

Draft Proposed Performance Metrics for 2010

Residential

Deeper Savings Metrics

1. MassSAVE/Weatherization: Deeper Savings {Electric & Gas}	
Threshold	Achieve an increase in average MMBTU savings per customer served in 2010 of 10% , as compared with 2008 (annual report).*
Design	Achieve an increase in average MMBTU savings per customer served in 2010 of 20% , as compared with 2008 (annual report).
Exemplary	Achieve an increase in average MMBTU savings per customer served in 2010 of X% , as compared with 2008 (annual report).

*Calculation will be made by multiplying each 2008 and 2010 activity by the same deemed savings value for each activity; and then summing all activities into annual MMBTU totals.

Increase % = (MMBTU savings per customer₂₀₁₀ - MMBTU savings per customer₂₀₀₈) / MMBTU savings per customer₂₀₀₈

*MMBTU savings per customer₂₀₁₀ = (∑ do for each activity ∑ (# Activities₂₀₁₀ * Deemed Savings Activity)) / #customers₂₀₁₀*

*MMBTU savings per customer₂₀₀₈ = (∑ do for each activity ∑ (# Activities₂₀₀₈ * Deemed Savings Activity)) / #customers₂₀₀₈*

Deemed values will be agreed upon using the most current, credible value from existing deemed savings, Summit Blue 2008 study, GDS 2009 study, and targeted evaluation activities for this purpose. Parties will establish this set of deemed values by February 15th 2010.

2. MassSAVE: Increase DI bulb penetration {Electric & Gas}	
Threshold	Facilitate coordination between all PA residential direct-installation lighting efforts and the Products program on the availability of specialty bulbs under consideration for direct installation. Produce a memo proposing a strategy to use the current direct-installation bulb procurement process, or an alternative, to ensure the availability of consistent quality specialty bulbs across all PA programs promoting efficient residential lighting. Memo to EEAC consultants by March 1, 2010. Consultant comments by March 15, 2010. Final memo by April 15, 2010.
Design	Achieve an overall average number of DI bulbs installed per customer served in Q3-Q4 2010 of 15 or greater.
Exemplary	Achieve an overall average number of DI bulbs installed per customer served in Q3-Q4 2010 of 17 or greater.

3. CoolSmart: Increase % of correct installations {Electric}	
Threshold	8% of homes participating in the CoolSmart program that receive an efficient equipment rebate for ducted systems will have equipment installations that include both QI (charge and airflow) and proper sizing (based on completed Manual J) services.
Design	12% of homes participating in the CoolSmart program that receive an efficient equipment rebate for ducted systems will have equipment installations that include both QI (charge and airflow) and proper sizing (based on completed Manual J) services.
Exemplary	16% of homes participating in the CoolSmart program that receive an efficient equipment rebate for ducted systems will have equipment installations that include both QI (charge and airflow) and proper sizing (based on completed Manual J) services. Of these 16% of homes receiving equipment rebates and combined QI and sizing/Manual J services, 30% must also participate in the program's duct sealing or ESQI component.

4. Multifamily Retrofit: Deeper Savings {Electric & Gas} – Alternate	
Threshold	5% of multifamily buildings served in Q3-Q4 2010 achieve an overall energy savings for the residential component of the building of 20% or greater over baseline usage, based on modeled savings for measures agreed to be implemented.
Design	10% of multifamily buildings served in Q3-Q4 2010 achieve an overall energy savings for the residential component of the building of 20% or greater over baseline usage, based on modeled savings for measures agreed to be implemented.
Exemplary	15% of multifamily buildings served in Q3-Q4 2010 achieve an overall energy savings for the residential component of the building of 20% or greater over baseline usage, based on modeled savings for measures agreed to be implemented.

5. Products: Set Top Boxes {Electric}					
Threshold	Engage set top box (STB) manufacturers and service providers (cable, telecom, satellite and others) in Massachusetts to assess the market and the opportunity for energy savings from this technology. Coordinate with program administrators in other states and with regional and national stakeholders such as NEEP, CEE and ENERGY STAR as appropriate. Provide a written assessment by June 15, 2010 of the STB market in Massachusetts addressing STB product types and functionalities, quantities sold annually and currently installed in Massachusetts, product availability and cost, ENERGY STAR Tier 1 vs. Tier 2 savings, MA stakeholders' interest in promoting efficient STBs and in becoming ENERGY STAR STB Partners, and state level standards and other regulatory, e.g., Department of Telecommunications and Cable, opportunities.				
Design	Develop a multiyear plan by September 15, 2010 to address promotion of energy efficient STBs in Massachusetts, including the pursuit of standards and regulatory options. The plan will explicitly address and provide recommendations as to trade-offs between early promotion of the current ENERGY STAR Tier 1 specifications, including early STB retirement efforts, versus focusing on possible delayed promotion of the Tier 2 specification.				
Exemplary	<p>Implement the multi-year plan and by year end and achieve one or both of the two following Options:</p> <table border="1" data-bbox="467 1052 1338 1381"> <tbody> <tr> <td>1</td> <td>Work with appropriate stakeholder groups to file STB standards legislation by year end.</td> </tr> <tr> <td>2</td> <td>By year end petition the Department of Telecommunications and Cable (DTC) to establish regulatory requirement for the installation of efficient STBs that addresses both Tier 1 and Tier ENERGY STAR specifications</td> </tr> </tbody> </table> <p>The utilities will prepare a memo by February 15, 2011 proposing annual savings, and savings duration, to be attributed to them if either of the Options is successfully attained. The memo will estimate the projected gross savings from these efforts and propose an attribution factor. This factor will represent the percentage of the gross STB savings that the utilities can claim as program savings. The memo will detail the utilities efforts to achieve the Option 1 and/or 2 outcomes and the rationale for both the proposed attribution factor and for the number of years for which these STB savings should be claimed. The memo will also detail how a standards and/or regulatory outcome would modify, delay or obviate the need for additional consumer and/or upstream program efforts starting in 2011.</p>	1	Work with appropriate stakeholder groups to file STB standards legislation by year end.	2	By year end petition the Department of Telecommunications and Cable (DTC) to establish regulatory requirement for the installation of efficient STBs that addresses both Tier 1 and Tier ENERGY STAR specifications
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Infrastructure Metrics

6. Community Initiatives {Electric & Gas}	
Threshold	Develop and implement at least three (3) community mobilization initiatives, in collaboration with community-based personnel, to deliver energy efficiency services in three (3) communities (e.g. cities, towns, neighborhoods) in the Commonwealth. At least 2 of the 3 initiatives to target traditionally hard-to-reach or underserved communities.
Design	Establish a PA Community Initiative Working Group to review the final report, to coordinate with any pertinent EEAC working groups, and to coordinate on-going community initiative efforts.
Exemplary	Produce a final report documenting the results of the initiatives, including lessons learned and cost-effectiveness. Include report findings in planning process for 2011 community initiative efforts.

7. MassSAVE: Explore inclusion of Energy Professionals {Electric & Gas}	
Threshold	Explore the potential for expanding delivery of MassSAVE program vendor services to include individual credentialed energy professionals. Document the standards for vendor services (e.g. accreditation/certifications, cost-effectiveness, administration, reporting to DOER and PAs, training requirements) and provide a detailed specification on each component of the audit process. Explore the various potential business arrangements for best administrative efficiency.
Design	Implement a limited 'energy professionals' initiative to provide vendor services to 50-100 MassSAVE customers statewide.
Exemplary	Document the results of the pilot and include the report findings in on-going efforts to expand the program services delivery base. Provide an interim memo by September 15 th documenting pilot results to date to help inform the mid-course adjustment process.

Low Income

On the theme “Deeper, then Broader”

1. Low-income Best Practices Working Group {Electric & Gas}	
Threshold	In coordination with LEAN, implement best practices as agreed in 2009. Continue at least quarterly discussions and technology analysis. This will include providing written updates on meetings, analyses and additional best practices implemented.
Design	Explore and consider adoption of new program measures, specifically including, but not limited to: solar domestic hot water heating, single family horizontal axis clothes washers, clothes drying racks, micro-combined-heat-and-power, landlord heating systems where tenants pay for heat, measures to be included in TLC Kit, indirect hot water heating, demand control measures, LED lighting, outdoor resets for new heating systems, super-insulation of walls and attics, foundation wall and slab insulation.
Exemplary	Implement a limited pilot to test at least two (2) of these new program measures in 2010. Document results and findings in a memo to EEAC consultants by January 30, 2011.

2. Low-income Auditor Training & Contractor Recruitment/Support {Elec. & Gas}	
Threshold	N/A
Design	Contribute funding and logistical support of LEAN's efforts and those of the Massachusetts Department of Housing and Community Development (DHCD) for auditor training and explore common protocols in areas identified through the Best Practices Working Group. This will include developing and distributing new auditor training materials.
Exemplary	In coordination with LEAN and the Massachusetts Department of Housing and Community Development (DHCD), contribute <i>increased</i> funding and logistical support of LEAN's efforts and those of the DHCD to continue and expand efforts to recruit and train weatherization and heating contractors to support network activities sufficient for the ramp up of the program. Specifically, working closely with LEAN and the Massachusetts Department of Housing and Community Development (DHCD), strongly support their recruitment of weatherization and heating contractors in numbers appropriate to meet the requirements of Energy Efficiency funding and who demonstrate the ability to meet US DOE standards.

3. Low-income 1-4 Retrofit: Deep Energy Retrofit {Electric & Gas}	
Threshold	Convene a planning forum with key members of LEAN, the Best Practices working group and the Deep Energy Retrofit (DER) Pilot working group to discuss collaborating on a deep retrofit project in 2010. Explore potential synergies in marketing, training, incentives, QA/QC, etc. Document the proposed coordination in a memo. Draft memo to EEAC consultants by March 1, 2010. Consultant comments by March 8, 2010. Final memo by March 15, 2010.
Design	Collaborate with the Deep Energy Retrofit (DER) pilot on one (1) low-income DER project. Work on project to begin by July 1, 2010.
Exemplary	Provide a preliminary assessment of any early stage 'lessons learned' in a memo to EEAC consultants by August 15, 2010 to help inform mid-course adjustment process. Draft report, with findings and recommendations for 2011-2012, by December 31, 2010. EEAC consultant comments by January 15, 2011. Final report by January 30, 2011.

Note: A Deep Energy Retrofit is a project that involves super-insulating the building shell, and which achieves over 50% energy savings.

4. Low-Income Multifamily: Deeper Savings {Electric & Gas}	
Threshold	5% of multifamily buildings served in Q3-Q4 2010 achieve an overall energy savings for the residential component of the building of 20% or greater over baseline usage, based on modeled savings for measures agreed to be implemented.
Design	10% of multifamily buildings served in Q3-Q4 2010 achieve an overall energy savings for the residential component of the building of 20% or greater over baseline usage, based on modeled savings for measures agreed to be implemented.
Exemplary	15% of multifamily buildings served in Q3-Q4 2010 achieve an overall energy savings for the residential component of the building of 20% or greater over baseline usage, based on modeled savings for measures agreed to be implemented.

Commercial & Industrial

C&I #1 Small Business Electric and Gas Integration	
By July 1, jointly identify additional cost-effective prescriptive gas and electric measures to be added to the Direct Install Program and integrate in to the Direct Install Program. As part of this exercise, "X%" will be defined in the next phase of this metric.	
Threshold	In the second half of the year, X% of completed DI projects will include these new measures.
Design	In the second half of the year, X% of completed DI projects will include these new measures.
Exemplary	In the second half of the year, X% of completed DI projects will include these new measures.

C&I #2 Targeted Customer Segments	
During 2010, complete TA studies for projects not initiated prior to 1/1/2010 and obtain commitments to follow through with implementation from X data centers, high performance laboratories/clean rooms, or industrial facilities. To qualify assessments and commitments must include at least 1 each of electric and gas non-prescriptive measures, where applicable (e.g. data center with minimal gas usage). Measures for industrial facilities must be related to process. A "commitment" is a completed custom application.	
The "X" will be agreed on by January 1, 2010.	
Threshold	X data centers, high performance laboratories/clean rooms, or industrial facilities.
Design	X data centers, high performance laboratories/clean rooms, or industrial facilities.
Exemplary	X data centers, high performance laboratories/clean rooms, or industrial facilities.

C&I #3 Combined Heat & Power	
The electric and gas PAs will complete X detailed technical assessment (TA) studies for Combined Heat & Power projects for projects not already initiated prior to 2010.	
Statewide goal. All PAs will receive incentive based on total statewide success.	
The "X" will be agreed on by January 1, 2010. This metric applies to all gas and electric PAs; however, it is not a requirement that gas PAs contribute any funds to TA studies or CHP rebates.	
Threshold	X detailed technical assessment (TA) studies
Design	X detailed technical assessment (TA) studies
Exemplary	X detailed technical assessment (TA) studies

C&I #4 Retrofit -- Depth of savings	
Develop a plan to accomplish deep retrofits among a portion of large retrofit customers. Evidence of plan will include a plan document finalized by March 31, 2010.	
Begin implementation of efforts at capturing whole-building, deep savings of both electric and gas. Perform assessments and obtain X customer commitments to follow-through with savings of at least Y% whole building energy savings (gas and electric). Measures completed in 2008 and 2009 could be included in the Plan.	
The "X" and "Y" will be agreed on by March 31, 2010	
Threshold	Develop plan and begin implementation by April 1, 2010
Design	Perform assessments and obtain X customer commitments to follow-through with savings of at least Y% whole building energy savings (gas and electric).
Exemplary	Perform assessments and obtain X customer commitments to follow-through with savings of at least Y% whole building energy savings (gas and electric).

C&I #5 New Construction -- Comprehensiveness and depth of savings	
Achieve in a minimum of X% of new construction or substantial renovation projects at least an estimated Y% whole building savings (gas and electric) compared to code. Completed projects or signed commitments with projects under construction can count. Core Performance will qualify if they do at least one additional measure besides the required ones.	
The "X" and "Y" will be agreed on by January 1, 2010	
Threshold	Develop plan and begin implementation by April 1, 2010
Design	X= Y=
Exemplary	X= Y=

Proposed allocation of metrics monies across C&I metrics	
Metric #1 Small bus. elec/gas integration	20%
Metric #2 Targeted customer segments	10%
Metric #3 CHP	20%
Metric #4 Retrofit – savings depth	25%
Metric #5 NC – compr. and savings depth	25%

Evaluation, Measurement, and Verification (EM&V)

EM&V #1 – Omnibus Metric	
Threshold	By date Feb 1, 2010 release RFPs for all six of the major Research Area EM&V contracts described in the EM&V section of the October 30 statewide gas and electric energy efficiency plans.
Design	<p>Select winning proposals, and sign contracts (with Research Area manager PAs) with all research area lead contractors by April 15.</p> <p>and</p> <p>Kick off a total of (8) new studies by June 30, 2010 including the commercial and industrial market characterization study</p> <p>and</p> <p>By July 31, 2010 complete a process/market evaluation of customer and market responses to new and changed initiatives, with focused research on any initiatives that appear to be achieving lower participation and/or market response than anticipated. Those initiatives to be evaluated to be agreed upon by PAs and Council Consultants by April 15, 2010. Study to include recommendations for more detailed follow-on research into new and changed initiatives.</p>
Exemplary	<p>By date September 15, complete the following studies, described in the EM&V section of the October 30 , 2009 statewide gas and electric energy efficiency plans, in order to help support the mid-course adjustment process:</p> <ol style="list-style-type: none"> 1. Residential NEBs study 2. Residential Lighting study 3. C& I Free ridership and Spillover Using Existing Methodology or a Study to Update the Free ridership and Spillover Methodology <p>and</p> <p>By September 30, 2010 submit a memo describing program recommendations made as results of the studies described above are completed.</p>