall County	Cumberland County	Marion County	
	Knox County	De Witt County	Monroe County	
	Lake County	Douglas County	Perry County	
	LaSalle County	Edgar County	Pope County	
	Lee County	Effingham County	Randolph County	
	Livingston County	Fayette County	Richland County	
	Marshall County	Ford County	Saline County	

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
	McHenry County	Fulton County	St. Clair County	
	Mercer County	Greene County	Wabash County	
	Ogle County	Hancock County	Washington County	
	Peoria County	Jasper County	Wayne County	
	Putnam County	Jersey County	White County	
	Rock Island County	Logan County	Williamson County	
	Stark County	Macon County		
	Warren County	Macoupin County		
	Whiteside County	Mason County		
	Will County	McDonough County		
	Woodford County	McLean County		
		Menard County		
		Montgomery		
		Morgan County		
		Moultrie County		
		Piatt County		
		Pike County		
		Sangamon County		
		Schuyler County		
		Scott County		
		Shelby County		
		Tazewell County		
		Vermilion County		

**Table 3.7: Cooling Degree-day Zones by County**

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Boone County	Bureau County	Adams County	Bond County	Alexander County
Carroll County	Cook County	Brown County	Clay County	Hardin County
DeKalb County	DuPage County	Calhoun County	Clinton County	Johnson County
Jo Daviess County	Grundy County	Cass County	Edwards County	Massac County
Kane County	Henderson County	Champaign County	Fayette County	Pope County
Lake County	Henry County	Christian County	Franklin County	Pulaski County
McHenry County	Iroquois County	Clark County	Gallatin County	Randolph County
Ogle County	Kankakee County	Coles County	Hamilton County	Union County
Stephenson County	Kendall County	Crawford County	Jackson County	
Winnebago County	Knox County	Cumberland County	Jefferson County	
	LaSalle County	De Witt County	Jersey County	
	Lee County	Douglas County	Lawrence County	
	Livingston County	Edgar County	Macoupin County	
	Marshall County	Effingham County	Madison County	
	Mercer County	Ford County	Marion County	
	Peoria County	Fulton County	Monroe County	
	Putnam County	Greene County	Montgomery	
	Rock Island County	Hancock County	Perry County	
	Stark County	Jasper County	Richland County	
	Warren County	Logan County	Saline County	
	Whiteside County	Macon County	St. Clair County	
	Will County	Mason County	Wabash County	

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
	Woodford County	McDonough County	Washington County	
		McLean County	Wayne County	
		Menard County	White County	
		Morgan County	Williamson County	
		Moultrie County		
		Piatt County		
		Pike County		
		Sangamon County		
		Schuyler County		
		Scott County		
		Shelby County		
		Tazewell County		
		Vermilion County		

### 3.10 Measure Incremental Cost Definition

**Operations and Maintenance (O&M) and/or Deferred Baseline Replacement Cost Changes:** Any avoided costs are treated as benefits, and any increased costs are treated as Incremental Costs. In cases where the efficient Measure has a significantly shorter or longer life than the relevant baseline measure (e.g., LEDs versus halogens), the avoided baseline replacement measure costs should be accounted for as a benefit in the TRC test analysis.

**Incremental Costs** means the difference between the cost of the efficient Measure and the cost of the most relevant baseline measure that would have been installed (if any) in the absence of the efficiency program. Installation costs (material and labor) shall be included if there is a difference between the efficient Measure and the baseline measure. The Customer’s value of service lost, the Customer’s value of their lost amenity, and the Customer’s transaction costs shall be included in the TRC test analysis where a reasonable estimate or proxy of such costs can be easily obtained (e.g., Program Administrator payment to a Customer to reduce load during a demand response event, Program Administrator payment to a Customer as an inducement to give up functioning equipment). This Incremental Cost input in the TRC analysis is not reduced by the amount of any Incentives (any Financial Incentives Paid to Customers or Incentives Paid to Third Parties by a Program Administrator that is intended to reduce the price of the efficient Measure to the Customer). Incremental Cost calculations will vary depending on the type of efficient Measure being implemented, as outlined in the examples provided below and as set forth in the IL-TRM. Note that the TRM includes at least one deemed incremental cost(s) as a default value(s) for most measures. However, consistent with the TRM Policy Document policy, in instances where Program Administrators have better information on the true incremental cost of the measures (e.g., direct install programs), the Program Administrator-specific incremental cost value should be used for the purposes of cost-effectiveness analysis.

Examples of Incremental Cost calculations include:

- a. The Incremental Cost for an efficient Measure that is installed in new construction or is being purchased at the time of natural installation, investment, or replacement is the additional cost incurred to purchase an efficient Measure over and above the cost of the baseline/standard (i.e., less efficient) measure (including any incremental installation, replacement, or O&M costs if those differ between the efficient Measure and baseline measure).
- b. For a retrofit Measure where the efficiency Program caused the Customer to update their existing equipment, facility, or processes (e.g., air sealing, insulation, tank wrap, controls), where the Customer would not have otherwise made a purchase, the appropriate baseline is zero expenditure, and the Incremental Cost is the full cost of the new retrofit Measure (including installation costs).
- c. For the early replacement of functioning equipment with a new efficient Measure, where the Customer would not have otherwise made a purchase for a number of years, the appropriate baseline is a dual baseline that begins as the existing equipment and shifts to the new standard equipment after the expected remaining useful life of the existing equipment ends. Thus, the Incremental Cost is the full cost of the new

efficient Measure (including installation costs) being purchased to replace a still-functioning equipment less the present value of the assumed deferred replacement cost (including installation costs) of replacing the existing equipment with a new baseline measure at the end of the existing equipment’s life. This deferred credit may not be necessary when the lifetime of the measure is short, the costs are very low, the measure is highly cost-effective even without the deferred credit, or for other reasons (e.g., certain Direct Install Measures, Measures provided in Kits to Customers).<sup>38</sup>

- d. For study-based services (e.g., facility energy audits, energy surveys, energy assessments, retro-commissioning, new construction design services), the Incremental Cost is the full cost of the study-based service. Even if the study-based service is performed entirely by a Program Administrator’s program implementation contractor, the full cost of the study-based service charged by the program implementation contractor is the Incremental Cost, because this is assumed to be the cost of the study-based service that would have been incurred by the Customer if the Customer were to have the study-based service performed in the absence of the efficiency Program. If the Customer implements efficient Measures as a result of the study-based service provided by the efficiency Program, the Incremental Cost for those efficient Measures should also be classified as Incremental Costs in the TRC analysis. Note that the Incremental Costs associated with study-based services should be included in Cost-Effectiveness calculations “only at the level at which they become variable.”<sup>39</sup> In some cases, this will be at the Measure level; in others, it will be at the Program level. Such costs should be included in Measure-level Cost-Effectiveness calculations only when they are inseparable from the efficiency improvements – i.e., when the provision of the study-based service is what produces energy savings (e.g., retro-commissioning). Conversely, when study-based service costs are separable from the costs of the efficient Measures themselves and Customer, Program Administrator and/or other parties have discretion over which of the identified efficient Measures to subsequently install (e.g., for facility energy audits, surveys or assessments that are used to identify potential efficient Measures for installation), the Incremental Cost associated with such study-based services should be included only in Program-level Cost-Effectiveness analyses (rather than allocated to individual efficient Measures).
- e. For the early retirement of functioning equipment before its expected life is over (e.g., appliance recycling Programs), the Incremental Costs are composed of the Customer’s value placed on their lost amenity, any Customer transaction costs, and the pickup and recycling cost. The Incremental Costs include the actual cost of the pickup and recycling of the equipment (often paid for by a Program Administrator to a program implementation contractor) because this is assumed to be the cost of recycling the equipment that would have been incurred by the Customer if the Customer were to recycle the equipment on their own in the absence of the efficiency Program. The payment a Program Administrator makes to the Customer serves as a proxy for the value the Customer places on their lost amenity and any Customer transaction costs.

### 3.11 Discount Rates, Inflation Rates, and O&M Costs

The Illinois Utilities use screening tools that apply an appropriate discount rate to any future costs or benefits. From 2026 to 2029, the societal discount rate, required for use by all electric utilities, is defined as a nominal discount rate of 4.33%, or a real (inflation-adjusted) discount rate of 2.0%.<sup>40</sup>

Where a future cost is provided within the TRM (e.g., in early replacement measures where a deferred baseline replacement cost is provided) and the future cost has been adjusted using an inflation rate of 2.28% (based on USEIA/AEO Inflation Forecast), the nominal discount rate should be used to discount to the present value. Where future costs have not been adjusted for inflation, the real discount rate should be used to discount to present value.

<sup>38</sup> In such instances, the Incremental Cost is the full cost of direct installation Measures (materials and labor) and the full cost of Measures provided in Kits to Customers.

<sup>39</sup> See The National Efficiency Screening Project, National Standard Practice Manual for Assessing Cost-Effectiveness of Energy Efficiency Resources, Edition 1, Spring 2017. Retrieved from <https://nationalefficiencyscreening.org/national-standard-practice-manual/>.

<sup>40</sup> Real discount rate is based on EPA’s Social Cost of Carbon Report and Inflation Rate on USEIA/AEO Inflation Forecast. Nominal discount rate is calculated as  $((1+\text{Inflation}) * (1+\text{RDR}) - 1)$ .

The following table provides the historical discount rate that have been applied:

Program Year Applied To (TRM Based Upon)	Nominal Discount Rate	Real Discount Rate	Inflation Rate
2026 – 2029 (v14.0 – v17.0)	4.33%	2.0% <sup>41</sup> (EPA’s Social Cost of Carbon Report)	2.28% (USEIA/AEO Inflation Forecast)
2022 – 2025 (v10.0 – v13.0) <sup>42</sup>	2.40%	0.42% (10yr Treasury bond rates)	1.98%
2018 – 2021 (v6.0 – v9.0) <sup>43</sup>	2.38%	0.46% (10yr Treasury bond rates)	1.91%
EPY9 and GPY6 (v5.0)	Not specified	5.34% (WACC)	1.91%
EPY5-8 and GPY1-5 (v1.0 - v4.0)	Not specified	5.23% (WACC)	Not specified

As per ‘Section 8.5 Discount Rates’ of the Illinois Energy Efficiency Policy Manual, new discount and inflation rates for subsequent Plan cycles will be added to the IL-TRM as soon as available, and no later than October 1 of the year prior to the Plan filing.

Some measures specify an operations and maintenance (O&M) parameter that describes the incremental O&M cost savings that can be expected over the measure’s lifetime. For most measures the TRM does not specify the NPV of the O&M costs. Instead, the necessary information required to calculate the NPV is included. An example is provided below:

Baseline Case: O&M costs equal \$150 every two years.
Efficient Case: O&M costs equal \$50 every five years.

Given this information, the incremental O&M costs can be determined by discounting the cash flows in the Baseline Case and the Efficient Case separately using the real discount rate.

For a select few measures that include baseline shifts that result in multiple component costs and lifetimes over the lifetime of the measure, this standard method cannot be used. In only these cases, the O&M costs are presented both as Annual Levelized equivalent cost (i.e., the annual payment that results in an equivalent NPV to the actual stream of O&M costs) and as NPVs using a real societal discount rate of 2.0%.

When discounting nominal data that was adjusted to nominal from original real data using an inflation rate that is different than the IL-TRM inflation rate value, the analyst should first adjust for inflation using the original (non-IL-TRM) value to convert the data back to the appropriate year’s real dollars and then use the real discount rate as specified in the IL-TRM.

<sup>41</sup> All parties agree that reasonable arguments can be made to support use of either a 1.5% or 2.0% real discount rate. All parties agree to use 2.0% as a compromise value in order to avoid litigation on this issue in the EEP proceedings. All parties reserve the right to advocate for different discount rates in other analyses or proceedings before the Commerce Commission, including in future efficiency planning or reconciliation cases. No party shall use the fact that a party has agreed to this compromise position as evidence in a future proceeding concerning discount rate assumptions.

<sup>42</sup> Consistent with the IL EE Policy Manual Version 2.0, the societal discount rate used for analyses pertaining to the 2022-2025 Plan cycle will be this discount rate first presented in the 2021 IL-TRMv9.0. “The societal discount rate will be fixed for the entirety of each Plan period, and used for all analyses pertaining to that Plan period. That is, the real and/or nominal societal discount rates used in the development of the Program Administrators’ multi-year Plans shall also be used for retrospective Cost-Effectiveness analyses of the evaluated results of each of the years in those Plans as well as in the IL-TRM applicable to the years in those Plans.”

<sup>43</sup> Consistent with the IL EE Policy Manual Version 2.0, “The societal discount rate used for analyses pertaining to the 2018-2021 Plan cycle will be the discount rate in the 2019 IL-TRM.”

### 3.12 Interactive Effects

The TRM presents engineering equations for most measures. This approach is desirable because it conveys information clearly and transparently and is widely accepted in the industry. Unlike simulation model results, engineering equations also provide flexibility and the opportunity for users to substitute local, specific information for specific input values. Furthermore, the parameters can be changed in TRM updates to be applied in future years as better information becomes available.

One limitation is that some interactive effects between measures are not automatically captured. Because we cannot know what measures will be implemented at the same time with the same customer, we cannot always capture the interactions between multiple measures within individual measure characterizations. However, interactive effects with different end-uses are included in individual measure characterizations whenever possible. For instance, waste heat factors are included in the lighting characterizations to capture the interaction between more-efficient lighting measures and the amount of heating and/or cooling that is subsequently needed in the building. By contrast, no effort is made to account for interactive effects between an efficient air conditioning measure and an efficient lighting measure, because it is impossible to know the specifics of the other measure in advance of its installation.

For custom measures and projects where a bundle of measures is being implemented at the same time, these kinds of interactive effects should be estimated. Interactive effects between measures should be captured sequentially in accordance with best practice with respect to building science. For example: when building HVAC and envelope improvements are made at the same time, envelope improvement savings should be calculated first using the existing HVAC in the calculation, and the HVAC improvement savings should be calculated second assuming that the envelope improvements have already been made and the new installed HVAC capacity reflects the lower heating and cooling loads.

### 3.13 Electrification and Fossil Fuel Baselines (Public Act 102-0662)

On September 15, 2021, the Climate and Equitable Jobs Act (CEJA) was signed into law, effective immediately. Section 220 ILCS 5/8-103B(b-27) of CEJA states that beginning in 2022 an electric utility may:

*“...offer and promote measures that electrify space heating, water heating, cooling, drying, cooking, industrial processes, and other building and industrial end uses that would otherwise be served by combustion of fossil fuel at the premises, provided that the electrification measures reduce total energy consumption at the premises. The electric utility may count the reduction in energy consumption at the premises toward achievement of its annual savings goals. The reduction in energy consumption at the premises shall be calculated as the difference between: (A) the reduction in Btu consumption of fossil fuels as a result of electrification, converted to kilowatt-hour equivalents by dividing by 3,412 Btu's per kilowatt hour; and (B) the increase in kilowatt hours of electricity consumption resulting from the displacement of fossil fuel consumption as a result of electrification measures under this subsection”.*

#### 3.13.1 Fossil Fuel Baseline Efficiencies for Electric Efficiency Measures

The energy savings for an electric efficiency measure with a fossil fuel baseline is the difference in energy consumption between the fossil fuel baseline and the efficient electric measure.

Use the following approach to define the baseline for efficient electric measures that would otherwise be served by combustion of fossil fuel at the premise:

1. If available, apply the baseline efficiency assumptions included in the TRM.
2. If not available, apply the following assumptions:

- a. For Time of Sale and New Construction applications, apply the minimum efficiency available in Illinois on the new equipment market for the fossil fuel.
- b. For Early Replacement:
  - i. If the existing system is known:
    1. For the remaining life of the existing equipment, use the rated efficiency of the existing system.
    2. For the remaining measure life after the existing equipment would have been replaced, use the minimum efficiency available in Illinois on the new equipment market for the fossil fuel.
  - ii. If the existing system is unknown:
    1. Use the best available information for existing equipment efficiency. If no information is available, use the minimum efficiency available in Illinois on the new equipment market for the fossil fuel.

Where a measure includes both fuel switch savings and non-fuel switch savings, the characterization will clearly separate the two types to allow appropriate tracking. In addition, a separate section entitled 'Cost Effectiveness Screening' is provided in all fuel switch measures to outline the actual meter level impacts of a fuel switch measure for use in cost effectiveness screening calculations. An example fuel switch calculation is provided below (from 5.1.10 ENERGY STAR Clothes Dryer):

An ENERGYSTAR Most Efficient Heat Pump clothes dryer with CE<sub>EffElec</sub> of 5.7 purchased in place of a baseline gas dryer:

$$\begin{aligned} \text{SiteEnergySavings (MMBTUs)} &= [\text{FuelSwitchSavings}] + [\text{NonFuelSwitchSavings}] \\ \text{FuelSwitchSavings} &= [(Load/CE_{\text{baseGas}} * \text{Ncycles} * \text{MMBtu\_convert} * \%Gas_{\text{Gas}}] - \\ & \quad [Load/CE_{\text{EffElec}} * \text{Ncycles} * \%Gas_{\text{Gas}} * 3412/1,000,000] \\ &= (8.45/2.84 * 283 * 0.003412 * 0.84) - (8.45/5.7 * 283 * 0.84 * \\ & \quad 3412/1000000) \\ &= 1.21 \text{ MMBtu} \\ \text{NonFuelSwitchSavings} &= [(Load/CE_{\text{baseGas}} * \text{Ncycles} * \text{MMBtu\_convert} * \%Electric_{\text{Gas}}] - \\ & \quad [Load/CE_{\text{EffElec}} * \text{Ncycles} * \%Electric_{\text{Gas}} * 3412/1,000,000] \\ &= (8.45/2.84 * 283 * 0.003412 * 0.16) - (8.45/5.7 * 283 * 0.16 * \\ & \quad 3412/1000000) \\ &= 0.23 \text{ MMBtu} \\ \text{SiteEnergySavings (MMBTUs)} &= 1.21 + 0.23 \\ &= 1.44 \text{ MMBtu} \end{aligned}$$

If supported by an electric utility:

$$\begin{aligned} \Delta\text{kWh} &= \Delta\text{SiteEnergySavings} * 1,000,000 / 3,412 \\ &= 1.44 * 1,000,000/3412 \\ &= 422.5 \text{ kWh} \end{aligned}$$

Actual meter impacts are as follows (calculation methodology is provided in the Cost Effectiveness Screening section at the end of each measure with fuel switching scenarios):

$$\begin{aligned} \Delta\text{Therms} &= [\text{Gas Dryer Consumption Replaced}] \\ &= [(Load/CE_{\text{baseGas}} * \text{Ncycles} * \text{Therm\_convert} * \%Gas_{\text{Gas}}] \\ &= [8.45/2.84 * 283 * 0.03412 * 0.84] \\ &= 24.1 \text{ therms} \\ \Delta\text{kWh} &= [\text{Gas Dryer Electric Consumption Replaced}] - [\text{Electric Dryer Consumption Added}] \\ &= [Load/CE_{\text{EffGas}} * \text{Ncycles} * \%Electric_{\text{Gas}}] - [Load/CE_{\text{EffElec}} * \text{Ncycles} * \%Electric_{\text{Electric}}] \\ &= [8.45/2.84 * 283 * 0.16] - [8.45/5.7 * 283 * 1] \\ &= - 284.8 \text{ kWh} \end{aligned}$$

### 3.13.2 Fuel Units and Conversion Factors

Savings presented in the “Fossil Fuel Savings” section of the TRM will always be provided in Therms. Conversion to other fuel units should be based on site energy use, utilizing the conversion factors displayed below:

Fuel	Energy Units	BTUs per Energy Unit	Conversion Multiplier from Therms to Energy Unit
Natural Gas	Therms	100,000	1.0

Fuel	Energy Units	BTUs per Energy Unit	Conversion Multiplier from Therms to Energy Unit
Propane Gas	Gallons	91,333	1.095
Fuel Oil	Gallons	138,500	0.722
Diesel	Gallons	138,500	0.722
Electric	kWh	3,412	29.3

### 3.14 Secondary kWh Savings from Fossil Fuel Saving Measures

Up until v10, only natural gas savings were detailed within the measure characterizations. A number of measures provide secondary electric savings due to the reduction in heating consumption (for example furnace fan savings resulting from shell improvements in a fossil fuel heated home, typically labelled as kWh\_heating Gas). These secondary savings can be claimed regardless of the fossil fuel in question (e.g. shell improvements to a home with oil heat) even if natural gas is specifically mentioned within the characterization.