

Illinois EE Stakeholder Advisory Group Market Transformation Savings Working Group 2021 Plan (Final)

I. Working Group Purpose

The purpose of the SAG Market Transformation Savings Working Group (MT Savings Working Group) is:

1. To provide a forum to discuss policy issues related to market transformation (MT) savings evaluation and estimation.
2. 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
3. To discuss evaluation questions related to MT initiatives; and
4. To discuss, and if possible, reach consensus on savings protocols for MT initiatives that may be included in the IL-TRM.

The MT Savings Working Group will report-back to the large group SAG, as needed.

II. Background

Market transformation programs were administered by the Illinois Department of Commerce and Economic Opportunity from 2008 – 2017. Per the Future Energy Jobs Act, the administration of these programs shifted to the utilities on June 1, 2017. Illinois utilities formed a utility collaborative (Midwest Market Transformation Collaborative) to further discuss market transformation and invite utilities throughout the Midwest to participate. The SAG Working Group will address Illinois-specific market transformation topics as described in the purpose section above.

The MT Savings Working Group launched 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 and included in the IL-TRM. The final Market Transformation Framework is available for download via this link: [Attachment C to IL-TRM Version 8.0: Framework for Counting Market Transformation Savings in Illinois \(August 23, 2019\)](#).

Quarterly Working Group meetings were held in 2020, to discuss open market transformation policy issues and review progress updates on market transformation initiatives.

III. 2021 Working Group Goals

MT Savings Working Group Goals in 2021 include:

1. Provide a forum for utilities to update interested stakeholders on the progress of market transformation initiatives;
2. Provide a forum for stakeholders to raise market transformation ideas for consideration by Illinois utilities;
3. Finalize open market transformation policy questions, if needed; and
4. Discuss and if possible, reach agreement on how utilities may claim savings from market transformation initiatives.

IV. Coordination with Annual IL-TRM Update Process

The Illinois TRM update process for IL-TRM Version 10.0 begins in spring 2021. Any final revisions to the IL-TRM Version 10.0 *Attachment C: Framework for Counting Market Transformation Savings in Illinois*, including consensus savings protocols for market transformation initiatives, must be submitted to the IL-TRM Administrator no later than September 1, 2021.

To ensure transparency for SAG MT Savings Working Group activities, if the IL-TRM Attachment C Framework referenced above requires revision in 2021, the final draft Attachment C Framework will be circulated to SAG for final review and comment before the final version is submitted to the IL-TRM Administrator.

V. Working Group Website

The SAG website includes a page dedicated to the MT Savings Working Group, available at: https://www.ilsag.info/mt_savings_working_group/

VI. Participation

MT Savings Working Group participation is open to all interested SAG participants, unless a topic may present a financial conflict of interest or when consensus resolution is needed, such as finalizing savings protocols for specific market transformation initiatives and finalizing policy issues. SAG participants are invited to self-select into the Working Group.

VII. Schedule

Meetings of the MT Savings Working Group in 2021 are outlined below. Quarterly Working Group meetings are planned. The schedule is subject to change pending feedback from Working Group participants. Additional meetings will be scheduled as needed.

Table 1: SAG Market Transformation Savings Working Group 2021 Schedule		
Date / Time	Agenda	Next Steps
<p>Q1 Meeting: Wed., March 17 10:00 am – 12:00 pm</p>	<p>2021 Working Group Plan (SAG Facilitator)</p> <ul style="list-style-type: none"> IL-TRM Version 10.0 process check-in: Are there any MT initiative savings protocols that need to be finalized in 2021 for inclusion in the IL-TRM? Status update on final draft MT policy issues <p>Midwest MT Collaborative Update (MEEA)</p> <p>Code Advancement MT Initiative:</p> <ul style="list-style-type: none"> Update on Stretch Codes and Building Performance Standards (Slipstream and MEEA) 	<p>Final comments due on Working Group Plan by Wed., March 31</p> <p>Follow-up items will be determined during the meeting</p>
<p>Q2 Meeting: Tues., June 29 10:00 am – 12:00 pm</p>	<p>Retail Products Platform MT Initiative:</p> <ul style="list-style-type: none"> ComEd update on initiative progress Update on Natural Market Baseline <p>Thin Triple Pane Windows MT Initiative:</p> <ul style="list-style-type: none"> Update from Northern IL Utilities Discuss potential for Ameren Illinois to join initiative in next EE Plan <p>Midwest MT Collaborative Update (MEEA), if needed</p>	<p>Follow-up items will be determined during the meeting</p> <p>A follow-up call with non-financially interested parties will be scheduled to further discuss savings protocols, if needed</p>
<p>Q3 Meeting: Wed., September 15 10:00 am – 12:00 pm</p>	<p>SAG Facilitator to present process for stakeholders to share MT ideas in Q4 meeting</p> <p>Gas Heat Pump Water Heaters MT Initiative:</p> <ul style="list-style-type: none"> Business Plan and Market Characterization 	<p>Follow-up items will be determined during the meeting</p> <p>Due date for MT EE Ideas TBD</p> <p>A follow-up call with non-financially interested parties will be scheduled to further discuss savings protocols, if needed</p>
<p>Q4 Meeting: Wed., December 1 10:00 am – 12:00 pm</p>	<p>Interested stakeholders to share MT ideas with IL utilities</p> <p>Utilities to share MT update, if needed: Are there any new MT initiatives being pursued in 2022?</p>	<p>Follow-up items will be determined during the meeting</p> <p>A follow-up call will be scheduled to further discuss savings protocols, if needed.</p>