**CONTEXT**

- Incorporates proposed EEAC priorities, Councilor input, and experience from previous work plans
- Covers a 12-month period from January 2020 – December 2020
- 2020 heavily focused on supporting 2019-2021 Plan achievement
  - Support accounts for ~ 65% of the proposed budget
- Strategic planning will begin in summer
- Formal planning including stakeholder meetings begins in the fall
- Getting KPIs right is a key focus
CONSULTANT TEAM UPDATES IN 2020 AND BEYOND

► New Active Demand Advisory Group added to focus on these issues
  - Includes existing Team members and members Sean Becker and Mike Rufo

► C&I Advisory Group to be led by Adam Jacobs

► Caroline Hazard and Elizabeth Chant join Residential Advisory Group

► Eric Belliveau to continue as Principal-in-Charge; Gretchen Calcagni to serve as project manager
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
► 21% of consultant budget
EM&V

Specific areas of focus in 2020 include:

- Overseeing the studies laid out in the Strategic Evaluation Plan (SEP)
- Completing and reporting on key studies related to participation barriers, Energy Optimization, and demand
- Building a mature framework for savings claims from market effects and new codes and standards provisions
- Working with the PAs on EM&V aspects of potential savings studies for the planning process for the 2022-2024 Plan
- Developing additional studies as needed to support the evolution of programs, policies, and markets.
PLANNING AND ANALYSIS

► Context: Ensuring the Council effectively performs its responsibilities; supporting development of a strategic vision for the future; reviewing and analyzing 2019 results and 2020 reporting

► Work Areas
  - Council support
  - Technical analysis/Review reports and data
  - Regulatory support

► 33% of consultant budget
PLANNING AND ANALYSIS

Specific areas of focus in 2020 include:

- Ensuring effective program performance and to achievement the 2019-2021 Three-Year Plan goals
  - Providing guidance related to new elements in the Plan including energy optimization, active demand, residential enhancements, etc.
  - Reviewing and commenting on results of the PA MMBtu study
- Aiding the Council in the process of outlining key elements of the 2022-2024 Three-Year Plan
- Ensuring the Council effectively performs its responsibilities, and that EEAC processes are informative, effective, and efficient
- Providing technical analysis to support the development and implementation of a strategic vision for the future
ACTIVE DEMAND

► Context: Reviewing and analyzing available information to guide implementation, evaluation, and reporting of ADR elements of the Plan including daily dispatch; participating in strategic planning

► Work Areas
  - Planning and Implementation Support
  - Identifying New Opportunities and EM&V Impacts

► 7% of consultant budget
ACTIVE DEMAND

Specific areas of focus in 2020
- Reengaging Demand Reduction Working Group to discuss 2019 ADR results and planned efforts for summer 2020
- Reviewing daily dispatch demonstration results and provide support for Council and DPU approval
- Monitoring and reviewing the winter 2019-2020 demand management efforts.
- Coordinating with sector teams to ensure fully integrated program delivery of ADR and EE in the programs
- Tracking and participating in winter benefits study
- Reviewing 2019 EM&V results and plan and evaluations for 2020 offerings
- Coordinating with PAs on gas and other ADR opportunities
RESIDENTIAL AND LOW INCOME

► Context: Refining existing program strategies to incorporate EO; increase participation; heat pump goals; tracking Key Performance Indicator (KPI) data; assessing new technologies and program approaches

► Work Areas
  – Program and effective practices support
  – RMC and Council meeting participation
  – Income eligible program review

► ~17% of consultant budget
RESIDENTIAL

Specific areas of focus in 2020:

- Collaborating with the PAs on implementing, tracking, assessing, and reporting on 2019-2021 residential enhancements including
  - Active demand reduction
  - Strategic electrification—particularly heat pumps
  - Increasing conversions through facilitated services
  - Energy optimization education for customers
  - Passive House
  - Serving all customers including renters and moderate income
  - Home Energy Scorecards

- Continuing to identify and bring forward opportunities for realizing an integrated, state-of-art residential program in MA
  - Follow up on recommendations from white paper: "Mass Save® 2019 Residential Program Review: Opportunities and Recommendations for 2020 and Beyond"
Specific areas of focus in 2020:
- Increasing participation and savings by renters, moderate income customers, and limited English proficiency customers
- Continuing to work with PAs and LEAN to address findings, outputs, and recommendations of Multifamily Census and Low Income Process Evaluation
COMMERCIAL & INDUSTRIAL

► Context: Monitoring lighting market changes and their impacts on programs; Small Business participation; tracking KPI data trends; identifying new and existing non-lighting technologies with additional potential, focusing on opportunities for controls

► Work Areas
  - Program and effective practices support
  - New technologies and innovation support
  - C&I Management Committee and Council meeting participation
  - Incorporate feedback from EM&V and studies

► ~17% of consultant budget
COMMERCIAL & INDUSTRIAL

Specific areas of focus in 2020:

- Small Business/Turnkey Initiative
- New construction program improvements
- Strategic energy management (SEM)
- Lighting and lighting controls, including lighting transition planning and street lighting
- Custom HVAC projects
- Equipment System Performance Optimization (ESPO) program Manufacturing custom process
- Demand and storage program performance
- Technical assistance and training for contractors and distributors, especially with respect to lighting and HVAC controls
- Combined Heat and Power savings and project size
- Energy Optimization and fuel switching, including air and ground-source heat pumps and variable refrigerant flow (VRF) systems
- Workforce development issues relevant to C&I building operations and maintenance
TECHNICAL SERVICES

► Context: On-going administrative tasks that support the Council’s information sharing, review of website for visits and potential changes in 2020

► Work Areas:
  − Meeting minutes for EEAC and Ex Comm. Potential support of strategic planning meetings
  − Website maintenance, updates, and document posting
  − Consultant Team quarterly report

► 5% of consultant budget

► Specific focus area for 2020 includes updated website structure/functionality based on EEAC feedback
# Q1 DELIVERABLES

<table>
<thead>
<tr>
<th>Month</th>
<th>Category</th>
<th>Topic</th>
<th>Description</th>
<th>Advisory Group(s)</th>
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<tbody>
<tr>
<td>January</td>
<td>Memo</td>
<td>2020 Work Plan</td>
<td>Describes Consultant Team tasks, deliverables, and budget for 2020</td>
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<td>Presentation</td>
<td>2020 Work Plan</td>
<td>Summarizes Consultant Team tasks and deliverables for 2020</td>
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<td>Memo</td>
<td>Residential Program Design</td>
<td>Started in December 2019, this memo provides the Consultant Team’s recommendations regarding remaining residential program opportunities and suggested metrics measuring success</td>
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<td>February</td>
<td>Tracking Spreadsheet</td>
<td>EM&amp;V Status Update</td>
<td>A spreadsheet summarizing the status of current and planned EM&amp;V studies</td>
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<td>Memo</td>
<td>Consultant Team Quarterly Report</td>
<td>Report on Consultant Team activities for Q4 of 2019.</td>
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<td>March</td>
<td>Presentation</td>
<td>PA Q3 Report</td>
<td>Observations on KPIs, PA differences, areas PAs not on track to meet goals or council priorities</td>
<td>P&amp;A Residential C&amp;I</td>
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<td>Presentation</td>
<td>Non-participant studies</td>
<td>Results of the non-participant studies conducted in response to language in the 2019-2021 term sheets</td>
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# HIGH-LEVEL BUDGET PROPOSAL

## $1,558,000

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<thead>
<tr>
<th>Staff</th>
<th>Role</th>
<th>Strategic Planning</th>
<th>Planning &amp; Implementation</th>
<th>Oversight of EM&amp;V</th>
<th>Coordinate Technical Services</th>
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<td>Eric Belliveau</td>
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<td>Mark Kravatz</td>
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<td>George Lawrence</td>
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<td>Michael Rufo</td>
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<td>Lori Lewis</td>
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<td>Anna Sommer</td>
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## LABOR TOTALS

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| TOTALS | $635,765 | $491,040 | $333,400 | $97,375 | $1,557,580 |