

## Summary of Technical Reference Manual “Front Matter” Comments

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<b>Commenter</b>	<b>Comment</b>	<b>EE SAG Participant Response(s)</b> <ul style="list-style-type: none"> <li>• Discussion items for May 29 SAG</li> </ul>
<b>Citizen’s Utility Board</b> (Devins)	<u>Role of SAG:</u> The development of the TRM is a collaborative effort, and certain stakeholders should not have a greater role in the development or maintenance of the TRM	
	<u>Role of Utilities in EM&amp;V:</u> Utilities should not serve as “facilitator” of EM&V review of the TRM, as this compromises independence of EM&V.	
	<u>Applicability of TRM:</u> Utilities must use the TRM unless the utilities have a new measure not covered by the TRM. Utilities should use TRM savings values in savings proceedings.	
<b>Navigant</b> (Erikson)	<u>Evaluators May Use non-TRM Savings Values During Evaluation:</u> The EM&V-derived savings estimates presented by evaluators may use inputs to savings calculations that vary from what is in the TRM.	
<b>Navigant</b> (Del Basio) [Oral Remark 5-15-12 TRM Meeting]	Need to clearly explain what values are applied retrospectively instead of prospectively, and define terms.	
<b>Nicor</b> (Weaver)	<u>TRM Values Should Be Used in Program Tracking Systems:</u> Portfolio Administrators will update tracking systems to collect data needed for the TRM application, and will use TRM values in the tracking system.	
	<u>Tracking Systems May Not Be Updated by June 1, 2012:</u> Given the number of measures in the TRM,	

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	and the fact that the TRM was just finalized, utilities will need time to update tracking systems, and implementers will need time to update program designs to reflect new values.	
	<u>Evaluators Will Use the TRM Values in Determining Savings:</u> However, if measure not in the TRM, evaluator can develop appropriate savings calculations, and the calculations may be applied retrospectively.	
	<u>TRM Mistakes:</u> The TRM can be updated mid-cycle if the TRM value clearly contains a mistake.	
	<u>Updating Utility Goals:</u> If measure values updated, gas and electric goals may need to be updated accordingly (consistent with ComEd settlement agreement).	
	<u>Various Line Edits</u>	
<b>ODC (Sutter); Navigant (Erickson) and Nicor (Weaver)</b>	<p><u>“Prospective” vs. “Retrospective” Definitions and Applicability of the TRM in Evaluation.</u> The “evaluator team” (plus Ted Weaver)</p> <ul style="list-style-type: none"> <li>• added two more terms for the glossary and adjusted two that were present to help clarify the meaning of “retrospective” and “prospective” application..</li> <li>• Re-wrote the evaluator role section of the TRM.</li> <li>• Added language for a section around the use of the TRM in EM&amp;V.</li> <li>• Added a table on when EM&amp;V updates should be applied retrospectively versus prospectively.</li> </ul>	

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<b>ICC Staff</b>	<u>ADD: ICC Enabling Policy for TRM</u>	
	<u>Utilities/DCEO must use measure tracking codes in the tracking database</u>	
	<u>Roles and responsibilities: Edited (Section 2.6.1)</u>	
	<u>TRM update process: Edited (Section 2.6.2)</u>	
	<u>TRM values must be used in tracking databases (Section 2.8)</u>	
	Extensive line edits (throughout document)	