

Study Name	Research Area	Study Type	Study Manager	Overall Evaluation Goal (Project Summary/Purpose)	Expected Outcomes	Current Notes
Impact Evaluation of the Upstream Lighting Program (P17)	C&I	Impact	Bill Blake	Impact evaluation of the 2012 Bright Opportunities program	The study will provide updated assumptions based on MA-specific research for the following: Application of purchased lamps by facility/space type; Hours of use; baseline replaced lamp; and gross savings realization rates.	
Mid-Sized Customer Assessment (P19)	C&I	Other	Wendy Todd	Assess whether current program delivery methods are adequately serving the needs of "mid-sized" customers	This study will produce a profile of mid-sized customers across the PAs as well as assess current levels of EE activity/awareness among the mid-sized population and determine if there are specific needs of the population that are not being met by current program offerings and/or delivery methods.	This study, along with several others, is leveraging a single C&I customer general population survey effort.
Impact Evaluation of 2011-2012 CHP Installations (P20)	C&I	Impact	Erik Mellen	An impact evaluation of 2011-12 CHP installations	The study will provide realization rates for electricity (kWh); net energy (therms) and coincident peak demand.	Builds on impact evaluation of 2010 CHP installations and will examine a census of all CHP systems finalized in 2010-2012.
Existing Buildings Market Characterization (P21)	C&I	Other	Wendy Todd	Assess the current market for EE in existing buildings	This study will provide a comprehensive characterization of the C&I market including physical characteristics of buildings, building owner/tenant relationships, inventory of the type of energy equipment by end use, business practices that affect energy use and purchase decisions and recent energy related improvements or renovations.	This study, along with several others, is leveraging a single C&I customer general population survey effort.
Lighting Controls Impact Evaluation (P22)	C&I	Impact	Bill Blake	Determine why program savings for retrofit lighting controls dropped off significantly in 2010 and 2011	The study will provide an assessment of the type of impact evaluation to apply for the lighting controls program; will make recommendations for changes to future lighting controls programs in light of any new market conditions; and will make recommendations for adjustments to current savings estimation methods.	
Whole System Approach (P23)	C&I	Other	Wendy Todd	Assess whole system programs and initiatives offered by other utilities and states.	The study will examine 3 existing program offerings to obtain an understanding of the key program features and best practices for attaining deeper savings from whole system approaches. The study will also attempt to determine the feasibility of a whole system approach for existing buildings in MA.	3 programs are: Pay for Performance (NJ); Heating Optimization (Xcel Energy); Custom Retrofit (ConEdison). Early results were presented at the 2013 IEPEC conference in Chicago.

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LED Market Effects Study (P27)	C&I	Other	Bill Blake	Baseline Market Effects Study of LEDs	This study will establish the baseline penetration of LEDs in both the Residential and Commercial markets.	Joint study between Residential and C&I research areas Lays the groundwork for completing a Market Effects Assessment in 2-3 years.
Boiler Market Characterization (P38)	C&I	Other	Mark Sevier	Market Characterization of the gas boiler market	This study will characterize the current boiler market including total size and EE share as well as determine the market share currently influenced by PA programs.	
Impact Evaluation of 2012 Custom HVAC Installations (P29)	C&I	Impact	Erik Mellen	Impact evaluation of 2012 Custom HVAC Installations	This study will provide realization rates for custom HVAC installations.	In order to obtain field measurements during appropriate seasons, this study will take place over a 2 year period with results expected in Q2 2015.
C&I Code Compliance Follow-up (P24)	C&I	Other	Wendy Todd	Mine the data collected for the 2012 Baseline Code Compliance Study to determine if there is anything to learn about the baseline for program measures	Where possible, this study will verify levels of energy code compliance rates in current construction projects and will support program development efforts for targeted new construction efforts.	
Impact Evaluation of 2012 Prescriptive Non-Lighting Installations (P30)	C&I	Impact	Whitney Brougher	Impact evaluation of 2012 Prescriptive Non-Lighting Measures	This study will provide revised savings estimates for prescriptive non-lighting measures.	The measures studies will be determined during the scoping process. A number of factors will be considered in making this determination, including but not limited to percent of overall savings and evaluability. More detail will be provided in a later summary.
2012 C&I Customer Profile (P31)	C&I	Other	Whitney Brougher	Characterization of the C&I market using PA billing and project tracking data	This study will provide a profile of the C&I market in MA for the second year in a row.	The first year of the study linked PA billing data to PA tracking data and attempted to identify business types for all C&I customers before analyzing program participation across size categories, fuels and PAs. The exact analyses to be conducted in the second year will be determined during project scoping. More detail will be provided in a later summary.
Learning From Successful Projects (P32)	C&I	Other	Erik Mellen	This study will examine the practices and/or characteristics that make a project successful.	TBD	This study is still in the scoping phase. More detail will be provided in a later summary.
How PA Differences Affect Program Outcomes (P33)	C&I	Other	Wendy Todd	The goal of this research is to identify the factors that lead to differences in the depth and cost of savings among the PAs.	TBD	This study is still in the scoping phase. More detail will be provided in a later summary.

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Commercial Real Estate Market Assessment (P34)	C&I	Other	Wendy Todd	To gain an understanding of the complex relationship between building owners, property managers and tenants and identify specific program offerings and points in the leasing process that offer opportunities to capture energy efficiency savings.	The study will identify the key building features and services that tenants consider when selecting a property; will identify how building owners and property managers market their properties; will determine the type and role of financial limitations and how they affect EE investment; and identify the leasing process and the role EE plays in it.	When/If this study moves forward it will be coordinated with the statewide commercial real estate working group so that there is no duplication of effort and that research is being coordinated and leveraged where feasible.
Roof Top Unit Controller Market Effects (P35)	C&I	Other	Gail Azulay	Baseline Market Effects Study of Roof Top Unit Controllers	This study will establish the baseline penetration of RTU controllers in the C&I market.	This study is still in the scoping phase. More detail will be provided in a later summary.
Supply Side Population Characterization (P36)	C&I	Other	Wendy Todd	Market Characterization of supply side populations	This study will provide an understanding of participation trends and develop improved sample frames for specific supply side populations (e.g. Commercial HVAC).	This study is still in the scoping phase. More detail will be provided in a later summary.
Direct Install Process Evaluation (P37)	C&I	Process	Dave Weber	Process Evaluation of the Direct Install program	TBD	This study is still in the scoping phase. More detail will be provided in a later summary.
Impact Evaluation of 2012 Prescriptive Gas Installations (P39)	C&I	Impact	Tony Larson	Impact evaluation of 2012 Prescriptive Gas Measures	This study will provide revised savings estimates for prescriptive gas measures.	The measures studies will be determined during the scoping process. A number of factors will be considered in making this determination, including but not limited to percent of overall savings and evaluability. More detail will be provided in a later
EISA T-12 Phase Out Research (P40)	C&I	Other	Erik Mellen	The overall objective of this study is to research whether or not lighting manufacturers are still producing T-12 lamps despite the phase-out initiated by the EPACK and EISA legislation.	TBD	This study will leverage existing research efforts to conserve evaluation budget and reduce respondent fatigue.
C&I Market Effects Study	C&I	Other	TBD	The overall objective of this study is to capture the net effects over time of Massachusetts' programs to promote a technology to be determined by the PAs.	TBD	
Impact Evaluation of 2013 Custom Electric Installations	C&I	Impact	TBD	It is expected that a new Custom electric study will be performed on the 2013 program year, and will include any or all of CDA, Process and Compressed Air.	TBD	

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Impact Evaluation of 2013 Prescriptive Electric Installations	C&I	Impact	TBD	The objective of this impact evaluation is to provide verification or re-estimation of electric energy and demand savings estimates for a subset of Prescriptive electric projects.	TBD	
Impact Evaluation of 2013 Custom Gas Installations	C&I	Impact	TBD	In 2014, the evaluation team plans to begin scoping an impact evaluation of 2013 measures, which will include all PAs. This impact evaluation will also include a desk review task to further test this approach for helping to decide when to evaluate these programs.	TBD	
Regional Lighting Logger Study	Resi	Impact	Matt Nelson	Coordinated regional operating hours of use study with Connecticut, Rhode Island, and NYSEDA	The study will provide hours of use of both efficient and non-efficient light bulbs by room and socket type.	Loggers are being removed
Net Impacts	Resi	Impact	Mark Sevier	Assess the impacts the RNC program has had on the marketplace over the past seven years	The study will provide estimates of free-ridership and spillover.	
LI Lighting HOU and Thermostat Study	Resi	Impact	Riley Hastings	Operating hours of use study and secondary heat analysis	The study will provide hours of use of both efficient and non-efficient light bulbs by room and socket type in LI homes.	Delaying the release of this report to align with Regional Lighting Logger study to ensure consistency in methodology
Lighting Market Assessment	Resi	Market Characterization	Matt Nelson	Provide ongoing monitoring of the MA lighting market.	This study will provide an understanding of the current and developing state of the residential lighting market especially as it relates to EISA, including CFL/LED saturation and sales/market share, availability and pricing of efficient lighting, and supplier and consumer attitudes and expectations.	
Lighting Saturation Stagnation Assessment	Resi	Market Characterization	Wendy Todd	Assess possible reasons for the current plateau in CFL saturation as well as to determine ways to accelerate LED adoption.	This study will provide a better understanding of and find ways to overcome stagnation in efficient lighting saturation.	
Market Lift Assessment	Resi	Impact Evaluation	Matt Nelson	Assess the planning and implementation of the Market Lift effort and develop a net-to-gross (NTG) estimate of that effort.	The study will assess whether the Market Lift effort was designed and implemented in a way that ensured clear attribution to the effort and develop a NTG estimate for the effort.	

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Multi-Stage Lighting Net-to-Gross Study	Resi	Impact Evaluation	Matt Nelson	Estimate net-to-gross (NTG) ratios for key product types incented in the Residential Lighting Program and to assess the associated strategic implications.	NTG Estimates	
Appliance Program Evaluation	Resi	Impact Evaluation	Wendy Todd	This study will explore changes to the way the Appliance initiative is currently delivered, including new marketing strategies or retail partnerships, updated incentives, and other cost-effective options.	TBD	
Incremental Cost Research	Resi	Impact	Gail Azulay	Provide updated incremental cost data for use in cost-effectiveness screening and setting of incentive levels.	The study will provide up-to-date incremental cost data for lighting, appliance and HVAC measures.	
HEHE & CoolSmart Impact Evaluation	Resi	Impact	Riley Hastings	Determine gross savings for the HEHE and CoolSmart programs and provide refined estimates of hours of use and coincidence factor for a variety of space heating and cooling measures.	Gross savings from high efficiency natural gas furnaces and boilers in the HEHE program.	
Advanced Power Strips Evaluation	Resi	Impact Evaluation	Matt Nelson	The goal of this study is to identify alternative program designs that will generate higher participation and savings per participant.	Recommendations for alternative program designs that will generate higher participation and savings per participant.	
HES Program Delivery Assessment	Resi	Impact and Process Evaluation	Mike Goldman	The study will focus on determining accurate conversion rates and other key performance metrics for HES overall, as well as for LVs and HPCs specifically. The study will also explore opportunities for greater and deeper savings for each program.	Conversion rates and other key performance metrics for HES overall, as well as for LVs and HPCs specifically and recommendations for achieving greater and deeper savings.	
HEAT Loan Process Analysis	Resi	Impact	Mike Goldman	The goal of this study is to understand the extent to which the HEAT Loan influences customer decision-making, relative to the other factors that influence participation and to explore whether the availability of the HEAT Loan impacts contractor pricing.	TBD	

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Low Income Multifamily Impact Evaluation	Resi	Process/ Impact	Riley Hastings	Inventory of the methods currently used to estimate LIMF savings, explore opportunities for standardization where appropriate, assess whether all data required for evaluation are available, and develop PA-specific realization rates for appropriate measures.	Statewide methodology for calculating savings and PA-specific realization rates for appropriate measures.	
Multifamily Process	Resi	Process	Kim Crossman	Assess and monitor the current state of the evolution of the Multifamily Program as a standalone or integrated offering with the commercial side and provide an ongoing examination of barriers, program	Recommendations for improving program delivery	
Multifamily High Rise New Construction Baseline Assessment	Resi	Process	Mark Sevier	Provide a baseline study of new construction building practices in four-story	Provide a baseline study of new construction building practices in four-story and higher	
Residential Customer Profile Study	Resi	Market Characterization	Kim Crossman	Compile utility and participant data on residential customers	Provide insights into levels of participation, energy consumption, and energy savings relative to consumption	
Trade Ally Panels	Resi	Market Evaluation	Melanie Coen	Explore if data quality, response rates, and data collection costs can be improved by a more systematic data collection approach across programs, markets, and evaluations	Development of trade ally/ market actor panels	
Residential Market Effects Study	Resi	Process	Matt Nelson	The overall goal of this study is to document and quantify the net effects over time of Massachusetts' programs to promote a technology to be determined by the PAs.	TBD	
Serrafix CMI	S/CC	Process	Monica Cohen	Review of the Northampton/Pittsfield CMI initiatives	Determine if evaluation met specific design metrics.	
Umbrella Mktg - 2013 Post Campaign/MassSave Brand Assessment	S/CC	Other	Phil Moffitt	Assess impact of 2013 marketing campaign and brand effectiveness	Analysis of post-campaign brand awareness	
Umbrella Mktg - COOL SMART/GasNetworks Brand Assessment	S/CC	Other	Phil Moffitt	Assess brand effectiveness	Determine brand effectiveness for CS/GN brands.	
Efficient Neighborhood+ Initiative	S/CC	Other	Melanie Coen	Community Selection and Initiative Framework	Provide a methodology to help PAs determine which neighborhoods are appropriate targets and document the theory behind the initiative.	
Efficient Neighborhood+ Initiative, Phase I	S/CC	Other	Melanie Coen	Evaluation Planning and Readiness	Define initiative's success indicators, capture baseline conditions.	
Efficient Neighborhood+ Initiative, Phase II	S/CC	Other	Melanie Coen	Initiative Evaluation	Assess the performance of the initiative against defined success indicators, and explore opportunities for improvement.	Phase II will start after the completion of Phase I, based on in the field progress

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Behavioral Program Persistence Study	S/CC	Impact	Mike Goldman	Determine persistence of behavioral program savings.	Determine to what extent program savings persist without treatment, if the savings do persist what is the impact on measure life, and recommend whether PAs can change treatment models based on these results.	Need to have broader group review one-pager
Codes & Standards Coordination/Planning	S/CC	Other	Bill Blake	Track implementation efforts to coordinate future codes & standards evaluation across research areas.	Evaluation plan for Codes & Standards work	
Market Effects Strategic Planning	S/CC	Other	Kim Crossman	Facilitate the development of a process to evaluate market effects and ensure methodological consistency across research areas/programs.	Clear plan and direction for market effects evaluation efforts; documentation of preferred methodology.	
Net-To-Gross Top-Down NTG Methods	S/CC	Other	Monica Cohen	This study will assess and employ alternative techniques for using top-down modeling to measure net energy impacts.	The long term goal is to develop and apply a top-down method for MA, and to understand the strengths and limitations of that method.	
Net-To-Gross Electric C&I NTG	S/CC	Other	Kim Crossman	Quantify NTGR for electric C&I programs	Updated NTGR ratio for electric C&I programs using current methodology	
Non Energy Impacts - Low Income Health NEIs	S/CC	Other	Marie Abdou	Quantify health related NEIs for LI participants	TBD	Needs review of scope
Non Energy Impacts - Using C&I NEIs for Project Recruitment	S/CC	Other	Marie Abdou	Use data from C&I Retrofit NEI study to inform marketing strategies for implementation	Data to inform implementation market strategies	
Non Energy Impacts - Quantifying C&I New Construction NEIs	S/CC	Other	Marie Abdou	Quantify participant non-energy impacts associated with commercial and industrial new construction projects	NEI values for C&I New Construction projects.	
Retrospective Electric DRIPE	S/CC	Other	Monica Kachru	Assess the level and accuracy of DRIPE as set forth in the 2011 Avoided Energy Supply Cost Study.		

The above includes only studies that have reached at least the detailed scoping phase. There are other studies in the early scoping phase that aren't included.