



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

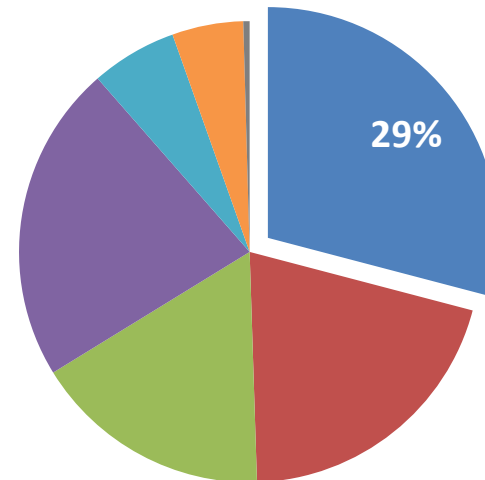
► Work Areas

- 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



ACTIVE DEMAND MANAGEMENT (ADM)

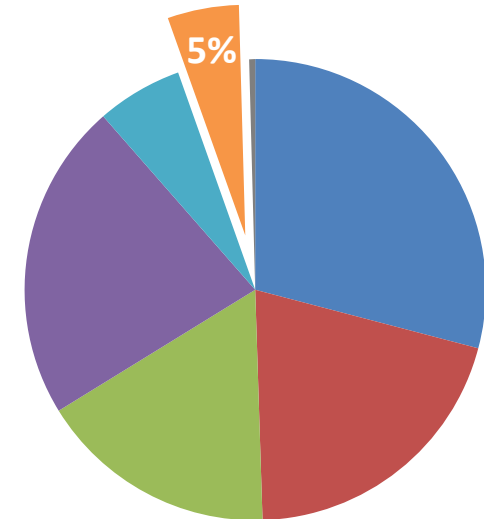
2022 Budget Allocation – Active Demand

► 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



RESIDENTIAL AND INCOME ELIGIBLE WORK

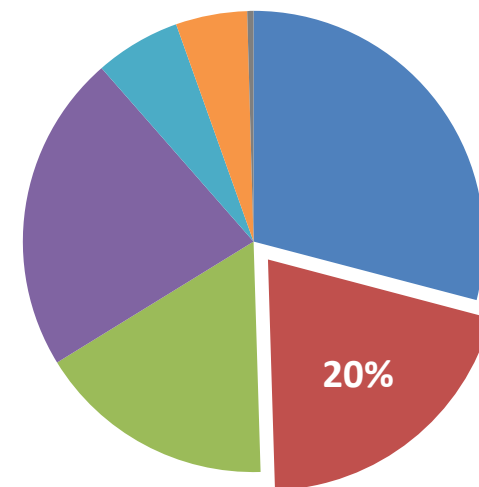
► Work Areas

- 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

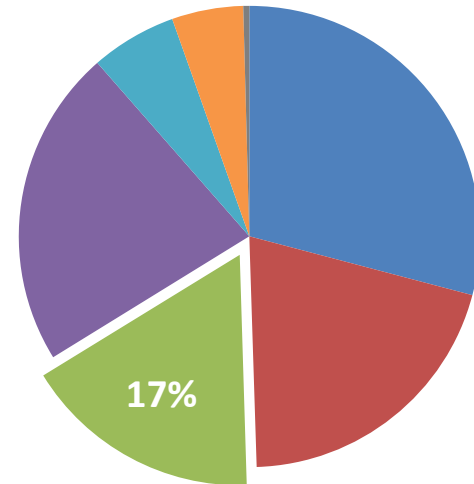
► Work Areas

- 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**

2022 Budget Allocation – C&I



EM&V WORK

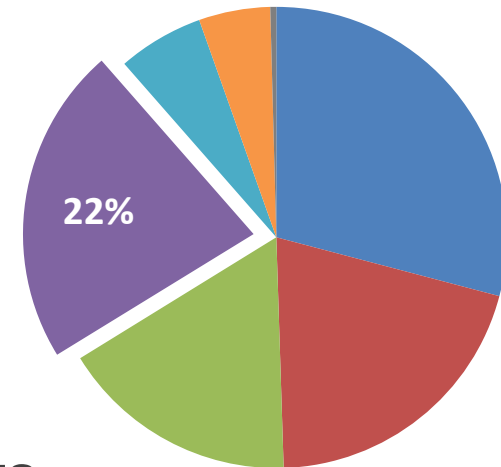
2022 Budget Allocation – EM&V

► 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



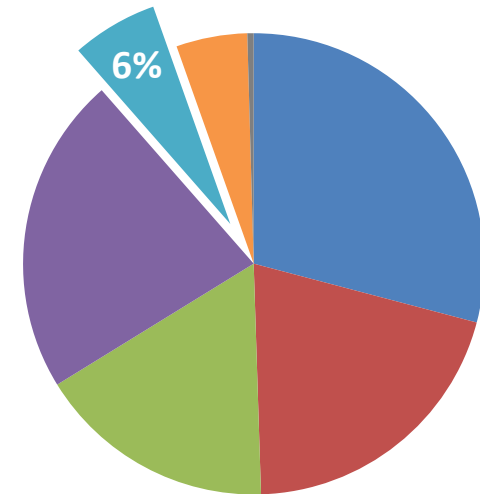
TECHNICAL SERVICES WORK

- ▶ **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



Month	Category	Topic	Description	Advisory Group(s)
January	Memo	2022 Work Plan	Describes Consultant Team tasks, deliverables, and budget for 2022	All
	Presentation	2022 Work Plan	Summarizes Consultant Team tasks and deliverables for 2022	All
February	TBD	TBD	TBD	TBD
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	Consultant Team Quarterly Work Plan	Plan for Consultant Team activities and deliverables in Q2 of 2022.	All

HIGH-LEVEL BUDGET PROPOSAL

\$1,386,070

YEAR 3

	Staff	Role	Strategic Planning	Planning & Implementation	Oversight of EM&V	Coordinate Technical Services	Total Hours	
Optimal Energy, Inc.	Eric Belliveau	Principal in Charge	300	290	40	40	670	
	Gretchen Calcagni	Project Manager and Technical Services Lead	250	300	15	100	665	
	Phil Mosenthal	SME: Codes and Standards, Policy	6	6			12	
	Matt Socks	SME: AESC Study, Potential Studies, TRM	200	60			260	
	Crystal Johnson	SME: Low Income/Equity	180	180			360	
	Michelle Keller	SME: C&I	90	90			180	
	Adam Jacobs	C&I Lead	250	500			750	
	Analyst	Analyst Support	170	250		200	620	
	Senior Analyst	Senior Analytic Support	50	60			110	
	Cindy Kimball	Contract Administrator & Technical Services Core Member				100	100	
Individuals	Jeff Schlegel	SME: Active Demand, Avoided Cost study, ISO issues, Policy	100	100			200	
	Caroline Hazard	Residential and Low Income Core Member	100	100			200	
	Ralph Prah	EM&V Lead			900		900	
	Bob Wirtshafter	EM&V Core Member			250		250	
	Michael Rufo	SME: GHG strategies, Distributed Energy Resources, CA best practices	10	10	10		30	
	Other Consultants (TBD)	SME TBD if necessary (average projected rates)	70	75			145	
AE	Lori Lewis	EM&V Core Member			110		110	
Cahoon	Carol Lasky	SME: Website and Graphic Design				75	75	
	Design Support	SME: Website and Graphic Design				75	75	
CX	Margaret Lynch	Residential and Low Income Lead	150	370			520	
	Jennifer Chiodo	C&I Core Member and EM&V Core Member	50	90	180		320	
EFG	Glenn Reed	Residential and Low Income Core Member	150	150			300	
	Anna Sommer	SME: Planning and Analysis	25	25			50	
	Dan Mellinger	SME: Lighting	25	30			55	
SP	Sean Becker	SME: Energy Storage and ADR	25	50			75	
Gor	Elizabeth Chant	SME: Low Income/Equity	40	40			80	
	George Lawrence	C&I Core Member	25	50			75	
TOTALS			Hours	2,266	2,826	1,505	590	7,187
			Budget Amount (Labor)	\$442,625	\$545,110	\$308,860	\$83,475	\$1,380,070
			Budget Amount (Travel)	\$3,000	\$3,000	\$0	\$0	\$6,000
			Total 2022 Budget Amount	\$445,625	\$548,110	\$308,860	\$83,475	\$1,386,070



THANK YOU

Questions?

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