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SAG Market Transformation Savings Working Group: Process Overview

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May 19, 2020 Working Group Meeting

Agenda

- ▶ Working Group Purpose
- ▶ Process for Consensus on Savings Protocols
- ▶ Next Steps for IL-TRM Version 9.0
- ▶ Process for Consensus on Policy Issues

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 approaches for MT initiatives that may be included in the IL-TRM.

Process for Consensus on Savings Protocols

- ▶ **Objective:** To reach consensus on savings protocols for specific market transformation initiatives, for potential inclusion in the IL-TRM.
- ▶ **Topics to Discuss for Specific MT Initiatives:**
 - ▶ Overview of market transformation initiative + Business Plan (if developed)
 - ▶ 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 and discuss individual market transformation initiative + savings proposal
 2. Circulate draft savings proposal for individual MT initiatives to Working Group for review
 - ▶ 15 Business Days will be provided for review
 - ▶ Follow-up discussion scheduled to finalize savings approach + discuss if savings approach should be included in IL-TRM
 3. Document consensus on MT initiative-specific savings approaches:
 - ▶ Submit final/consensus savings approach to IL-TRM Administrator for inclusion in Attachment C or
 - ▶ Post on SAG website (Working Group page)

Next Steps for IL-TRM Version 9.0

1. Will savings approaches for any MT initiatives be included in IL-TRM V9?

- ▶ Working Group needs to share final/consensus savings approaches with IL-TRM Administrator no later than Sept. 1, 2020
- ▶ In order to meet the Sept. 1 deadline, draft savings approach proposals need to be shared with Working Group no later than July

2. What savings approach information should be considered for inclusion in the IL-TRM?

- ▶ This will be discussed by the Working Group for each MT initiative

3. Are any revisions needed to the IL-TRM *Attachment C: Framework for Counting Market Transformation Savings in IL?*

- ▶ The final draft version requires circulation to SAG for review/comment no later than mid-August, before the Sept. 1 deadline to submit consensus language to IL-TRM Administrator
- ▶ Two edits may be needed:
 1. Introductory paragraph describing how Attachment C was developed
 2. Consensus for MT policies developed in 2020

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/>
 - ▶ Alternative: Final resolution documented in IL-TRM Attachment C (Framework for Counting Market Transformation Savings in Illinois)
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.

Next Working Group Meeting

▶ Q3 Meeting (July 22) - Tentative Topics:

- ▶ Gas Heat Pump Water Heaters Business Plan and Market Characterization
- ▶ Commercial Food Service Pilot Progress and Market Baseline Update
- ▶ Code Program Implementation Plan
- ▶ Retail Products Platform Business Plan
- ▶ Luminaire Level Lighting Controls Business Plan

Questions?

