



Memorandum

To EEAC
From Eric Belliveau and the EEAC Consultant Team
Date 2 October 2013
Subject September Monthly Report

The Consultant Team is pleased to provide this update to the Council on our recent activities. As requested, we have revised the format of this memo; we now keep the past highlights and future activities for each of the four Advisory Groups together in order to better convey progress and trends in each area.

Planning & Analysis Advisory Group

Highlights from the Past Month

- Prepared for and attended the EEAC meeting on September 10 and participated in the Executive Committee meeting on September 25. Briefed individual Councilors in advance of the EEAC meeting.
- Provided support to the EEAC Executive Committee in meetings and through briefings and written materials on the statewide database, the 2013 AESC/avoided cost study and its application in MA, the review of 2012 and three-year performance (2010-2012) with a focus on C&I programs, the evaluation strategic plan, and DPU 11-120 reporting streamlining.
- Supported the design and development of the statewide database, as directed by the Council and the Council's statewide database Subcommittee. Participated in the statewide database Subcommittee as assigned. Met with selected consultants and exchanged information on the strengths and weaknesses of available Mass Save program data. Explored potential discussion topics for the Database Working Group as established in the revised reporting protocols established in D.P.U. 11-120-A.
- Continued making progress with DOER and the PAs on the consultant-recommended interim approach to data and data management, focused on improving effectiveness and efficiency, to ensure reliable and internally-consistent data in the interim while the statewide database is being developed. Discussed web-based file storage, versioning and version control (logs), PA data manager(s) responsible for data quality and internal consistency, and the importance of QA and consistent data for all users.
- Reviewed and analyzed the 2012 Annual Reports and three-year (2010-2012) program performance, including the individual PA results and the statewide compilations for electric and gas. Completed a three-year review of 2010-2012 performance, coordinating with the PAs, with a special focus on the C&I



energy savings shortfalls in 2011-2012 and the C&I underinvestment in the same years. Prepared a summary of the Consultant analysis, which was presented to the Council at the September 10 EEAC meeting. Reviewed and commented on the draft PA 2010-2012 summary presentation and the draft PA C&I presentation.

- Reviewed the impacts of the recent evaluation studies on the 2012 programs as part of the review of the 2012 Annual Reports. Focused the remaining 2012 review efforts on the benefits and non-energy impact (NEI) values in the Annual Reports.
- Continued work related to the regional AESC study. Reviewed the final report with an eye towards applying the study results in MA for the 2014 and 2015 program years. Provided an update to the Council and answered questions from DOER and individual Councilors. Coordinated with the PAs to analyze and assess the implications of the new avoided cost values for the 2014 and 2015 program years and to discuss the analysis of DRIPE effects.
- Continued work on DPU 11-120 reporting streamlining regarding the regulatory review, reporting, and approval of performance reports, performance incentives, energy efficiency surcharges, and mid-term modifications. Reviewed the July 30 consultant team proposal and mark-up for a template for the Annual Implementation Update intended for the 2014 and 2015 program years, as part of the Council review process.
- Interacted with the PAs and the management committees to discuss and ensure the early and effective implementation of the key components of the 2013-2015 Three-Year Plan, including the key program enhancements, strategies, and action plans, in order to achieve the savings and benefits goals, maximize the use of best practices, serve all segments of MA customers, and support the Council's priorities while encouraging the cost-efficient use of ratepayer funding.
- Referred to the final version of the 2012 Report Technical Reference Manual (TRM) as part of our review of the 2012 Annual Reports. TRM team waiting for decision on whether TRM data will be part of the Annual Implementation Update.

Upcoming Activities

- Continue meeting with the PAs and management committees to discuss and ensure the early and effective implementation of the key components of the 2013-2015 Three-Year Plan. Significant focus will be on the C&I programs and how to achieve the C&I goals.
- Review and brief the Council on the regional AESC study completed in 2013. Provide a summary to the Council at the October 8 meeting, coordinating with the PAs.
- Support the design and development of the statewide database, as directed by the Council and the Council's statewide database Subcommittee and participate in the statewide database working group as assigned.
- Continue working with the PAs on efficient interim approach to data and data management until the statewide database is fully developed.

MA EEAC



CONSULTANT TEAM

- Follow up on the three-year review of 2010-2012 performance, as well as 2013 performance year-to-date, presented to the Council in September, as directed by the Council.
- Review and comment on the PAs' presentation and report to the Council on how the PAs intend to achieve the 2013 goals, with emphasis on the C&I programs and consideration of the trends in prior program years.
- Review, analyze, and comment on the 2013 quarterly reports and the dashboard monthly reports and trends. Also, working with the PAs, complete the new template for the quarterly reports, focusing on the reporting of benefits and GHG emissions reductions (Q2 and Q4 reporting), and implement any additional revisions identified and directed by the Council as a result of EEAC review of the revised template used for the Q1 and Q2 reports.
- Support the Council, as directed, in its review and analysis of the DPU NOI Phase II order and the EE Guidelines, through the DPU 11-120 reporting streamlining process. Participate in the DPU 11-120 reporting streamlining working group and subcommittee as directed by the Council. Complete work on the template for an Annual Implementation Update to be used for the 2014 and 2015 program years.
- Support the Council by continuing analysis and work on the DPU EE Guidelines Phase I NOI regarding net savings and environmental/carbon compliance costs, as directed by the Council.
- Continue to work on future tasks related to the Technical Reference Manual (TRM), per the TRM schedule and process and as amended, if necessary, when the Annual Implementation Update is finalized.

C&I Advisory Group

Highlights from the Past Month

The C&I Group continues to maintain focus on achieving the 2013 goals, informed by past experience and research.

- Reviewed and provided input to PAs' September EEAC Presentation on achieving C&I goals. Continued discussions with PAs on C&I progress towards 2013 goals and spending. Discussed need for urgency, importance of achieving 2013 goals, and brought forward potential strategies.
- Developed initial drafts of Consultant Team C&I presentation for review and input by Council and PAs.
- Began discussions with PAs and DOER on statewide policy for when and how to adopt new Energy Code baseline.
- Continued work on Restaurants/Lodging Best Practice research report. Developed workplan for Retro-commissioning Best Practice research report.
- Reviewed and analyzed C&I data in statewide PARIS database to determine whether it can be used to identify best practices.



- Participated in Mass Save Lighting Committee meeting to develop program enhancements for 2014.
- Developed C&I material for EEAC Report to Legislature.
- Continued to support Commercial Real Estate Working Group. Reviewed and commented on first draft of interview guide. Participated in CRE meeting.
- Began discussions with National Grid on need for forum to address high-level and/or longer-term strategy and planning topics. Proposed a quarterly meeting to begin in October.
- Continued to participate in multi-family working group to increase comprehensiveness, break down barriers between Res and C&I, and plan/prepare for upcoming evaluation to verify gains being made and prepare for future enhancements..

Upcoming Activities

The C&I Advisory Group will continue to support the implementation of the Plan. Specific areas of focus in coming months will include:

- Delivering a presentation to the Council at the October Council meeting to address achievement of the Three Year Plan C&I Goals.
- Monitoring PA achievement towards goals and spending. Continuing to work with PAs on planning and strategy to address any goal shortfalls.
- Reviewing and analyzing available PA data to identify best practices. Where data is available and best practices can be clearly identified, we will work with PAs replicate among all PAs. Where data is not available or useful, we will work with PAs and stakeholders on data needs in order to effectively identify best practices among PAs.
- Finalizing Restaurants/Lodging Best Practice Research Report, presenting results to PAs, and working with PAs to develop and implement resulting recommendations and enhancements to programs. This work is expected to be complete in Q4 2013.
- Beginning Retro-commissioning Best Practice Research. Once complete, we will work with PAs to develop and implement resulting recommendations and enhancements to programs. This work is expected to be complete in Q4 2013.
- Developing workplan for Healthcare Best Practice Research. Once workplan is complete, research will begin. Once research is complete, we will work with PAs to develop and implement resulting recommendations and enhancements to programs. This work is expected to be complete in Q1 2014
- Continuing to work with PAs, stakeholders, Council, and others to develop an integrated solution for customer-owned and utility-owned street lights.
- Continuing to work with PAs and DEP on water/wastewater strategy.



- Continuing to work with PAs to make a stronger connection and feedback loop between evaluation and implementation.
- Continuing to support the Commercial Real Estate Working Group and development of a PA roadmap to address the segment.

Residential and Low Income Advisory Group

Highlights from the Past Month

The Residential Advisory Group covered key program areas by engaging with the Residential Management Committee (RMC) and key initiative working groups and on several topics.

- Engaged the PAs on high-level Residential Sector issues at the Residential Management Committee (RMC) meetings, and through individual communications with RMC members. Monitored PA progress on new initiative enhancements and action plans.
- Developed summary recommendations for multifamily program improvements and enhancements; coordinated same with C&I consultant team and presented findings and recommendations at RMC meeting on September 18; began reviewing PAs' PARIS multifamily program data to enhance ongoing analysis of the program's performance and opportunities for enhancements.
- Reviewed and provided comments on drafts of proposed residential evaluation plans; maintained ongoing dialogue with evaluation team to coordinate evaluation and residential consulting team activities.
- Participated in Res Barriers Working Group meeting on September 18, asking questions about reported information and posing possible approaches for landlord-tenant barriers discussion with stakeholders and PAs' consideration.
- Updated lighting best practices paper to include September year-to-date program data and revised incentive and TRC cost/annual and lifetime kWh saved.
- Continued work to compile responses to Council members' HES questions.
- Began initial review of PAs' 2012 annual report non-energy impact values.
- Continued to monitor YTD lighting and consumer products initiative activity relative to goals.
- Reviewed recently released national ENERGY STAR® market share data and began consideration of implications for consumer products initiative.
- Monitored continued progress of both regional (all homes) and MA-specific low income lighting hours of use studies.



- Discussed goals for behavior programs with other consulting team members, confirming interest in new program models and integration of electric and gas behavior reports.
- Prepared residential content for Consultants' September Council presentation.
- Communicated and coordinated with DOER staff regarding residential sector issues, including providing technical assistance regarding calculating savings when offering cold climate heat pumps to participants with fossil fuel heated homes.
- Reviewed minutes and agendas of working group meetings.

Upcoming Activities

The Residential Advisory Group will continue to work with the PAs on planning tasks and preparation activities toward the successful implementation of the 2013-2015 statewide plan.

- Continue program planning discussions with the PAs at the Residential Management Committee (RMC), including on monitoring progress on the key Three Year Plan implementation tasks.
- Continue to develop multifamily recommendations memo with additional detail comparing peer program designs as discussed at September 18 RMC meeting.
- Discuss HES realization rates memorandum with RMC; review results of initial launch of HPC delivery model and questions from the council related to HES to assist in prioritizing consultant work efforts; assess opportunities for additional enhancements to HES initiative.
- Continue work to assess available sources of residential data, including PARIS.
- Determine goals for residential database content; participate in scoping process as appropriate.
- Continue participation in Res Barriers Working Group.
- Provide additional input on residential evaluation plans.
- Continue review of PAs' 2012 annual report non-energy impacts.
- Continue to monitor YTD lighting and appliance initiative activity relative to goals.
- Continue work with consulting team to determine best approach to address PAs' refrigerator and TV planning assumptions and to consider possible impact on PAs' consumer products initiative.



Evaluation, Measurement & Verification Advisory Group

Highlights from the Past Month

The EM&V Group continued to advance toward completion the ten 2012-2013 studies that are still in progress. These studies are generally expected to be completed between Fall and early Winter of this year. In addition, the Group completed the following activities.

- Continued to advance toward completion the ten 2012-2013 studies that were already in the implementation stage as of the end of August. These studies are generally expected to be completed between Fall and early Winter. Advanced a few new studies that had been in the planning stage as of the end of August to the implementation stage.
- Working with the PAs and evaluation contractors, neared completion of a comprehensive 2013-2014 evaluation plan. Development of this plan has required extensive scoping of the new studies, significant input from stakeholders, and refinement of the overall EM&V planning process. Because the plan represents an incremental evolution in the planning process, the new individual studies discussed in it are in varying stages of planning. Typically, the more advanced the planning stage, the more stakeholder input a study has already received. We anticipate that the 2013-2014 evaluation plan will be distributed to interested parties for review and comment by early October.
- Working with the PAs, began developing the RFP for a new EM&V contractor team for the Cross-Cutting Research Area. The RFP is expected to be released in October or November, with contractor selection in December, and a new contractor team on board in the first or second quarter of 2014.

Upcoming Activities

In October we expect to focus most sharply on evaluation planning. This includes:

- Developing integrated 12-18 month evaluation plans for each of the three major research areas.
- Moving additional new 2013-2014 studies from the planning to the implementation stage.
- Continue advancing toward completion those studies that are already being underway.