**Proposed EM&V Procedure Amendments to Policy Manual V1**

Section 3.7.ii

**Draft EM&V Reports, Findings, Results and Recommendations.** EM&V Contractors will provide all draft EM&V Reports, and any draft findings, results, or recommmendations, in any format, simultaneously to Program Administrators, Commission Staff, and the SAG Facilitator. The SAG Facilitator will forward all these materials to all SAG parties that have previously indicated to the SAG Facilitator they are interested in draft EM&V information. In addition, the SAG facilitator will promptly post draft EM&V reports on the SAG website as they are made available. SAG participants will have fifteen (15) Business Days for review and comment, or within a timeline mutually agreed to by the parties. Once draft EM&V reports are finalized, draft EM&V reports (and any other draft EM&V data) will be removed from the SAG website and final EM&V reports will be added, and all SAG parties will be notified.

Section 3.7.iv

**Draft EM&V Work Plans.** EM&V Contractors shall simultaneously distribute all draft EM&V work plans to Program Administrators, Commission Staff and the SAG Facilitator. The SAG Facilitator will post draft EM&V work plans on the SAG website as they are made available. The SAG Facilitator will also promptly notify all SAG parties that have indicated an interest in draft EM&V information of such posting. SAG participants will have fifteen (15) Business Days for review and comment, or within a timeline and process mutually agreed to by the parties. Once draft EM&V work plans are finalized, draft EM&V work plans will be removed from the SAG website and final EM&V work plans will be added.

**10.1 EM&V Work Plans**

Program Administrators shall require Evaluators to submit draft EM&V work plans annually by June 1 so that annual and total Plan EM&V work plans can be assessed. Draft EM&V work plans shall be submitted to Program Administrators, the SAG Facilitator, and Commission Staff concurrently for review and comment, including a summary outline of tentatively planned and proposed evaluation activities for the three-year Portfolio Plan. Program Administrators shall require Evaluators to coordinate evaluation plans, methodologies, statistical analysis, and approaches to avoid unnecessary duplication of effort, to the extent practicable.

The SAG Facilitator will post draft EM&V work plans to the SAG website for review and comment and promptly circulate notice to SAG Parties that have indicated a desire to receive EM&V information. Comments on draft EM&V work plans shall be submitted to Program Administrators, Commission Staff and Evaluators within fifteen (15) Business Days, or a timeline mutually agreed to by the parties. Evaluators will review feedback and provide final EM&V work plans to Program Administrators, the SAG Facilitator, and Commission Staff within fifteen (15) Business Days, or a timeline and process mutually agreed to by the parties. Evaluators will aim to finalize EM&V work plans by July 15 annually, for the Program Year that closes on May 31. The SAG Facilitator will post final EM&V work plans on the SAG website and notify all SAG Parties that have indicated a desire to receive EM&V information.

Evaluators shall consider evaluation priorities in drafting EM&V work plans. As necessary or as may be required, EM&V work plans may include identifying Measures, Programs, and markets that will be evaluated, including proposed evaluation methodologies, timelines and Plans for process evaluations, impact evaluations, and Net-to-Gross (NTG) and Technical Reference Manual (IL-TRM) research that is consistent with the annual NTG and IL-TRM processes described in Section 7, Evaluation Policies, of this Policy Manual and approved in Commission orders. Evaluators should define Participant as it applies to the specific evaluation. Certain evaluation items listed above may not apply for all Programs.

**10.2 Draft EM&V Reports, Findings, Results and Recommendations**

In order to ensure EM&V reports are completed in a timely manner, Program Administrators shall provide necessary Program material and final Program tracking data for use in the evaluation to the Evaluators by September 1, utilizing best efforts.

In order to ensure delivery of timely EM&V reports, draft EM&V reports for the Program Year ending May 31st shall be presented to Program Administrators, Commission Staff and the SAG Facilitator simultaneously as soon as practicable, on or before January 15 for residential and commercial and industrial Programs, utilizing best efforts. The SAG Facilitator will promptly post draft EM&V reports to the SAG website and notify all SAG Parties that have indicated a desire to receive EM&V information of the posting. Final EM&V reports will be provided on or before March 31, utilizing best efforts. If draft EM&V reports are not provided by January 15, Evaluators will provide a preliminary evaluation findings memo, including savings and NTG, on or before January 15. Comments on the draft EM&V reports shall be submitted to the Program Administrators, Illinois Energy Efficiency Commission Staff Evaluators and the SAG Facilitator within fifteen (15) business days of receipt of the draft EM&V reports, or within a timeline mutually agreed to by the parties. The SAG Facilitator will promptly post comments on draft EM&V reports to the SAG website and notify all SAG Parties that have indicated a desire to receive EM&V information of the posting.

Whenever EM&V contractors desire to share draft findings, research results or recommendations, in any format, they shall distribute these draft findings, research results, or recommendations simultaneously to the Program Administrator, Commission Staff and the SAG Facilitator. The SAG Facilitator will promptly distribute this draft EM&V information to all SAG Parties that have previously indicated a desire to receive EM&V information. In the event that that sharing any draft EM&V findings, research results, or recommendations would violate confidentiality concerns, the EM&V contractors shall work with the Program Administrators to resolve these concerns as appropriate, potentially including aggregating data or providing summary information to other parties.