LIEEAC (Illinois Full (IQ-N and IQ-S) Income Qualified (IQ) Energy Efficiency (EE) Committee

Related Issues – Meeting #3
Wednesday, November 30

TRM + IQ TRM WORKING GROUP OVERVIEW

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AGENDA

TRM Overview

IQ TRM Working Group Objectives

IQ TRM Working Group Work to Date

Engaging with CBOs and CAAs

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TRM OVERVIEW

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What is the 'Technical Reference Manual'?

The purpose of the Illinois Statewide Technical Reference Manual (TRM or IL-TRM) is to provide a transparent and consistent basis for calculating energy (electric kilowatt-hours (kWh) and natural gas therms) and capacity (electric kilowatts (kW)) savings generated by the State of Illinois' energy efficiency programs, which are administered by the state's largest electric and gas Utilities.

- The TRM is filed each year with the Illinois Commerce Commission as a consensus document.

- It is made up of 4 volumes: Overview, Commercial, Residential, Cross-cutting and Attachments.

What is the 'Technical Reference Manual'?

- Provides a common consistent reference document for all prescriptive efficiency programs in the State.

- Provides transparency in the basis for assumptions and calculations.

- Allows utilities to quantify savings towards regulatory goals and compliance.

- Identifies new opportunities for programs to pursue.

- Identifies gaps in robust assumptions that can be addressed by evaluation efforts in the State.

- Is an ever-evolving document – to incorporate changing markets, evaluation results, new technologies

The TRM Process

Why it exists

- efficiency optimization (performance standards/goals)
- accountability for how funds are spent

Update Cycle

- Technical Advisory Committee (TAC) is convened each year to discuss issues, prioritize updates, and update TRM based on new information
- Filed each year with the Illinois Commerce Commission (ICC) as a consensus document

It is made up of 4 volumes

1. Overview and User Guide (Policy and Summary of Changes)
2. Commercial
3. Residential
4. Cross-cutting and Attachments

It also include an errata which identifies any changes or errors from previous program year

Website includes non-consensus measures

TRM Update Cycle

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Illinois TRM Cycle		Identify Updates	Develop Prioritized list	Develop workpapers	Review workpapers/ resolve issues/ prepare 1st draft		Revise	2nd Draft	3rd and Final Draft			

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WHY AN IQ WORKING GROUP?
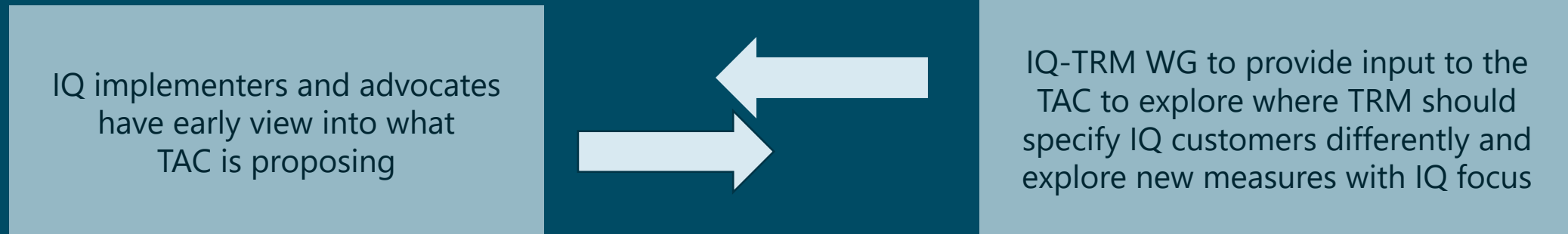
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Why an Income Qualified Working Group?

Need for improved engagement with **Income Qualified program implementers and advocates** to ensure that impacts of TAC decisions/TRM changes on IQ programs are understood, are appropriate and that IQ communities' needs are being met.

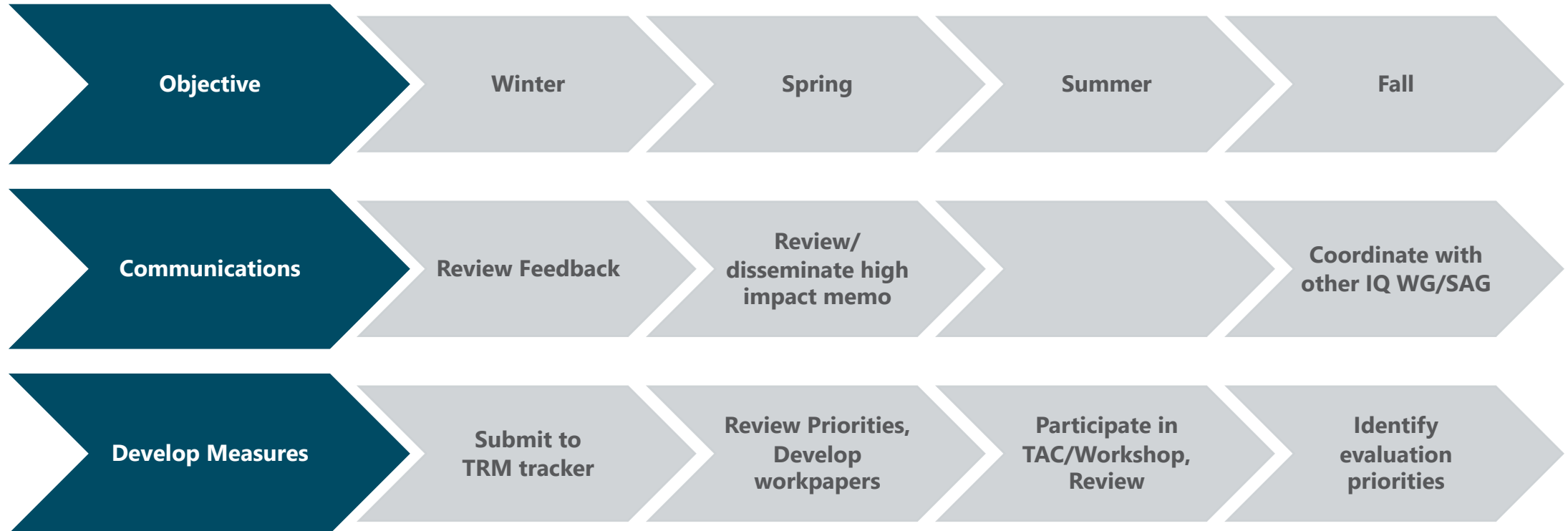## Need for improved 2-way communication

| IQ implementers and advocates have early view into what TAC is proposing | IQ-TRM WG to provide input to the TAC to explore where TRM should specify IQ customers differently and explore new measures with IQ focus |

IQ TRM Working Group Objectives

- Create an **early warning system** to communicate to CBOs/CAAs upcoming measure changes.

- Explore **IQ-focused changes and issues in the TRM**. **Propose issues** to TAC for prioritization/consideration.

- Support **development of measure changes** or updates.

- **Solicit feedback** through existing channels from other stakeholders.

Proposed Workflow*: IQ Working Group

Objective	Winter	Spring	Summer	Fall
Communications	Review Feedback	Review/ disseminate high impact memo		Coordinate with other IQ WG/SAG
Develop Measures	Submit to TRM tracker	Review Priorities, Develop workpapers	Participate in TAC/Workshop, Review	Identify evaluation priorities

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*Proposed Workflow and Timeline

What we achieved snapshot 2021 + 2022

- Provided overview of TRM policies and process

- Convened Sixteen Working Group meetings

- Reached 35+ organizations for feedback

- Identified key issues in TRM based on working group feedback

- Identified data and evaluation needs (needed to move a measure forward)

- Identified individuals to "own" workpapers to advance proposed measures

- Established workplan and process as a group for the following year

- Collected feedback via survey and discussions

- Participated in LIAAC Related Issues meetings, SAG meetings

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What we achieved snapshot 2021 + 2022

Proposed 5 measure updates to the TAC (all included in v.11)

- **ISR updates for IQ Kits** – Advanced Power Strips, Pipe Insulation, Low Flow Aerators and Showerheads

- **Mobile home specific furnace costs**

- **Furnace Blower Retrofit Cost** – based on IQ program data

- **Air Handler Filter Cleaning/Replacement** – new measure requested by IQ committee

- **Tree Planting** – discussed during v10; developed during v11

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IQ TRM Working Group: What's next

DECEMBER 2022

Next IQ Working Group Meeting Tuesday, December 13th

Discuss next year's workplan + schedule

Survey participants for feedback

Review survey feedback

Adjourn working group for 2022

Finalize Scope and Schedule for Next Year including key moments for CBO and CAA participation

WINTER 2023

Kickoff 2023 IQ TRM Working Group

Submit issues to request tracker for TAC consideration and review any feedback from stakeholders

SPRING 2023 +

Review evaluation findings/data, characterize measures

Ongoing: Coordinate with IQ Advisory, SAG Working Groups

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Questions

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Questions

Opening: How much have you participated in the TRM process?

Coordination

How can we support better communication and coordination with CBOs and CAAs?

Which EE program categories are CBOs and CAAs struggling to engage IQ communities?

Needs > Measures

Which topics or categories have the most impact when working with IQ communities?

What are some approaches to generate new measure ideas or evaluation needs from CBOs and CAAs?