

# Memo



→ CONSULTANT TEAM

To: **Energy Efficiency Advisory Council**  
From: **Eric Belliveau and the Consultant Team**  
Date: **November 29, 2021**  
Subject: **EEAC Consultant Team 2021 Third Quarter Report**

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## SUMMARY

This document summarizes the work completed by the EEAC Consultant Team during the third quarter of 2021. In each section below, the Consultants provide details on the status of key work areas undertaken during Q3. As in the past, our report is organized by advisory groups, representing the major areas of effort across the entire range of Consultant responsibilities and portfolio of Program Administrator (PA) programs. Within each advisory group section of the report, we describe specific tasks the Consultant Team completed in Q3 that did not necessarily have a distinct deliverable associated. In Q3, the Consultant Team spent a significant amount of time working on tasks related to the 2022-2024 Three-Year Planning process. Because this process involves all Advisory Groups of the EEAC Consultant Team, we've included a specific Three-Year Planning section to this report. We also provide a table at the end of the document that lists the known deliverables the Team produced over the quarter.

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## THREE-YEAR PLANNING

The table below summarizes the three-year planning process activities and deliverables that occurred in Q3 of 2021. All advisory groups were involved in these efforts to some extent. The majority of our three-year planning work in Q3 was focused on reviewing and developing a plan scenario to achieve the state's greenhouse gas (GHG) emissions reduction goal, participating in the Key Drivers process, and supporting the Council with developing its comments and resolution on the April draft of the 2022-2024 Plan.

Time Period	Activity/Milestone	Task	Information Needed	Status
<b>July</b>	Greenhouse Gas (GHG) Emissions Reduction Goals	Compare State GHG target to draft PA plan; identify opportunities for PAs to meet or exceed target; develop a scenario to achieve GHG target		Complete. Presented a Plan scenario to achieve state GHG goal at July 28 Special EEAC meeting.
	Key Drivers Process	Work with the PAs to review and understand assumptions behind high priority topics in the draft 2022-2024 Plan and reach consensus where possible	Draft plan and associated data including BCR models	Complete. The key drivers process shifted to a focus on GHG emissions reductions after the release of the GHG goal in July. Discussions were on-going throughout Q3.
	Council Resolution Regarding the April 30 <sup>th</sup> Draft 2022-2024 Three-Year Plan	Support the EEAC in developing its comments and resolution on the draft Plan, including quantitative elements to include in resolution	Draft plan and associated data including BCR models	Complete. Council resolution was passed at July 28 Special EEAC meeting
<b>August</b>	Greenhouse Gas (GHG) Emissions Reduction Goals	Identify opportunities for PAs to meet or exceed target; develop a scenario to achieve GHG target		Participated in numerous meetings with PAs to discuss potential scenarios for meeting to state GHG target for the Plan.
<b>September</b>	Updated 2022-2024 Plan Data	Reviewed data tables and BCR models reflective of the PAs updates to the Plan since the April draft	Updated data tables and BCR models	Complete.
<b>On-going Q3</b>	Strategic Planning	Support the Council with additional analysis and information to review April Draft Plan and support review and analysis of September		Complete. Consultant Team participated in numerous strategic planning meetings and provided supporting analysis throughout the quarter.

		updated Plan		
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## PLANNING & ANALYSIS

In Q3, the Planning and Analysis Advisory Group focused much of its efforts on supporting the 2022-2024 planning process. This included participating in strategic planning meetings, reviewing the Plan TRM, supporting the AESC Gas Add-on study and social cost of carbon development. The Group also reviewed PA MTM requests during the quarter. These tasks are summarized in the table below:

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
<b>July</b>	EEAC Meeting #1	1. Key Drivers Update 2. Draft Council Resolution	Review and provide feedback on draft resolution; develop meeting materials; brief Councilors	Draft meeting materials	Complete
	EEAC Meeting #2	1. Secretary's Greenhouse Gas Reduction Goal for Three-Year Plan 2. Council Resolution vote	Review and provide feedback on resolution edits; develop materials; brief Councilors	Draft meeting materials	Complete
	N/A	2021 AESC Gas Add-on	Participate in planning meetings and review and provide feedback on draft methodology and outline, as available		Complete
<b>August</b>	EEAC Meeting	1. Eversource MTM Request 2. Performance incentive mechanism presentation	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft meeting materials	Complete

	N/A	PA Q2 2021 Results	Review of Q2 2021 results for both electric and gas programs	Q2 2021 results	Complete
	N/A	2021 AESC Gas Add-on	Participate in planning meetings and review and provide feedback on draft results and report, as available		Complete
	N/A	Social Cost of Carbon	In response to the Climate Act, work with Synapse, the MA PAs, and MA state agencies, (the MA subset of the AESC study group) to supplement the AESC 2021 study and research an updated Social Cost of Carbon (SCC), to be used as a benefit in the benefit-cost analysis for 2022-2024 Plan		Complete. Value used in September Plan numbers and October updated Plan text
	N/A	PA Q2 Report	Review data and narrative from PA Q2 Report		Complete
<b>September</b>	EEAC Meeting	1.Updated Plan Goals and Budgets 2.Mid-Term Modifications	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft meeting materials	Complete
	N/A	TRM Review	Review 2022-2024 TRM and application of inputs in the Plan BCR models; provided feedback to PAs	Draft TRM and application of inputs	The C-Team received a complete draft of the TRM in late September. We completed our review the first week of October. As of early November, some outstanding questions for

					the PAs still remain.
<b>On-going Q3</b>	N/A	<b>Strategic planning</b>	Work with DOER, AGO, and PAs to schedule and participate in meetings related to high priority topics identified as areas of focus for the next Three-Year Plan.		Complete. Consultant Team participated in numerous strategic planning meetings and provided supporting analysis through the quarter.

## ACTIVE DEMAND

In Q3, the Active Demand Advisory Group had multiple meetings with DOER to discuss priorities related to Income Eligible (IES) active demand, generation in the C&I curtailment program, gas demand response, and 5-year incentive locks for daily dispatch in the 2022-2024 plan. The Active Demand Advisory Group had also met with the PAs on 2 separate occasions to discuss updates to the PAs April draft plan and expected changes for the final Plan across a variety of active demand management (ADM) measures and programs.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
<b>Q3</b>	September 7 Check-in w/ DOER on ADM	Discussion of Daily Dispatch non-storage measures and gas demand response	Review PA provided data on active demand management for both C&I curtailment and Wifi T-stats, and review of language in PA filings related to gas demand response demonstrations in EE programs and other rate-cases	NA	Complete
	September 13 Meeting w/ PA ADM leads	IES ADM, Non-thermostat Residential measures, generator participation in C&I curtailment, gas demand response (DR)	Discuss changes expected in PAs new BCR models from April draft plan	Updated BCR models (received September 22)	Complete
	September 30 Meeting w/ PA	Daily Dispatch, IES ADM	Discuss expected plan narrative update details	October plan narrative	Complete

	ADM leads	updates, Gas DR	on 5-year incentive lock for daily dispatch; Request additional reporting on IES ADM	update	
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## RESIDENTIAL AND INCOME ELIGIBLE

The Residential Advisory Group worked this quarter to advance the EEAC's priorities in discussions with the PAs and LEAN regarding revisions to the April 30 draft Plan, including participating in the key drivers process, supporting the Equity Working Group and finalization of the Equity Targets, and providing the EEAC with analysis to support its work on the October resolution.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
<b>July</b>	July 14 EEAC	Draft Council Resolution	Draft content for resolution; provide comments on draft resolution; brief Councilors	N/A	Complete
	July 15 RMC	Electrification of New Homes Program	Prepare agenda topics and discussion questions	PAs provided updates on program planning	Complete
	July 28 EEAC	GHG reduction goals	Review and comment on draft consultants' presentation	N/A	Complete
<b>August</b>	August 11 RMC	Heat pumps	Discuss the status of PA programmatic efforts to achieve the GHG goals with heat pumps	PAs provided updates on program planning	Completed this discussion; ongoing topic
	August 17 IES key drivers meeting	Continue electrification discussion; discuss insulation potential	Finalize and share budget and participation analysis with LEAN and PAs	Answers to information requests made to PAs and LEAN	Discussion complete. We did not receive answers to most of our information requests
	August 25 RMC	Changes to April draft	Discuss expected significant changes to	Updates from PAs on	Discussion complete. The RMC was not able to

			the September revised BCR models and October revised narrative text of the plan as compared to the April 30 draft	changes	provide updates on BCR changes. For most programmatic updates, the PAs indicated they were still working out details.
<b>September</b>	September 17 RMC	Renovations and Additions	Prepare discussion questions for RMC meeting	Answers to information requests made during meeting	Discussion complete. PAs provided answers to information requests on 10.27
	September 22 EEAC	PA review of revised plan	Review revised data tables and briefed Councilors on same	Revised data tables	Complete
<b>On-going Q3</b>	1-2x/mo., plus planning meeting and preps	Equity Working Group	Prepare for and participate in Equity Working Group meetings; finalize Equity Targets	Various types of information to support agenda topic(s) for each meeting; response from PAs to most recent Targets document; additional information from PAs on equity investments	Complete
	June 29 <sup>th</sup> Mtg	Workforce development	Met with DOER and the PAs regarding workforce development plan budget and program details and provide comments.	Updated budget spreadsheet and program summary sheets; Clean Energy Pathways' mentorship, job placement and retention strategy.	Complete
	N/A	PA reporting	Review and analyze PA reporting, including 2020 Plan Year Report and 2021 Q2 report and KPIs.	Q2 report	Complete
	N/A	EM&V	Coordinate with res EM&V efforts, including providing input on draft	Draft res EM&V reports	Reviewed and commented on Quick Hit studies for VHEAs and HPWHs as

			res EM&V work products		well as WiFi thermostat impact analysis and Residential Customer Profile Study
	Various	Income Eligible Program	Pursue Council priorities through key drivers process; coordinate with LEAN and DOER on an ongoing basis; participate in Low Income Best Practices Working Group and LIMF Advisory Group	Revised plan numbers for Income Eligible Sector	Complete

## COMMERCIAL AND INDUSTRIAL

The C&I Advisory Group's quarterly report is structured primarily around scheduled Commercial & Industrial Management Committee (CIMC) meetings which took place twice per month, as well as participation in several different PA working groups. In addition to ongoing matters related to addressing the EEAC's priorities and general work to monitor the PAs' implementation of their 2019-2021 Plan commitments, substantial portions of Q3 meetings with the PAs were used to discuss matters relevant to the 2022-2024 planning process. The specific tasks related to these meetings and on-going work are listed in the table below:

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
July	7/7 CIMC Meeting	2020 Plan vs. Actual Results for Electric Programs	Review and analyze evaluated 2020 BCR models and compare to planned 2020 goals. Develop agenda and comparison tables for discussion	Additional details from PAs on: TLED sales volume (by type A, B and C) and Retro-commissioning costs	Complete
	7/20 CIMC Meeting	2022-2024 planning w/ a focus on Deep Energy Retrofits (DER), ground source heat pumps (GSHPs), Refrigerant	Discuss measures likely to have significant impacts on PAs ability to meet GHG goals	Definition of Deep Energy Retrofits and CHP planning assumptions	Complete

		Leaks and combined heat and power (CHP)			
<b>August</b>	8/4 CIMC Meeting	Deep dive on C&I lighting w/ focus on networked lighting controls	Discussion of lighting controls savings factors from recent studies in CT and MA	N/A	Complete
	8/17 CIMC Meeting	GSHP incentive follow-ups + review of PA progress towards meeting GHG and EWG goals in the commercial sector	Discuss various planning items relevant to increasing Commercial GHG reductions and relevant context for small business goals in Equity Working Group (EWG)	Updated PA planning numbers	Complete
<b>September</b>	9/1 CIMC Meeting	CHP pipeline, delivered fuel switching incentives in updated plan and Deep Energy retrofit framework	Review of various planning assumptions and joint review/editing session w/ PAs on DER framework proposal	Updated PA planning numbers	Complete
	9/21 CIMC Meeting	Small Business Weatherization and C&I electrification	Discuss delivery model and screening inputs for Small biz Wx and review of C&I electrification incentives	Updated PA BCR models	Complete
<b>On-going Q3</b>	Informal C&I Leads Call	Bi-weekly informal check-ins w/ CIMC co-chairs and DOER	Programmatic details such as C&I working group structure	PA proposed C&I working group structure and updated plan narrative	

## EVALUATION, MEASUREMENT, AND VERIFICATION

In Q3, our work in the area of Evaluation, Measurement, and Verification (EM&V) continued to be shaped by the requirements of the 2009 Council resolution that established the Commonwealth's current EM&V framework, which assigns substantial responsibilities to the Council Consultants. Working on the Council's behalf, we are charged with overseeing every phase of the EM&V process, including evaluation planning, contractor procurement, study implementation, reporting and outreach, and application of study results.

Specific EM&V research objectives in the third quarter of 2021 included:

Time Period	Task	Information Needed	Status
<b>Ongoing Q3</b>	Complete all studies that are needed to feed into the three-year plan. Studies for which impact factors still need to be finalized include C&I Non-energy Impacts (NEIs), residential heating displacement impact, C&I lighting control impacts, and Non-residential New Construction Net-to-Gross (NTG). In addition, for several other studies for which impact factors have been finalized, the associated report still needs to be finalized.	Ongoing Q3	Impact factors were all finalized by the end of Q3. The last of the associated final reports were finalized in October.
	Continue moving through the planning and implementation process those in-progress studies that do not need to be finalized in time for the three-year plan.	None	In progress and generally on schedule.
	Finalize Strategic Evaluation Plan (SEP) for inclusion with three-year plan.	None	Finalized in October.
	Provide as-needed EM&V support for policy and planning issues that arise in connection with the completion of the three-year planning process.	None	Complete.

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## TECHNICAL SERVICES

The Technical Services team is responsible for a variety of administrative tasks that support the Council’s information sharing.

Below are the primary tasks of the Technical Services Team in Q3 were:

Time Period	Task	Information Needed	Status
On-going Q3	Update the EEAC website including improving the search function, updating images, and improving backend functionality.	Head shots from Councilors	Work done in Q3 included site design and implementation, overall construction of the site's backend, comprehensive navigation set-up, homepage configuration, and photo research, among others. Website update work remains on-going and is expected to be completed in Q4.
	Post meeting materials for the July - September EEAC Meetings, planning workshops, and other associated planning resources and public comment.		Complete
	Take meeting minutes at the July-September Executive Committee and EEAC meetings.		Complete

## COUNCIL DELIVERABLES

The sections below provide details on Council work products for Q3:

Month	Category	Topic	Description	Advisory Group(s)	Status
July	Presentation	Key Drivers Update	A presentation summarizing activities undertaken and remaining work to be done on Key Drivers process	All	Complete
	Presentation	Consultant Team Plan Metrics Recommendations	A presentation providing recommendations and associated metrics for how the PAs can achieve the State GHG emissions reduction goals set for the 2022-2024 term	All	Complete

<b>August</b>	Memo	Consultant Team Q3 Work Plan	A memo identifying key tasks and deliverables of the Consultant Team in Q3 2021	All	Complete
	Memo	Consultant Team Q2 report	A report summarizing the activities of the Consultant Team in Q2 2021	All	Complete
	Presentation	Q2 Results	A presentation highlighting results of the PA Q2 report and KPI data	All	Did not develop presentation given other priorities
<b>September</b>	Presentation	2020 Plan Year Report	A presentation highlighting results of the PA 2020 Plan Year report	All	Complete
<b>On-going Q3</b>	Tracking Spreadsheet	EM&V Status Update	A spreadsheet summarizing the status of current and planning EM&V studies – Updated monthly	EM&V	Complete