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APPENDIX A-1

1 **I. INTRODUCTION**

2 **A. Witness Identification**

3 **Q. What is your name and what is your business address?**

4 A. My name is Marion Lunn Perkins. My business address is 10 South Dearborn St.,
5 Chicago, Illinois 60603.

6 **Q. By whom are you employed and in what capacity?**

7 A. I am employed by Commonwealth Edison Company (“ComEd”) as the Director
8 of Regulatory Solutions.

9 **Q. What is your relevant work and educational experience?**

10 A. Please see my Statement of Qualifications, attached as an Appendix
11 to this direct testimony, for my relevant work and educational experience.

12 **Q. What are your current responsibilities as the Director of Regulatory Solutions?**

13 A. In my current role, I oversee the Regulatory Strategy & Solutions, as well as
14 the Regulatory Affairs & Compliance teams, within ComEd’s Regulatory Department.
15 These teams support strategy, stakeholder engagement, and case management
16 for a wide range of ComEd’s proceedings before the Illinois Commerce Commission
17 (“ICC” or “Commission”), as well as compliance activities and general engagement with
18 ICC Commissioners and Staff.

19 Q. **What are your responsibilities in connection with this filing?**

20 A. As the Director of Regulatory Solutions, I am charged with providing strategic direction
21 in the development of ComEd’s Performance and Tracking Metrics Plan for 2028-2031
22 (“PM Plan 2”) and leading the stakeholder engagement efforts ahead of the filing,
23 including participation in the ICC Staff-led workshop series.

24 **B. Purpose of Direct Testimony**

25 Q. **What is the purpose of your direct testimony?**

26 A. I introduce PM Plan 2, which proposes seven performance metrics and 32 tracking metrics
27 for the 2028-2031 period. I describe ComEd’s approach to developing its proposed
28 performance and tracking metrics, and summarize ComEd’s proposed
29 performance metrics, each of which includes a calculation method, a data collection
30 method, and annual performance targets. I also describe the 32 proposed tracking metrics.

31 **C. Summary of Recommendations**

32 Q. **What are the principal recommendations of your direct testimony?**

33 A. I recommend that the Commission find that PM Plan 2 meets the specifications of Section
34 16-108.18 and is prudent and reasonable. ComEd developed the proposed Performance
35 and Tracking Metrics and associated PM Plan 2 based on the current set of Performance
36 and Tracking Metrics approved by the Commission in ICC Docket No. 22-0067,
37 the applicable sections of the Public Utilities Act (“PUA”) (and specifically Section 16-
38 108.18(e)), ComEd’s projected performance, and stakeholder feedback.
39 In my professional opinion, PM Plan 2 is prudent and reasonable and I recommend
40 it be approved by the Commission without modification.

41 **D. Attachments**

42 Q. **What are the attachments to your direct testimony?**

43 A. The following Exhibits (“Ex”.) are attached to my testimony:

- 44 • **ComEd Ex. 1.01** contains ComEd’s proposed Performance and Tracking Metrics
45 Plan 2 (2028-2031).
- 46 • **ComEd Ex. 1.02** presents ComEd’s proposed procedural schedule for
47 this proceeding.

48 **E. Introduction of Other Witnesses**

49 Q. **What other witnesses are providing direct testimony on behalf of ComEd?**

50 A. The following witnesses provide direct testimony on behalf of ComEd:

- 51 • **Susanna Aguilar (ComEd Ex. 2.0)** – ComEd witness Aguilar describes in detail
52 ComEd’s proposed performance metrics related to reliability and resiliency.
- 53 • **Kimberly Swan (ComEd Ex. 3.0)** – ComEd witness Swan describes in detail
54 ComEd’s proposed performance metric related to peak load reduction.
- 55 • **Aqeel Saeed (ComEd Ex. 4.0)** – ComEd witness Saeed describes in detail
56 ComEd’s proposed performance metric related to supplier diversity.
- 57 • **Wyatt Bohn (ComEd Ex. 5.0)** – ComEd witness Bohn describes in detail
58 ComEd’s proposed performance and tracking metrics related to affordability.
- 59 • **Taral Patel (ComEd Ex. 6.0)** – ComEd witness Patel describes in detail ComEd’s
60 proposed performance metric related to interconnection timeliness.
- 61 • **James Menard (ComEd Ex. 7.0)** – ComEd witness Menard describes in detail
62 ComEd’s proposed performance metric related to customer service.

63 **II. COMED'S PROPOSED PERFORMANCE METRIC PLAN**

64 **A. Development of Performance and Tracking Metrics Plan 2**

65 **Q. What does Section 16-108.18(e) of the Public Utilities Act require for**
66 **performance metrics approved by the Commission?**

67 A. Although I am not a lawyer and am not offering a legal opinion, I understand that the statute
68 contains a number of requirements related to performance metrics, which I summarize
69 below.

70 In anticipation of a possible future multi-year rate plan filing,¹
71 Illinois electric utilities, like ComEd, are required to propose, and the Commission
72 is required to review for approval, performance and tracking metrics that meet
73 the specifications of Section 16-108.18. The Commission shall approve no more than eight
74 performance metrics, with at least one metric from each of the following six categories:
75 (i) reliability and resiliency; (ii) peak load reduction; (iii) supplier diversity expansion;
76 (iv) affordability customer service delivery costs; (v) timeliness to customer requests
77 for interconnection; and (vi) customer service performance. 220 ILCS 5/16-
78 108.18(e)(2)(A)(i)-(vi). Metrics must be designed to achieve incremental improvements
79 over baseline performance values and targets, over a performance period of up to 10 years,
80 and no less than 4 years. *Id.* at § 16-108.18(e)(2).

81 Metrics must include a description of their purpose, a calculation method,
82 a data collection method, annual performance targets, and any incentives or penalties

¹ ComEd has not made a final decision as to whether to elect a multi-year rate plan or an Article IX rate case, and this filing should not be construed as a commitment to file a multi-year rate plan for the period 2028-2031. Instead, ComEd is making this proposal to preserve the option to choose to file a multi-year rate plan in the future.

83 for the utility’s achievement of, or failure to achieve, their performance targets,
84 provided that the total amount of potential incentives and penalties shall be symmetrical.
85 *Id.* at § 16-108.18(e)(2)(B). Incentives and penalties shall be reflected as basis points
86 added to, or subtracted from, the utility's cost of equity, with no less than 20 and
87 no more than 60 basis points at risk during any given Multi-Year Rate Plan. *Id.*

88 Metrics must be reasonably within control of the utility to achieve,
89 and should measure outcomes and actual, rather than projected, results where possible.
90 *Id.* at § 16-108.18(e)(2)(D). Metrics must include one year of tracking data collected
91 in a consistent manner, verifiable by an independent evaluator to establish a baseline and
92 measure outcomes and actual results against projections where possible. *Id.* at § 16-
93 108.18(e)(2)(D).

94 Achievement of performance metrics are based on the assumptions that the utility
95 will adopt or implement the technology and equipment and make the investments
96 to the extent reasonably necessary to achieve the goal. *Id.* at § 16-108.18(e)(2)(G).

97 **Q. Does the PM 2 Plan fulfill these requirements?**

98 **A.** Yes. ComEd’s proposed PM Plan 2 fulfills the applicable requirements.

99 ComEd has proposed at seven performance metrics – one performance metric
100 in each of the six required categories and a second reliability performance metric.
101 Each of seven proposed performance metrics are “designed to achieve incremental
102 improvements over baseline performance values and targets, over a performance period
103 of up to 10 years, and no less than 4 years.” 220 ILCS 5/16-108.18(e)(2).

104 Each performance metric is designed to be “reasonably within control of the utility
105 (ComEd) to achieve.” 220 ILCS 5/16-108.18(e)(2)(D).

106 Finally, for each performance metric, ComEd proposes a symmetrical penalty and
107 incentive structure. The Plan provides that, if ComEd achieves the highest level
108 of performance on all of its proposed performance metrics in any year, the maximum
109 incentive ComEd can earn in that year is 29 basis points. Likewise, if ComEd achieves
110 the lowest level of performance on all its proposed metrics in any year, the maximum
111 penalty applicable to that year is 29 basis points.

112 ComEd has also proposed 32 tracking metrics, which are designed to collect
113 and monitor data for the dual purposes of measuring and reporting ComEd’s performance
114 and to potentially establish future performance metrics. *See* 220 ILCS 5/16-108.18(e)(3).
115 At least one tracking metric falls within each of the five required categories of performance
116 provided in Section 16-108.18(e)(3).

117 **Q. How did ComEd approach the development of the performance metrics included in**
118 **PM Plan 2?**

119 **A.** First and foremost, ComEd’s PM Plan 2 is designed to meet the statutory objectives
120 and requirements of Section 16-108.18, including the requirement that metrics encourage
121 the cost-effective, equitable achievement of outcomes while ensuring no degradation in
122 performance.

123 In developing PM Plan 2, ComEd started with the current Performance and
124 Tracking Metrics Plan for 2024-2027 (“PM Plan 1”), and after contemplating
125 what has been learned in the first year of implementation and what is achievable in the next

126 metrics period, proposed incremental changes. ComEd then shared this proposal
127 with stakeholders during a series of Performance Metrics Workshops and considered
128 their feedback and perspectives, which are captured in the Staff Report to the Commission
129 at the conclusion of those workshops. In particular, ComEd studied whether
130 proposed changes and related achievement of the metrics was practicable and reasonably
131 within ComEd's control to achieve.

132 **Q. What characteristics did ComEd look for in potential performance metrics?**

133 **A.** To select the metrics included in the Plan from among the many potential options,
134 ComEd ensured that the selected metrics, as a whole, met all of the following principles:

- 135 • Metrics should incent better utility operations and efficiency;
- 136 • Metrics should meaningfully create value for customers, and should result in
137 benefits all customers, rather than particular subsets of customers;
- 138 • Metrics should be consistent, and operate in harmony, such that achievement of
139 one metric does not cause failure or low performance on another metric;
- 140 • Metrics should be clearly defined, measurable, and unambiguous;
- 141 • Metrics should be quantifiable using reasonably available data that does not
142 disclose confidential or proprietary information;
- 143 • Metrics should measure outcomes that ComEd can control through its actions;
- 144 • Metrics should be indifferent to technology, to the extent feasible, and should allow
145 for technological innovation and adaptation;
- 146 • Metrics should be measured against a sensible baseline; and

- 147 • Metrics should incorporate adequate lead time to develop, prepare, and establish
148 the baseline.

149 These principles ensure that each individual metric included in PM Plan 2 is clearly
150 defined and based on adequate, consistent data; that each metric measures and encourages
151 practices that support ComEd in efficiently providing reliable and resilient electric
152 delivery service to all its customers; and that the overall PM Plan 2 is a cohesive whole.

153 Q. **How did ComEd consider the input of workshop participants when developing
154 PM Plan 2?**

155 A. ComEd has taken into consideration the recommendations of the workshop participants
156 and follow-up discussions in developing and finalizing PM Plan 2. In early 2025,
157 ComEd participated in a series of six stakeholder workshops related to ComEd and
158 Ameren’s proposed performance metrics for 2028-2031. The workshops provided
159 a transparent forum for discussion and allowed ComEd to take in the perspectives
160 of stakeholders regarding various potential metrics and implementation issues.
161 ComEd and other workshop participants submitted written comments, and
162 Commission Staff and the workshop facilitator prepared a summary Report
163 to the Commission. After the workshops concluded in early April, ComEd continued
164 to meet with stakeholders to further address questions and receive feedback on adjustments
165 ComEd made to initial proposals in response to stakeholder recommendations
166 in the workshops.

167 ComEd appreciates the time devoted by stakeholders, and the efforts of Staff and
168 the facilitator in assembling the Staff Report. ComEd is open to continuing the dialogue
169 to resolve any open issues over the course of this proceeding.

170 **B. Overview of the Performance and Tracking Metrics Plan 2**

171 Q. **At a high level, what is provided within ComEd's PM Plan 2?**

172 A. ComEd's PM Plan 2 includes seven performance metrics and 32 tracking metrics.

173 For each of the performance metrics, the Plan includes a description of the metric,
174 a methodology to calculate performance, a description of the data sources and data
175 collection methods, annual performance targets, and the incentive/penalty ranges.
176 Included in the annual performance targets is a baseline, or a methodology for developing
177 the baseline, against which improvements will be measured. The Plan demonstrates
178 that the incremental annual performance targets proposed by ComEd will accumulate
179 to significant improvements in performance over time.

180 The Plan also includes a symmetrical incentive and penalty structure applicable to
181 each metric. The incentives and penalties are weighted to emphasize performance on
182 reliability, resiliency, and efficient operation of the electric distribution system.
183 Each performance metric includes an annual incremental level of superior performance
184 that would warrant an incentive, and these annual increments stair-step upwards each year
185 to encourage continuous improvements. ComEd earns no incentive (and receives
186 no penalties) for steady-state performance in any year. Incremental incentives
187 and penalties are applied based on the extent to which performance deviates significantly
188 above or below the annual incremental target.

189 Q. **How will the incentives and penalties be calculated?**

190 A. Basis points for penalties and incentives will be calculated using a “linear design”
191 rounded to the nearest hundredth point. Under the linear design, the amount of
192 incentive/penalty earned for each performance metric will be determined by multiplying
193 (i) the percentage of the maximum target achieved by (ii) the maximum incentive/penalty
194 amount. In other words, there will be straight-line interpolation from deadband
195 performance (resulting in neither an incentive nor a penalty) to the maximum
196 incentive/penalty amount. Incentive/penalty amounts will be rounded to the nearest
197 hundredth of a basis point. This is the same approach approved by the Commission
198 for the initial Performance and Tracking Metrics Plan (2024-2027).

199 **1. Performance Metrics**

200 Q. **What are ComEd’s proposed performance metrics?**

201 A. ComEd’s seven proposed PM Plan 2 performance metrics, including the substantive
202 modifications from the version of the metric that is currently in effect and was approved
203 by the Commission in ICC Docket No. 22-0067, are summarized in Table 1 below.

Table 1: Summary of Performance Metrics in Plan 2

Statutory Category	Performance Metric	Description	Modification from PM Plan 1	Basis Points
Reliability / Resiliency	1. Overall Reliability and Resiliency	Composite metric measuring 1) improvement in the System Average Interruption Duration Index (“SAIDI”), excluding Extreme Weather Event Days (“EWEDs”) and planned interruptions, and 2) resiliency based on customers whose power is restored within 12 hours of losing power during an EWED.	Change from SAIDI only, to composite metric, adding resiliency; exclusion of EWEDs, rather than Major Event Days	+/-5 bps
	2. Reliability in Equity Investment Eligible Communities (EIEC)	Composite metric measuring reliability in EIECs.	Change from focus on number of customers experiencing 4 or more interruptions for, to 3 or more interruptions; change from focus on customers experiencing an interruption lasting 12 or more hours, to 8 or more hours; exclusion of EWEDs, rather than Major Event Days	+/-5 bps
Peak Load	3. Peak Load Reduction	Increase in peak load reduction across ComEd’s demand response programs.	Change from peak load reduction capability to actual peak load reductions	+/-6 bps
Supplier Diversity	4. % Diversity-Certified Spend	Increase in spending with diverse prime suppliers and subcontracted spend by non-diverse prime suppliers with diverse suppliers.	Change BPS from +/- 3 bps to 0 bps	0 bps
Affordability	5. Reduced Disconnections	Annual reduction in residential disconnections in the top 20 zip codes with highest historical disconnection rates.	Updated zip codes and baseline	+/-5 bps

Statutory Category	Performance Metric	Description	Modification from PM Plan 1	Basis Points
Interconnection	6. Interconnection Timeliness	Increase in business days saved when interconnection tasks are completed more quickly than permitted under the Part 466 Rules.	Adjustment to baseline for DERMS	+/-5 bps
Customer Service	7. First Contact Resolution	Improvement in the percentage of incoming contacts to ComEd that are resolved on the first contact.	Updated baseline	+/-3 bps

205 Each proposed metric is discussed in detail in the direct testimonies of ComEd
 206 witnesses Aguilar, ComEd Ex. 2.0 (Metrics 1 and 2); Swan, ComEd Ex. 3.0 (Metric 3);
 207 Saeed, ComEd Ex. 4.0 (Metric 4); Bohn, ComEd Ex. 5.0 (Metric 5); Patel, ComEd 6.0
 208 (Metric 6); and Menard, ComEd Ex. 7.0 (Metric 7).

209 **Q. How do the proposed performance metrics in PM Plan 2 vary from the performance**
 210 **metrics approved in PM Plan 1?**

211 **A.** As noted, in developing PM Plan 2, ComEd started with PM Plan 1, and is proposing
 212 only incremental changes, based on learnings, passage of time (*e.g.*, updates to baselines),
 213 and feedback from stakeholders. The modifications are captured in Table 1, above.

214 **a. Incentives & Penalties**

215 **Q. What factors did ComEd consider when determining the maximum incentive or**
 216 **penalty adjustment of 29 basis points for PM Plan 2?**

217 **A.** ComEd considered several factors before deciding on 29 total basis points. The total
 218 incentives and penalties applicable in any year may total no more than 60 basis points,
 219 and no less than 20 basis points, overall. ComEd considered the total basis points
 220 of PM Plan 1 (32 basis points), and the resulting basis points achieved by ComEd in 2024.
 221 Also, ComEd considered whether the total basis points would (i) encourage ComEd to

222 achieve the performance target in the least cost manner; (ii) the value of benefits to
223 customers, the grid, public health and safety, and the environment; and (iii) impact on
224 affordability of customers' electric bills, including low-income customers,
225 ComEd's revenue requirement, the promotion of renewable and distributed energy.

226 Q. **Why is it appropriate to set a maximum incentive or penalty adjustment of**
227 **29 basis points for PM Plan 2?**

228 A. It is reasonable to set a maximum incentive or penalty adjustment of 29 basis points,
229 because (1) ComEd started with the 32 basis points approved by the Commission for
230 PM Plan 1; and (2) the 2024 results demonstrated that these metrics, and their allocated
231 basis points, result in an overall challenging, yet achievable plan that has a fair number of
232 basis points at risk. As ComEd is only considering incremental changes to existing metrics,
233 it is proposing no changes to the Commission's previously approved basis point
234 allocations, with the exception of assigning no (zero) basis points to the supplier diversity
235 metric (currently at +/- 3 basis points). *See Saeed Dir., ComEd Ex. 4.0.*

236 **b. Net Benefits**

237 Q. **How does ComEd address net benefits for its PM Plan 2?**

238 A. ComEd's approach to net benefits is consistent with its ComEd's approach to net benefits
239 in the proceeding that led to the approval of PM Plan 1 (ICC Docket No. 22-0067), and
240 the guidance from the Commission's final order in that proceeding. In that Final Order,
241 the Commission stated that:

- 242 • "calculating net benefits of the performance metrics is difficult when benefits
243 are unknown or not quantifiable";

- 244 • but, “to the extent possible, a cost-benefit analysis would certainly aid in
245 the Commission's analysis of any particular metric’s potential net benefit”; and
- 246 • “the statute does not require that any party, including the utility, must provide
247 a net benefit methodology.”

248 See *Commonwealth Edison Co.*, ICC Docket No. 22-0067, Order (Sept. 27, 2022) at 69.
249 ComEd agrees with those Commission conclusions. To the extent possible, however,
250 ComEd has identified quantifiable and qualitative benefits and incremental costs that could
251 be attributable to each metric, just as it did for the metrics proposed in PM Plan 1,
252 using most recently available numbers. These analyses are presented in ComEd Ex. 2.0
253 through ComEd Ex. 7.0 for each proposed metric.

254 **Q. Why is it appropriate to evaluate both the quantitative and qualitative benefits when**
255 **evaluating the net benefits associated with the proposed PM Plan 2?**

256 A. The Plan produces net benefits – some of which may be quantifiable, and some of which
257 are qualitative in nature. For example, benefits associated with some individual
258 performance metrics within the Plan – like those related to reliability and resiliency – can
259 be quantified in dollars using industry-standard tools such as the Interruption Cost Estimate
260 (“ICE”) Calculator. But other performance metrics are designed to achieve qualitative
261 benefits in customer experience that are more difficult to capture as a dollar-value.
262 In particular, the affordability, customer service, and interconnection timeliness measure
263 customer experience in different situations, which are more difficult to quantify.
264 While ComEd has attempted to identify quantifiable benefits for each of those metrics,

265 the qualitative benefits are no less important than the more easily-quantified benefits,
266 and no less meaningful in producing benefits to customers.

267 Evaluating the benefits of PM Plan 2 as a whole ensures that the benefits
268 arising from these qualitative metrics are appropriately considered alongside the benefits
269 arising from the more quantitative metrics. This also ensures that the Plan operates
270 cohesively and is designed to the applicable statutory goals.

271 **2. Tracking Metrics**

272 Q. **What tracking metrics is ComEd proposing for PM Plan 2?**

273 A. ComEd is proposing 32 tracking metrics in PM Plan 2, which are summarized in Table 2
274 below. As shown in Table 2, PM Plan 2 contains at least one tracking metric for each of
275 the statutorily required categories.

276 **Table 2: Summary of Tracking Metrics in PM Plan 2**

Category	Tracking Metric
Emissions Reductions	1. Emissions Reductions Supported by ComEd Programs
	2. ComEd Net GHG Emissions
	3. Marginal Greenhouse Gas Emissions Reduction Index
	4. Emissions Reductions from Electrification Index
	5. Report Tracking Metrics for Any Demand Response-related Tariff or Program (11 components)
	6. Managed EV Charging (4 components)
	7. V2G Export Compensation (3 components)
	8. EV EMS Cost Savings (3 components)
	9. Direct Current Fast Charging Load
Grid Flexibility	10. DERMS and Managed Charging Network Availability
	11. DERMS Participation
	12. Cumulative DER Interconnected to ComEd Distribution System
	13. Annual DER Interconnected to ComEd Distribution System
	14. EV Load and Participation
	15. Grid Flexibility Tracking Metrics (16 components)
Cost Savings	16. Avoided Outage Cost Due to Grid Modernization Investments
	17. Number of NWA Opportunities
	18. DER projects pending capacity-constrained interconnection
	19. Number of pending interconnection requests with cost estimate and current status

Category	Tracking Metric
	20. Interconnection upgrade cost estimates as compared to actual interconnection cost
	21. Total costs of interconnection upgrade by project and feeder
	22. Total time measured in days to complete key milestones of interconnection process
Diversity in Jobs and Opportunities	23. % Tier 1 Spend with Illinois Businesses
	24. % Diverse Professional Services Spend
	25. Number of Diverse Contractors Completing ComEd Development Programs
Equity in Allocation of Grid Planning Benefits	26. IEEE and All-In Regional SAIDI
	27. DSM Program Equitable Participation
	28. Financial Assistance Outreach & Education
	29. Customers Exceeding Minimum Service Levels
	30. Equitable Grid Planning Metric (3 components)
Other	31. ComEd employee and contractor Occupational Safety and Health Administration (OSHA) -reported injuries per year
	32. Disconnections for nonpayment in each of the 20 zip codes being measured as part of the affordability metric from 2024 to 2027

277 ComEd is proposing to maintain the 30 tracking metrics from PM Plan 1. Additionally,
 278 ComEd is proposing 2 new tracking metrics. I discuss Tracking Metric 31 below, and
 279 ComEd witness Bohn discusses Tracking Metric 32. See Bohn Dir, ComEd Ex. 5.0.
 280 Details for all 32 tracking metrics are provided in the proposed Performance and
 281 Tracking Metrics Plan attached to my testimony (ComEd Ex. 1.01).

282 Q. **What data will Tracking Metric 31 (OSHA-reported injuries) track?**

283 A. Tracking Metric 31 is focused on employee safety. It will measure ComEd employee and
 284 contractor injuries that are reported to the Occupational Safety and Health Administration
 285 (“OSHA”). In the workshop process, the Office of the Illinois Attorney General proposed
 286 this tracking metric and ComEd agreed to include in its proposed PM Plan 2.

287 **III. IMPLEMENTATION OF THE PERFORMANCE AND TRACKING METRICS**
288 **PLAN 2**

289 Q. **How will ComEd’s PM Plan 2 be implemented?**

290 A. ComEd is not proposing any material modifications to how the performance and tracking
291 metrics are implemented from PM Plan 1. In the future, if ComEd elects to again file, and
292 the Commission approves, a multi-year rate plan, then the Commission will evaluate
293 ComEd’s performance under each metric in the annual performance evaluation
294 proceedings for that multi-year rate plan.

295 In that scenario, ComEd will file an annual evaluation report in this docket
296 no later than February 15 each year. Once the annual performance evaluation proceeding
297 is commenced on May 1, ComEd will include its evaluation report with its direct testimony.
298 In addition, as required by the PUA, an independent evaluator will “review the utility’s
299 assumptions, baselines, targets, calculation methodologies, and other relevant information,
300 especially ensuring that the utility’s data for establishing baselines matches
301 actual performance.” Second, the independent evaluator will “provide a report
302 to the Commission in each annual performance evaluation describing the results”, and
303 “shall present this report as evidence as a nonparty participant.” 220 ILCS 5/16-
304 108.18(f)(3).

305 Then, in annual proceedings, the Commission will evaluate ComEd’s performance,
306 as verified by the independent evaluator, against the performance metrics approved
307 in this proceeding, and apply the incentives and penalties associated with the approved
308 metrics to adjust the ROE component of ComEd’s rates for each year subject to its multi-
309 year rate plan.

310 Q. **Will there be a contract with the independent evaluator?**

311 A. Yes. The contract with the independent evaluator should require the evaluator
312 to participate in annual performance evaluation proceedings as a non-party participant
313 for the purpose of filing direct testimony that “review[s] the utility’s assumptions,
314 baselines, targets, calculation methodologies, and other relevant information,
315 especially ensuring that the utility’s data for establishing baselines matches
316 actual performance,” and reports the results, as required by Section 16-108.18(f)(3).
317 ComEd further proposes that the contract should require the independent evaluator
318 to respond to data requests from parties to the proceedings and be available to provide
319 oral testimony at evidentiary hearings as required. The contract should permit,
320 but not require, the independent evaluator to file rebuttal testimony, as well as corrected
321 or revised testimony if needed. The contract should further require that
322 the independent evaluator be represented at evidentiary hearings by its own legal counsel.
323 These recommendations are based on the statutory criteria and the structure of
324 the current contract, which was directed in the 2022 Performance Metrics Order
325 and informed by the roles and responsibilities of the independent evaluator
326 in ComEd’s recent energy efficiency formula rate update (“EE FRU”) proceedings.

327 Q. **How will ComEd obtain Commission approval for the contract with the independent**
328 **evaluator?**

329 A. As it has done for PM Plan 1, once the Commission approves the next Plan, including
330 the above roles and responsibilities, ComEd will conduct a competitive bidding process
331 to select an independent evaluator, and will return to the Commission for approval of

332 the contract. Specifically, ComEd proposes to submit a finalized (but not executed)
333 contract to the Commission’s Executive Director by letter, no less than three (3) months
334 before the 2028-2031 Performance Metrics period. ComEd proposes that
335 Commission Staff submit a report regarding its assessment of the contract and recommend
336 Commission action. Once the contract is approved by the Commission and executed by
337 ComEd and the independent evaluator, ComEd will submit an executed copy
338 as a compliance filing in this docket.

339 **Q. Under what tariff does ComEd propose to implement the performance metrics,**
340 **and related incentives and penalties, as set forth in your testimony and that of**
341 **other ComEd witnesses?**

342 A. Yes. ComEd will leverage the previously approved “Rider PIM – Performance Incentive
343 Metrics,” or Rider PIM.

344 **Q. How will Rider PIM be updated?**

345 A. ComEd will file an update to Rider PIM, with the approved PM Plan 2 metrics
346 and applicable information tariff sheets to reflect the final order in this proceeding,
347 with an effective date of January 1, 2028. As noted above, ComEd has not made
348 a final decision as to whether to elect a multi-year rate plan or an Article IX rate case,
349 and discussion regarding modifying Rider PIM for 2028-2031 should not be construed as
350 a commitment to file a multi-year rate plan for the same period.

351 **IV. PROPOSED PROCEDURAL SCHEDULE**

352 **Q. By when does ComEd request a Commission order in this docket?**

353 A. ComEd must include a detailed plan for achieving the performance metrics approved
354 in this proceeding in its 2028-2031 Multi-Year Integrated Grid Plan (“2028-2031 MGP”),
355 including any necessary investments. ComEd is already beginning to prepare its 2028-
356 2031 MGP, which must be filed by January 2026. Therefore, ComEd respectfully requests
357 that the Commission approve the proposed PM Plan 2 no later than the October 30, 2025
358 Regular Open Meeting, to provide adequate time to incorporate the findings
359 from this proceeding into the 2028-2031 MGP. ComEd recognizes that this is a short
360 procedural schedule, but believes it is achievable given the significant advance work
361 the parties were able to accomplish through the workshop process.

362 **Q. Has ComEd developed a proposed procedural schedule?**

363 A. Yes. ComEd has drafted a proposed procedural schedule and shared it with ICC
364 Office of General Counsel (“OGC”) that is attached as ComEd Ex. 1.02 for consideration
365 of the Administrative Law Judge and interested stakeholders. ComEd will continue
366 to work with OGC and Commission Staff, and other intervenors, in advance of
367 the prehearing conference.

368 **Q. Will ComEd update PM Plan 2 following the conclusion of this proceeding?**

369 A. Yes. ComEd commits to update PM Plan 2 after the conclusion of this proceeding to reflect
370 the final order, and file the updated PM Plan 2 in this docket.

371 V. **CONCLUSION**

372 Q. **Does that conclude your direct testimony?**

373 A. Yes.

APPENDIX

STATEMENT OF QUALIFICATIONS

Marion Lunn Perkins

I have been the Director of Regulatory Solutions at ComEd since January 2024. Prior to my current role, I was the Senior Manager for Customer Solutions Strategic Planning & Portfolio Management (April 2019 – December 2023) and Manager for Energy Efficiency Programs (July 2017 – April 2019) at ComEd. Before joining ComEd, I was the Assistant Deputy Director and then Deputy Director for Energy & Recycling at the Illinois Department of Commerce & Economic Opportunity (“DCEO”) (August 2014 – July 2017). Before DCEO, I held positions at the U.S. Department of Energy, the White House Council on Environmental Quality, and the U.S. Department of Housing & Urban Development.

I hold a Master of Public Administration, with a focus on environmental science and policy, from Columbia University, and a Bachelor of Arts in international studies from Emory University.

I have provided testimony on behalf of ComEd before the ICC in the following dockets:

- 23-0340 Annual energy efficiency formula rate update and revenue requirement reconciliation pursuant to Section 8-103B of the Public Utilities Act
- 22-0362 Annual energy efficiency formula rate update and revenue requirement reconciliation pursuant to Section 8-103B of the Public Utilities Act
- 21-0472 Annual energy efficiency formula rate update and revenue requirement reconciliation pursuant to Section 8-103B of the Public Utilities Act
- 21-0155 Approval of the Energy Efficiency and Demand-Response Plan Pursuant to Section 8-103B of the Public Utilities Act
- 20-0475 Annual energy efficiency formula rate update and revenue requirement reconciliation pursuant to Section 8-103B of the Public Utilities Act