

# MW External Stakeholder Outreach Plan



# DRAFT MW External Outreach Strategy

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*Proposal being forwarded to Midwest Market Transformation Collaborative (MW MTC) to engage stakeholders and external entities in states across the Midwest to:*

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- Ensure interested entities understand the goals & work of the MW MTC.
- Instigate a process for updating stakeholders over time and soliciting their input.
- Develop a process for stakeholders to submit Market Transformation (MT) ideas for consideration.

# Engagement with Stakeholders

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- **(Startup) Inform Stakeholders on the Goals and Work of the MW MTC**
  - Virtual meeting in Q3/Q4 2020 to brief stakeholders on the MW MTC:
    - Outline activities to date and review identified potential MT opportunities and MT initiatives in-progress
    - Invitation list will be informed by utility members of the MW MTC, participants in state/utility stakeholder groups and additional organizations throughout the Midwest
- **Annual Update for Stakeholders**
  - After the initial briefing, the MW MTC will hold annual webinars to update stakeholders on progress and the status of work
- **MT Idea Submission**
  - Stakeholders submit ideas that could evolve into MT efforts
  - Ideas will be solicited annually
  - Ideas that score highly as MT initiatives will be kept in a pipeline for potential adoption

# MT Ideas Submission Process

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- Set expectations
- Online form to submit MT ideas – description of market, technology and MT characteristics
- Follow up for clarifications
- MW MTC utilities will decide whether to:
  - Start a new initiative
  - Develop research steps to investigate the idea further
  - Put on a list of longer-term pipeline ideas
  - Not proceed
- Review the results with stakeholders, in the annual update meeting or stand-alone meeting if needed
  - Each proposer will be notified of the outcome for their proposal in advance of the public meeting.

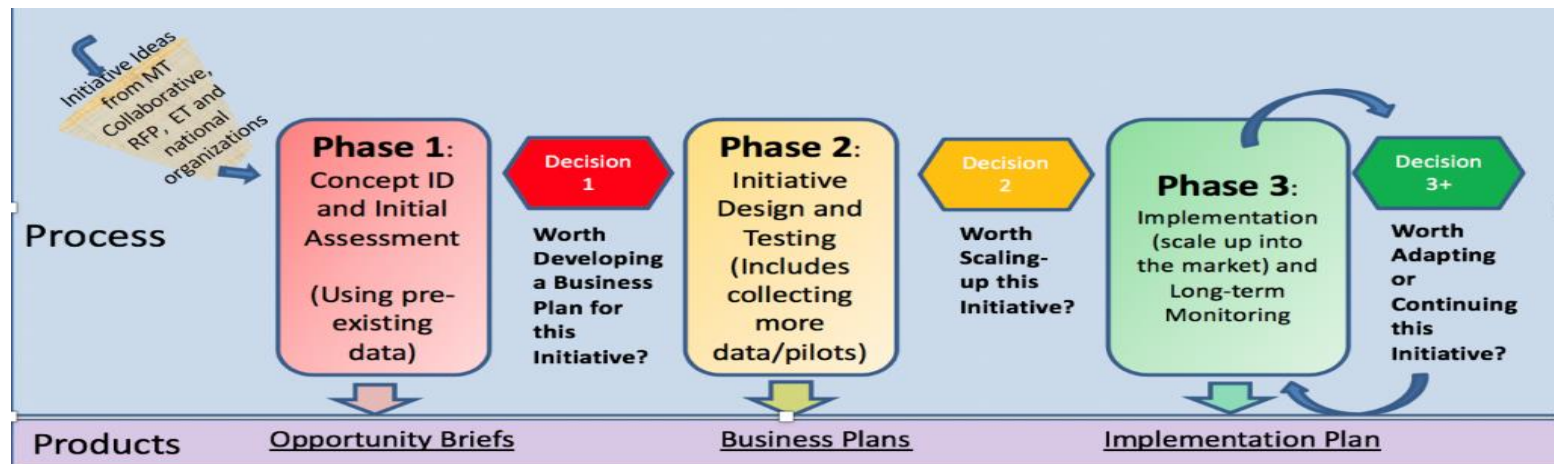
# Illinois Specific Considerations





# Illinois-Specific Considerations

- **How will non-utility stakeholders have the opportunity to provide feedback on which initiatives move forward?**
  - 3 development stages: Opportunity Brief>Business Plan> Implementation Plan
  - *Opportunity Brief* presented to the SAG MT Working Group at the time a utility or group of utilities elect to develop a Business Plan
  - *Business Plan* presented at a SAG MT WG meeting
    - based on input, utilities will decide whether to move forward to implementation
  - If move forward, *implementation plan* follows, with statement of work, schedule, and budget



# IL-Specific Considerations (2/5)

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- **Who will implement MT initiatives?**
  - Funders of initiatives will decide:
    - whether implementation is conducted jointly among the funders or conducted individually by each utility
    - if/how and when to bid out implementation tasks
- **How will non-utility stakeholders be able to provide feedback on initiatives as they evolve?**
  - Annual update webinar provides opportunity for stakeholder feedback on existing initiatives and those in the pipeline
  - In addition, it is likely that updates will be delivered at SAG MT WG meetings as needed (similar to current EE work)

# IL-Specific Considerations (3/5)

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- ***How are the natural market baselines and savings estimates being developed (from a process perspective)? Who is involved in that process and what does it look like? What is the role of non-utility stakeholders?***
  - Natural market baselines are an integral part of developing a Business Plan
  - Evaluators review methods and recommendations on natural market baseline and savings estimates before the Business Plan is released
  - Stakeholders will review the natural market baseline at the time the BP is presented to state/utility stakeholders
- ***What if there is not consensus on the natural market baseline or the savings per unit?***
  - A plan will be developed that is agreeable to the parties to address the contentious issues
  - Discussion will include whether the stakeholders can support the utility(ies) moving forward with the initiative in the meantime, since savings are sometimes a small part of the first few years of an initiative



# IL-Specific Considerations (4/5)

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- ***After a Natural Market Baseline (NMB) is in place, what is the process for considering and adopting prospective modifications?***
  - If new data and information arise that will impact the forecasted NMB, utilities funding the initiative can raise the need for an adjustment and bring the recommendation to MT WG for input
    - See Attachment C in TRM for examples
  - MT WG stakeholders can request the utilities review the natural market baseline anytime they become aware of new data or market conditions that could influence the NMB forecast
- ***After a budget is in place, what is the process for significant budget changes?***
  - Budget changes that are intentional planning decisions on the part of the utility (not caused by unexpectedly low or high participation) in excess of 50% for MT-funded initiative budgets under \$5 million or 20% for MT-funded initiative budgets over \$5 million will be brought to the SAG when practicable, but no later than the next quarterly SAG meeting.

# IL-Specific Considerations (5/5)

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- ***Beyond natural market baseline and budget, how does a change to an initiative happen and how do stakeholders find out?***
  - Initiative progress/changes will be reviewed at the annual update webinar
- ***Public Availability of MT documents***
  - Opportunity Briefs and Business Plans reviewed by MT WG will be made available through the Illinois SAG Market Transformation Savings Working Group webpage, and on any website that is developed for the MW MTC.
  - Accessed here: [https://www.ilsag.info/mt\\_savings\\_working\\_group/](https://www.ilsag.info/mt_savings_working_group/)

# Questions/Next Steps

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- Discussion
- Next Steps:
  - Please send any feedback to Margie Gardner and Nick Dreher:
    - [mgardner@resource-innovations.com](mailto:mgardner@resource-innovations.com)
    - [ndreher@MWAlliance.org](mailto:ndreher@MWAlliance.org)
  - MW MTC will review proposal at their August meeting