



Memorandum

To EEAC
From Eric Belliveau and the EEAC Consultant Team
Date 13 November 2012
Subject Monthly Report – October 2012

The Consultant Team is pleased to provide this monthly update to the Council on our recent activities. Substantial effort in October was focused on the final Three-Year Plan filing submitted on November 2nd.

Highlights from the Advisory Groups

Planning & Analysis Advisory Group



C&I Advisory Group

- Continued review and engagement with the PAs on Three-Year Plan costs, goals, and commitments. Continued to work with PAs on cost driver analysis and negotiations to bring costs down from September plan draft.
- Continued to refine more simplified performance metrics for Council and PAs. Held meetings with PAs to negotiate threshold performance values.
- Reviewed and provided input to MassSave TRM and key planning assumptions.
- Continued discussions with PAs and DOER on Codes and Standards plan and savings attribution.
- Reviewed and provided input to several C&I M&V studies and plans, including Custom Electric, Upstream, and a boiler baseline study. Comments included issues with baseline determination, study methodology, and need to assess "additional opportunities."

Residential Advisory Group

The Residential Advisory Group covered key program areas by engaging with several working groups and on several topics.



- **General:** Engaged the PAs on high level Residential Sector issues at the Residential Management Committee (RMC) meeting, with a primary focus on reviewing and revising the Three-Year Plan and on residential and low income metrics development. Performed analysis on HES close rates and multifamily participant data. Communicated with the DOER Residential Team regarding residential sector issues. Participated in weekly EEAC Consulting Team calls and bi-weekly RES Consulting Team coordination calls. Developed Low-income and Residential metrics concepts for 2013. Developed New EEAC Councilor Selection Process in conjunction with DOER and stakeholders.
- **Lighting:** Along with the EM&V Advisory Group, continued to engage PA EM&V and Planning staff on key residential lighting planning assumptions for Three-Year Plan. Reviewed monthly YTD measure level program reporting.
- **Products:** Reviewed and distributed to the PAs just-made-available 2011 ENERGY STAR market share data, pointing to high free-ridership levels for key program measures (TVs and refrigerators). Suggested several approaches pursued by PAs in other jurisdictions to mitigate free-ridership and inquired as to PAs' planned response to the ENERGY STAR market share data. Reviewed and commented on draft final Consumer Electronics study which recommended a number of strategies to pursue savings in this diverse product category. Reviewed monthly YTD measure-level program reporting including recently included refrigerator and freezer recycling data.
- **HVAC:** Worked with PAs to adjust HPWH water heater rebate for Three-Year Plan. Current rebate level was resulting in "free" HPWHs being sold at retail
- **RNC:** Met with contractors, vendor, advocates to plan for IECC2012 duct and envelope tightness (DET) testing approach in support of the new energy code in MA, and followed up with JMC and others to discuss supporting these code efforts. Reviewed TRM for RNC lighting measures. Attended portion of JMC meeting to address DET and other rater issues.
- **Low Income Multifamily:** Participated in a portion of the Low Income Best Practices working group meeting.

Evaluation, Measurement & Verification Advisory Group

- **EM&V Reports:** Finalized a number of additional studies in time for inclusion in the Three-Year Plan filing, and posted them on the EEAC website. There are now some 90 final EM&V reports from the 2010-2011 and 2011-2012 study waves posted on the website.
- **EM&V Implementation:** Moved forward a large number of 2012-2013 studies now in the detailed planning and/or implementation stage, including a variety of impact evaluations, market assessment studies, and process evaluations.
- **EM&V Planning:** Reached agreement with PAs on final content of EM&V section of plan filing. Provided input on behalf of MA to the EM&V Forum 2013 planning and budgeting process. Attended October EMC mtg. Worked with NY, CT and RI to advance a collaborative four-state residential lighting operating hours study. Began a dialogue with the PA evaluators and program staff on the handling of Green Communities in the development of net-to-gross and baseline estimates for new construction.



- **TRM:** Completed work on the Three-Year Plan version of the TRM.
- **EM&V Application Issues:** Worked with the PAs to attempt to resolve significant issues regarding the valuation of non-energy impacts (NEIs) in equipment retrofits in the residential non-low-income sector. Because a resolution on this issue was not ultimately reached in time for the Three-Year Plan filings, we believe the filings include estimates of residential NEI values that are uncertain and could ultimately prove to be overstated. We are now planning to work with the PAs to conduct high-priority EM&V research intended to help clarify the magnitude of NEI benefits associated with residential non-LI equipment retrofits.
- **EM&V Policy Issues:** Supported EM&V-related aspects of negotiations regarding the final three-year plan filing, including three-year EM&V budget and Residential NEI valuation issues.

Upcoming Activities

The sections below detail expected project efforts in the coming month. A two-month calendar of significant milestones and events appears after the Advisory Group summaries.

Planning & Analysis Advisory Group

Three-Year Plan activities continue to be the major focus of nearly the entire Consultant Team, including the Planning & Analysis Advisory Group. Some of the specific tasks we anticipate are:



C&I Advisory Group

The C&I Advisory Group remains focused on completing the Three-Year Plan process and the final corollary tasks to support the filing. These include:

- Continued discussions with PAs in the C&I Management Committee to address final remaining items that were not addressed in the plan text.
- Negotiating final threshold values for performance metrics.
- Continued work with DOER and the PAs on a process to apply and claim savings from codes and standards
- Working with the PAs on finalizing and applying performance metrics to the Three-Year Plan targets

Once the plan is complete in mid-November, the focus of the C&I Advisory Group will shift from developing the plan itself to working with the PAs to ensure that all plan commitments are implemented.



The Residential Advisory Group

The Residential Advisory Group will continue to work with the PAs on finalizing Three Year Planning efforts and on preparation tasks to begin implementing the statewide plan on January 1st.

- Continue important planning discussions with the PAs at the Residential Management Committee (RMC), including on 2013 metrics and Three Year Plan implementation tasks.
- On-going dialogue and review of PA's proposed options, plans and next steps in the area of codes and standards.

EM&V Advisory Group

- In November we expect our biggest single focus to be on moving forward the large number of 2012-2013 studies now in the detailed planning and/or implementation process. We also expect a significant focus on contractor recruitment for 2013-2015.

MA EEAC



CONSULTANT TEAM

November 2012

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
			1	2 Final Three-Year Plan submitted
5	6	7	8 Annual "Cool Talk" contractor/distributor meeting	9
12	13 EEAC Meeting	14	15	16
19	20	21	22	23
26	27	28	29	30 JMC/RNC Meeting

MA EEAC



CONSULTANT TEAM

December 2012

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
3	4	5	6	7
10	11 EEAC Meeting	12	13	14
17	18	19	20 JMC/RNC Meeting	21
24	25	26	27	28
31				