

# SAG Portfolio Planning Process 2024 Schedule Flowchart (Final Draft 2/5/2024)

The objective of the SAG Portfolio Planning Process in 2024 is to reach consensus on Illinois Energy Efficiency Portfolio Plans prior to utilities filing Plans for approval with the Illinois Commerce Commission on or before March 1, 2025. Contact the SAG Facilitator, Celia Johnson, with questions (Celia@CeliaJohnsonConsulting.com).

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 Subcommittee, Working Group, or Steering Committee Meetings  
Green - Process Deliverables  
Pink - IQ North and IQ South Committee Joint Activities  
Aqua - SAG Negotiations

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY
<p><b>Wed. Jan. 17</b> Kick-off Part 1: 1- SAG Facilitator presents final draft 2024 Plan 2- Introduction to EE Ideas Opportunity</p> <p><b>Tues. Jan. 16 and Tues. Jan. 23:</b> Finalize Metrics in Reporting Working Group</p> <p><b>Additional Joint SAG-IQ Activities:</b> TBD for 2024</p>	<p><b>Tues.-Wed. Feb. 13-14</b> Kick-off Part 2: IL Utilities overview of current EE programs + considerations for next EE Plans</p> <p><b>Wed. Feb. 21:</b> IL Utilities present overview of IQ EE programs</p> <p><b>Thurs. Feb. 1:</b> Survey Responses Due; Comments on 2024 SAG Plan Due</p> <p><b>Wed. Feb. 7:</b> SAG Facilitator to finalize SAG Plan</p> <p><b>Tues. Feb. 6:</b> Steering Committee Meeting</p> <p><b>Wed. Feb. 28:</b> Q1 MT Savings Working Group</p>	<p><b>Tues. March 5:</b> 1- Address follow-up questions from February meetings, if needed 2- Leveraging Other EE Opportunities 3- SAG Facilitator process reminder - eligibility to participate in final EE Plan negotiations</p> <p><b>Fri. March 15:</b> EE Ideas Due Eligible stakeholders who want to participate in EE Plan negotiations will notify SAG Facilitator</p> <p><b>Wed. March 13:</b> Q1 Equity Subcommittee</p> <p><b>Date TBD:</b> NEI Working Group</p>	<p><b>Tues.-Wed. April 9-10:</b> Stakeholder EE Idea Presentations</p> <p><b>Tues.-Wed. April 16-17:</b> Stakeholder EE Idea Presentations</p> <p><b>Mon. April 1:</b> Steering Committee Meeting: Discuss initial questions on EE Idea submittals</p> <p><b>Wed. April 24:</b> Network Lighting Controls Subcommittee</p>	<p><b>Tues.-Wed. May 14-15:</b> Utilities respond to Stakeholder EE Ideas</p> <p><b>Wed. May 8:</b> Q2 MT Savings Working Group</p> <p><b>Wed. May 22:</b> Utilities and Stipulating Parties Discuss Leveraging / Attribution Policy</p>	<p><b>Wed. June 12:</b> 1- Utilities present Total Resource Cost Test Non-Measure Level Inputs (e.g. carbon adder, benefits adder, etc.); 2- EE Financing Mechanisms</p> <p><b>Wed. June 5 and Wed. June 26:</b> Follow-up Meetings with Utilities and Stipulating Parties on Leveraging / Attribution Policy</p> <p><b>Wed. June 26:</b> Feedback on Non-Measure Level Inputs Due</p>	<p><b>Wed. July 17:</b> Discuss feedback on Non-Measure Level Inputs; Addt'l Topics TBD</p> <p><b>Wed. July 10:</b> Q3 MT Savings Working Group</p> <p><b>Wed. July 24:</b> Q2 Equity Subcommittee</p>

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AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY 2025	FEBRUARY 2025
<p><b>Tues.-Wed. Aug. 13-14</b> 1- Ameren IL, ComEd, and Nicor Gas Draft Potential Study Results 2- PG/NSG Draft Potential Study Results</p> <p><b>Fri. Aug. 16:</b> Negotiating stakeholders share initial EE Plan requests with utilities; utilities review requests while preparing draft EE Plans</p> <p><b>Fri. Aug. 16:</b> Utilities share confidentiality agreements w/ negotiating stakeholders for signatures</p>	<p><b>Sept. NTG Meetings</b> *Annual SAG Topic* Wed. Sept. 4 Wed. Sept. 11 Wed. Sept. 18 Wed. Sept. 25</p> <p><b>Tues.-Wed. Sept. 10-11</b> Ameren IL and Nicor Gas present draft EE Portfolio Plans</p> <p><b>Fri. Sept. 6:</b> Final signatures for confidentiality agreements with negotiating stakeholders</p> <p><b>Fri. Sept. 13:</b> Ameren IL, Nicor Gas share "batch files" with negotiating stakeholders</p> <p><b>Tues. Sept. 17:</b> Stakeholders interested in presenting feedback at Oct. 1-2 meetings notify SAG Facilitator</p>	<p><b>Tues.-Wed. Oct. 1-2</b> Initial SAG feedback on draft Ameren IL, Nicor Gas EE Plans</p> <p><b>Tues.-Wed. Oct. 8-9</b> ComEd and PG/NSG present draft EE Portfolio Plans</p> <p><b>Tues.-Wed. Oct. 29-30:</b> Initial SAG feedback on draft ComEd, PG/NSG EE Plans</p> <p><b>Fri. Oct. 11:</b> ComEd, PG/NSG share "batch files" with negotiating stakeholders</p> <p><b>Tues. Oct. 15:</b> Stakeholders interested in presenting feedback at Oct. 29-30 meetings notify SAG Facilitator</p> <p><b>Week of Oct. 14:</b> Final Ameren IL, Nicor Gas negotiations begin</p>	<p>No Large Group SAG planning process meetings</p> <p><b>Week of Nov. 12:</b> Final ComEd, PG/NSG negotiations begin</p> <p>*No meetings week of Nov. 25</p>	<p><b>Tues.-Wed. Dec. 3-4:</b> *Annual SAG Topic* EM&amp;V Work Plan Presentations for 2025 Programs</p> <p><b>Fri. Dec. 20:</b> Finalize Negotiations and Stipulated Agreements with Ameren IL and Nicor Gas</p> <p>*No meetings week of Dec. 23 and week of Dec. 30</p> <p>Negotiating Stakeholders: Review final draft Ameren IL and Nicor Gas EE Plans</p>	<p>No Large Group SAG planning process meetings</p> <p>*Annual SAG Topic* Date TBD: SAG Facilitator to present final draft 2025 SAG Plan for feedback</p> <p><b>Fri. Jan. 31:</b> Finalize Negotiations and Stipulated Agreements with ComEd and PG/NSG</p> <p>Negotiating Stakeholders: Review final draft EE Plans</p>	<p>No planning process meetings</p> <p>Utilities file 4-year EE Portfolio Plans with the ICC on or before March 1, 2025</p>