

SAG Portfolio Planning Process Overview

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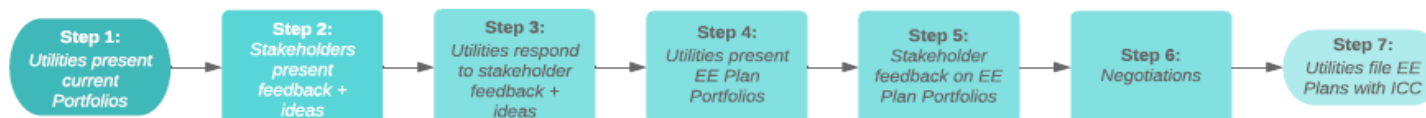
October 26, 2020 SAG Meeting

SAG Portfolio Planning Process

- ▶ **Objective:** To reach consensus on Illinois utility EE Plans for 2022-2025
 - ▶ A forward-thinking, consensus-seeking process to discuss foundational issues to EE Plan development, including: budgets, Portfolio objectives, program ideas, and program design
- ▶ **Participation:** Key steps to the Large Group SAG Planning Process have taken place via joint meetings with the Income Qualified (IQ) North and IQ South EE Advisory Committees
- ▶ **Final Negotiations:** At the conclusion of the Planning Process this fall, final negotiations will be held with utilities and non-financially interested stakeholders
- ▶ **ICC Filing:** Utilities will file EE Plans with the Commission for approval on or before March 1, 2021

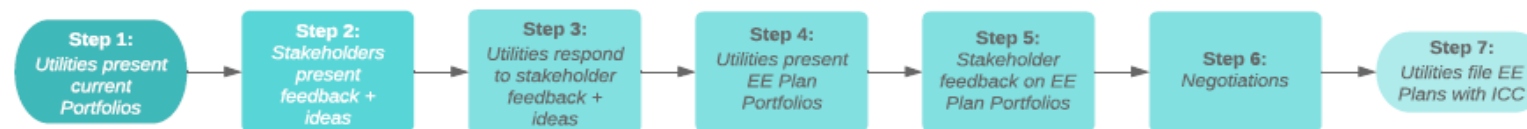
2020 Planning Process Steps to Date

- ▶ **March:** Utilities presented overview of current EE Portfolios
 - ▶ [March 10 meeting](#) + [March 11 meeting](#)
- ▶ **April 27:** Energy Efficiency Ideas Due
 - ▶ [2020 Energy Efficiency Ideas](#)
- ▶ **May + Early June:** Energy Efficiency Idea Presentations
 - ▶ [May 12 meeting](#) + [May 13 meeting](#) + [June 3 meeting](#)
- ▶ **June:** Utilities provided initial response to Ideas
 - ▶ [June 16 meeting](#) + [June 17 meeting](#)
- ▶ **Additional topics:** Utility Potential Study results; evaluation planning; COVID-19 impacts; equity hiring and workforce development
 - ▶ See [SAG Portfolio Planning Process page](#) for additional meeting links



Final Planning Process Steps

- ▶ **October 26-27:** Utilities present preliminary draft 2022-2025 EE Portfolios
 - ▶ Presentations will focus on an overview of preliminary EE Portfolios - questions on other materials are encouraged
 - ▶ Meeting Materials:
 - ▶ Portfolio Overview Presentations
 - ▶ Utility-Specific Portfolio Summary Tables (Excel)
 - ▶ Updated TRC Inputs Table (originally presented in June)
 - ▶ Updated Utility Response to EE Ideas Table (originally presented in June)
- ▶ **November 16-17:** Opportunity for SAG, IQ North and IQ South Committee participants to provide initial feedback



Initial Feedback on 2022-2025 EE Portfolios

- ▶ **Purpose of November 16-17 meetings:** For SAG, IQ North and IQ South Committee participants to provide initial feedback on preliminary utility 2022-2025 Portfolios
 - ▶ If SAG or IQ Committee participants have feedback to share on preliminary portfolios, please notify me **no later than Friday, November 6**
 - ▶ I will follow-up with parties interested in sharing feedback
 - ▶ Summary of topics/feedback is **due by Thursday, Nov. 12**
 - ▶ Feedback will be presented during Nov. meetings
 - ▶ Final meeting timing will depend on how many parties are interested in sharing feedback
 - ▶ Agendas will be organized by topic area (for example: IQ residential feedback, non-IQ residential feedback, business program feedback, etc.)
 - ▶ Meetings will be held via Zoom
- ▶ During Nov. meetings, utilities can also answer follow-up questions raised in October (if needed)

Final Negotiations

- ▶ Negotiations will begin in early December
 - ▶ Participants = utilities and non-financially interested stakeholders
 - ▶ Participants may be asked to sign Confidentiality Agreements
 - ▶ If consensus is reached, participants will be asked to sign utility-specific Stipulated Agreements
- ▶ Non-financially interested stakeholders = parties that do not have a financial stake in the utility EE Portfolios
 - ▶ A “financially interested party” may *gain undue advantage or benefit by participating* in negotiations
 - ▶ See Financial Conflict of Interest ‘process rule’, pages 9-10 of [SAG Process Guidance](#)
- ▶ Key steps for negotiation schedule:
 1. Reach conceptual agreement with each utility by January 15
 2. Finalize stipulated agreements by end of January
 3. Utilities file EE Portfolio plans with ICC on or before March 1 (if consensus is reached, stipulated agreements will be filed in individual utility dockets)

IQ South Committee: Ameren IL and Nicor

▶ Statutory Directive for IQ South Committee

- ▶ *“The electric utilities shall also convene a low-income energy efficiency advisory committee to assist in the design and evaluation of low-income energy efficiency programs.”*
- ▶ SAG Process: Time limited
- ▶ IQ Committee Process: Feedback is ongoing. However, certain elements of next four-year plan will be “locked down” once plans filed on March 1 of 2021.
 - ▶ IQ Program Budgets and Savings Targets
 - ▶ “Stipulations” related to IQ portfolio and programs (and rest of the EE portfolio)

▶ Small Group CAA/CBO Focus Group Meetings

- ▶ Organized by the IQ S Facilitator team, both Ameren IL and Nicor have held “small group” CAA/CBO-only focus group meetings to solicit feedback on a variety of proposed IQ programs emerging from the SAG process, IQ committee process and current portfolios.
- ▶ Some high-level comments will be presented by Ameren IL and Nicor in this series of meetings.
- ▶ More detailed feedback will be presented in the SAG November feedback meetings by the CBOs/CAAs themselves.

Questions?

