MEEA’s 2018 Post-Election Analysis

December 6, 2018
Meet the Presenters

MEEA Policy Team

• Nick Dreher – Sr. Policy Manager
• Nick Hromalik – Policy Manager
• Greg Ehrendreich – Research Analyst
• Sophia Markowska – Policy Associate
Webinar Agenda

1. Regional Highlights & Trends
2. State-by-State Results
3. Q&A
We are a nonprofit membership organization with 160+ members, including:

- Utilities
- Research institutions
- State and local governments
- Energy efficiency-related businesses

As the key resource and champion for energy efficiency in the Midwest, MEEA helps a diverse range of stakeholders understand and implement cost-effective energy efficiency strategies that provide economic and environmental benefits.
Regional Highlights and Trends
Regional Highlights & Trends

Major Takeaways

- Governor races: lots of new faces
- Minimal power change in legislatures
- Trifecta shake ups
- Only one divided legislature by party
- New EE opportunities, but existing messages on cost-effectiveness and economic benefit hold true
Regional Highlights & Trends
Governor’s Party (pre-election)

9 governors races
- Illinois
- Iowa
- Kansas
- Michigan
- Minnesota
- Nebraska
- Ohio
- South Dakota
- Wisconsin
Regional Highlights & Trends
Governor’s Party (post-election)

9 governors races
• 7 new governors
  – MN, OH, SD
  – 4 flipped party: IL, KS, MI, WI
• 2 incumbents re-elected
  – IA and NE
Regional Highlights & Trends
State Senate Makeup (post-election)

All Senate Makeup - 2019

- Total Seats: 573
- Dem: 200 (+8)
- Rep: 371 (+1)
- Ind: 2

- 114 new state senators
Regional Highlights & Trends
State House Makeup (pre-election)

All House Makeup - 2018

Total Seats 1,312
Dem 455
Rep 847
Vac 10
Regional Highlights & Trends
State House Makeup (post-election)

All House Makeup - 2019

- Total Seats: 1,312
- Republican: 806 (+49)
- Democratic: 504
- Vacant: 2

- 352 new state representatives
Regional Highlights & Trends

Legislative Majority (post-election)

- MN is the nation’s only divided legislature
Regional Highlights & Trends

Trifectas (pre-election)

Trifecta states:
- Indiana
- Iowa
- Kansas
- Kentucky
- Michigan
- Missouri
- Nebraska
- North Dakota
- Ohio
- South Dakota
- Wisconsin
Regional Highlights & Trends

Trifectas (post-election)

Governors determined trifecta status

Gained:
Illinois

Lost:
Kansas
Michigan
Wisconsin
Regional Highlights & Trends
Veto-Proof Supermajorities (pre-election)

Supermajorities:
- Indiana
- Kansas
- Kentucky
- Missouri
- Nebraska
- North Dakota
- Ohio
- South Dakota
Regional Highlights & Trends

Veto-Proof Supermajorities (post-election)

- IL now has supermajorities in both chambers
2018 Election Results by State
Illinois
Governor-Elect JB Pritzker (D)
- Newly elected in 2018
- Defeated incumbent Bruce Rauner (R)
- 100% renewable energy campaign pledge
- Supports increased EE investment
5 member commission appointed for five-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Party</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair - Brien Sheahan</td>
<td>R</td>
<td>2020</td>
</tr>
<tr>
<td>John Rosales</td>
<td>D</td>
<td>2019</td>
</tr>
<tr>
<td>Sadzi Martha Oliva</td>
<td>R</td>
<td>2020</td>
</tr>
<tr>
<td>Anastasia Pailvos</td>
<td>I</td>
<td>2023</td>
</tr>
<tr>
<td>D. Ethan Kimbrel</td>
<td>D</td>
<td>2023</td>
</tr>
</tbody>
</table>
State Senate Makeup (post-election)

Illinois Senate Makeup - 2019

- Total Seats: 59
  - Dem: 39
    - +2
  - Rep: 20
    - -2

Illinois +2 -2
Illinois

State House Makeup (post-election)

Illinois House Makeup - 2019

Total Seats
118

Dem
73
+6

Rep
45
-6
**Illinois Legislature**

- Democrats gained 2 seats in the Senate and 6 seats in the House
- Democrats gained a supermajority in the House
Outlook for Energy Efficiency

- Governor outreach to provide tangible economic value of EE
- New ICC Chair expected with additional appointments possible in 2019
- Currently updating to latest model building energy code (2018 IECC)
- FEJA 2.0
  - Remove the industrial exemption
  - Increased Natural Gas EE investment
Indiana
Indiana Commissioners

Five member nonpartisan commission appointed for four-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair James Huston</td>
<td>2021</td>
</tr>
<tr>
<td>David Ziegner</td>
<td>2019</td>
</tr>
<tr>
<td>David Ober</td>
<td>2020</td>
</tr>
<tr>
<td>Stefanie Krevda</td>
<td>2022</td>
</tr>
<tr>
<td>Sarah Freeman</td>
<td>2022</td>
</tr>
</tbody>
</table>
Indiana State Senate Makeup (post-election)

Indiana Senate Makeup - 2019

- Total Seats: 50
- Republic: 40
- Democratic: 10
- Difference: +1
Indiana
State House Makeup (post-election)

Indiana House Makeup - 2019

Total Seats: 100
- Rep: 67
- Dem: 32
- Vac: 1

+2
-3
• Democrats gained 1 seat in House and 2 seats in the Senate
• Republican supermajority maintained
• Re-elected incumbent (D) in House-7 resigned post-election, opening up a vacancy
Outlook for Energy Efficiency

Indiana

• Pursue maximum investment in EE through IRPs
• Commissioner education on impact of 2014 repeal and opt-out, and general value of EE
• MEEA advocacy on maintaining building energy code
Iowa
Gov. Kim Reynolds (R)

• Incumbent
• Replaced Gov. Terry Branstad in May 2017
• Led the effort to write Iowa’s Energy Plan in 2016
• May 2018: signed SF 2311 into law, which significantly weakened Iowa’s energy savings programs
Iowa Commissioners

Three member nonpartisan commission appointed for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Geri Huser</td>
<td>2021</td>
</tr>
<tr>
<td>Nick Wagner</td>
<td>2019</td>
</tr>
<tr>
<td>Richard Lozier</td>
<td>2023</td>
</tr>
</tbody>
</table>
State Senate Makeup (post-election)

Iowa Senate Makeup - 2019

- Total Seats: 50
- Rep: 33 (+4)
- Dem: 17 (-3)

Iowa
State House Makeup (post-election)

Iowa House Makeup - 2019

- Total Seats: 100
- Rep: 54
- Dem: 46
- Net Change: +5
• Democrats gained 5 seats in House
• Republicans gained 4 seats in the Senate
• One vacant House seat filled
• Republicans retained trifecta; made legislative gains, while congressional positions went to the Democrats
Outlook for Energy Efficiency

- Energy efficiency took a big hit in 2018 with passage of the spending cap and other weakening provisions
- The state legislature is ripe for education
- Work with state energy office to identify opportunities to fill program gaps
- Likely to start update to model building energy code (2018 IECC)
  - Current code is 6 years old (2012 IECC)
  - Assist the Iowa Building Advisory Council and Iowa Building Codes Bureau during the update process
Kansas
Gov.-Elect Laura Kelly (D)

- Newly elected in 2018
- Has served in State Senate since 2004
- Ran against Brownback administration’s past actions
Three member nonpartisan commission appointed for four-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Shari Feist Albrecht</td>
<td>2020</td>
</tr>
<tr>
<td>Jay Scott Emler</td>
<td>2019</td>
</tr>
<tr>
<td>Dwight D. Keen</td>
<td>2022</td>
</tr>
</tbody>
</table>
Kansas

State Senate Makeup (post-election)

Kansas Senate Makeup - 2019

Total Seats: 40

Dem: 9 (+0)
Rep: 30 (+1)
Ind: 1

State Senate Makeup (post-election)
Kansas State House Makeup (post-election)

Kansas House Makeup - 2019

- Total Seats: 125
- Republican (Rep): 85 (+0)
- Democratic (Dem): 40 (+0)
• Republicans gained 1 seat in Senate
• No change to House balance
• Supermajority maintained by Republicans
Kansas

Outlook for Energy Efficiency

- Governor-elect will appoint new members to the KCC and CURB
- Potential State Energy Plan
- Provide support to local jurisdictions on energy codes adoption (Kansas adopts codes by jurisdiction rather than statewide)
Kentucky
Three member nonpartisan commission appointed for four-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Michael Schmitt</td>
<td>2019</td>
</tr>
<tr>
<td>Vice Chair Robert Cicero</td>
<td>2020</td>
</tr>
<tr>
<td>Talina R. Mathews</td>
<td>2021</td>
</tr>
</tbody>
</table>
Kentucky

State Senate Makeup (post-election)

Kentucky Senate Makeup - 2019

Total Seats: 38

Dem: 10
Rep: 28

Net: +1

MEEA
MIDWEST ENERGY EFFICIENCY ALLIANCE
Kentucky
State House Makeup (post-election)

Kentucky House Makeup - 2019

Dem
39
+2

Rep
61
-1

Total Seats
100
Kentucky Legislature

- Republicans gained 1 seat in Senate and lose 1 in House
- Democrats gained 2 seats in House
- One House vacancy filled
- Supermajority remains Republican in both bodies
Michigan
Gov.-Elect Gretchen Whitmer (D)

- Newly elected in 2018
- Platform contains environmental justice and economic development
  - No specifics on energy, but transition team includes clean energy advocates
Three member nonpartisan commission appointed to six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Sally Talberg</td>
<td>2021</td>
</tr>
<tr>
<td>Norman Saari</td>
<td>2019</td>
</tr>
<tr>
<td>Rachael Eubanks</td>
<td>2023</td>
</tr>
</tbody>
</table>
Michigan

State Senate Makeup (post-election)

Michigan Senate Makeup - 2019

- Total Seats: 38
  - Dem: 16 (+6)
  - Rep: 22 (-5)
Michigan
State House Makeup (post-election)

Michigan House Makeup - 2019

Rep 58
Dem 52
Total Seats 110
+5

MEEA
- Democrats gained 5 seats in House and 6 seats in Senate
- One Senate vacancy filled
- Republicans lost Senate supermajority
Outlook for Energy Efficiency

- 2016 legislation has spurred gains in energy waste reduction
- Any increases in EWR will require bipartisan solutions between gov. (D) and legislature (R)
- Strong commission
- Interested in increased energy code compliance, including a Codes Compliance Collaborative
Minnesota
Governor-Elect Tim Walz (D)

- Newly elected in 2018
- Serving in the U.S. House since 2007
- MN has longest streak Democratic governors - 12 years
- Believes EE and renewable options save communities and rural businesses money
Minnesota Commissioners

Five member commission appointed for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Party</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Nancy Lange</td>
<td>D</td>
<td>2019</td>
</tr>
<tr>
<td>Vice Chair Dan Lipschultz</td>
<td>D</td>
<td>2020</td>
</tr>
<tr>
<td>John Tuma</td>
<td>R</td>
<td>2021</td>
</tr>
<tr>
<td>Matthew Schuerger</td>
<td>N/A</td>
<td>2022</td>
</tr>
<tr>
<td>Katie Sieben</td>
<td>D</td>
<td>2023</td>
</tr>
</tbody>
</table>
Minnesota Senate Makeup (post-election)

Minnesota Senate Makeup - 2019

- No MN Senate elections

- Total Seats: 67
  - Dem: 33
  - Rep: 34
  - +0
Minnesota
State House Makeup (post-election)

Minnesota House Makeup - 2019

Total Seats 134
Dem 76 +19
Rep 58 -19
• All 134 members of the House were up for election
• Democrats gained 19 seats and flipped House
• Senate not up for election - will be in 2020
• Only state in the nation with a divided state legislature
Minnesota

Outlook for Energy Efficiency

- Bipartisan approach is key
- Strong commission
- MN has been strong on EE and we hope it continues with the new administration and divided legislature
- Commercial energy code on track to be updated
- The state is in jeopardy of not updating residential energy code, meaning an update won’t occur for 6 more years. More effort needed.
Missouri
Governor Mike Parson (R)

• Took office June 1, 2018 following the resignation of Eric Greitens
• Previously served as Lt. Governor
Five member nonpartisan commission appointed for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Ryan A. Silvey</td>
<td>2024</td>
</tr>
<tr>
<td>Bill Kenney</td>
<td>2019</td>
</tr>
<tr>
<td>Daniel Hall</td>
<td>2019</td>
</tr>
<tr>
<td>Scott Rupp</td>
<td>2020</td>
</tr>
<tr>
<td>Maida Coleman</td>
<td>2021</td>
</tr>
</tbody>
</table>
Missouri Senate Makeup (post-election)

Missouri Senate Makeup - 2019

Total Seats: 34

- Republicans: 25 (+2)
- Democrats: 9 (+1)

State Senate Makeup (post-election)
Missouri

State House Makeup (post-election)

Missouri House Makeup - 2019

Total Seats 163
Dem 47 +2
Rep 116 +6
Missouri Legislature

- Republicans gained 6 seats in House and 2 in Senate
- Democrats gained 1 seat in Senate and 2 in House
- 8 vacant House and 3 vacant Senate seats filled
- Supermajority remains for Republicans in both houses
Outlook for Energy Efficiency

New MPSC Chairman Silvey is a good target for outreach and education
The bulk of opportunity in MO is within the commission and the statewide advisory collaborative
Missouri (a homerule state) is interested in increased energy codes compliance
  – Ameren MO launching a residential energy code compliance program in 2019
Provide support for local jurisdictions interested in energy code adoption
Nebraska
Governor Pete Ricketts (R)

- Incumbent
- Supported the Keystone XL pipeline
- Co-owner Chicago Cubs
### Five member commission elected for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Party</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Tim Schram</td>
<td>R</td>
<td>2025</td>
</tr>
<tr>
<td>Vice Chair Rod Johnson</td>
<td>R</td>
<td>2023</td>
</tr>
<tr>
<td>Crystal Rhoades</td>
<td>D</td>
<td>2021</td>
</tr>
<tr>
<td>Mary Ridder</td>
<td>R</td>
<td>2023</td>
</tr>
<tr>
<td>Dan Watermeier*</td>
<td>R</td>
<td>2025</td>
</tr>
</tbody>
</table>

* newly elected to replace Commissioner Frank E. Landis Jr.
Nebraska Senate Makeup (post-election)

Nebraska Senate Makeup - 2019

Total Seats: 49

Dem: 18 (+2)
Rep: 30 (+0)
Ind: 1
• Democrats gained 2 seats in Senate
• One vacancy filled & one independent seat flipped to Democrat
• Supermajority maintained by Republicans
Nebraska

Outlook for Energy Efficiency

• New appointments to the state energy office – director and deputy director
• Nebraska should update its statewide energy code
  – Current energy code is a decade old (2009 IECC)
  – Should also facilitate training of builders and code officials on updated building practices
  – Nebraska is the only Midwestern state that adopts its code legislatively
North Dakota
Three member commission elected for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Party</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Randy Christmann</td>
<td>R</td>
<td>2024</td>
</tr>
<tr>
<td>Brian Kroshus</td>
<td>R</td>
<td>2019</td>
</tr>
<tr>
<td>Julie Fedorchak</td>
<td>R</td>
<td>2022</td>
</tr>
</tbody>
</table>
North Dakota
Senate Makeup (post-election)

North Dakota Senate Makeup - 2019

Total Seats 47

Dem 10 +1

Rep 37 -1
North Dakota
House Makeup (post-election)

North Dakota House Makeup - 2019

Dem
15
+2

Rep
79
-2

Total Seats
94
North Dakota Legislature

- Democrats gained 1 seats in House and 2 in Senate
- Supermajority maintained by Republicans
Ohio
Gov.-Elect Mike DeWine (R)

- Current Ohio Attorney General and former U.S. Senator

- As AG sued the U.S. EPA over the Clean Power Plan, along with 23 other states

- Supports a full range of energy options, including nuclear and natural gas
Five member nonpartisan commission appointed for five-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Asim Haque</td>
<td>2021</td>
</tr>
<tr>
<td>Thomas Johnson</td>
<td>2019</td>
</tr>
<tr>
<td>Lawrence K. Friedeman</td>
<td>2020</td>
</tr>
<tr>
<td>Daniel R. Conway</td>
<td>2022</td>
</tr>
<tr>
<td>M. Beth Trombold</td>
<td>2023</td>
</tr>
</tbody>
</table>
Ohio Senate Makeup (post-election)

Ohio Senate Makeup - 2019

Total Seats: 33

Dem: 10 (+1)
Rep: 23 (-1)
Ohio

House Makeup (post-election)

Ohio House Makeup - 2019

- Rep: 62 (−3)
- Dem: 36 (+3)
- Vac: 1

Total Seats: 99
• Democrats gained 3 seats in House and 1 in Senate
• Supermajority maintained by Republicans
• House-97 (R) was appointed to fill vacant Senate-20 post-election; vacancy to be filled by House Republicans
Outlook for Energy Efficiency

• Major EE defense state
• Need to educate new actors on cost-effective benefits of EE and limit trade-offs of EE in a larger legislative package
• PowerForward process continues through Collaborative stakeholder meetings and two working groups:
  – Distribution System Planning Workgroup (PWG)
  – Data and Modem Grid Workgroup (DWG)
South Dakota
Governor-Elect Kristi Noem (R)

- Currently serving in U.S. House since 2006
- Supports an “all-of-the-above” energy solution
- Supported the Keystone XL pipeline
Three member commission elected for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Party</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Kristine Fiegen*</td>
<td>R</td>
<td>2025</td>
</tr>
<tr>
<td>Vice Chair Gary Hanson</td>
<td>R</td>
<td>2021</td>
</tr>
<tr>
<td>Chris Nelson</td>
<td>R</td>
<td>2023</td>
</tr>
</tbody>
</table>

*Chair Kristine Fiegen won reelection against Democrat Wayne Frederick
South Dakota Senate Makeup (post-election)

South Dakota Senate Makeup - 2019

- Total Seats: 35
- Rep: 30 (+1)
- Dem: 5 (-1)

MEEA (Midwest Energy Efficiency Alliance)
South Dakota
House Makeup (post-election)

South Dakota House Makeup - 2019

Dem 12
Rep 58
Total Seats 70

South Dakota
Democrats gained 2 seats in House
Republicans gained 1 seat in Senate
Three House districts still have potential recounts
Republicans will retain supermajority
Wisconsin
Governor-Elect Tony Evers (D)

- Newly elected in 2018
- Defeated incumbent Scott Walker
- Campaign platform included economic development and clean energy
Three member nonpartisan commission appointed for six-year terms

<table>
<thead>
<tr>
<th>Commissioner</th>
<th>Term Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Lon E. Roberts</td>
<td>2023</td>
</tr>
<tr>
<td>Mike Huebsch</td>
<td>2021</td>
</tr>
<tr>
<td>Rich Zipperer</td>
<td>2024</td>
</tr>
</tbody>
</table>
Wisconsin

Senate Makeup (post-election)

Wisconsin Senate Makeup - 2019

Total Seats: 33

Dem: 14

Rep: 19

+1
Wisconsin
Assembly Makeup (post-election)

Wisconsin Assembly Makeup - 2019

Total Seats: 99
Dem: 36 (+1)
Rep: 63 (-1)
Republicans gained 1 seat in Assembly and lost 1 in Senate
17 out of 33 Senate seats were up for election
A few seats shy of becoming a Republican supermajority in both the Assembly and Senate
Wisconsin

Outlook for Energy Efficiency

• New appointment to the PSC gives an opportunity to defend the Focus on Energy budget

• Changes to WI’s energy policy will likely come from executive branch or through commission activity

• MEEA will work to maintain EE priorities with the Evers administration

• WI should consider updating its residential energy code, which is currently the 2009 IECC
Q&A
Submit questions via the question box in GoToWebinar
Thank you!

Nick Hromalik
Midwest Energy Efficiency Alliance
nhromalik@mwalliance.org