



CONSULTANT TEAM DRAFT 2017-2018 WORK PLAN AND BUDGET

► **August 16, 2017**

CONTEXT



- ▶ **Incorporates EEAC priorities, Councilor input, and experience from previous work plans**
- ▶ **Covers a 16 month period from Sep 2017 - Dec 2018**
- ▶ **Heavily focused on supporting 2019-2021 Plan development**
 - Accounts for 44% of the proposed budget
 - Three-Year planning tasks will cut across advisory groups and are described as such
- ▶ **Additional non-planning advisory group-specific tasks are also included**

2019-2021 PLANNING ACTIVITIES AND MILESTONES

Activity/Milestone	Timeframe
Planning Workshop Briefing Documents	Jul-February 2017-2018
Stakeholder Workshops	Jul-February 2017-2018
Review of PA Potential Studies	Oct-Jan 2017-2018
Assessment of Potential/Goals Suggestion	Jan-June 2018
Draft Plan Initial Review	Apr-May18
Review of Draft Plan	May-Jun 2018
Draft Plan EEAC Stakeholder Process	May-Jun 2018
Key Drivers Process	May- July 2018
EEAC Comments	Jul 18
Term Sheet Negotiations	Sep-Oct 2018 Council Meeting
Review Final Draft Plan and Council Resolution	Oct 2018
Strategic Planning	Ongoing

EM&V



- ▶ **Context: Critical engine for providing objective and fact-driven results to ensure reliable savings claims, past and present**
- ▶ **Work Areas**
 - EM&V Planning
 - Study implementation
 - EM&V Reporting
 - Council and stakeholder engagement
- ▶ **Will work with DOER to prioritize a portion of the portfolio of individual studies to cover**
- ▶ **21% of consultant budget (including planning tasks)**

PLANNING AND ANALYSIS



- ▶ **Context: Ensuring the Council effectively performs its responsibilities; supporting development of a strategic vision for the future; reviewing 2016-2018 results**
- ▶ **Work Areas**
 - Council support
 - Technical analysis/Review reports and data
 - Regulatory support
- ▶ **43% of consultant budget (including planning tasks)**

RESIDENTIAL AND LOW INCOME

- ▶ **Context: Refining existing program strategies by implementing continuous improvements; identifying additional cost efficiencies; shaping EM&V research and findings; assessing new technologies and program approaches**
- ▶ **Work Areas**
 - Program and effective practices support
 - RMC and Council meeting participation
 - Incorporate feedback from EM&V and studies
- ▶ **Pending changes in residential lighting will continue to be a key consultant focus**
- ▶ **17% of consultant budget (including planning tasks)**

COMMERCIAL & INDUSTRIAL



- ▶ **Context: Monitoring lighting market changes and their impacts on MA programs; supporting continued evolution of efficiency programs; identifying new and existing technologies with additional potential**
- ▶ **Work Areas**
 - Program and effective practices support
 - New technologies and innovation support
 - CIMC and Council meeting participation
 - Incorporate feedback from EM&V and studies
- ▶ **Key focus areas are lighting, HVAC, and demand reduction**
- ▶ **17% of consultant budget (including planning tasks)**

TECHNICAL SERVICES



- ▶ **Context: On-going administrative tasks that support the Council's information sharing**
- ▶ **Work Areas:**
 - Meeting minutes – EEAC, Ex Comm, Demand Subcommittee
 - Website maintenance, updates, and document posting
 - Consultant Team quarterly report
- ▶ **2% of consultant budget**

HIGH-LEVEL BUDGET PROPOSAL

\$2,270,000

Budget Category	Allocation of Total Budget (\$)	P and A allocation	C&I Allocation	Residential Allocation	EM&V Allocation	Tech Services Allocation
2019-2021 Planning						
Briefing Documents	\$56,442	\$18,626	\$18,626	\$19,190		
Stakeholder Workshops	\$84,663	\$27,939	\$27,939	\$28,785		
Review of PA Potential Studies	\$56,442	\$36,687	\$8,466	\$8,466	\$2,822	
Suggestion	\$141,104	\$91,718	\$21,166	\$21,166	\$7,055	
Draft Plan Initial Review	\$28,221	\$11,288	\$5,644	\$5,644	\$5,644	
Review of Draft Plan	\$98,773	\$49,387	\$19,755	\$24,693	\$4,939	
Process	\$56,442	\$31,043	\$11,288	\$11,288	\$2,822	
Key Drivers Process	\$141,104	\$91,718	\$21,166	\$21,166	\$7,055	
EEAC Comments	\$35,276	\$17,638	\$7,055	\$7,055	\$3,528	
Term Sheet Negotiations	\$141,104	\$91,718	\$21,166	\$21,166	\$7,055	
Review Final Draft Plan	\$63,497	\$28,574	\$13,969	\$17,779	\$3,175	
Strategic Planning	\$98,773	\$69,141	\$9,877	\$14,816	\$4,939	
Other Work Areas						
Council Meetings - Plan	\$169,325	\$118,528	\$25,399	\$25,399		
Council Meetings - Thematic	\$141,104	\$77,607	\$28,221	\$28,221	\$7,055	
Committee Meetings	\$98,773	\$88,896	\$4,939	\$4,939		
AESC Support	\$70,552	\$70,552				
Evaluation Team Specific	\$423,313				\$423,313	
Residential Team Specific	\$111,994			\$111,994		
CI Team Specific	\$111,994		\$111,994			
Technical Team Specific	\$56,442					\$56,442
Travel and Direct Expense						
Travel and Direct Expense	\$84,663	\$46,564	\$21,166	\$12,699	\$4,233	
Budget Total						
Total	\$2,270,000	\$967,623	\$377,834	\$384,466	\$483,635	\$56,442