



CONSULTANT TEAM 2020-2022 WORK PLAN YEAR TWO

► January 27, 2021

CONTEXT



- ▶ **Covers a 12-month period from January 2021 – December 2021**
- ▶ **2021 heavily focused on supporting the Three-Year Planning Process**
 - Support accounts for ~ 43% of the proposed budget
- ▶ **PA Potential Study review and Consultant Assessment of Potential will take place early in 2021**
- ▶ **Review of draft Plan and associated key driver process will occur over much of the spring and summer**
- ▶ **The final plan elements and term sheet will be developed by August**

CONSULTANT TEAM UPDATES IN 2021 AND BEYOND



- ▶ **New Team Member, Crystal Johnson, will focus on equity and low income programs**
- ▶ **Jeff Schlegel will be taking on a reduced role**
- ▶ **Working on support and new personnel to take on pieces of what Jeff has been doing.**

EM&V



- ▶ **Work Areas:**
 - EM&V Planning
 - Study implementation
 - EM&V Reporting
 - Council and stakeholder engagement
- ▶ **Specific areas of focus in 2021:**
 - Developing a new Strategic Evaluation Plan (SEP)
 - Developing and implementing studies regarding equity and strategic electrification, and refining an active demand evaluation approach
 - Evaluating newer initiatives including energy optimization and strategic energy management (SEM)
 - Working with the PAs on EM&V aspects of potential savings studies for the planning process for the 2022-2024 Plan
- ▶ **~20% of consultant budget**

PLANNING AND ANALYSIS

► **Work Areas:**

- Council support
- Technical analysis/Review reports and data
- Regulatory support

► **Specific areas of focus in 2021 include**

- Reviewing and analyzing 2019 results and 2020 reporting
- Providing technical input to 2021 Regional Avoided Energy Supply Component (AESC) avoided costs study
- Aiding the Council in the process of outlining key elements of the 2022-2024 Three-Year Plan
- Supporting development of a strategic vision for the future

► **~33% of consultant budget**

ACTIVE DEMAND



► **Work Areas:**

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

► **Specific areas of focus in 2021:**

- Monitoring and tracking active demand management and daily dispatch field experience and results
- Supporting program offerings in the field this summer and winter and monitor what has already been done
- Working with the PAs on strategic planning for active demand offerings in the 2022-2024 Plan

► **~6% of consultant budget**

RESIDENTIAL AND LOW INCOME

► **Work Areas:**

- Planning and tech support for 2019-2021 Plan implementation
- Planning and tech support for 2022-2024 Plan development
- RMC and Council meeting participation
- Coordinate with EM&V Efforts

► **Specific areas of focus in 2021:**

- Supporting PA and LEAN achievement of commitments and goals in 2019-2021 Plan, including heat pump goals
- Planning for program adaptations due to COVID-19 and lighting market transformation
- Workforce development
- Increasing services to historically underserved customers
- Supporting translation of Council priorities into actionable strategies for inclusion in 2022-2024 Plan

► **~19% of consultant budget**

www.nia-eeac.org

COMMERCIAL & INDUSTRIAL

► Work Areas:

- Planning/tech support for 2019-2021 Plan implementation
- Planning/tech support for 2022-2024 Plan development
- Program and effective practices support
- New technologies and innovation support
- CIMC and Council meeting participation
- Coordinate with EM&V Efforts

**~15% of
consultant budget**

► Specific areas of focus in 2021:

- Supporting PAs achievement of commitments and goals in 2019-2021 Plan
- Assessing program impacts resulting from the circumstances of COVID-19
- Supporting PA pivot to non-light savings from sources such as HVAC systems, building envelope and other process/plug-loads, and controls
- Supporting Council priorities for inclusion in 2022-2024 Plan
- Expanding workforce development

TECHNICAL SERVICES



- ▶ **Work Areas:**
 - Meeting minutes for EEAC and Ex Comm.
 - Website maintenance, updates, and document posting
 - Consultant Team quarterly report
 - Support development of the annual report to the DPU and legislature
- ▶ **Specific focus area for 2020 includes updated website structure/functionality based on EEAC feedback**
- ▶ **~7% of consultant budget**

Q1 DELIVERABLES



Month	Category	Topic	Description	Advisory Group(s)
January	Memo	2021 Work Plan	Describes Consultant Team tasks, deliverables, and budget for 2021	All
	Presentation	2021 Work Plan	Summarizes Consultant Team tasks and deliverables for 2021	All
	Presentation	AESC study results	A presentation summarizing the results of the AESC study and potential considerations for the Three-Year Plan.	Planning & Analysis
	Memo	C&I ventilation baselines	A memo jointly drafted by EEAC consultants, PAs and evaluators on changes in baseline ventilation rates resulting from the COVID-19 pandemic	C&I, EM&V
February	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q4 of 2020.	All
March	Presentation	PA Q4 Report	Observations on KPIs, PA differences, areas PAs not on track to meet goals or council priorities	P&A Residential C&I
	Presentation	Assessment of Potential	A presentation on the results of the Consultant Team Assessment of Potential	Planning & Analysis

HIGH-LEVEL BUDGET PROPOSAL

\$1,772,190

YEAR 2 - 2021								
	Staff	Role	Strategic Planning	Planning & Implementation	Oversight of EM&V	Coordinate Technical Services	Total Hours	
Optimal Energy, Inc.	Eric Belliveau	Principal in Charge	580	230	50	100	960	
	Gretchen Calcagni	Project Manager and Technical Services Lead	580	275	50	200	1,105	
	Phil Mosenthal	SME: Codes and Standards, Policy	50	40			90	
	Matt Socks	SME: AESC Study, Potential Studies, TRM	100	535			570	
	Elizabeth Chant	SME: Low Income/Equity	115	100			215	
	Adam Jacobs	C&I Lead	585	275			860	
	Senior Analyst	Senior Analytic Support	100	100		100	300	
	Analyst	Analyst Support	100	100		100	289	
	April Clodgo	Contract Admin & Tech Services Core Member				100	100	
Individuals	Jeff Schlegel	SME: Active Demand, Avoided Cost study, ISO issues, Policy	235	10			245	
	Caroline Hazard	Residential and Low Income Core Member	115	110			225	
	Ralph Prael	EM&V Lead			950		950	
	Bob Wirtshafter	EM&V Core Member			300		300	
	Michael Rufo	SME: GHG strategies, Active Demand, CA best practices	55	35	60		150	
	George Lawrence	C&I Core Member	75	75			150	
	Crystal Johnson	SME: Low Income/Equity	125	125			250	
	Other Consultants (TBD)	SME TBD if necessary (average projected rates)	80	40			120	
AEC	Lori Lewis	EM&V Core Member			180		180	
Cahor	Carol Lasky	SME: Website and Graphic Design				70	70	
	Design Support	SME: Website and Graphic Design				75	75	
CEI	Margaret Lynch	Residential and Low Income Lead	440	300			740	
CX	Jennifer Chiodo	C&I Core Member and EM&V Core Member	190	80	190		460	
EFG	Glenn Reed	Residential and Low Income Core Member	165	145			310	
	Chris Neme	SME: Planning and Analysis	50	25			75	
	Dan Mellinger	SME: Lighting	80	50			130	
SP	Sean Becker	SME: Energy Storage and ADR	125	75			200	
TOTALS			Hours	3,945	2,725	1,780	745	9,195
			Amount (Labor)	\$764,565	\$520,025	\$358,650	\$114,450	\$1,757,690
			Amount (Travel)	\$6,000	\$6,000	\$2,000	\$500	\$14,500
			Total 2021 Amount	\$770,565	\$526,025	\$360,650	\$114,950	\$1,772,190