

SAG Market Transformation Savings Working Group: 2020 Plan

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February 13, 2020 Working Group Meeting

Working Group Purpose

- ▶ To provide a forum to discuss policy issues related to MT savings evaluation and estimation.
- ▶ 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:
 - ▶ Logic Models;
 - ▶ Savings/unit;
 - ▶ Total market unit data collection;
 - ▶ Natural market baseline data and projections;
 - ▶ Service territory accounting; and
 - ▶ The duration of any MT savings credit.
- ▶ To reach consensus on savings protocols for MT initiatives that may be included in the IL-TRM.

2020 Schedule

- ▶ **Q1 (Today):**
 - ▶ Discuss open market transformation policy questions
- ▶ **Q2 (May 19, teleconference):**
 - ▶ Code Program Business Plan
 - ▶ Commercial Food Service Pilot Progress and Market Baseline Update
- ▶ **Q3 (July 22, in-person):**
 - ▶ Gas Heat Pump Water Heaters Business Plan and Market Characterization
 - ▶ Luminaire Level Lighting Controls Business Plan
 - ▶ Retail Products Platform Business Plan
- ▶ **Q4 (September 22, teleconference):**
 - ▶ Commercial Food Service - Pilot Results and MT Business Plan Opportunity
 - ▶ Additional topics TBD

Process for Consensus on Savings Protocols

- ▶ **Objective:** To reach consensus on savings protocols for specific market transformation initiatives, for inclusion in the IL-TRM.
- ▶ **Topics to Discuss for Specific MT Initiatives:**
 - ▶ Market Transformation Business Plan
 - ▶ *Data/approach proposed to be used to develop savings, including but not limited to:* Logic Models; savings/unit; total market unit data collection; natural market baseline data and projections; service territory accounting; and the duration of any MT savings credit.
- ▶ **Process:**
 1. Review business plan + data/approach proposal for individual MT initiatives. Discuss what information should be included in IL-TRM.
 2. Circulate draft savings protocol to Working Group for review (15 Business Days). Schedule Working Group follow-up discussion, if needed.
 3. Submit final/consensus savings protocol(s) to IL-TRM Administrator for IL-TRM Version 9.0.
- ▶ **Timing for Inclusion in IL-TRM V9:** Send final (consensus) materials to IL-TRM Administrator no later than Sept. 1, 2020

Process for Consensus on Savings Protocols (cont.)

▶ Open questions:

1. What information should be considered for inclusion in the IL-TRM on savings protocols?
 - ▶ This will be addressed by the Working Group for each MT initiative.
2. Are any revisions needed to the Attachment C: Framework for Counting MT Savings in IL?
 - ▶ Note: If Attachment C requires any updates in 2020, the final draft version requires circulation to SAG for review/comment before the Sept. 1 deadline.

Process for Consensus on Policy Issues

1. Background on the policy request will be presented to interested SAG participants.
2. Proposed policy resolution will be circulated to SAG for review, including a request for edits or questions, with a minimum of ten (10) Business Days provided for review.
3. If the SAG Facilitator receives substantive edits, questions or concerns regarding proposed resolution of an open policy issue, a follow-up SAG discussion will be held with interested SAG participants.
4. Final resolution will be documented on the Policy page of the SAG website: <https://www.ilsag.info/policy/>
5. The SAG Facilitator will maintain a “Policy Tracker” describing any policies to be considered in a future update to the Policy Manual or IL-TRM Policy Document.

Questions?