

# SAG Portfolio Planning Process 2020 and Q1 2021 Schedule (Final - updated March 24, 2020)

The objective of the SAG Portfolio Planning Process is to reach consensus on Illinois Energy Efficiency Portfolio Plans prior to utilities filing Plans for approval with the Illinois Commerce Commission on March 1, 2021.

Visit the SAG website for a detailed Project Plan and other resources:  
[www.ILSAG.info/meetings/portfolio-planning-process/](http://www.ILSAG.info/meetings/portfolio-planning-process/)

**Color Coding:**  
 Blue - Large Group SAG  
 Orange - SAG Working Groups  
 Green - SAG Deliverables  
 Pink - IQ Advisory Committee Planning Activities  
 Aqua - SAG Negotiations

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY
<p><b>Fri. Jan. 17 (Call):</b> Present final draft SAG 2020 Plan</p> <p><b>Tues. Jan. 28 (Springfield):</b> Weatherization Meeting</p> <p><b>Deliverable:</b> SAG Facilitator to Finalize 2020 SAG Plan by Jan. 31</p>	<p><b>Tues. Feb. 4 (Call):</b> Gas utilities present draft Adj. Savings Goals for 2020</p> <p><b>Thurs. Feb. 6 (Call):</b> ComEd Baseline Study Results</p> <p><b>Mon. Feb. 10 (Call):</b> CPAS (TRM) and Cannabis Follow-Up</p> <p><b>Thurs. Feb. 13 (call):</b> MT Savings Working Group</p> <p><b>Deliverables:</b> SAG Facilitator to Finalize Process Templates by Feb. 14; finalize stakeholder questions to inform March 10-11 Meetings by Feb. 10</p>	<p><b>Tues.-Wed. March 10-11 (Calls):</b> Kick-off Planning Process; utility report-out on 2019 + utilities tee up ideas</p> <p><b>Tues. March 3 (Call):</b> Midstream Working Group</p> <p><b>Thurs. March 5 (Call):</b> NEI Working Group</p> <p><b>Deliverables:</b> SAG Facilitator to complete outreach by March 2; Utilities to share Confidentiality Agreements with non-financially interested parties by March 2</p>	<p><b>Tues. April 14 (Call):</b> COVID-19 Utility Updates</p> <p><b>Tues., April 28 (Call):</b> Midstream Working Group</p> <p><b>Deliverable:</b> Stakeholder feedback + ideas due [Date TBD]</p>	<p><b>Tues.-Wed. May 12-13 (Calls):</b> Stakeholder feedback/idea presentations; IQ feedback &amp; ideas</p> <p><b>Tues. May 5 (Call):</b> NEI Working Group</p> <p><b>Tues. May 19 (Call):</b> MT Savings Working Group</p> <p><b>Joint SAG-IQ Activities:</b> IQ focus on Wed., May 13 (PM)</p> <p><b>Negotiating Parties:</b> Discuss Current Portfolio Performance; initial feedback (utility-specific meetings)</p>	<p><b>Tues.-Wed. June 16-17: (Calls):</b> Utilities respond to ideas; workforce dev.; additional planning process topics TBD</p> <p><b>Tues, June 23 (Call):</b> ComEd Potential Study Results</p> <p><b>Mon. June 29 (Call):</b> Ameren IL Potential Study Results</p> <p><b>Mon., June 1 (Call):</b> NEI Working Group</p> <p><b>Tues., June 2 (Call):</b> Midstream Working Group</p> <p><b>Joint SAG-IQ Activities:</b> IQ focus on Wed., June 17 (PM)</p>	<p><b>Tues. July 21 (Chicago):</b> Planning process topics TBD; cannabis follow-up</p> <p><b>Tues., July 28 (Call):</b> PG &amp; NSG Potential Study Results</p> <p><b>Wed. July 22 (Chicago):</b> MT Savings Working Group</p>

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AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY 2021	FEBRUARY 2021
<p>No Large Group SAG Meetings</p>	<p><b>Sept. NTG Meetings</b> Weekly Friday Meetings (Calls): Thurs Sept. 3 Fri. Sept. 11 Fri. Sept. 18 Fri. Sept. 25</p> <p><b>Mon. September 21 (Call):</b> MT Savings Working Group</p>	<p><b>Tues.-Wed. Oct. 13-14:</b> Utilities present draft EE Plan Portfolios, with budget and savings targets; IQ North utilities present portfolios to CBOs</p> <p><b>Joint SAG-IQ Activities:</b> IQ focus on Wed., Oct. 14 (PM)</p> <p><b>Deliverable:</b> <i>Utility Batch Files shared with non-financially interested parties by Oct. 7</i></p>	<p><b>Wed.-Thurs. Nov. 4-5: (Chicago):</b> Stakeholder feedback on draft EE Plans; brief quarterly update from utilities</p> <p><b>Joint SAG-IQ Activities:</b> IQ focus on Thurs., Nov. 5 (PM)</p> <p><b>Final Negotiations Begin:</b> Utilities and Non-Financially Interested Parties</p>	<p><b>Tues.-Wed. Dec. 1-2 (Calls):</b> EM&amp;V Work Plan Presentations for 2021 Programs</p> <p><b>Tues. Dec. 8 (Call):</b> NEI Working Group</p> <p>Negotiations Continue</p>	<p><b>Tues., Jan. 12 (Call):</b> SAG Facilitator presents final draft 2021 SAG Plan</p> <p>Negotiations Continue</p>	<p><b>Tues. Feb. 9 (Call):</b> Gas utilities present draft Adj. Savings Goals for 2021</p> <p><b>By Feb. 1:</b> Negotiations Finalized</p> <p>Note: Utilities will file 4-year EE Portfolio Plans with the ICC on or before March 1, 2021</p>