



CONSULTANT TEAM 2022 WORK PLAN

► **January 14, 2022**

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

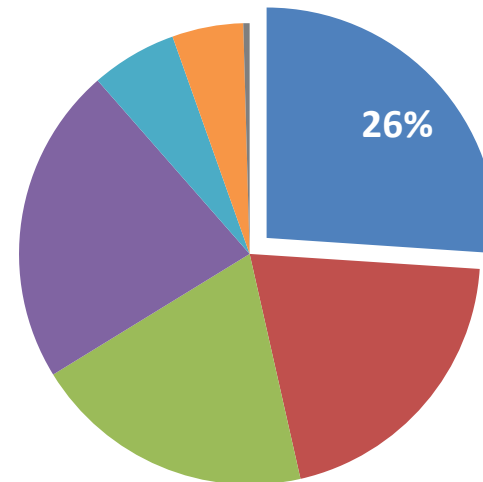
► Work Areas

- Council support
- Technical analysis
- Regulatory support

► Key Topics

- 2019-2021 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)

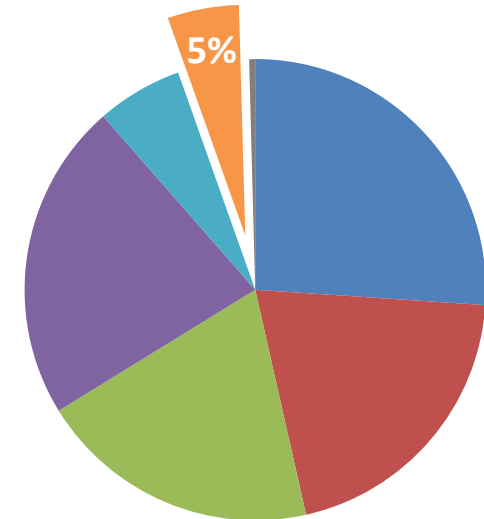
2022 Budget Allocation – Active Demand

► 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

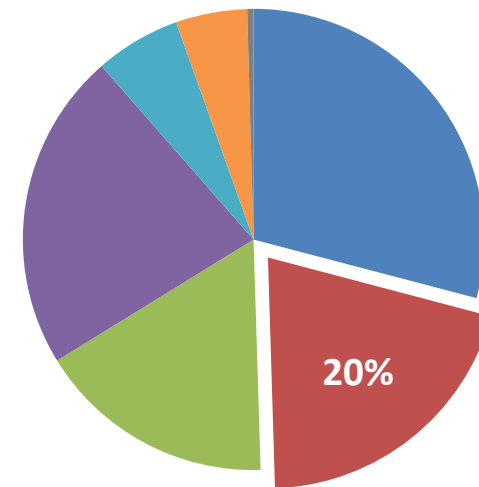
2022 Budget Allocation – Res and IES

► 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 energy scorecards
- Multifamily customers



- IES production
- Res and IES Equity targets
- WFD for heat pumps and other efforts

COMMERCIAL & INDUSTRIAL WORK

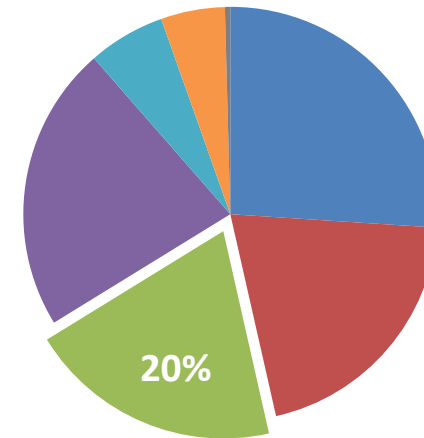
► Work Areas

- 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

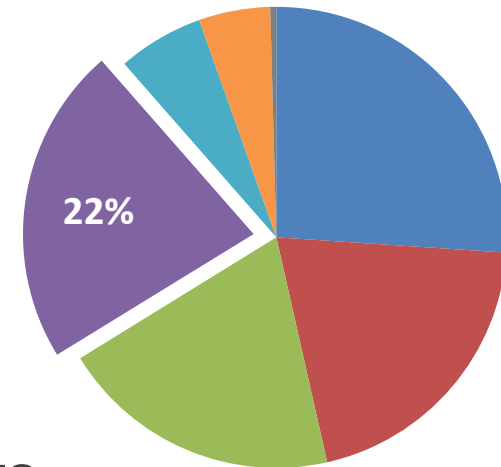
2022 Budget Allocation – EM&V

► 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



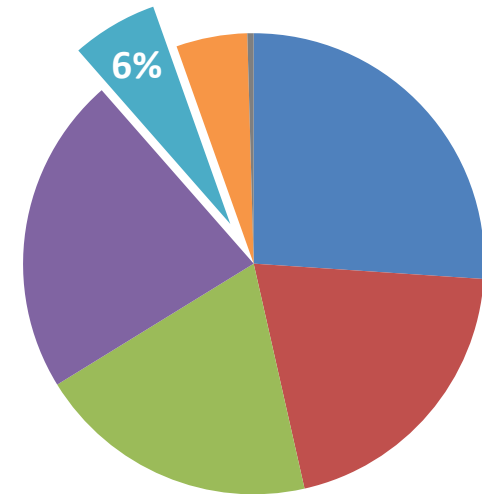
TECHNICAL SERVICES WORK

- ▶ **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

\$1,386,820

YEAR 3

	Staff	Role	Hourly Rate	Strategic Planning	Planning & Implementation	Oversight of EM&V	Coordinate Technical Services	Total Hours
Optimal Energy, Inc.	Eric Belliveau	Principal in Charge	\$220	250	290	40	40	620
	Gretchen Calcagni	Project Manager and Technical Services Lead	\$194	200	300	15	100	615
	Phil Mosenthal	SME: Codes and Standards, Policy	\$220	6	6			12
	Matt Socks	SME: AESC Study, Potential Studies, TRM	\$194	100	60			160
	Crystal Johnson	SME: Low Income/Equity	\$194	180	180			360
	Michelle Keller	SME: C&I	\$194	150	150			300
	Adam Jacobs	C&I Lead	\$189	250	600			850
	Analyst	Analyst Support	\$142	150	255		200	605
	Senior Analyst	Senior Analytic Support	\$173	50	60			110
	Cindy Kimball	Contract Administrator & Technical Services Core Member	\$100				100	100
Individuals	Jeff Schlegel	SME: Active Demand, Avoided Cost study, ISO issues, Policy	\$202	100	100			200
	Caroline Hazard	Residential and Low Income Core Member	\$176	100	100			200
	Ralph Prah	EM&V Lead	\$202			900		900
	Bob Wirtshafter	EM&V Core Member	\$204			200		200
	Michael Rufo	SME: GHG strategies, Distributed Energy Resources, CA best practices	\$235	10	10	10		30
	Other Consultants (TBD)	SME TBD if necessary (average projected rates)	\$210	70	75			145
CA/ AE	Lori Lewis	EM&V Core Member	\$220			160		160
CA/ CEI	Carol Lasky	SME: Website and Graphic Design	\$120				75	75
	Design Support	SME: Website and Graphic Design	\$105				75	75
CX	Margaret Lynch	Residential and Low Income Lead	\$184	150	370			520
EFG	Jennifer Chiodo	C&I Core Member and EM&V Core Member	\$210	50	90	180		320
EFG	Glenn Reed	Residential and Low Income Core Member	\$220	150	150			300
	Anna Sommer	SME: Planning and Analysis	\$220	25	25			50
	Dan Mellinger	SME: Lighting	\$205	25	30			55
Ca/ SP	Sean Becker	SME: Energy Storage and ADR	\$240	25	50			75
Ca/ SP	Elizabeth Chant	SME: Low Income/Equity	\$204	40	40			80
Ca/ SP	George Lawrence	C&I Core Member	\$194	25	50			75
TOTALS			Hours	2,106	2,991	1,505	590	7,192
			Budget Amount (Labor)	\$411,325	\$576,360	\$309,660	\$83,475	\$1,380,820
			Budget Amount (Travel)	\$3,000	\$3,000	\$0	\$0	\$6,000
Total 2022 Budget Amount TOTALS				\$414,325	\$579,360	\$309,660	\$83,475	\$1,386,820



THANK YOU

Questions?

► January 5, 2022