

2011 Mid-Term Modifications – Revised List of Potential Topics

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We have not received from the PAs a proposed/draft list of topics for the 2011 Mid-Term Modifications (MTM), in response to several draft lists we have provided to the EEAC and to the PAs directly over the last few months. The PAs did indicate that their view is that the list of 2011 MTM topics would be very short, and limited solely to topics that trigger the DPU Guidelines (20% variance from Plan), and the PAs represented this position in a draft template/outline. In the absence of a list from the PAs we have developed a revised list, below.

Our current straw proposal is to provide information in two documents, in parallel:

1. 2011 Mid-Term Modifications for DPU review and approval, i.e., the list of modifications that are triggered by the DPU Guidelines (and the reasonable interpretation of those Guidelines); see the note on the “triggers” for modifications, below
2. A parallel document that tells the story for 2011, i.e., what have we learned in 2011 from program experience and the evaluations, and revisions made for 2011. There should be a concise document that tells the story for 2011 going forward. This should not be done in the quarterly reports (which look backward) but should be in a concise document on 2011 that looks forward.

Related topic:

Triggers for Mid-Term Modifications and the DPU Guidelines, for DPU review and approval vs. notification of the Council and DPU – these triggers are being discussed and we (consultants) expect that a proposal to the DPU will be developed and filed.

Revised list of potential topics for 2011 Mid-Term Modifications:

- New programs and discontinued programs (PAs?)
- Programs for which there will be +/- 20% variances from planned (PAs? e.g., High Efficiency Heating Equipment?)
- Increased gas funding for low income/non-profit multifamily gas opportunities
- Behavior/feedback programs – as its own program in its own program row in the 08-50 tables (with generic name), and include recent pilots as programs, with costs and savings (technically not a brand new activity, but a new representation as a “program”)
- Performance incentives with the three components (benefits, value, and specific performance metrics), and revised allocation of the benefits component to the individual PAs to address the problems per DPU Order; consultant-proposed revision to value component, and fewer performance metrics focused on highest-priority desired outcomes
- Technical Reference Manual (TRM) implementation
- Data tables (08-50) (all of the 08-50 data tables that have revisions for 2011)

List of potential topics for 2011 “tell the story” document, in parallel:

- Modifications to programs and program designs, with a focus on the most important program revisions, even if they don’t trigger a 2011 Mid-Term Modification (e.g., rental housing landlord strategy, etc.)
- Other funding, other program funding and financing capital, and implications for 2011

- Financing, Residential and C&I financing offerings
- Nature and level of customer financial incentives, incentive levels vs. increased financing
- Codes and standards savings attribution?
- Other key issues and themes (e.g., multi-fuels, fuel switching; etc.)?
- EM&V implementation (how results of evaluations were incorporated and addressed)
- Others?

Council review and resolution on the 2011 MTM filing and on the parallel 2011 “tell the story” document