

# **Illinois EE Stakeholder Advisory Group Market Transformation Savings Working Group 2020 Plan (Final)**

## **I. Purpose**

The purpose of the SAG Market Transformation Savings Working Group<sup>1</sup> (MT Savings Working Group) is:

1. To provide a forum to discuss policy issues related to MT savings evaluation and estimation.
2. To provide an opportunity to review specific MT initiatives and the data/approach proposed to be used to develop savings, including but not limited to:
  - a. Logic Models;
  - b. Savings/unit;
  - c. Total market unit data collection;
  - d. Natural market baseline data and projections;
  - e. Service territory accounting; and
  - f. The duration of any MT savings credit.
3. To reach consensus on savings protocols for MT initiatives that may be included in the IL-TRM.

The MT Savings Working Group will report-back to the large group SAG, as needed.

## **II. Background**

Market transformation programs were administered by the Illinois Department of Commerce and Economic Opportunity from 2008 – 2017. Per the Future Energy Jobs Act, the administration of these programs shifted to the utilities on June 1, 2017. Illinois utilities formed a utility collaborative (Midwest Market Transformation Collaborative) to further discuss market transformation and invite utilities throughout the Midwest to participate. The SAG Working Group will address Illinois-specific market transformation topics as described in the purpose section above.

The MT Savings Working Group launched in March 2019. Six meetings were held in 2019. Meetings from March to August focused on reaching agreement on the *Framework for Estimating Market Transformation Savings Whitepaper*, which was included as an attachment in IL-TRM Version 8.0. The final Market Transformation Framework is available for download via this link: [Attachment C to IL-TRM Version 8.0: Framework for Counting Market Transformation Savings in Illinois \(August 23, 2019\)](#).

The November 2019 Working Group meeting focused on discussing code study results, teeing up open market transformation policy issues, and an update from utilities on the Midwest Market Transformation Collaborative.

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<sup>1</sup> SAG Working Groups are small groups of interested SAG participants that are convened to discuss short-term issues that need resolution.

### III. Process

Any revisions to the IL-TRM Version 9.0 Attachment C: Framework for Counting Market Transformation Savings in Illinois, including consensus savings protocols for market transformation initiatives, must be submitted to the IL-TRM Administrator no later than September 1, 2020.

To ensure transparency for SAG MT Savings Working Group activities, if the IL-TRM Attachment C Framework referenced above requires revision in 2020, the final draft Attachment C Framework will be circulated to SAG for final review and comment before the final version is submitted to the IL-TRM Administrator.

### IV. Working Group Website

The SAG website includes a page dedicated to the Market Transformation Savings Working Group: [https://www.ilsag.info/mt\\_savings\\_working\\_group/](https://www.ilsag.info/mt_savings_working_group/)

The Working Group website serves as a resource to participants, including agendas, meeting presentations, and meeting notes.

### V. Participants

Participation in the MT Savings Working Group is open to all interested SAG participants, unless a topic may present a financial conflict of interest. The following entities expressed interest in participating:

Ameren Illinois; Cadmus Group; Center for Energy in the Environment; City of Chicago; ComEd; Energy Resources Center, UIC; Franklin Energy; Gas Technology Institute; Guidehouse; ICC Staff; Illinois Attorney General’s Office; Midwest Energy Efficiency Alliance (MEEA); Northwest Energy Efficiency Alliance (NEEA); Nicor Gas; Natural Resources Defense Council (NRDC); Opinion Dynamics; Peoples Gas & North Shore Gas; Prah & Associates; Resource Innovations; Smart Energy Design Assistance Center (SEDAC); Slipstream; and VEIC (IL-TRM Administrator).

### VI. Schedule

Meetings of the MT Savings Working Group in 2020 are outlined below. Working Group meetings will be held quarterly in 2020. The schedule is subject to change pending feedback from Working Group participants. Additional meetings will be scheduled as needed.

<b>Date / Time</b>	<b>Agenda</b>	<b>Next Steps</b>
<b>Q1 Meeting: Thursday, Feb. 13 10:00 am – 12:00 pm</b>	2020 Working Group Plan (SAG Facilitator)  Discuss proposed policy resolution for MT issues (Resource Innovations and MEEA)	Circulate updated proposed policy resolution for review/comment, in response to feedback shared on Feb. 13

<b>Table 1: SAG Market Transformation Savings Working Group 2020 Schedule</b>		
<b>Date / Time</b>	<b>Agenda</b>	<b>Next Steps</b>
Teleconference	Midwest MT Collaborative update	
<b>Q2 Meeting:</b> <b>Tuesday, May 19</b> 9:30 am – 12:00 pm  Teleconference	Follow-up from Feb. meeting, if needed  Code Program Business Plan  Commercial Food Service Pilot Progress and Market Baseline Update  IL-TRM Version 9.0 process check-in	A follow-up call will be scheduled to further discuss savings protocols for the IL-TRM, if needed.
<b>Q3 Meeting:</b> <b>Wed., July 21</b> 10:30 am – 4:00 pm  In-person (Chicago)	Follow-up from May meeting, if needed  Gas Heat Pump Water Heaters Business Plan and Market Characterization  Luminaire Level Lighting Controls Business Plan Update (tentative)  Retail Products Platform Business Plan  IL-TRM Version 9.0 process check-in	A follow-up call will be scheduled to further discuss savings protocols, if needed.
<b>Q4 Meeting:</b> <b>Tues., Sept. 22</b> 10:00 am – 12:00 pm  Teleconference	Midwest MT Collaborative update – are there any new MT initiatives being pursued in 2021?  Commercial Food Service Pilot Results and MT Business Plan	A follow-up call will be scheduled to further discuss savings protocols, if needed.