

Illinois Energy Efficiency Stakeholder Advisory Group: 2022 SAG Plan Final (3/11/2022)

I. Background

The Illinois Energy Efficiency Stakeholder Advisory Group (SAG) is an advisory body established by the Illinois Commerce Commission (ICC or Commission) that is open to all interested participants. SAG is a forum that allows parties to provide early and ongoing input on energy efficiency programs, express different opinions, better understand the opinions of others, and foster collaboration and consensus, where possible and appropriate.

This 2022 SAG Plan includes an overview of SAG activities from January 1 through December 31, 2022. Due to the number of SAG activities that may be needed in 2022, the SAG Facilitator will prioritize topics and meeting timing based on feedback from the SAG Steering Committee. The SAG is independently facilitated by Celia Johnson, Celia Johnson Consulting LLC, with facilitation meeting support provided by the Midwest Energy Efficiency Alliance (MEEA).¹

II. 2022 SAG Activities

Section II of this SAG Plan provides an overview of SAG activities in 2022, including:

- Categories of SAG Meetings;
- Recurring SAG Activities;
- SAG Participation;
- SAG Coordination with Other Processes;
- SAG Subcommittees;
- SAG Working Groups; and
- Large Group SAG Topics for 2022.

A. Categories of SAG Meetings

Table 1 below describes various categories of SAG meetings, including the SAG Steering Committee, Large Group SAG, SAG Technical Advisory Committee, SAG Subcommittees, and SAG Working Groups.

¹ Contact Celia Johnson (Celia@CeliaJohnsonConsulting.com) to join the SAG distribution list.

Table 1: SAG Meetings	
Meeting Category	Description
SAG Steering Committee	Members of the SAG Steering Committee includes senior representative of utilities, community-based organizations, and non-financially interested stakeholder participants that signed 2022-2025 Stipulated Agreements with Illinois utilities. The Steering Committee provides substantive feedback to the SAG Facilitator on: (1) annual SAG Plans; and (2) progress towards meeting annual SAG Plan goals to ensure that the time spent on SAG is as productive and valuable as possible. Meetings will be held on a bi-annual basis.
Large Group SAG	<p>Large Group SAG meetings will be held in-person on a quarterly basis, at a minimum. The SAG Facilitator will prioritize topics and issues that are required by the Illinois Energy Efficiency Policy Manual Version 2.1, or as it may be updated from time to time; directives to SAG from the Illinois Commerce Commission (ICC); and ICC-approved stipulated agreements between utilities and non-financially interested parties.</p> <p>Other topics related to EE portfolio planning, design, implementation, and evaluation will be scheduled for Large Group SAG discussion as time and resources permit.</p>
SAG Technical Advisory Committee (TAC)	Technical Advisory Committee (TAC) meetings address updates to the IL-TRM, EM&V issues, and other issues of a technical nature. TAC meetings are facilitated by the independent Illinois TRM Administrator, VEIC. SAG participants will be briefed on topics covered in the TAC, as needed. The SAG Facilitator coordinates with the IL-TRM Administrator and participates in TAC meetings, as needed.
SAG Subcommittees	<p>SAG Subcommittees will be established for necessary issue-specific topics based on ICC directives, Policy Manual requirements, and stipulated agreements. Participation in SAG Subcommittees will be open to all SAG participants, unless there may be a financial conflict of interest.</p> <p>In 2022, there are three (3) Subcommittee that are anticipated to be convened by the SAG Facilitator:</p> <ol style="list-style-type: none"> 1. Policy Manual Subcommittee 2. Equity Subcommittee 3. Network Lighting Controls Subcommittee
SAG Working Groups	<p>SAG Working Group meetings will be held to discuss short-term issues that need resolution. Meetings will be held by teleconference and scheduled as needed, with participation by interested SAG participants. SAG Working Groups may recommend next steps to the Policy Manual Subcommittee or IL-TRM TAC.</p> <p>In 2022, there are four (4) Working Groups that are anticipated to be convened by the SAG Facilitator:</p> <ol style="list-style-type: none"> 1. Evaluation Working Group

Table 1: SAG Meetings	
Meeting Category	Description
	2. Market Transformation Savings Working Group 3. Non-Energy Impacts Working Group 4. Reporting Working Group

B. Recurring SAG Activities

There are a number of topics that require recurring discussion in the SAG, as referenced in the Illinois Energy Efficiency Policy Manual Version 2.1.² The SAG Facilitator will organize the following SAG activities related to recurring topics in 2022:

1. Quarterly Reports: Schedule quarterly utility-report-outs to SAG twice per year. Quarterly reports will be posted to the SAG website. For quarters where utilities are not presenting to SAG, utility reports will be circulated to SAG participants by email.
2. Annual Reports: Schedule annual utility report-outs following the end of each program year (combined with a quarterly report-out). Annual reports will be posted to the SAG website.
3. IL-TRM Update Process: Send notice of IL-TRM meetings to the appropriate SAG participants; circulate IL-TRM materials, as requested by the IL-TRM Administrator; update the SAG website with IL-TRM materials; and participate in a discussion of IL-TRM priorities prior to the launch of the annual IL-TRM process, organized by the IL-TRM Administrator.
4. Evaluation Work Plans: Schedule SAG meeting(s) on an annual basis for evaluators to present an overview of draft EM&V work plans for the upcoming year. Draft EM&V work plans will be posted to the SAG website for review and comment. Notice will be circulated to SAG directing that comments on draft EM&V work plans shall be submitted to utilities, ICC Staff, and evaluators within fifteen (15) business days, or such other timeline mutually agreed to by the Parties. Final EM&V work plans will be posted on the SAG website.
5. Evaluation Reports: Draft and final evaluation reports will be posted on the SAG website, as they are made available by independent evaluators.
6. Net-to-Gross Updates: Organize and facilitate meeting(s) to discuss annual updates to Net-to-Gross (NTG) values in September 2022. Independent evaluators share initial NTG recommendations by September 1, 2022 with final values determined by October 1, 2022. Draft and final NTG documents and other NTG meeting communications will be posted to the SAG website and circulated to SAG.

² See IL EE Policy Manual Subcommittee: <http://www.ilsag.info/illinois-ee-policy-manual.html>

7. Adjustable Savings Goals: Organize and facilitate discussions regarding gas utility Adjustable Savings Goals for the 2022 program year, if needed. At a minimum, draft Adjustable Savings Goal spreadsheets for gas utilities will be circulated to interested stakeholders for review. The 2022 update to gas utility Adjustable Savings Goals will also be posted on the SAG website.³
8. Updates to the Policy Manual: Organize and facilitate Policy Manual Subcommittee meetings on an as-needed basis. The Policy Manual Version 3.0 update process is anticipated to be held in 2022.

C. SAG Participation

Participation in large group SAG meetings, SAG Subcommittee, and SAG Working Group meetings is open to all interested parties, unless a topic may present a financial conflict of interest or when an issue requires consensus resolution. Topics that present a conflict will be identified in advance by the SAG Facilitator.

SAG participants include Illinois utilities administering energy efficiency programs (Ameren Illinois, ComEd, Nicor Gas, and Peoples Gas – North Shore Gas); stakeholders representing environmental advocacy, consumer advocacy, and ratepayer advocacy; Illinois Commerce Commission Staff; program implementation contractors; independent evaluators; the Illinois TRM Administrator; community-based organizations and other interested companies and organizations.

Financial Conflict of Interest Policy

Excerpted from SAG Process Guidance

Definitions: A non-financially interested stakeholder participant does not have a financial interest in Illinois utility energy efficiency portfolios, or a financial interest with Illinois utilities. A “financially interested party” means any person or entity, or employee of an entity, that engages in the purchase, sale, marketing or implementation of energy efficiency products, services, programs, pilots or research. A “financially interested party” may also engage in other work with utilities outside of energy efficiency.

Policy: A financial conflict of interest may be present when a SAG participant, in the judgment of the SAG Facilitator, may have a financial stake in a SAG discussion topic and participation by the financially interested party could have adverse consequences, such as hindering complete and frank discussions, or the participant may gain undue advantage or benefit by participating. SAG participants that may have a financial conflict of interest in specific meetings topics must recuse themselves from participating in those meetings or portions of those meetings for relevant topics. Notwithstanding this restriction, the designated agent(s) of a participating utility shall not be considered to have a financial conflict of interest for purposes of participating in SAG discussions. Conflicts may change from time to time.

³ See Adjustable Savings Goals policy for gas utilities: http://www.ilsag.info/adjustable_savings_goals.html

Topics that may present a financial conflict of interest include, but are not limited to, the following:

1. Discussion of proprietary and/or confidential information (e.g., current and prospective program implementers, contractors, and product representatives);
2. Current and past program performance (e.g., current program implementers and contractors);
3. Future bids (e.g., current and prospective program implementers, potential bidders, and contractors);
4. Evaluation performance and proposed changes (e.g., current and prospective independent evaluation contractors); and/or
5. Final negotiations on portfolio planning for utility Energy Efficiency Plans. Prior to the discussion of confidential topic(s), SAG participants may be asked by a utility or utilities to sign a non-disclosure, or confidentiality agreement.

D. SAG Coordination with Other Processes

As described in the SAG Process Guidance document, *Section VI, Coordination with Other Processes*, the SAG Facilitator will coordinate with two other Illinois energy efficiency advisory processes, including 1) Annual update process for the IL-TRM through the SAG TAC, facilitated by Vermont Energy Investment Corp. (VEIC), the IL-TRM Administrator⁴; and 2) Income Qualified Accountability Committee, facilitated by Future Energy Enterprises.

E. SAG Subcommittees

As described in Table 1 above, SAG Subcommittees are established for necessary issue-specific topics based on ICC directives, Policy Manual requirements, and stipulated agreements. Participation in SAG Subcommittees will be open to all SAG participants, except for topics that may involve a financial conflict of interest. For any new or recurring Subcommittees, a Subcommittee Plan and schedule will be prepared annually by the SAG Facilitator and reviewed by interested participants with a request for feedback.

There are three (3) SAG Subcommittees expected to be active in 2022, including the Policy Manual Subcommittee, Equity Subcommittee, and Network Lighting Controls Subcommittee, as briefly described below. Subcommittee Plans will be developed by the SAG Facilitator with feedback requested from Subcommittee participants.

Policy Manual Subcommittee

Website: <https://www.ilsag.info/meetings/subcommittees/policy-manual-version-3-0-subcommittee/>

- **Purpose:** To discuss proposed Illinois energy efficiency policies and reach agreement on Illinois Energy Efficiency Policy Manual Version 3.0, for filing with the Commission in 2023.
- **Background:** Policy Manual Version 1.0 was developed in 2014 at the direction of the Commission, and approved by the Commission in 2015. Since the first version was

⁴ See IL-TRM page of the SAG website for additional information: <https://www.ilsag.info/technical-reference-manual/>

developed, the Policy Manual has been updated on an as-needed basis, including Version 1.1, Version 2.0 and Version 2.1. Policy Manual Version 3.0 is anticipated to include policy updates needed due to passage of the Climate and Equitable Jobs Act (CEJA) in September 2021, as well as other policies proposed by interested participants.

- **Process and Timing:** The Policy Manual update process will kick-off with proposed policies due by May 1. The first meeting is anticipated in late May. A proposed schedule will be shared with Policy Manual Subcommittee participants. The goal is to submit Policy Manual Version 3.0 to the Commission for approval by December 1, 2022.
- **Topics may include:**
 - Electrification or decarbonization EE policies
 - Proposed policy on renewable measures (circulated to SAG for feedback in Q4 2021)
 - Policies related to heating penalties and negative savings (raised by ComEd's evaluator Guidehouse in 2020)
 - Additional policy proposals (opportunity to propose policies will be open to all interested Subcommittee participants)

Equity Subcommittee

Website: <https://www.ilsag.info/meetings/subcommittees/equity-subcommittee/>

- **Purpose:** To discuss topics related to equity in energy efficiency portfolios, as referenced in 2022-2025 EE Plan Stipulated Agreements.
- **Background:** The 2022-2025 EE Plan Stipulated Agreements between individual utilities and non-financially interested stakeholders referenced discussing a variety of topics related to equity, diverse contractor hiring, and utility Market Development Initiatives.
- **Process and Timing:** Kick-off early Q2 (April). A proposed schedule will be shared with Equity Subcommittee participants. The draft Subcommittee Plan and process will be for the Equity Subcommittee will be discussed and reviewed with the IQ Accountability Committee Leadership Team, before finalizing.
- **Topics:** In 2022, the SAG Facilitator will prioritize equity policy topics that may require addition to the Policy Manual. The list of topics below are provided for reference, excerpted from a variety of utility Stipulated Agreements (and may not appear in all utility Stipulated Agreements).
 - Metrics:
 - ACEEE Leading with Equity Initiative
 - Discuss equity and affordability reporting metrics around energy burden, energy affordability, procedural equity, bill impacts, other identified areas
 - Equitable participation metrics
 - Market Development Initiative updates, which may include:
 - Discuss Market Development Initiative research results
 - Develop and implement a Market Development Action Plan reporting process
 - Discuss Market Development Initiative implementation details, which may include discussing an implementation plan
 - Diverse Contracting and Bidding:

- Utility tracking and reporting of diverse vendors and trade allies, broken down by diverse category (whether refinements are needed).
- Identify any data or information gaps related to identifying diverse potential bidders, to achieve the goal of increasing diverse bidders for utility-contracted entities.
- Review technical and performance requirements, as well as Requests for Proposals and Invitation for Bid to enable non-traditional bidders, new and/or marginally capitalized businesses, not-for-profits and CBOs to compete effectively when practicable.
- Other:
 - Identify ways in which the effect of Ameren’s and other utilities’ efficiency programs on energy burdens and energy affordability can be enhanced while still meeting other statutory and policy objectives.
 - Identify policy mechanisms that could support enhanced investment in both (1) targeting of efficiency programs and services to economically challenged, historically under-served and diverse communities; and (2) the diversification of contractors and trade allies delivering efficiency programs and services. Such policy mechanisms may include, but would not be limited to the potential to adopt higher net to gross (NTG) assumptions for, delivery of programs by community-based organizations, community action agencies, or in targeted communities than currently used for programs as a whole (system-wide).
 - Hold twice-yearly workshops to review and discuss Ameren Illinois program activity in the Champaign County Regional Planning Commission (CCRPC) tool with room for feedback on how the tool is designed and used.

Network Lighting Controls Subcommittee

Website: <https://www.ilsag.info/meetings/subcommittees/network-lighting-controls-subcommittee/>

- **Purpose:** To discuss measures associated with network lighting controls.
- **Background:** The 2022-2025 EE Plan Stipulated Agreements between Ameren Illinois, ComEd and non-financially interested stakeholders referenced creating a new Technical Advisory Committee Subcommittee to address the measures associated with network lighting controls.
- **Timing:** Quarterly meetings in 2022: Q2 (April); Q3 (July); Q4 (October)
- **Topics:** Discuss strategies for accelerating adoption of networked lighting controls, luminaire level lighting controls, and other related measures.

F. SAG Working Groups

SAG Working Groups are small groups of interested SAG participants that are convened to discuss short-term issues that need resolution. SAG Working Groups will report-back to the large group SAG following discussions, as needed. Working Groups are open to all interested SAG participants, unless a topic may present a financial conflict of interest. SAG Working Groups are established as time and resources permit, with meetings scheduled on an as-needed basis.

The SAG Facilitator anticipates convening four (4) SAG Working Groups in 2022. Each Working Group is briefly described below. A Working Group Plan and schedule will be developed by the SAG Facilitator with feedback requested from Working Group participants.

SAG Working Groups are open to all interested participants, unless a topic presents a financial conflict of interest. SAG participants are invited to self-select into Working Groups of interest. The SAG Facilitator maintains a separate distribution list for each Working Group.

Evaluation Working Group

Website: <https://www.ilsag.info/evaluation-working-group/>

- **Purpose:** To discuss evaluation questions that are more technical in nature and may not be of interest to all large group SAG participants.
- **Background:** A number of specific evaluation questions were raised in 2020 that required discussion by a small group of interested SAG participants. For transparency and ease of participation, a new Working Group focused on evaluation topics was established in 2021.
- **Timing:** Meetings will be scheduled as-needed.
- **Topics:**
 1. Savings that can be claimed based on net market effects (research report-out by Opinion Dynamics for Ameren Illinois);
 2. Additional evaluation issues that arise and require discussion.

Market Transformation Savings Working Group

Website: [Market Transformation Savings Working Group](#)

- **Purpose:** The purpose of the Market Transformation Savings Working Group (MT Savings Working Group) is:
 1. To provide a forum for stakeholders to raise market transformation ideas for consideration by Illinois utilities;
 2. To provide a forum to discuss policy issues related to MT savings evaluation and estimation;
 3. To provide an opportunity to review specific MT initiatives and the data/approach proposed to be used to develop savings, including but not limited to:
 - a. Logic Models
 - b. Savings/unit
 - c. Total market unit data collection
 - d. Natural market baseline data and projections
 - e. Service territory accounting
 - f. Market progress indicators
 - g. The duration of any MT savings credit.
 4. To discuss evaluation questions related to MT initiatives; and
 5. To reach consensus on savings protocols for MT initiatives that may be included in the IL-TRM.
- **Background:** The MT Savings Working Group began in March 2019. The goal of the Working Group in 2019 was to reach agreement on a framework for market transformation savings, to be included in IL-TRM Version 8.0. The *Attachment C*,

Framework for Market Transformation Savings in Illinois, was finalized in August 2019. Quarterly Working Group meetings were held in 2020, to discuss open MT policy issues and review progress updates on MT initiatives. Three meetings were held in 2021, to discuss updates on MT initiatives.

- **Timing:** Three meetings are planned in 2022: Q1 (March); Q2 (May); Q4 (October).
- **Consensus Process:** If consensus is needed on any MT initiatives, it will be addressed in a small group of non-financially interested parties.

Topics to Address:

1. Q1 Meeting (March)
 - a. Overview of 2022 Working Group Plan
 - b. Code Advancement Stretch Codes update
 - c. Retail Products Platform evaluation update
2. Q2 Meeting (May)
 - a. Code Advancement Building Performance Standards
 - b. Announce opportunity for stakeholders to propose MT ideas
3. Q3 Meeting (October)
 - a. Stakeholder presentations on MT ideas
 - b. MT initiative updates, which may include:
 - i. Gas Heat Pump Water Heaters
 - ii. Thin Triple Pane Windows
 - iii. Other, as needed

Non-Energy Impacts Working Group

Website: [Non-Energy Impacts Working Group](#)

- **Purpose:** To discuss results from Illinois non-energy impact (NEI) studies.
- **Background:** The Non-Energy Impacts Working Group (“NEI Working Group”) was established in 2018 to discuss NEI research plans and draft research results from Illinois NEI studies, as well as defensible methodologies to use across the state related to calculating non-energy impacts. Guidehouse, ComEd’s evaluator, and Opinion Dynamics, Ameren Illinois’ evaluator, developed detailed research plans in 2018 to address NEIs as well as economic impacts of EE programs. Draft research results and methodologies were reviewed by the Working Group throughout 2019 and 2020. NEI research results for the gas utilities Nicor Gas, Peoples Gas and North Shore Gas were also reviewed in 2020. There were no NEI Working Group meetings held in 2021.
- **Timing:** Limited meetings are anticipated in 2022, and will be scheduled when NEI research results are ready to be presented.
- **Topics:**
 - Participant NEI research/results update for Ameren Illinois and ComEd
 - C&I / business NEI research results for Ameren Illinois and ComEd

Reporting Working Group

Website: www.ilsag.info/reporting-working-group

- **Purpose:** To discuss utility reporting items referenced in 2022-2025 EE Plan Stipulated Agreements.

- **Background:** Utilities prepare Quarterly Reports and Annual Reports to provide progress updates on EE programs. Reports are filed with the Commission and posted on the [Utility Reports page](#) of SAG website. Reports are also circulated to SAG at the end of each quarter. Utility reporting requirements are referenced in the Policy Manual (see Section 6, Program Administration and Reporting).
- **Timing:** A proposed schedule will be shared with Reporting Working Group participants.
- **Topics:**
 - As referenced in the 2022-2025 EE Plan Stipulated Agreement, ComEd to work with stakeholders to develop progress metrics on energy efficiency and financial assistance efforts in quarterly reports.
 - Discuss clarification on new utility reporting referenced in 2022-2025 EE Plan Stipulated Agreements, as needed.

III. Large Group SAG Topics for 2022

There are a number of topics that SAG participants are interested in discussing at Large Group SAG meetings in 2022. This section of the SAG Plan includes topics related to: A) Utilities; and B) Evaluation. Meeting agendas will be finalized with presenters in advance of each meeting. Topics are scheduled at SAG meetings based on priority, and as time and resources permit. Section III is not intended to be an exhaustive list; there may be additional topics that require discussion in 2022.

A. Utility Topics

1. Utility report-out presentations/progress updates twice per year on EE portfolio results
2. Workforce Development and Diversity: Walker-Miller Energy Services and Energy Justices Labs presentation on results from Income Qualified Focus Groups and Diverse Vendor Survey, completed for Ameren Illinois
3. Ameren Illinois and ComEd present findings from their Efficient Choice websites
4. Leveraging other initiatives (federal stimulus or other funding sources, tentative topic if needed)
5. SAG Facilitator to present process for stakeholder EE ideas to be shared with utilities throughout the 2022-2025 Energy Efficiency Plan
6. Health and safety materials reporting – update from utilities on data collect and what has been used to date in 2022

B. Evaluation Topics

1. Report-out on economic and employment impacts of EE portfolios, with presentations by utility evaluators (Guidehouse and Opinion Dynamics)
2. Annual process to reach agreement on Net-to-Gross (NTG) values for the 2023 program year, with initial NTG value recommendations provided by independent evaluators; and
3. Annual meeting for evaluators present draft evaluation plans for 2023 utility EE programs

IV. Schedule

Table 3 below includes the 2022 SAG schedule for Large Group SAG meetings. Meetings of the SAG Steering Committee, SAG Subcommittees, and SAG Working Groups are not listed in the table below. Instead, meetings will be scheduled by the SAG Facilitator with participants of each group.

Final Large Group SAG meeting agendas will be circulated to participants approximately five (5) Business Days before each meeting. Meeting dates and the agenda topics listed in Table 3 are subject to change.

Table 3: Large Group SAG 2022 Schedule		
Date / Time	Planned Agenda	Next Steps
<p>Tues. Feb. 22 10:00 am – 12:00 pm</p>	<p><u>Quarterly SAG Meeting (Quarter 1)</u></p> <ul style="list-style-type: none"> • SAG Planning: SAG Facilitator presents final draft 2022 SAG Plan and schedule; request for comments. • Draft EM&V Plans (Tentative): Ameren Illinois evaluator presents an overview of high-level draft multi-year evaluation plans. <p>Note: An additional meeting for evaluators to present draft EM&V Plans for ComEd, Nicor Gas, Peoples Gas & North Shore Gas will be scheduled soon.</p>	<p>Comments on the 2022 SAG Plan due by Tuesday, March 8; SAG Facilitator to finalize the 2022 SAG Plan and post on the website by Friday, March 11</p> <p>Written draft Ameren Illinois EM&V plan will be provided by March 25 and circulated to SAG</p>
<p>Wed. May 4 (Day 1) 10:00 am – 12:30 pm</p> <p>Thurs. May 5 (Day 2) 9:30 am – 12:30 pm</p>	<p><u>Quarterly SAG Meeting (Quarter 2)</u></p> <p>Day 1:</p> <ul style="list-style-type: none"> • SAG Facilitator: Reminder on Upcoming Policy Manual Update Process • Statutory Update: Overview of statutory impacts; key changes to electric EE Portfolios from Climate and Equitable Jobs Act (CEJA) • Ameren Illinois and ComEd Presentations: Efficient Choice Website Findings <p>Day 2:</p> <ul style="list-style-type: none"> • Electric and Gas Utility 2021 Report-Out: Utilities present Calendar Year 2021 results, highlights of new 2022 programs • Leveraging federal stimulus (discuss if needed) 	<p>Follow-up items will be circulated following the meeting</p>
<p>Tues. July 19 (Day 1) 9:30 am – 12:30 pm</p> <p>Wed. July 20 (Day 2) 9:30 am – 12:30 pm</p>	<p><u>Quarterly SAG Meeting (Quarter 3)</u></p> <p>Day 1:</p> <ul style="list-style-type: none"> • Report-out on economic and employment impacts of Illinois EE programs (Guidehouse and Opinion Dynamics) • Additional topics TBD 	<p>Follow-up items will be circulated following the meeting</p>

Table 3: Large Group SAG 2022 Schedule		
Date / Time	Planned Agenda	Next Steps
	<p>Day 2:</p> <ul style="list-style-type: none"> • Income Qualified Research: Walker-Miller Energy Services and Energy Justice Labs presentation on results from Income Qualified Focus Groups and Diverse Vendor Survey, completed for Ameren Illinois 	
<p>September 2022 Large Group SAG Meetings – NTG Update Process</p>	<p>Net-to-Gross Meetings: Four Large Group SAG meetings to discuss evaluator Net-to-Gross (NTG) recommendations for programs beginning January 1, 2023.</p> <ul style="list-style-type: none"> • Meeting 1 – Friday, Sept. 2 (9:30 am – 12:30 pm): Evaluators present initial recommended NTG values for Illinois utilities. Discuss questions and follow-up. • Meeting 2 – Tuesday, Sept. 13 (10:00 am – 12:00 pm): Follow-up discussion on recommended NTG values. Discuss consensus on recommended values. • Meeting 3 – Tuesday, Sept. 20 (10:00 am – 12:00 pm): Follow-up discussion on recommended NTG values. Discuss consensus on recommended values. • Meeting 4 – Tuesday, Sept. 27 (10:00 am – 12:00 pm): Final meeting to discuss follow-up and consensus on recommend values. 	<p>NTG values for the program year beginning Jan. 1, 2023 must be finalized by independent evaluators by Oct. 1, 2022</p>
<p>Tues. Nov. 15 (Day 1) 9:30 am – 12:30 pm</p> <p>Wed. Nov. 16 (Day 2) 9:30 am – 12:30 pm</p>	<p><u>Quarterly SAG Meeting (Quarter 4)</u></p> <p>Day 1: Electric and Gas Utility Quarterly Report-Outs: Utilities present Calendar Year 2022 to date results</p> <ul style="list-style-type: none"> • If needed, include update on health and safety materials reporting (data collected, what has been used to date in 2022) <p>Day 2:</p> <ul style="list-style-type: none"> • Process for EE Idea Proposals (SAG Facilitator) • Additional topics TBD 	<p>Follow-up items will be circulated following the meeting</p>

Table 3: Large Group SAG 2022 Schedule		
Date / Time	Planned Agenda	Next Steps
<p>December 2022: Annual EM&V Work Plan Meetings</p>	<p>Annual EM&V Work Plan Meetings: Two Large Group SAG meetings to discuss draft evaluation plans for 2023, with additional updates provided on multi-year evaluation activities</p> <ul style="list-style-type: none"> • Meeting 1 – Tuesday, December 6 (9:30 am – 12:00 pm): Evaluators present an overview of high-level draft multi-year evaluation plans for Ameren Illinois and ComEd EE programs • Meeting 2 – Wednesday, December 7 (10:00 am – 12:00 pm): Evaluators present an overview of high-level draft multi-year evaluation plans for Nicor Gas and Peoples Gas & North Shore Gas programs 	<p>Draft written EM&V work plans will be provided for review and comment on or before December 15</p> <p>SAG Facilitator to post on the SAG website and circulate notice to SAG</p>

V. Additional SAG Activities

As referenced in the Ameren Illinois 2022-2025 Stipulated Agreement, multi-family workshops will be held with interested stakeholders twice per year, starting in 2022, to outline data gathering consistent with the topics below. This will include working with interested stakeholders to establish an appropriate data sharing review and process. Interested participants agree to assess the schedule/frequency and need for continued multi-family workshops.

Regarding comprehensiveness of treatment of efficiency opportunities within MF buildings:

- a. % of buildings/projects (and number of apartments within those buildings) served YTD that received whole building assessments
- b. % of buildings/projects and apartments served YTD that received only DI measures
- c. % of buildings/projects and apartments YTD that only received in-unit measures
- d. % of buildings/project and apartments YTD that received only common-area measures
- e. % of buildings/projects and apartments served YTD that got recommendation to install at least one major measure
- f. % of buildings/projects and apartments that got recommendation for major measures 12-24 months ago that followed through and installed at least one recommended major measure, if possible
- g. % of buildings/projects and apartments that got recommendation for major measures 0-12 months ago that followed through and installed at least one recommended major measure, if possible