

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. The shapes are primarily triangles and polygons, creating a modern, dynamic feel. The text is centered on a white background that is partially framed by these blue shapes.

# 2019 SAG Plan

## January 14, 2019

Celia Johnson, SAG Facilitator

# Today's Agenda

- ▶ Overview of 2019 SAG Plan and Schedule
  - ▶ SAG Goals
  - ▶ Key Components of SAG Plan
    - ▶ Large Group SAG
    - ▶ SAG Steering Committee
    - ▶ SAG Subcommittees
    - ▶ SAG Working Groups
    - ▶ Potential Large Group SAG Topics
- ▶ Questions/Comments?

# SAG Goals - Shared in July 2018

- ▶ Ensure that discussions are productive and valuable.
- ▶ Engage additional stakeholders to participate in SAG.
- ▶ Encourage presentations to SAG on innovative ideas.
- ▶ Be a source of information to policymakers and the public about Illinois energy efficiency programs.
- ▶ Use SAG as a forum to resolve issues that may reduce litigation. Inform the Commission of SAG plans and activities.

As described in the Policy Manual:

- ▶ *SAG is a forum that allows parties to express different opinions, better understand the opinions of others, and foster collaboration and consensus, where possible and appropriate.*

# Key Components of 2019 SAG Plan

## ▶ Large Group SAG Meetings

- ▶ Quarterly in-person meetings

## ▶ SAG Steering Committee

- ▶ Two meetings per year; members include senior representatives of utilities and non-financially interested stakeholders that are regular SAG participants
- ▶ The purpose is to provide 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.

## ▶ SAG Subcommittees

- ▶ Conclude the Policy Manual Subcommittee Version 2.0 update
- ▶ Launch the new EM&V Subcommittee following Policy Manual Version 2.0 negotiations

# 2019 SAG Plan (cont.)

- ▶ **SAG Technical Advisory Committee**

- ▶ Meetings will be held as needed, in coordination with VEIC

- ▶ **SAG Working Groups**

- ▶ Non-Energy Impacts Working Group
- ▶ Market Transformation Savings Working Group
- ▶ EE Successes Working Group (tentative)

# Innovative Ideas

- ▶ One of the key SAG goals for the 2018-2021 EE Plan is to educate participants on and encourage the discussion of innovative ideas. An "innovative idea" may be an issue in the EE industry, a successful EE or related program in another jurisdiction, a method of reaching customers, an efficiency measure or product being tested in a new manner, etc.
  - ▶ There is a SAG Innovative Ideas Survey posted on the home page of the SAG website: <https://www.surveymonkey.com/r/8DPMTZB>
  - ▶ Innovative ideas will be accepted on a rolling basis, and scheduled for discussion at SAG as time and resources permit.
  - ▶ The September SAG meeting will be focused on energy efficiency innovation.

# Large Group SAG Meeting Dates

## ▶ Quarterly In-Person Meetings

- ▶ Tuesday, Feb. 26 (Chicago)
- ▶ Tuesday, May 14 (Springfield)
- ▶ Tuesday, September 10 (Chicago - EE innovation meeting)
- ▶ Tuesday, November 19 (Chicago)

# SAG Subcommittees in 2019





# Policy Manual Subcommittee

- ▶ **Purpose:** To reach agreement on Policy Manual Version 2.0.
- ▶ **Participation:** Open to all interested SAG participants, unless there is a financial conflict of interest.
- ▶ **Meetings:** Apx. monthly in-person meetings, with follow-up teleconferences in-between.
- ▶ **Process:** The Subcommittee continues discussing proposed policies for inclusion in Version 2.0.
  - ▶ Negotiation meetings are expected to begin in April.
- ▶ **Timing:** The goal is to finalize Version 2.0 by the end of May 2019, to be submitted to the Commission for approval in June.

# EM&V Subcommittee

- ▶ **Purpose:** To address topics and issues related to evaluation.
- ▶ **Participation:** Open to all interested SAG participants, unless there is a financial conflict of interest.
- ▶ **Process:** The EM&V Subcommittee cover a variety of topics related to evaluation, as needed.
  - ▶ I am working on an EM&V Subcommittee Plan and will meet individually with utilities and key stakeholders for feedback during the first quarter of 2019.
- ▶ **Meetings:** Ongoing meetings throughout EE Plan; estimating 2 meetings per year, as needed.
- ▶ **Timing:** Launch in late spring or early summer, following Policy Manual negotiations.

# SAG Working Groups in 2019

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the right side of the slide, creating a modern, dynamic feel.

## SAG Working Group: Non-Energy Impacts

- ▶ **Purpose:** To discuss draft research results from Illinois NEI studies as well as defensible methodologies to use across the state related to calculating non-energy impacts. The NEI Working Group may make recommendations to the Policy Manual Subcommittee or IL-TRM Technical Advisory Committee regarding how NEI results may be included in utilities' reporting, cost-effectiveness analyses, and/or the IL-TRM.
- ▶ **Participation:** Open to all interested SAG participants, unless there is a financial conflict of interest.
- ▶ **Goal:** Discuss draft NEI research plans; resolve open questions; discuss draft research results.
- ▶ **Meetings:** Held by teleconference. First meeting was held in August 2018. Meetings scheduled as-needed.

# SAG Working Group: Non-Energy Impacts (cont.)

The following topics are anticipated in 2019:

- ▶ Discuss the proposed job methodology for economic impact studies.
- ▶ Review and discuss draft research results for the Ameren Illinois' and ComEd evaluator's 2018 non-energy impact studies and economic impact studies.
- ▶ Consider the conditions under which NEIs may be included in the IL-TRM and used in cost-effectiveness analysis. Discuss defensible methodologies to use across the state related to calculating NEIs.

# SAG Working Group: Market Transformation Savings

- ▶ **Purpose:** To discuss market transformation initiatives where the utilities are interested in claiming energy efficiency savings.
- ▶ **Participation:** Open to all interested SAG participants, unless there is a financial conflict of interest.
- ▶ **Goal:** Reach agreement on how utilities may claim savings from market transformation initiatives.
- ▶ **Meetings:** Held by teleconference; scheduled as-needed.
- ▶ The following topics are anticipated for discussion in 2019:
  - ▶ Claiming savings in a potential building codes program;
  - ▶ Claiming savings for Building Operator Certification; and
  - ▶ Any other market transformation initiatives where the utilities are interested in claiming savings.

## SAG Working Group: Illinois EE Successes (tentative)

- ▶ **Purpose:** To provide an Illinois-specific "Successes Fact Sheet" including an overview of EE accomplishments and key results from the economic impacts studies being completed in 2019.
- ▶ **Background:** SAG convened a Successes Subcommittee in early 2015 to collect and share data on EE program successes in Illinois. Version 1 of the Successes Fact Sheet covers Electric Program Years 1-6 and Gas Program Years 1-3. The Fact Sheet is available for download on the SAG website: [http://www.ilsag.info/subcommittee\\_il-ee-successes.html](http://www.ilsag.info/subcommittee_il-ee-successes.html).
- ▶ **Goal:** SAG participants are interested in considering updating the Successes Fact Sheet with a Version 2, once evaluated energy efficiency results are available for Calendar Year 2018 programs.
- ▶ **Timing:** SAG will consider updating the Successes Fact Sheet later in 2019, after economic impact study results are finalized.

# Large Group SAG Topic Categories

1. Utility Topics
  2. Equity in EE Topics
  3. Program-Specific Topics
  4. Other Topics
- ▶ There are a number of topics that SAG participants are interested in discussing at Large Group SAG meetings in 2019.
    - ▶ Meeting agendas will be finalized with presenters in advance of each Large Group SAG meeting.
    - ▶ We will not have time to address all topics of interest in 2019. Topics are scheduled at SAG meetings as time and resources permit.



# Utility Topics

- ▶ Utility report-out presentations twice per year
- ▶ Draft Potential Study / Baseline Study results (for utilities completing in 2019)
  - ▶ Itron is completing a study for ComEd in 2019.
- ▶ Key changes to 2019 EE programs, including pilot programs and R&D initiatives
- ▶ Overview of Third Party EE Programs (electric utilities)
- ▶ Update on ComEd Call for Ideas
- ▶ Market Transformation collaboration update
- ▶ On Bill Financing update
- ▶ Annual Net-to-Gross (NTG) process
- ▶ Gas utilities present draft Adjustable Savings Goals

# Equity in EE Topics

- ▶ **Health and EE:** Green and Healthy Homes Initiative presentation on the connection between health and EE; successful GHHI programs across the U.S.; overview of ComEd “Call for Ideas” pilot program
- ▶ **Training on Lessons in Equity:** Hire someone to provide a training session to SAG on how to address equity issues.
- ▶ **Metrics:** Discuss how utilities track metrics outside of savings and cost-effectiveness. Start by requesting utilities to present on current tracking.
- ▶ **Customer Barriers:** Discuss coordination between EE and customers struggling to pay utility bills.

# Equity in EE Topics (cont.)

## ▶ **Workforce Development and Diversity:**

- ▶ Invite ComEd to present about their “incubator program” that supports diverse vendors responding to RFPs.
- ▶ Invite Nicor Gas to present about their Diversity Business Initiative that supports diverse vendors.
- ▶ Invite Ameren Illinois to present about their Market Development Initiative, specifically projects that target local / diverse vendors.
- ▶ Invite MEEA to share an overview of lessons learned from the MEEA Diversity Initiative and/or 2019 MEEA Conference diversity workshops.

# Program-Specific Topics

- ▶ Commercial Kitchen Pilot Program results (ComEd, Nicor Gas, Peoples Gas & North Shore Gas)
- ▶ All-Electric / Ductless Heat Pump Pilot Program results (ComEd)
- ▶ Lighting controls - the importance of focusing on controls and an overview of national and/or regional analysis on lighting.
- ▶ C&I program implementation - invite ComEd to present on new strategies.
- ▶ Voltage Optimization - invite Ameren Illinois to present.
- ▶ Strategic Energy Management (SEM) - invite Ameren Illinois, ComEd, Nicor Gas, Peoples Gas & North Shore Gas to present an overview of utility SEM programs and progress.
- ▶ Invite a utility or program administrator from one of ACEEE's "exemplary programs" to present.

# Other Topics

- ▶ Overview of new SAG website (anticipated launch in the first quarter of 2019).
- ▶ Market Transformation Working Group report-out to SAG; including a high-level overview of MEEA code baseline study results.
- ▶ Invite Ameren Illinois and ComEd evaluators to present final Non-Energy Impact study results for 2018.
- ▶ Invite Ameren Illinois and ComEd evaluators to present final economic impact study results for 2018.
- ▶ Evaluators present an overview of high-level draft multi-year evaluation plans for utility EE programs.
- ▶ Schedule a “Lunch and Learn” for the Illinois Solar for All Program Administrator to provide information about the program.

# Questions or Comments?

- ▶ Please send any questions, comments, or redline edits on the final draft 2019 SAG Plan by COB on **Monday, January 28**.
  - ▶ Send comments and edits directly to [Celia@CeliaJohnsonConsulting.com](mailto:Celia@CeliaJohnsonConsulting.com)
  - ▶ The 2019 SAG Plan will be finalized by **Thursday, January 31**.
  - ▶ If you are interested in participating in the new SAG Market Transformation Savings Working Group, please reach out to me by **Thursday, January 31**.