

Resolution of the Energy Efficiency Advisory Council
D.P.U. 11-120-A Reporting Streamlining
November 12, 2013

Introduction

The Department of Public Utilities (“Department”) is moving toward a true three-year term, in which, after the Department approves the Program Administrators’ 2013-2015 Three-Year Plans (“3YP”), the Department stays its evaluation of the 3YP (so long as there are no mid term modifications) until its conclusion and after the Program Administrators (“PAs”) submit their three-year term performance reports.

Voting members of the Energy Efficiency Advisory Council (“EEAC” or “Council”) have concerns that “streamlining” the reporting requirements for the 2013-2015 three-year term invites a cutback in the existing energy efficiency information and data that are currently being provided to and relied upon by the EEAC and other stakeholders.

Voting members of the EEAC resolve herein to review the Plan-Year reports, and to review the annual implementation updates to be prepared by the PAs.

Annual Reports (n/k/a Plan-Year Reports per DPU 11-120 Terminology)

The EEAC believes it is critical to annually review and analyze actual results from the energy efficiency programs. The current Annual Reports document and report the actual results (costs, savings, benefits, and cost-effectiveness) of the energy efficiency programs, thereby documenting the performance, achievements, and the value of the ratepayer sponsored energy efficiency program investments.

The EEAC will review the Plan-Year Reports as described in the D.P.U. 11-120-A Phase II Order¹. Currently, the EEAC conducts two reviews of annual performance (i.e., the review of preliminary annual results based on the fourth quarter report and the review of the final Annual Reports), which it deems appropriate, informative, and useful for monitoring the performance of the energy efficiency program portfolio. The EEAC wants to continue this practice, by reviewing the Plan-Year Reports as part of its responsibilities.

The EEAC, however, wants to ensure that valuable information and data contained in the current Annual Reports are not lost or diminished in the Plan-Year Reports as a result of the Department’s streamlining efforts. Currently, the Council is in the process of reviewing the Plan-Year Report template proposed by the PAs, and the Council will continue to participate in D.P.U. 11-120 discussions.

¹ See D.P.U. 11-120-A Phase II Order, at III.D.

2014 Implementation Updates

Accurate and thoughtful assessments of energy efficiency programs require best available data. Indeed, early detection of significant deviations from planned energy efficiency programs, program performance, and/or experience in the field enables programs to be modified for, optimized end-results. Best available data (including data already available from the Annual Reports and EM&V studies) should continue to be provided and applied in an annual forward-looking manner to inform the investments in the 3YP, as well as to ensure the achievement of the Department-approved goals set forth in the 3YP.

The EEAC believes it is crucial to track progress toward achievement of the original 3YP goals by using annual implementation updates that are based on recent evaluation results, actual field experience, and the best available information. Annual implementation updates will provide information regarding any strategic adjustments that may be necessary along the way without changing the original 3YP goals, unless there is a Mid-Term Modification (“MTM”) ². In response to this need, the PAs and the EEAC consultants have developed a template and framework for a 2014 implementation update, summarized in the narrative provided in Appendix A.

2014 implementation updates ought to address, in the format provided in Appendix A, all estimated changes in values and assumptions since the original 3YP, which may impact the remaining period of the 3YP, including changes due to the results of evaluation studies, changes in costs, variations between actual and planned expenditures, savings, or benefits, and changes in codes and standards or other baseline changes. Annual implementation updates are necessary, given the magnitude of the ratepayer funded energy efficiency program investment, regardless of whether an MTM is triggered. The process for both the development and EEAC review of the implementation updates does not require an adjudicatory process before the Department, if no MTM is triggered. Implementation updates are intended for informational purposes only. Implementation updates shall not be considered restatement or redrafting of the 3YP.

2014 implementation updates should include two components:

1. Quantitative analysis and summary of the changes and the implications of the changes for the remaining period of the 3YP, which are based on recent evaluation results, actual field experience, and best available information; as well as PA-anticipated adjustments that the PAs may implement (without changing the original 3YP goals) for the remaining period of the 3YP in order to attain the original 3YP goals; and
2. Narrative description and more in-depth analysis of the three to five most significant drivers of the changes including the impacts, implications, and PA-anticipated

² For example, if the performance of one C&I program is lagging, it is important to consider reallocating resources to other C&I programs in order to address any potential shortfall and remain focused on achieving at least 100% of the goals set forth in the original Three-Year Plan.

adjustments for the remaining period of the 3YP based on the most recent evaluation results, actual field experience, and best available information.

Appendix A attached hereto outlines the template and framework for the quantitative analysis component of the 2014 implementation update, and the accompanying narrative in Appendix A describes in more detail the purpose, timing, content and limits of the implementation update.

The EEAC supports the PAs' preparation of the implementation updates for the 3YP in the first quarter of 2014, based on the most recent evaluation results, actual field experience, and best available information to help ensure that the goals of the original 3YP are achieved or exceeded. The approach set forth in Appendix A will be utilized for 2014. The PAs and Council will review how this 2014 process works going forward.

ATTACHMENT A

Annual Implementation Update (“IU”)—Narrative Description

1. **Purpose:** To provide the Energy Efficiency Advisory Council (“Council”) with an update on implementation approaches informed by the most recent and best available data in 2014. The IU will be provided using a common template for electric and gas Program Administrators (“PAs”) respectively. These templates are included as Attachment A. Updates will be provided on a PA-specific basis and a rolled-up statewide basis. The IU allows the Council to monitor achievement against goals and to review forward-looking strategies to achieve goals based upon in-the-field experience and EM&V results.
2. **Timing:** The IUs will be submitted and presented in February 2014. PAs and the Council’s consultants suggest that the February 2014 Council meeting be moved to the end of that month to allow for review of the IUs. This timeframe was chosen as it allows the inclusion of preliminary year-end results and latest EM&V findings. This timing allows for earlier indications of updated implementation approaches and their proposed effect. (See Massachusetts Reporting Timeline at Attachment B).
3. **Content:**
 - a. Excel spreadsheets- contain key quantitative data regarding budgets, savings, and benefits, including current forecast compared to approved goals and “Anticipated Implementation Adjustments” (refer to Attachment A). Anticipated Implementation Adjustments do not re-set the approved Massachusetts Three-Year Electric and Gas Energy Efficiency Plan goals; rather they indicate a PA’s current strategic thinking on the most likely future course to achieving three-year goals. PAs have flexibility to be opportunistic and to adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth. The “output” tab shows the summary table that would be used to highlight and discuss the IU before the Council (and in any other summary forums). The rest of the tabs are the support worksheets, which show the calculations and the more detailed derivation of values for savings, budgets/costs, and benefits.
 - b. Narrative Materials- detailed narrative and data on the three to five most significant drivers of changes from approved plan assumptions whether from EM&V, in-the-field conditions, and/or other best available information. The exact content of the narrative would be determined by the nature of the changes. As a benchmark, refer to the information provided in the C&I Council presentations provided by the PAs and the Council’s consulting team in September and October 2013, respectively. The narrative would be expected to describe the drivers of performance variances from original goals and the forward-looking strategies to maintain successful delivery of the Plan.
4. **Limits of this document:** The IU is not a revised Plan. It does not change or recast the goals approved in D.P.U. 12-100 through 12-111. These goals remain fixed absent a Mid-Term Modification. The IU provides an agreed-upon set of data, and does not include an update to DPU 08-50 tables. The current Annual Implementation Update approach will be utilized for February 2014. The PAs and the Council will review how this 2014 process works and optimize going forward.
5. **Open items:** Two items currently remain under discussion. It has not been determined whether PAs will show both annual and/or lifetime savings goals/targets, and it has not been determined whether the PAs will present data on oil savings.
6. **Conclusion:** The IU builds on our collective experience, existing reporting, and EM&V frameworks. The IUs are designed to provide key information in an efficient manner. The IUs allow an early view of this information and the updated strategies to be deployed to maintain benefits under the Plan.

	2013			2014						2015						2013-2015 Goals			Anticipated Percent of 3-Year Goals Based on Actual Achievement to Date and Anticipated Adjustments		
	Preliminary Year End/Target			Anticipated Implementation Adjustments			Current forecast vs. annual goal original projection (%)			Anticipated Implementation Adjustments (include percentage+/-)			Current forecast vs. annual goal original projection (%)			Taken from Original Plan compliance filings / "North Star" absent on MTM					
	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings (Annual MWh)	Budgets (\$)	Benefits (\$)	Savings	Budgets	Benefits
Residential (total)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
1. Residential Whole House	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential Multi-Family Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential Home Energy Services	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential Behavior/Feedback	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2. Residential Products	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential Cooling & Heating Equipment	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential Lighting	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Residential Consumer Products	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Low-Income (total)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
4. Low-Income Whole House	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Low-Income New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Low-Income Single Family Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Low-Income Multi-Family Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Commercial & Industrial (total)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
6. C&I New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
C&I New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
7. C&I Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
C&I Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
C&I Direct Install	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
PORTFOLIO	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cross Sector Items Material Updates (e.g., EM&V, marketing) (summary narrative)	Narrative, brief statements on preliminary 2013 year end actuals						Narrative, brief statements on anticipated adjustments for 2015														

- Attached are detailed narrative and data on the [three-five] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PAs "Plan Implementation Update Materials")
- Anticipated Implementation Adjustments **do not re-set the Original Plan goals**; rather they indicate PAs' current strategic thinking on most likely course to achieving three-year goals. In-the-field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation
- TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings
- A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward
- Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts

Program	2013					2014					2015					2013-2015			
	2013 Approved Annual MWh	2013 Preliminary Year-End	2013 Preliminary Year-End As % of Approved Values	Difference between approved value and projected preliminary year-end	2014 Approved Annual MWh	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2015 Approved Annual MWh	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2015) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2013-2015 3YR Approved Annual MWh	2013-2015 values adjusted by anticipated implementation adjustments	Adjustments relative to approved 3 year values
Source	08-50 Tables	2013 Q4 Report	c / b	b - c	08-50 Tables	Input	f * (t + g)	Input	h + (h * i)	j / i	08-50 Tables	Input	l * (t + m)	Input	n + (o * n)	p / l	08-50 Tables	d + j + p	s / r
Residential (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
1. Residential Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential New Construction			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Residential Multi-Family Retrofit			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Residential Home Energy Services			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Residential Behavior/Feedback			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
2. Residential Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Cooling & Heating Equipment			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Residential Lighting			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Residential Consumer Products			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Low-Income (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
4. Low-Income Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income New Construction			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Low-Income Single Family Retrofit			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Low-Income Multi-Family Retrofit			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
Commercial & Industrial (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
6. C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I New Construction			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
7. C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Retrofit			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
C&I Direct Install			0%	0		0	0	0%	0	0%		0%	0	0%	0	0%	0	0	0%
GRAND TOTAL	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%

1) Attached are detailed narrative and data on the [three-five] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PA's "Plan Implementation Update Materials")

2) Anticipated Implementation Adjustments **do not re-set the Original Plan goals**; rather they indicate PA's current strategic thinking on most likely course to achieving three-year goals. In the field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth

3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings

4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward

5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts

Program	2013				2014						2015				2013-2015				
	2013 Approved Budget	2013 Preliminary Year-End	2013 Preliminary Year-End As % of Approved Values	Difference between approved value and projected preliminary year-end	2014 Approved Budget	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2015 Approved Budget	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2015) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2013-2015 3YR Approved Budget	2013-2015 values adjusted by anticipated implementation adjustments	Adjustments relative to approved 3 year values
Source	08-50 Tables	2013 Q4 Report	c / b	b - c	08-50 Tables	Input	f * (1 + g)	Input	h + (h * i)	j / f	08-50 Tables	Input	l * (1 + m)	Input	n + (o * n)	p / l	08-50 Tables	d + j + p	s / r
Residential (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
1. Residential Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential New Construction			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Multi-Family Retrofit			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Home Energy Services			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Behavior/Feedback			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
2. Residential Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Cooling & Heating Equipment			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Lighting			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Consumer Products			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
3. Residential Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Statewide Marketing			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential DOER Assessment			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential EEAC Consultants			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Sponsorships & Subscriptions			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential HEAT Loan			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Workforce Development			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential R&D and Demonstration			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Education			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Low-Income (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
4. Low-Income Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income New Construction			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Low-Income Single Family Retrofit			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Low-Income Multi-Family Retrofit			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
5. Low-Income Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Statewide Marketing			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Low-Income DOER Assessment			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Low-Income Energy Affordability Network			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Commercial & Industrial (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
6. C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I New Construction			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
7. C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Retrofit			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
C&I Direct Install			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
8. C&I Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Statewide Marketing			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
C&I DOER Assessment			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
C&I EEAC Consultants			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
C&I Sponsorships & Subscriptions			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
GRAND TOTAL	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%

1) Attached are detailed narrative and data on the [three-five] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information), and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PA's "Plan Implementation Update Materials")

2) Anticipated Implementation Adjustments **do not reset the Original Plan goals**; rather they indicate PA's current strategic thinking on most likely course to achieving these year goals. In the field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth

3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings

4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward

5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts

Program	2013				2014					2015					2013-2015				
	2013 Approved Lifetime Benefits (\$)	2013 Preliminary Year-End	2013 Preliminary Year-End As % of Approved Values	Difference between approved value and projected preliminary year-end	2014 Approved Lifetime Benefits (\$)	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2015 Approved Lifetime Benefits (\$)	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2015) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2013-2015 3YR Approved Lifetime Benefits (\$)	2013-2015 values adjusted by anticipated implementation adjustments	Adjustment relative to approved 3 year values
Source	08-50 Tables	2013 Q4 Report	c / b	b - c	08-50 Tables	Input	f * (1 + g)	Input	h + (h * i)	j / i	08-50 Tables	Input	l * (1 + m)	Input	n + (o * n)	p / l	08-50 Tables	d + j + p	s / r
Residential (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
1. Residential Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Multi-Family Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Home Energy Services	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Behavior/Feedback	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
2. Residential Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Cooling & Heating Equipment	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Lighting	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Consumer Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
4. Low-Income Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Single Family Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Multi-Family Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Commercial & Industrial (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
6. C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
7. C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Direct Install	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
GRAND TOTAL	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%

1) Attached are detailed narrative and data on the (three-five) most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PA - "Plan Implementation Update Materials").

2) Anticipated Implementation Adjustments **do not reset the Original Plan goals**; rather they indicate PA's current strategic thinking on most likely course to achieving three-year goals. In-the-field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth.

3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings.

4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward.

5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts.

	2013			2014						2015						2013-2015 Goals			Anticipated Percent of 3-Year Goals Based on Actual Achievement to Date and Anticipated Adjustments		
	Preliminary Year End/Target			Anticipated Implementation Adjustments			Current forecast vs. annual goal original projection (%)			Anticipated Implementation Adjustments (include percentage+/-)			Current forecast vs. annual goal original projection (%)			Taken from Original Plan compliance filings / "North Star" absent on MTM					
	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets	Benefits	Savings	Budgets (\$)	Benefits (\$)	Savings	Budgets	Benefits
Residential (total)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0	0	0	0%	0%	0%
1. Residential Whole House	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Residential New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Residential Multi-Family Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Residential Home Energy Services	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Residential Behavior/Feedback	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
2. Residential Products	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Residential Cooling & Heating Equipment	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Low-Income (total)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
4. Low-Income Whole House	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Low-Income Single Family Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Low-Income Multi-Family Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Commercial & Industrial (total)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
6. C&I New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
C&I New Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
7. C&I Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
C&I Retrofit	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
C&I Direct Install	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
PORTFOLIO	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0	0%	0%	0%
Cross Sector Items Material Updates (e.g., EM&V, marketing) (summary narrative)	Narrative, brief statements on preliminary 2013 year end actuals						Narrative, brief statements on anticipated adjustments for 2015														

- 1) Attached are detailed narrative and data on the [three-five] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PAs "Plan Implementation Update Materials")
- 2) Anticipated Implementation Adjustments **do not re-set the Original Plan goals**; rather they indicate PAs' current strategic thinking on most likely course to achieving three-year goals. In-the-field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation
- 3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings
- 4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward
- 5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts

Program	2013					2014					2015					2013-2015			
	2013 Approved Annual Therms	2013 Preliminary Year-End	2013 Preliminary Year-End As % of Approved Values	Difference between preliminary year-end and Approved value	2014 Approved Annual Therms	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2015 Approved Annual Therms	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2015) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2013-2015 3YR Approved Annual Therms	2013-2015 values adjusted by anticipated implementation adjustments	Adjustments relative to approved 3 year values
Source	08-50 Tables	2013 Q4 Report	c / b	c - b	08-50 Tables	Input	f * (t + g)	Input	h + (h * i)	j / i	08-50 Tables	Input	l * (t + m)	Input	n + (o * n)	p / l	08-50 Tables	d + j + p	s / r
Residential (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0	0%	0	0	0	0%
1. Residential Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Residential New Construction			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Residential Multi-Family Retrofit			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Residential Home Energy Services			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Residential Behavior/Feedback			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
2. Residential Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Residential Heating & Water Heating			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
3. Residential Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Residential Statewide Marketing																			
Residential DOER Assessment																			
Residential EEAC Consultants																			
Residential Sponsorships & Subscriptions																			
Residential Workforce Development																			
Residential Education																			
Residential HEAT Loan																			
Residential R&D and Demonstration																			
Low-Income (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
4. Low-Income Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Low-Income Single Family Retrofit			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Low-Income Multi-Family Retrofit			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
5. Low-Income Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
Low-Income Statewide Marketing																			
Low-Income DOER Assessment																			
Low-Income Energy Affordability Network																			
Commercial & Industrial (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
6. C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
C&I New Construction			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
7. C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
C&I Retrofit			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
C&I Direct Install			0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
8. C&I Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%
C&I Statewide Marketing & Education																			
C&I DOER Assessment																			
C&I EEAC Consultants																			
C&I Sponsorships & Subscriptions																			
C&I Workforce Development																			
GRAND TOTAL	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0%	0	0	0	0%

1) Attached are detailed narrative and data on the [three-five] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PA's "Plan Implementation Update Materials")

2) Anticipated Implementation Adjustments **do not re-set the Original Plan goals**; rather they indicate PA's current strategic thinking on most likely course to achieving three-year goals. In the field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth.

3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings.

4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward.

5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts.

Program	2013				2014					2015					2013-2015				
	2013 Approved Budget	2013 Preliminary Year-End	2013 Preliminary Year-End As % of Approved Values	Difference between preliminary year-end and Approved value	2014 Approved Budget	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2015 Approved Budget	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2013-2015 3YR Approved Budget	2013-2015 values adjusted by anticipated implementation adjustments	Adjustments relative to approved 3 year values
Source	08-50 Tables	2013 Q4 Report	c / b	c - b	08-50 Tables	Input	f * (1 + g)	Input	h + (h * i)	j / f	08-50 Tables	Input	l * (1 + m)	Input	n + (o * n)	p / l	08-50 Tables	d + j + p	s / r
Residential (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
1. Residential Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential New Construction			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Multi-Family Retrofit			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Home Energy Services			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
Residential Behavior/Feedback			0%	0		0	0	0	0	0%		0	0	0	0	0%	0	0	0%
2. Residential Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Heating & Water Heating			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
3. Residential Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Statewide Marketing			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential DOE/R Assessment			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential EEAC Consultants			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential Sponsorships & Subscriptions			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential Workforce Development			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential Education			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential HEAT Loan			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Residential R&D and Demonstration			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Low-Income (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
4. Low-Income Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Single Family Retrofit			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Low-Income Multi-Family Retrofit			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
5. Low-Income Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Statewide Marketing			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Low-Income DOE/R Assessment			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Low-Income Energy Affordability Network			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
Commercial & Industrial (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
6. C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I New Construction			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
7. C&I Retrofits	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Retrofits			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
C&I Direct Install			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
8. C&I Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Statewide Marketing & Education			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
C&I DOE/R Assessment			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
C&I EEAC Consultants			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
C&I Sponsorships & Subscriptions			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
C&I Workforce Development			0%	0		0	0	0	0	0%		0	0	0	0%	0	0	0	0%
GRAND TOTAL	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%

1) Attached are detailed narrative and data on the [three-level] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PA's "Plan Implementation Update Materials").

2) Anticipated Implementation Adjustments **do not re-set the Original Plan goals**; rather they indicate PA's current strategic thinking on most likely course to achieving three-year goals. In the field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth.

3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings.

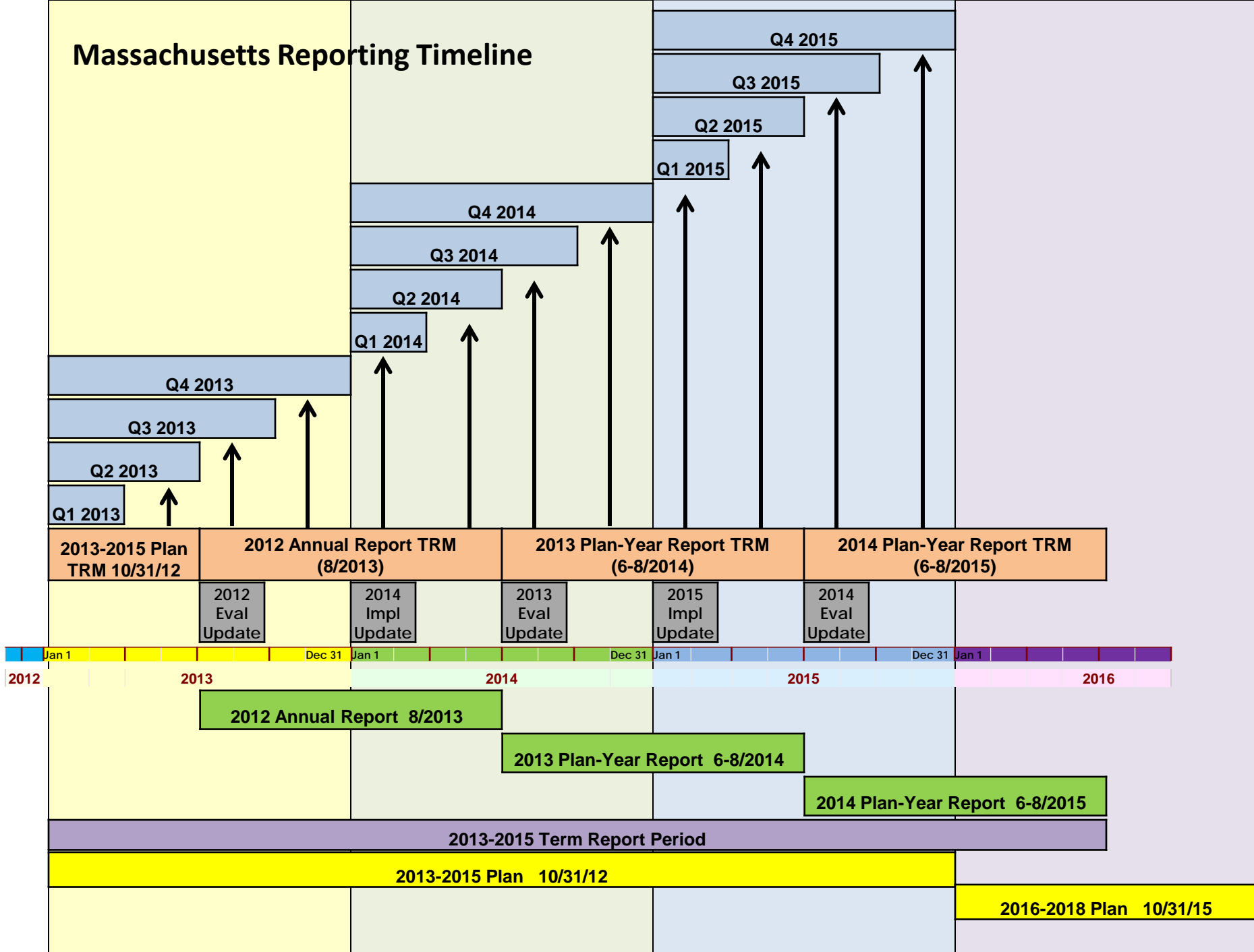
4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward.

5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts.

Program	2013					2014					2015					2013-2015			
	2013 Approved Lifetime Benefits (\$)	2013 Preliminary Year-End	2013 Preliminary Year-End As % of Approved Values	Difference between preliminary year-end and Approved value	2014 Approved Lifetime Benefits (\$)	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2014) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2015 Approved Lifetime Benefits (\$)	Estimated impacts on approved targets based on current information and studies (%) [pre/post updates]	Approved values adjusted by anticipated evaluation impacts	Anticipated implementation adjustments (2015) [may be populated or blank] - these values may lead to narrative	Approved values adjusted by anticipated implementation adjustments considering estimated impacts	Anticipated impacts & implementation adjustments as percentage of approved goal	2013-2015 3YR Approved Lifetime Benefits (\$)	2013-2015 values adjusted by anticipated implementation adjustments	Adjustment s relative to approved 3 year values
Source	08-50 Tables	2013 Q4 Report	c / b	c - b	08-50 Tables	Input	f * (t + g)	Input	h + (h * i)	j / f	08-50 Tables	Input	l * (t + m)	Input	n + (o * n)	p / l	08-50 Tables	d + j + p	s / r
Residential (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
1. Residential Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Multi-Family Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Home Energy Services	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Behavior/Feedback	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
2. Residential Products	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Heating & Water Heating	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
3. Residential Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Residential Statewide Marketing																			
Residential DOER Assessment																			
Residential EEAC Consultants																			
Residential Sponsorships & Subscriptions																			
Residential Workforce Development																			
Residential Education																			
Residential HEAT Loan																			
Residential R&D and Demonstration																			
Low-Income (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
4. Low-Income Whole House	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Single Family Retrofit			0%	0		0%	0		0%		0%	0		0%	0	0%	0	0	0%
Low-Income Multi-Family Retrofit			0%	0		0%	0		0%		0%	0		0%	0	0%	0	0	0%
5. Low-Income Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
Low-Income Statewide Marketing																			
Low-Income DOER Assessment																			
Low-Income Energy Affordability Network																			
Commercial & Industrial (total)	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
6. C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I New Construction	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
7. C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Retrofit	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Direct Install	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
8. C&I Hard-to-Measure	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%
C&I Statewide Marketing & Education																			
C&I DOER Assessment																			
C&I EEAC Consultants																			
C&I Sponsorships & Subscriptions																			
C&I Workforce Development																			
GRAND TOTAL	0	0	0%	0	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%

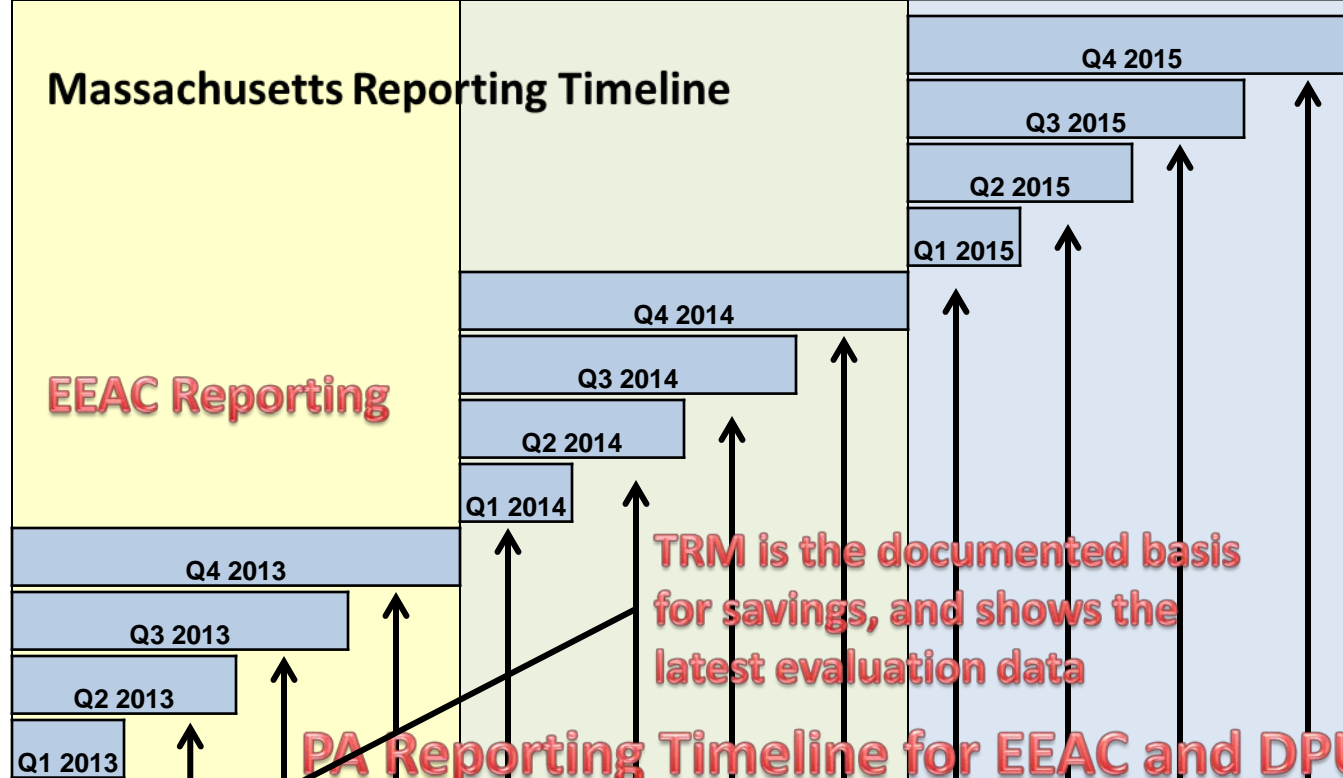
1) Attached are detailed narrative and data on the [three-five] most significant drivers of changes from original plan values (whether from EM&V, in the field conditions, or new and best available information); and the PA's Anticipated Implementation Adjustments to the Plan based upon these changed factors (PA's "Plan Implementation Update Materials")
2) Anticipated Implementation Adjustments do not reset the Original Plan goals, rather they indicate PA's current strategic thinking on most likely course to achieving three-year goals. In-the-field, PAs have flexibility to be opportunistic and adjust to market conditions. Anticipated Implementation Adjustments do not set prescriptive new goals/benchmarks that PAs will be measured against. Anticipated Implementation Adjustments may be expressed as a range/bandwidth
3) TBD whether PAs will show both annual and/or lifetime savings goals/targets, also TBD on oil savings
4) A "do and learn" approach to Annual Plan Implementation Updates will be deployed. The current approach will be utilized for the Annual Implementation Update for spring 2014 only. The PAs and the Council will review how this 2014 process works and optimize going forward
5) Nothing in this Annual Implementation Update process pre-judges, prejudices or creates commitments regarding statewide database development efforts

Massachusetts Reporting Timeline



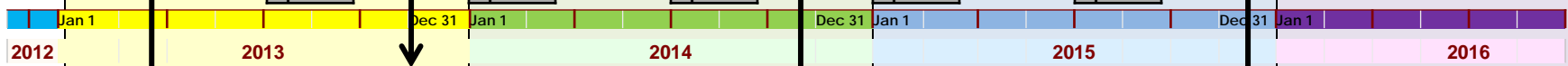
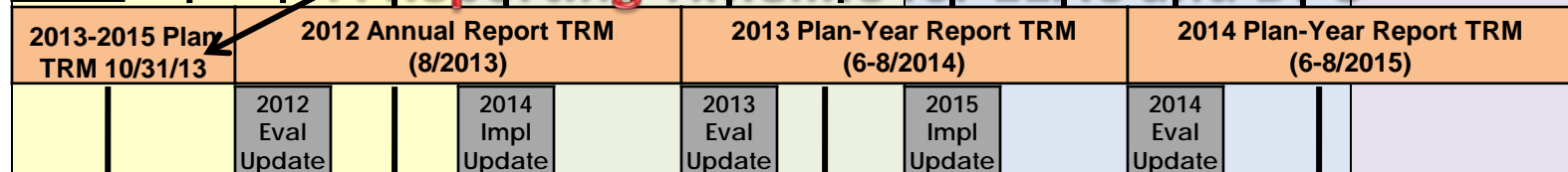
Massachusetts Reporting Timeline

EEAC Reporting



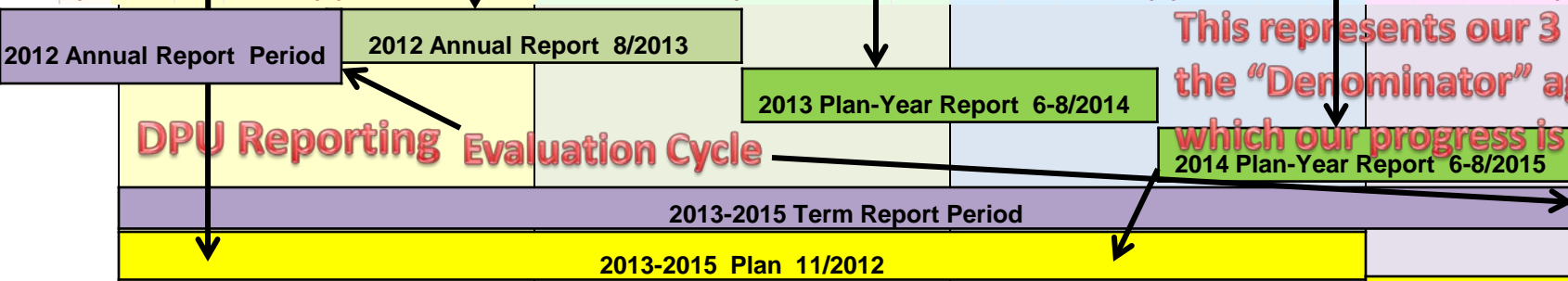
TRM is the documented basis for savings, and shows the latest evaluation data

PA Reporting Timeline for EEAC and DPU



This represents our 3 Year Goal the "Denominator" against which our progress is measured

DPU Reporting Evaluation Cycle



2012, 2013, 2014, 2015, 2016