CONSULTANT TEAM
2022 WORK PLAN

December 16, 2021
OVERVIEW

► Third year of C-Team contract
► Covers 12-month period from January 2022 – December 2022
► Work divided into several advisory groups
► 2022 heavily focused on supporting and guiding implementation of new elements in PAs’ Plan
► Assumes limited travel
► Personnel largely the same as 2021 Team
  - New team member, Michelle Keller, will support C&I sector
  - Jeff Schlegel will continue supporting targeted Planning & Analysis topics
PLANNING AND ANALYSIS WORK

► Work Areas
  - Council support
  - Technical analysis
  - Regulatory support

► Key Topics
  - 2019-2022 Term Report
  - New elements in the Plan
  - 2022 program achievement
  - Strategic planning
  - New processes and subgroups of the Council

2022 Budget Allocation – Planning & Analysis

29%
ACTIVE DEMAND MANAGEMENT (ADM)

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

► Key Topics
  - ADM and daily dispatch results and plans
  - Residential discount-rate enrollment
  - Phase-out of generator participation in C&I Curtailment and Daily Dispatch programs
  - Active Demand EM&V results of 2021 study efforts
  - Gas demand management opportunities

2022 Budget Allocation – Active Demand
RESIDENTIAL AND INCOME
ELIGIBLE WORK

► Work Areas
- Residential Sector Program Support
- IES Sector Program Support
- Equity
- Workforce Development (WFD)
- Coordinate with EM&V Efforts

► Key Topics
- Electrification and weatherization
- Retail Initiative enhancements (esp. HVAC)
- All-electric new construction
- Behavioral savings
- Home scorecards
- Multifamily customers

2022 Budget Allocation – Res and IES

- IES production
- Res and IES Equity targets
- WFD for heat pumps and other efforts
COMMERCIAL & INDUSTRIAL WORK

► Work Areas
- C&I Program Support
- Equity
- Workforce Development (WFD)
- Coordinate with EM&V Efforts

► Key Topics
- Deep Energy Retrofits
- Heat pump and electrification incentive offerings
- C&I Stakeholder Working Group
- Small Business Envelope and Insulation
- Retro-commissioning and controls opportunities
- Customer and vendor workforce development for building controls, heat pump systems and commercial envelope
EM&V WORK

► Work Areas
- EM&V Planning
- Study implementation
- EM&V Reporting
- Council/stakeholder engagement

► Key Topics
- EM&V-related term sheet agreements
- Council priorities: electrification, equity, and moderate income
- Prospective-only EM&V application framework transition
- A framework for savings claims from market effects
- Implementing studies in the Strategic Evaluation Plan
- Studies to support evolving programs, policies, and markets
TECHNICAL SERVICES WORK

► On-going administrative tasks that support the Council’s information sharing

► Work Areas
  - Meeting minutes
  - Consultant Team Quarterly Reports and Work Plans
  - Website relaunch
  - Website maintenance, updates, and document posting

2022 Budget Allocation – Tech Services
DELIVERABLES

► Work Plan focuses on topics to be covered and issues to be tracked

► Known deliverables include:
  - Analysis of 2019-2021 Term report
  - Presentations on 2022-2024 results and progress
  - Sector-specific presentations
    • Meeting topics still being finalized
  - Regular Tech. services activities

► Flexible approach to deliverables will allow Consultants to prioritize developments as they arise
  - Many PA commitments in the 2022-2024 Plan and still uncertainty from the DPU process
# 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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<tr>
<td>January</td>
<td>Memo</td>
<td>2022 Work Plan</td>
<td>Describes Consultant Team tasks, deliverables, and budget for 2022</td>
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<td>February</td>
<td>TBD</td>
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<td>March</td>
<td>Presentation</td>
<td>PA Q4 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>Consultant Team Quarterly Work Plan</td>
<td>Plan for Consultant Team activities and deliverables in Q2 of 2022.</td>
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## HIGH-LEVEL BUDGET PROPOSAL

### $1,386,070

### Year 3

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<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>Anna Sommer</td>
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### Budget Summary

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<th></th>
<th>Hours</th>
<th>Budget Amount (Labor)</th>
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THANK YOU

Questions?

► December 16, 2021