

Adjustable Savings Goals Policy Guidelines *Draft: Updated 08/01/16*

Background:

The Commission's December 16, 2015 Final Order in ICC Docket No. 15-0487 approved and adopted the [Illinois Energy Efficiency Policy Manual Version 1.0](#) ("Policy Manual"), which includes an Adjustable Savings Goals policy set forth in Subsection 6.2. During initial Policy Manual Subcommittee Version 2.0 discussions in early 2016, several parties proposed updates to this policy. However, Policy Manual Version 2.0 discussions were put on hold in spring 2016 to complete the Portfolio Planning Process.

Prior to the Energy Efficiency Plan ("Plan") filings required by Sections 8-103 and 8-104 of the Illinois Public Utilities Act in fall 2016, Policy Manual Subcommittee participants agreed to draft guideline language to interpret the approved Version 1.0 Adjustable Savings Goal policy, including a template on how to calculate adjustable savings goals.

Note: Capitalized terms are defined in Policy Manual Section 1: Glossary.

Adjustable Savings Goals Policy:

See Illinois Energy Efficiency Policy Manual Version 1.0, Section 6, Program Administration and Reporting, Subsection 6.2: Adjustable Savings Goals.

Program Administrator and/or IPA annual energy savings goals will be adjusted to align them with changes to IL-TRM values.

In addition, Program Administrator and/or IPA annual energy savings goals will be adjusted to align them with the Evaluator's recommended Net-to-Gross values for the entire Plan period prior to the start of the first Plan Year of an approved Plan or Section 16-111.5B Program.

Within sixty (60) days after Commission approval of the annual IL-TRM values, each Program Administrator will file adjusted energy savings goals reflecting updated IL-TRM values applicable to the Program Year commencing June 1.

Policy Guidelines – Adjustable Savings Goals for Section 16-111.5B Programs:

- Once a Section 16-111.5B Program is approved by the Commission, the vendor has the opportunity to negotiate different participation rates and/or Measure levels. Once the contract is signed, those Measures / participation rates will be fixed for the life of the contract for the purpose of setting annual savings goals. However, the vendor and the utility may negotiate a change in the Measure mix, for Program implementation and goal attainment purposes.
- Changes to the Illinois Statewide Technical Reference Manual for Energy Efficiency ("IL-TRM") will be applied on an annual basis to the gross unit savings values for the applicable Program Year. This will set the energy savings goal for the applicable Program Year.
- If the independent Evaluator recommends an updated Net-to-Gross ("NTG") value for a Section 16-111.5B Program, the energy savings goal can be adjusted during the

contract negotiation process, prior to the first Program Year of the contract. After contract execution of the approved Program, the energy savings goal will not be adjusted due to NTG changes in later Program Years.

Policy Guidelines – Adjustable Savings Goals for Section 8-103 and 8-104 Programs:

- After Commission approval of a Section 8-103 and/or 8-104 Plan the Measure participation levels identified in the approved Plan to derive the energy savings goals will be fixed for the entirety of the Plan for the purpose of calculating the adjusted energy savings goals.¹
- Prior to the start of the first Program Year of an approved Plan, the Program Administrator’s energy savings goal will be adjusted for respective Program Years over the entire Plan period in cases where the Evaluator’s final recommended Net-to-Gross (“NTG”) value for a Program, Sub-Program, or Measure differs from the NTG value used to calculate energy savings goals in the Program Administrator’s approved Plan. The Program Administrator’s energy savings goals will not be adjusted due to a change in the NTG value during the second and third Program Years of an approved Plan.²
- Changes to the Illinois Statewide Technical Reference Manual for Energy Efficiency (“IL-TRM”) will be applied on an annual basis to the gross unit savings values for the applicable Program Year, consistent with the EEPS Adjustable Savings Goal Template and guidelines. This will produce the adjusted energy savings goals.

EEPS Adjustable Savings Goal Template

Illinois Program Administrators will file the completed EEPS Adjustable Savings Goal Template for Section 8-103/8-104 Programs and Measures in the Electric Plan 4 (covering Electric Program Years 10-12) and Gas Plan 3 (covering Gas Program Years 7-9) dockets. The Excel version of the completed EEPS Adjustable Savings Goal Template will also be posted on the Illinois Energy Efficiency Stakeholder Advisory Group (“SAG”) website.

Following Commission approval of the Plan, the completed EEPS Adjustable Savings Goal Template will be used for the remainder of the approved Plan, with annual updates. As specified in Subsection 6.2 of the Policy Manual, Adjustable Savings Goals, Program Administrators will file adjusted energy savings goals reflecting updated IL-TRM values applicable to the Program Year commencing June 1, within sixty (60) days after Commission approval of the annual IL-TRM update. The updated EEPS Adjustable Savings Goal Template will be filed with the Commission to show the adjusted energy savings goals. The Excel versions of the completed and updated EEPS Adjustable Savings Goal Templates will also be posted on the SAG website.

The information below describes steps to complete the EEPS Adjustable Savings Goal Template for Section 8-103 and 8-104 Programs. As a general principle, when completing the EEPS Adjustable Savings Goal Template, Program Administrators should follow the calculation instructions specified in the comment boxes as well as the column headers and column labels (*row 7*) in the EEPS Adjustable Savings Goal Template. Note: The *Measure-Level Adjustments Tab* should be completed first before completing the *Program-Level Adjustments Tab*.

¹ In general, Program Administrators are not expected to meet the individual Measure goals or participation levels specified in the EEPS Adjustable Savings Goal Template.

² See Policy Manual Version 1.0, Subsection 7.2, Net-to-Gross Policy.

EEPS Adjustable Savings Goal Template – Program-Level Adjustments Tab

1. After completing the *Measure-Level Adjustments Tab*, Program Administrators will complete *columns (a), (b), (f), (j), (n), and (q)*, listing the names of the Energy Efficiency Programs and forecasted Plan savings and fuel type (kWh or Therms) for the respective Program Years and Plan period, and file the completed EEPS Adjustable Savings Goal Template with the Commission in the Plan docket. The Program names listed in *column (a)* should correspond with the names of the Programs specified in *column (a)* of the *Measure-Level Adjustments Tab*. If there are gas and electric Measures in a Program, include a separate row for gas and electric for the Program so that all adjustments are included in one template. Program Administrators have the flexibility to create a separate tab or section for the other fuel, if applicable. Below the list of Programs, include the *Portfolio Total (kWh or Therms)* savings by calculating the sum of the rows of Program savings for the respective fuel type (kWh or Therms) for *columns (b), (f), (j), and (n)*. The resulting value contained in *column (n)* in the row, *Portfolio Total (kWh or Therms)*, should be equal to the value of the Program Administrator's energy savings goal specified in its approved Plan from the Plan docket, and this value should also be equal to the value contained in *column (u)* in the row, *Portfolio Total (kWh or Therms)*, of the *Measure-Level Adjustments Tab*.
 - a. Note: The values contained in the row, *Portfolio Total (kWh or Therms)*, in the *Program-Level Adjustments Tab* for *columns (b), (f), (j), and (n)* should be equal to the values contained in the row, *Portfolio Total (kWh or Therms)*, of the *Measure-Level Adjustments Tab* for *columns (r), (s), (t), and (u)*, respectively.
 - b. The value contained in *column (b) – EPY10/GPY7 Plan Energy Savings Goal* for the "Program A" row of the *Program-Level Adjustments Tab* should be calculated by taking the sum of the values set forth in *column (r) – EPY10/GPY7 Plan Goal* for the rows associated with "Program A" Measures (Program designation specified in *column (a)*) and the same fuel type (kWh or Therms designation specified in *column (c)*) of the *Measure-Level Adjustments Tab*.
2. **Adjustments:** After completing the *Measure-Level Adjustments Tab* to reflect the updated IL-TRM values for the applicable Program Year(s), Program Administrators will calculate the adjusted energy savings goal at the Program and Portfolio level for the relevant Program Year(s) – *columns (c), (g), and (k)* – and the entire Plan period – *column (o)*. Template guidelines to support the adjusted energy savings goal calculation include the following:
 - a. Complete *columns (c), (g), (k) and (o) – Adjusted Energy Savings Goal*. Note: The value contained in *column (c) – EPY10/GPY7 Adjusted Energy Savings Goal* for the "Program A" row of the *Program-Level Adjustments Tab* should be calculated by taking the sum of the values set forth in *column (aw) – EPY10/GPY7 Final Goal* for the rows associated with "Program A" Measures (as listed in *column (a)*) and the same fuel type (kWh or Therms designation specified in *column (c)*) of the *Measure-Level Adjustments Tab*.
 - b. Complete *columns (d), (h), (l), and (p) – Energy Savings Adjustment to Plan Goal* by following the calculation instructions specified in the header row containing column labels to calculate the savings differential between the *Adjusted Energy Savings Goal* and the *Plan Energy Savings Goal* for the applicable Program Year and the Plan period; *column (d)=(c-b)*, *column (h)=(g-f)*, *column (l)=(k-j)*, and *column (p)=(o-n)*.
 - c. Briefly describe the main cause of the significant savings goal adjustments in *columns (e), (i), and (m) – Brief Explanation of Significant Adjustments*.

EEPS Adjustable Savings Goal Template – Measure-Level Adjustments Tab

1. Program Administrators will complete *columns (a) – (u) and (ba) – (bb)* and file the completed EEPS Adjustable Savings Goal Template with the Commission in the Plan docket. If there are gas and electric Measures, include a separate row for gas and electric so that all adjustments are included in one template. Program Administrators have the flexibility to create a separate tab or section for the other fuel, if applicable. Template guidelines to support completing the *Measure-Level Adjustments Tab* include the following:
 - a. *Column (a) – Program:* List the name of the Energy Efficiency Program. The name of the Program should correspond with one of the Program names specified in *column (a)* of the *Program-Level Adjustments Tab*.
 - b. *Column (b) – Measure:* List the detailed name of the Energy Efficiency Measure, including the efficiency level, where applicable. For example, Gas High Efficiency Furnace 95% AFUE Early Replacement.
 - c. *Column (c) – Energy Savings: kWh or Therms?:* List whether the Measure is a gas or electric Measure by specifying whether the savings are kWh or Therms.
 - d. *Column (d) – IL-TRM Adjustable? (1 if yes; 0 if no):* For Measures that are not significant to the overall Portfolio-level savings, recognizing the time and effort needed to provide information related to adjustable savings goals, Program Administrators will specify, prior to the start of the Plan, any Measures that will not be adjusted by annual IL-TRM changes for purposes of adjusting savings goals. Note that this flexibility is intended for Measures where the time and effort to make them adjustable per the Adjustable Savings Goals policy is high, and the Measures are not impactful to the Portfolio of Programs. Answer “1” if a Measure will adjust the savings goal based upon IL-TRM changes. Answer “0” if a Measure is not covered by the IL-TRM Version 5.0 and/or if the Program Administrator will not adjust the savings goal for a low-impact Measure based upon IL-TRM changes. Note: Once a decision is made concerning whether the Measure is *IL-TRM Adjustable*, that decision is effective for the entirety of the Plan period and it cannot be changed in subsequent Program Years of the Plan, unless consensus is reached at SAG that the extenuating circumstance warrants such a change.
 - i. For those Measures that are not *IL-TRM Adjustable* (*column (d)=0*), these “non-adjustable” rows should be shaded gray for *columns (ae) – (av) and (ba) – (bb)* and no calculations should be performed for these shaded gray cells, leave them blank. For those rows with Measures that are not *IL-TRM Adjustable*, the values contained in *columns (aw), (ax), and (ay)* should be set equal to the values contained in *columns (z), (aa), and (ab)*, respectively, in calculating the *Final Adjusted Net Energy Savings Goals*.
 - ii. For those rows with Measures that are *IL-TRM Adjustable* (*column (d)=1*), the values contained in *columns (aw), (ax), and (ay)* should be set equal to the values contained in *columns (ai), (ao), and (au)*, respectively, in calculating the *Final Adjusted Net Energy Savings Goals*.
 - iii. Note: The Custom Program is not adjustable under the IL-TRM, but there is a one-time savings goal NTG adjustment allowed for the Plan period if the Evaluator’s final recommended NTG values for the Custom Program that are provided prior to the start of the first Program Year of the Plan (*columns (w), (x), and (y)*) differ from the NTG values used to calculate energy savings goals for the Custom Program in the Program Administrator’s approved Plan (*columns (o), (p), and (q)*).

- e. *Column (e) – IL-TRM Section / Custom:* If the Measure is using the IL-TRM to calculate savings, insert the IL-TRM section number that corresponds to this Measure. For example, 5.3.16 is the IL-TRM section number for Advanced Thermostats. If savings are calculated on a custom basis, insert the word “Custom”.
- f. *Column (f) – Unit of Participation:* Describe the unit of participation for the Measure. For example, is participation calculated on a per home basis?
- g. *Columns (g), (h), and (i) – Plan Number of Units (Fixed Parameters for Calculating Adjustable Savings Goals):* Complete the forecasted Measure participation levels for the relevant Program Years used to derive the *Plan Energy Savings Goals* set forth in *columns (r), (s), (t), and (u)*.
 - i. Note: These Measure participation levels identified in the approved Plan and in *columns (g), (h), and (i)* that are used to derive the *Plan Energy Savings Goals* set forth in *columns (r), (s), (t), and (u)* will be fixed for the entirety of the Plan period for the purpose of calculating the *Final Adjusted Net Energy Savings Goals* set forth in *columns (aw), (ax), (ay), and (az)*.
- h. *Column (j) – IL-TRM Measure Code from IL-TRMv5.0:* List the applicable IL-TRM Measure Code from the IL-TRM Version 5.0, dated February 11, 2016. The IL-TRM Measure Code can be found at the end of each Measure characterization in the IL-TRM and is structured using five parts: Code Structure = Market + End-use Category + Measure + Version # + Effective Date. The IL-TRM Measure Codes are used to uniquely identify each Measure in the IL-TRM through the use of abbreviations for the major organizational elements of the IL-TRM. When these abbreviations are combined and delimited by a dash ('-') a unique, approximately 18-character alphanumeric code is formed that can be used for tracking the Measures and their associated savings estimates. For example, RS-HVC-ADTH-V01-160601 is the IL-TRM Measure Code for Advanced Thermostats. Leave blank for Measures not covered by the IL-TRM Version 5.0.
- i. *Column (k) – Reference Document Explaining Gross Unit Savings Calculation Details:* Provide the name of the document, and date and tab name if applicable, where the supporting calculation details and *Key Custom and IL-TRM Input Assumptions* for calculating the *Plan Gross Unit Savings* values contained in *columns (l), (m), and (n)* can be found for the relevant Measure.
- j. *Columns (l), (m), and (n) – Plan Gross Unit Savings:* Complete the gross kWh or Therm savings per unit of participation, for the applicable Program Years, used to derive the *Plan Energy Savings Goals* set forth in *columns (r), (s), (t), and (u)*. Program Administrators will specify the calculation details associated with these *Plan Gross Unit Savings* values within the reference document cited in *column (k)*, and Program Administrators will outline the *Key Custom and IL-TRM Input Assumptions* and values used in the calculation for the *IL-TRM Adjustable Measures (column (d)=1)* within the reference document and in *columns (ba) and (bb)*, or in another location as allowed for per the provisions described in *columns (ba) and (bb)*.
- k. *Columns (o), (p), and (q) – Plan NTG:* Insert the assumed NTG values for the applicable Program Years used to derive the *Plan Energy Savings Goals* set forth in *columns (r), (s), (t), and (u)*.
- l. *Columns (r), (s), and (t) – Plan Goal:* Calculate the Plan energy savings goals for the applicable Program Years referenced in *columns (r), (s), and (t)* by following the calculation instructions specified in the header row containing column labels

for each column; *column (r)=(g x l x o)*, *column (s)=(h x m x p)*, and *column (t)=(i x n x q)*.

- i. The value contained in *column (r) – EPY10/GPY7 Plan Goal* should be calculated by taking the product of the values contained in *column (g) – EPY10/GPY7 Plan Number of Units (Fixed)*, *column (l) – EPY10/GPY7 Plan Gross Unit Savings*, and *column (o) – EPY10/GPY7 Plan NTG*.
 - ii. The value contained in *column (s) – EPY11/GPY8 Plan Goal* should be calculated by taking the product of the values contained in *column (h) – EPY11/GPY8 Plan Number of Units (Fixed)*, *column (m) – EPY11/GPY8 Plan Gross Unit Savings*, and *column (p) – EPY11/GPY8 Plan NTG*.
 - iii. The value contained in *column (t) – EPY12/GPY9 Plan Goal* should be calculated by taking the product of the values contained in *column (i) – EPY12/GPY9 Plan Number of Units (Fixed)*, *column (n) – EPY12/GPY9 Plan Gross Unit Savings*, and *column (q) – EPY12/GPY9 Plan NTG*.
- m. *Column (u) – Total Electric Plan 4/Gas Plan 3 Goal*: Calculate the total Plan energy savings goal; *column (u)=(r+s+t)*. The value contained in *column (u) – Total Electric Plan 4/Gas Plan 3 Goal* should be calculated by taking the sum of the values contained in *column (r) – EPY10/GPY7 Plan Goal*, *column (s) – EPY11/GPY8 Plan Goal*, and *column (t) – EPY12/GPY9 Plan Goal*.
- n. *Column (ba) – Key Custom Input Assumptions (if none, specify NA)*: Assumptions in savings estimates that are custom and are not derived from values in the IL-TRM, and therefore will not necessitate a change in savings goals if the IL-TRM is updated, unless consensus is reached at SAG that the extenuating circumstance warrants an adjustment. List any custom assumptions selected by the Program Administrator to calculate the *Plan Gross Unit Savings* for the *IL-TRM Adjustable Measure* in the Plan and specified in *columns (l)*, *(m)*, and *(n)*. Answer “NA” if there are no custom assumptions selected by the Program Administrator to calculate the *Plan Gross Unit Savings* for the *IL-TRM Adjustable Measure*. The assumptions listed in *column (ba)* should be consistent with and clearly outlined in the reference document specified in *column (k) – Reference Document Explaining Gross Unit Savings Calculation Details*. Program Administrators have the flexibility to specify the custom assumptions selected by the Program Administrator within a separate tab or across multiple columns of the *Measure-Level Adjustments Tab*. In cases where the custom assumptions are provided within a separate tab, the name of the tab where the custom assumptions can be found should be clearly specified in *column (ba)*.
- i. Note: In general, if a custom input assumption specified in this *column (ba)* is changed by the Program Administrator during Program implementation and tracking of the Measure savings during the Plan period, given such a change to the custom input assumptions during Program implementation of the Measure is not the result of a change to the IL-TRM, the changed custom input assumption should not be used to adjust the Program Administrator’s energy savings goals. In other words, the custom input assumptions selected by the Program Administrator in its Plan filing (as specified in *column (ba)*) should remain fixed over the Plan period when calculating the *Gross Unit Savings* for the applicable Program Years set forth in *columns (ag)*, *(am)*, and *(as)* and the *Final Adjusted Net Energy Savings Goals* set forth in *columns (aw)*, *(ax)*, *(ay)*, and *(az)*, unless consensus is reached at SAG that the extenuating circumstance warrants an adjustment.

- o. *Column (bb) – Key IL-TRM Input Assumptions:* Assumptions derived from the IL-TRM that, if changed in the IL-TRM in the future, would necessitate a savings goal adjustment, unless consensus is reached at SAG that the extenuating circumstance warrants no adjustment. List the specific assumptions and values from the IL-TRM relied upon to calculate the *Plan Gross Unit Savings* for the Measure specified in *columns (l), (m), and (n)*. The assumptions listed in *column (bb)* should be consistent with and clearly outlined in the reference document specified in *column (k) – Reference Document Explaining Gross Unit Savings Calculation Details*. Program Administrators have the flexibility to specify the assumptions and values derived from the IL-TRM to calculate the *Plan Gross Unit Savings* for the Measure within a separate tab or across multiple columns of the *Measure-Level Adjustments Tab*. In cases where the assumptions and values derived from the IL-TRM are provided within a separate tab, the name of the tab where the assumptions and values derived from the IL-TRM can be found should be clearly specified in *column (bb)*.
 - i. *Examples of Key IL-TRM Input Assumptions:* 1) *Cooling_Reduction = 8.0% for 5.3.16 Advanced Thermostats Measure; or 2) Hours (Unknown Installation Location) = 847 for 5.5.8 LED Screw Based Omnidirectional Bulbs Measure.*
- 2. The reference documents cited in *columns (k), (af), (al), and (ar) – Reference Document Explaining Gross Unit Savings Calculation Details and column (v) – Reference Document Explaining Evaluator’s Recommended NTG Values* will be posted on the SAG website and provided in the Plan docket.
- 3. Below the list of Measures in the row, *Portfolio Total (kWh or Therms)*, calculate a total summation of all the Measure savings within a column for the respective fuel type savings (kWh or Therms) to determine the Portfolio savings goals and adjustments for *columns (r) – (u), (z), (aa) – (ad), (aj), (ap), and (av) – (az)*.
 - a. Note: The values contained in the row, *Portfolio Total (kWh or Therms)*, of the *Measure-Level Adjustments Tab* for *columns (r), (s), (t), and (u) – Plan Energy Savings Goals, and columns (aw), (ax), (ay), and (az) – Final Adjusted Net Energy Savings Goals*, should be equal to the values contained in the row, *Portfolio Total (kWh or Therms)*, in the *Program-Level Adjustments Tab* for *columns (b), (f), (j), and (n) – Plan Energy Savings Goal, and columns (c), (g), (k), and (o) – Adjusted Energy Savings Goal*, respectively.
 - b. The value contained in the row, *Portfolio Total (kWh or Therms)*, in *column (u)* of the *Measure-Level Adjustments Tab* should be equal to the value contained in the row, *Portfolio Total (kWh or Therms)*, in *column (n)* of the *Program-Level Adjustments Tab*, and this value should also be equal to the value of the Program Administrator’s energy savings goal specified in its approved Plan from the Plan docket.
- 4. **NTG Adjustment:** Energy savings goals will be adjusted once based upon the independent Evaluator’s final recommended NTG values for the entire Plan period that are provided prior to the start of Electric Program Year 10/Gas Program Year 7 (“EPY10/GPY7”). Template guidelines to support the NTG-adjusted energy savings goal calculation include the following:
 - a. Complete *columns (w), (x), and (y) – Evaluator’s NTG (Fixed)* with the Evaluator’s final recommended NTG values for the respective Program Years that are provided prior to the start of EPY10/GPY7, and specify the name of the reference document containing and explaining those values in *column (v) – Reference Document Explaining Evaluator’s Recommended NTG Values*.

Unit Savings calculated for the Measure due to a change to one of the *Key IL-TRM Input Assumptions* specified in *column (bb)* (see provisions contained in these guidelines for *columns (ba) and (bb)*), provide the IL-TRM adjusted *Gross Unit Savings* calculated for the Measure from applying the updated applicable IL-TRM assumptions in *column (ag) – EPY10/GPY7 Gross Unit Savings*. The details and specific changes to the *Key IL-TRM Input Assumptions* underlying this IL-TRM adjusted *Gross Unit Savings* calculation for the Measure should be clearly specified in the document listed in *column (af) – Reference Document Explaining Gross Unit Savings Calculation Details*.

- ii. *Column (af) – Reference Document Explaining Gross Unit Savings Calculation Details*: Provide the name of the document, and date and tab name if applicable, where the supporting calculation details, *Key Custom Input Assumptions*, any necessary adjustments made to the *Key IL-TRM Input Assumptions* based upon IL-TRM updates, and any SAG consensus extenuating circumstance adjustment notes and documentation (see provisions contained in these guidelines for *columns (ba) and (bb)*), are specified for calculating the *EPY10/GPY7 Gross Unit Savings* values contained in *column (ag)* for the relevant Measure.
- iii. *Column (ag) – EPY10/GPY7 Gross Unit Savings*: Complete the gross kWh or Therm savings per unit of participation for EPY10/GPY7 by applying the applicable IL-TRM provisions contained in the IL-TRM Version 6.0 or errata document applicable to EPY10/GPY7 as described below. In cases where the IL-TRM Measure Code change also results in a change to one of the *Key IL-TRM Input Assumptions* specified in *column (bb)*, the *Key IL-TRM Input Assumptions* should be adjusted to align with the updated applicable IL-TRM assumptions when calculating the *EPY10/GPY7 Gross Unit Savings* for the Measure. The calculation details and specific changes to *Key IL-TRM Input Assumptions* associated with the *EPY10/GPY7 Gross Unit Savings* calculation for the Measure should be clearly specified in the document listed in *column (af) – Reference Document Explaining Gross Unit Savings Calculation Details*.
 1. Note: If the IL-TRM Measure Code specified in *column (ae)* is identical to the one contained in *column (j)*, the resulting value contained in *column (ag) – EPY10/GPY7 Gross Unit Savings* should be set equal to the approved Plan value specified in *column (l) – EPY10/GPY7 Plan Gross Unit Savings*.
- iv. *Column (ah) – Gross Unit Savings Adjustment Explanation*: Briefly describe the cause of the adjusted *Gross Unit Savings* reflected in *column (ag) – EPY10/GPY7 Gross Unit Savings*. Note: Where applicable, document in both *column (ah)* and the reference document specified in *column (af)* if the adjustment is the result of SAG consensus concerning an extenuating circumstance as contemplated in the provisions contained in these guidelines for *columns (ba) and (bb)*.
- v. *Column (ai) – EPY10/GPY7 Adjusted Goal*: Calculate the adjusted energy savings goal for EPY10/GPY7 by taking the product of the values contained in *column (g) – EPY10/GPY7 Plan Number of Units (Fixed)*, *column (ag) – EPY10/GPY7 Gross Unit Savings*, and *column (w) – EPY10/GPY7 Evaluator’s NTG (Fixed)*; $column (ai) = (g \times ag \times w)$.

- vi. *Column (aj) – EPY10/GPY7 IL-TRM Adjustment*: Calculate the savings differential between the *EPY10/GPY7 Adjusted Goal* and the *EPY10/GPY7 NTG-Adjusted Goal* by following the calculation instructions specified in the header row containing column labels; *column (aj)=(ai-z)*.
 - vii. *Column (aw) – EPY10/GPY7 Final Goal*: Set equal to the value contained in *column (ai) – EPY10/GPY7 Adjusted Goal* for the rows containing Measures designated as *IL-TRM Adjustable (column (d)=1)*.
- b. Complete the IL-TRM adjustment for the second Program Year of the Plan, namely the *EPY11/GPY8 Adjustment*, by completing the following columns: *column (ak) – IL-TRM Measure Code from IL-TRMv7.0 or errata applicable to EPY11/GPY8*, *column (al) – Reference Document Explaining Gross Unit Savings Calculation Details*, *column (am) – EPY11/GPY8 Gross Unit Savings*, *column (an) – Gross Unit Savings Adjustment Explanation*, *column (ao) – EPY11/GPY8 Adjusted Goal*, *column (ap) – EPY11/GPY8 IL-TRM Adjustment*, and *column (ax) – EPY11/GPY8 Final Goal*, by following the calculation instructions specified in the headers of these columns within the *Measure-Level Adjustments Tab*.
- i. Note: Complete *column (al) – Reference Document Explaining Gross Unit Savings Calculation Details* by providing the name of the document, and date and tab name if applicable, where the supporting calculation details, *Key Custom Input Assumptions*, any necessary adjustments made to the *Key IL-TRM Input Assumptions* based upon IL-TRM updates, and any SAG consensus extenuating circumstance adjustment notes and documentation (see provisions contained in these guidelines for *columns (ba) and (bb)*), are specified for calculating the *EPY11/GPY8 Gross Unit Savings* values contained in *column (am)* for the relevant Measure.
 - ii. As described in the provisions contained in these guidelines for *column (d)*, the rows of Measures that are not *IL-TRM Adjustable (column (d)=0)* should be left blank and shaded gray for *columns (ae) – (av) and (ba) – (bb)*. The value contained in *column (ax) – EPY11/GPY8 Final Goal* should be set equal to the value contained in *column (aa) – EPY11/GPY8 NTG-Adjusted Goal* for each row with a Measure that is not *IL-TRM Adjustable (column (d)=0)*.
 - iii. The value contained in *column (ax) – EPY11/GPY8 Final Goal* should be set equal to the value contained in *column (ao) – EPY11/GPY8 Adjusted Goal* for each row with a Measure designated as *IL-TRM Adjustable (column (d)=1)*.
- c. Complete the IL-TRM adjustment for the third Program Year of the Plan, namely the *EPY12/GPY9 Adjustment*, by completing the following columns: *column (aq) – IL-TRM Measure Code from IL-TRMv8.0 or errata applicable to EPY12/GPY9*, *column (ar) – Reference Document Explaining Gross Unit Savings Calculation Details*, *column (as) – EPY12/GPY9 Gross Unit Savings*, *column (at) – Gross Unit Savings Adjustment Explanation*, *column (au) – EPY12/GPY9 Adjusted Goal*, *column (av) – EPY12/GPY9 IL-TRM Adjustment*, and *column (ay) – EPY12/GPY9 Final Goal*, by following the calculation instructions specified in the headers of these columns within the *Measure-Level Adjustments Tab*.
- i. Note: Complete *column (ar) – Reference Document Explaining Gross Unit Savings Calculation Details* by providing the name of the document, and date and tab name if applicable, where the supporting calculation details, *Key Custom Input Assumptions*, any necessary adjustments made to the *Key IL-TRM Input Assumptions* based upon IL-TRM updates, and any SAG consensus extenuating circumstance adjustment notes and

- documentation (see provisions contained in these guidelines for *columns (ba) and (bb)*), are specified for calculating the *EPY12/GPY9 Gross Unit Savings* values contained in *column (as)* for the relevant Measure.
- ii. As described in the provisions contained in these guidelines for *column (d)*, the rows of Measures that are not *IL-TRM Adjustable* (*column (d)=0*) should be left blank and shaded gray for *columns (ae) – (av) and (ba) – (bb)*. The value contained in *column (ay) – EPY12/GPY9 Final Goal* should be set equal to the value contained in *column (ab) – EPY12/GPY9 NTG-Adjusted Goal* for each row with a Measure that is not *IL-TRM Adjustable* (*column (d)=0*).
 - iii. The value contained in *column (ay) – EPY12/GPY9 Final Goal* should be set equal to the value contained in *column (au) – EPY12/GPY9 Adjusted Goal* for each row with a Measure designated as *IL-TRM Adjustable* (*column (d)=1*).
- d. Calculate an estimate of the Electric Plan 4/Gas Plan 3 *Final Adjusted Net Energy Savings Goal* by completing *column (az) – Electric Plan 4/Gas Plan 3 Final Goal* for all Measures by following the calculation instructions specified in the header row of the column: *column (az)=(aw+ax+ay)*; and then below the list of Measures, include the *Portfolio Total (kWh or Therms)* savings by calculating the sum of the rows of Measure savings for the respective fuel type (kWh or Therms) for *column (az)* to determine an estimate of the *Portfolio Final Adjusted Net Energy Savings Goal* for Electric Plan 4/Gas Plan 3.
- i. Note: Each Program Administrator's actual *Portfolio Final Adjusted Net Energy Savings Goal* for Electric Plan 4/Gas Plan 3 may not be known until after the Commission approves the IL-TRM Version 9.0, which may include IL-TRM updates specified as errata Measures applicable to EPY12/GPY9 that might necessitate additional energy savings goal adjustments to be made for the last Program Year to obtain an accurate calculation of the *Final Adjusted Net Energy Savings Goal* for Electric Plan 4/Gas Plan 3.