

**Illinois Energy Efficiency Stakeholder Advisory Group**  
Policy Manual Subcommittee Version 2.0  
Proposed Policy Template (final – 8/7/18)

**Background:**

Creation of an energy efficiency “policy manual” in Illinois was a directive from the Illinois Commerce Commission (ICC) to SAG in 2014. The Policy Manual “provides guiding principles for procurement, oversight, evaluation and operation of the electric and gas Energy Efficiency Programs authorized under Sections 8-103B and 8-104 of the Illinois Public Utilities Act (Act). The principles and policies articulated in the Policy Manual were derived from Commission orders, policies and procedures developed by the SAG, as well as Best Practices from state Energy Efficiency Programs delivered throughout the nation.”<sup>1</sup>

The first version of the Policy Manual was approved by the ICC in December 2015, following the conclusion of a SAG Subcommittee process. The second version, Version 1.1, was updated in spring 2017 to reflect editorial changes needed because of the Future Energy Jobs Act (FEJA). Version 1.1 was approved by the Commission in October 2017, with an effective date of January 1, 2018. The Policy Manual is available for download on the SAG website:

<http://www.ilsag.info/illinois-ee-policy-manual.html>.

**Process:**

- The Policy Manual Subcommittee is open to all interested SAG participants, unless a topic presents a Financial Conflict of Interest.
- SAG participants interested in proposing a policy for inclusion in Version 2.0 must complete this Proposed Policy Template and submit it to the SAG Facilitator.
- The SAG Facilitator will prepare a Policy Manual Subcommittee Plan, review and circulate the list of policy issues that have been raised since Version 1.1 was completed, and circulate all proposed policies to Subcommittee participants for review.
- Policy Manual Subcommittee Version 2.0 discussions will begin in September 2018, to discuss and reach agreement on policies for inclusion in Version 2.0.
- The goal is to finalize Version 2.0 no later than March 1, 2019. The updated Policy Manual will be submitted to the Commission for approval.

**Template Instructions:**

SAG participants with a proposed policy to be addressed in Policy Manual Version 2.0 must submit a completed Proposed Policy Template to the SAG Facilitator by the Due Date. SAG participants are encouraged not to propose significant changes to policies that have already been addressed by Policy Manual Version 1.1 and approved by the Commission, unless there is a compelling need/rationale to change a current policy, which should be explained in writing.

SAG participants are expected to make a good faith effort to provide supporting information about proposed policy issue(s), background research, and the proposal to address those issue(s). Additional information may be requested by the SAG Facilitator or Policy Manual Subcommittee participants. If you need help filling out the Proposed Policy Template, contact the SAG Facilitator for assistance.

**Due Date:** Send completed templates to Celia Johnson ([Celia@CeliaJohnsonConsulting.com](mailto:Celia@CeliaJohnsonConsulting.com)) no later than 5:00 pm on Friday, August 31, 2018.

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<sup>1</sup> IL EE Policy Manual Version 1.1, Section 2.1, Background.

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**Policy Issue**

*Describe the policy / issue to be discussed. Why does this policy require inclusion in the Policy Manual Version 2.0? What unresolved policy issue(s) will be resolved by inclusion in the Policy Manual Version 2.0?*

**Statewide policy on low income programs, including prioritization of these programs, serving this market segment, identifying the optimal funding levels, appropriate NTGs and TRM values (including how to treat NEIs) that reflect the policy, evaluation of IHWAP model, savings attribution and other issues, as appropriate.**

**Proposed Resolution**

*Describe the proposed resolution for this policy / issue, including any next steps that may be necessary.*

*Note: After this policy issue is discussed at the Policy Manual Subcommittee, you may be assigned to draft proposed policy language for review by the Subcommittee.*

**Set clear policy identifying the importance and prioritization of low-income programs that reflect the intent of the Future Energy Jobs Act (FEJA) and align with the provisions of the Public Utilities Act. Make appropriate adjustments to policies, including the NTG and TRM policy, as well as adjustments or alignments of other aspects of energy efficiency investment and implementation to reflect an appropriate statewide policy.**

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<p><b>Market Impact</b></p>	<p><i>Describe who this policy / issue impacts. Does this policy impact all Illinois utilities?</i></p> <p><b>This policy issue impacts all Illinois utilities, their customers, DCEO/IHWAP, trade allies, CAAs and other implementers and stakeholders.</b></p>
<p><b>Commission Directive(s) – if applicable</b></p>	<p><i>Has the Illinois Commerce Commission previously addressed this policy or issue? If so, please provide language and specific citations, including the ICC docket number.</i></p> <p><b>Not expressly.</b></p>
<p><b>Statutory Consistency</b></p>	<p><i>Have you reviewed your proposed policy against applicable Illinois statutes? Are there any possible conflicts? If so, please provide a citation and explanation.</i></p> <p><b>The policies should be consistent with Sections 8-103B and Sections 8-104, as well as other provisions of the Public Utilities Act.</b></p>

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**Background  
Research  
(optional)**

*Provide any background research completed in preparing this template, including source references and links, as applicable. How do other jurisdictions address this policy issue? Has ACEEE, NASEO, MEEA or any other national or regional energy efficiency organization addressed this topic? If so, please provide reports and any other relevant sources.*

**Additional  
Information**

*Provide additional information, as needed, to assist with understanding the issue and your request to include it in the Policy Manual Version 2.0.*

**TBD.**