



Introduction to SAG Market Transformation Working Group February Meeting

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February 28, 2024 SAG MT Savings Working Group Meeting

Market Transformation Savings Working Group

- ▶ **Purpose:** To provide a forum for utilities and stakeholders to discuss Illinois market transformation initiatives, and the data/approach proposed to be used for savings protocols
 - ❖ **What is “market transformation”?**
 - Illinois definition: “Market transformation is the strategic process of intervening in a market to create lasting change that results in the accelerated adoption of energy efficient products, services and practices.”
 - Intervention activities that seek to impact the long-term EE market, such as working directly with manufacturers, engaging with government agencies on test procedures, etc.
- ▶ **Background:** Established in 2019 to reach agreement on a framework for market transformation savings; this framework was included in IL-TRM Version 8. Since 2019, MT Working Group meetings have focused on discussing MT policy issues, progress on IL MT initiatives, MT evaluation
- ▶ **Working Group Website:**
https://www.ilsag.info/mt_savings_working_group/

Market Transformation Savings Working Group (cont.)

▶ 2024 Topics:

- ❖ Updates on utility MT initiatives
- ❖ When needed, review / approve market transformation savings protocols

▶ Meeting Timing:

- ❖ Q1 Meeting: February
- ❖ Q2 Meeting: May
- ❖ Q3 Meeting: July

▶ Market Transformation Ideas:

- ❖ If anyone has market transformation suggestions for IL utilities to consider as they develop their 2026-2029 EE Plans, share through the Large Group SAG “Energy Efficiency Ideas” process

2024 SAG Portfolio Planning Process

- ▶ **In 2024, Large Group SAG will focus on the Portfolio Planning Process**
 - ❖ This is a consensus-seeking process to discuss foundational issues to EE Portfolio Plan development with IL utilities
 - Utilities are responsible for planning, developing and implementing EE portfolios
 - Utilities are working on EE Plans for the next 4-year cycle -> 2026-2029
 - Each utility is required by statute to file a 2026-2029 EE Plan with the ICC for approval by March 1, 2025
 - ❖ SAG Planning Process occurs once every 4 years
 - SAG has an advisory role, including an opportunity for participants to share feedback and ideas with IL utilities
 - ❖ Large Group SAG meetings will focus on Planning Process
 - Monthly Large meetings through October 2024
 - SAG Subcommittee and SAG Working Groups will focus on current EE portfolio topics that need discussion
 - ❖ Dedicated page on SAG website: <https://www.ilsag.info/meetings/portfolio-planning-process/>

Energy Efficiency Ideas

- ▶ **Opportunity for interested SAG participants to submit:**
 1. Feedback on current EE portfolios, suggesting changes for the 2026-2029 EE Plans; and / or
 2. Energy efficiency ideas for utility consideration, such as program approaches or new measures that have been successfully implemented in another jurisdiction

- ▶ **Deadline for [EE Idea Submittals](#) - Friday, March 15, 2024**
 - ❖ This is not a formal RFP process
 - ❖ EE Ideas will be presented to SAG in April
 - ❖ IL utilities will respond to EE ideas at SAG in May

- ▶ **SAG participants encouraged to:**
 1. Focus on the highest priority EE ideas
 2. Work together to submit joint EE ideas, when possible
 3. Review the latest [utility EE reports](#) and review information from February SAG meetings to avoid proposing an EE idea already offered by a utility

Energy Efficiency Ideas (cont.)

▶ Submitting EE Ideas:

- ❖ [Use the Electronic EE Ideas Template](#)
- ❖ Participants may use the [EE Ideas Word template](#) to collaborate on EE Idea submittals

▶ Additional Guidance:

- ▶ Proposed ideas may be challenging to evaluate without enough information - please submit fully developed ideas and make a good faith effort to fill out as much information as possible in the template
 - See Policy Manual Section 3.10, Proposal Support:
 - *SAG participants that propose to discuss a policy change, Program design, or other topic relevant for discussion at SAG shall demonstrate fact-based support of their recommendation prior to discussion at SAG. Support includes, but is not limited to, background, research, and data analysis.*
- ▶ Compromise and understanding will be needed to reach consensus - it is likely that not all EE Ideas can be incorporated into the utilities' 2026-2029 EE Plans

Q&A

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