

SAG Market Transformation Small Group Process Update

Celia Johnson, SAG Facilitator
Wednesday, November 30 Meeting

Background and Purpose of MT Small Group

▶ Background

- ❖ In 2022, the SAG MT Savings Working Group approved edits to IL-TRM Attachment C, the Framework for Market Transformation Savings in IL
- ❖ The final meeting to discuss Attachment C edits was held in August - ComEd suggested a “MT Small Group” be created in the IL-TRM off-season to discuss several open MT questions
 - See [August 16](#) ComEd presentation: [MT Edits to Attachment C \(ComEd Presentation\)](#)

▶ Purpose of the MT Small Group

- ❖ To resolve open market transformation questions before the next IL-TRM update process begins in spring 2023

▶ Participation

- ❖ Open to all interested Working Group participants, unless a topic may present a financial conflict of interest or when consensus resolution is needed

Background and Purpose of MT Small Group

- ▶ **Meeting Frequency**

- ❖ Monthly

- ▶ **Timing to Resolve Open Issues**

- ❖ By end of Q1 2023 (March)

MT Small Group Topics

▶ **Topic 1: Logic Model Definition**

- ❖ Define “preponderance of the evidence” - a term used in IL-TRM Attachment C to evaluate the impact of the Logic Model for an MT initiative
- ❖ Discuss what this term means and how it will be applied for MT initiatives; discuss theory-based evaluation

▶ **Topic 2: MT Energy Savings Framework**

- ❖ Define specific re-opening criteria for this Framework
- ❖ Define what happens to MT savings (retrospectively and prospectively) when the Framework is revised; when does a utility get credit for future savings? What savings can be “put in the bank” for later?

MT Small Group Topics

▶ Topic 3: MT Policy Questions

- ❖ Several policy questions were raised when the MT Framework was developed in 2019
- ❖ Working Group reached “final draft” resolution in mid-2020, but was not ready to finalize given the early status of MT initiatives in IL
- ❖ Small Group to discuss:
 - Whether participants are comfortable with current final draft policy resolution, or whether additional edits are needed
 - In what forum does this resolution belong? Options include TRM Attachment C, IL EE Policy Manual, or SAG website
 - [Click here to download the Proposed Market Transformation Policy Resolution \(clean final draft, June 2020\)](#)

Small Group Meeting Date	Topics
Small Group Meeting #1: Wed. October 26, 2022 (9:00 - 10:30 am)	<ul style="list-style-type: none"> • Introduction to MT Small Group • Discuss theory-based evaluation; introduce Topic 1 - Logic Model Definition
Small Group Meeting #2: Wed. November 30, 2022 (10:00 am - 12:00 pm)	<ul style="list-style-type: none"> • Follow-up on October meeting • Introduce Topic 2 - MT Savings Framework • Introduce MT Policy Resolution from 2020 • Identify volunteer(s) to draft TRM Attachment C edits and/or policy options for the group to discuss at the Dec. meeting
Small Group Meeting #3: Tues. December 20, 2022 (10:30 am - 12:00 pm)	<ul style="list-style-type: none"> • Evaluators to share how they would undertake research under the new definition • Discuss draft Attachment C edits + request written feedback on Attachment C edits (due by Wed. Jan. 11)
Small Group Meeting #4: Tues. January 17, 2023 (10:30 am - 12:00 pm)	<ul style="list-style-type: none"> • Discuss written feedback; determine whether another round of feedback is needed
Small Group Meeting #5: Tues. February 14, 2023 (10:30 am - 12:00 pm)	<ul style="list-style-type: none"> • Discuss final draft resolution of open issues
SAG MT Savings Working Group Q1 Meeting: Wed. March 8, 2023 (10:00 am - 12:00 pm)	<ul style="list-style-type: none"> • Representative(s) of MT Small Group present resolution of open issues to larger Working Group • Final comments due by Wed. March 22

Questions?

SAG Facilitator Contact Information

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