

Memo



→ CONSULTANT TEAM

To: **Energy Efficiency Advisory Council**
From: **Eric Belliveau and the Consultant Team**
Date: **November 8, 2022**
Subject: **EEAC Consultant Team 2022 Third Quarter Report**

SUMMARY

This document summarizes the work completed by the EEAC Consultant Team during the third quarter of 2022. 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. The Consultant Team focused significant time on supporting and guiding implementation of the numerous new elements included in the PAs' Plan, many of which ramp up in 2022. We also provide a table at the end of the document that lists the known deliverables the Team produced over the quarter.

PLANNING & ANALYSIS

In Q3, the Planning and Analysis Advisory Group focused its efforts on reviewing the results of the PAs' 2019-2021 Term Report, reviewing a mid-term modification (MTM) request from Liberty, reviewing Q2 2022 results, and supporting new elements included in the PAs' Plan. These tasks are summarized in the table below:

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
July	EEAC Meeting	1.Active Demand 2.New Construction 3.C&I Deep Energy Retrofit	Review and provide feedback on PA draft presentations; develop materials brief Councilors	Draft presentation(s)	Complete
	N/A	Liberty MTM	Review MTM request and provide recommended action to the EEAC		Complete
August	EEAC Meeting	1.Liberty MTM 2.Res Multi-family updates 3.Renter Strategic Plan	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s)	Complete
	N/A	Q2 Report	Review results of the PA Q2 report and associated data		Complete
	N/A	2019-2021 Term Report	Review and analyze results of the PAs' 2019-2021 Term Report		Complete
September	EEAC Meeting	1.2019-2021 Term Report 2.Q2 Report 3. Renter Strategic Plan	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s)	Complete

	N/A	2019-2021 Term Report	Review and analyze results of the PAs' 2019-2021 Term Report		Complete
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ACTIVE DEMAND

In Q3, Active Demand Management activities were focused on review of meeting materials and ongoing evaluation efforts.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
July	EEAC Meeting	Active Demand	Review and provide feedback on PA draft presentations; develop materials	Draft presentation	Complete
On-going Q3	NA	Prepare for review of 2022 Summer ADM	Request data from PAs on 2022 Summer ADM season reporting	Data from PAs on 2022 Summer ADM season reporting	Complete
Q3	NA	2021 ADM Evaluation	Review 2021 ADM season evaluation	2021 ADM season evaluation	Complete

RESIDENTIAL AND INCOME ELIGIBLE

The Residential Advisory Group's primary areas of focus this quarter were reviewing the PAs' Strategic Renters Plan, rollout of initiatives early in the 2022-2024 Term, and early performance results. This quarterly report is structured primarily around the Residential Management Committee (RMC) meetings which took place twice per month.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
July	July 11 Equity Working Group (EWG)	Strategic Renters Plan	Review draft plan; prepare presentation comparing plan to prior input from EWG	Draft plan, prior comments	Complete

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
	July 13 Residential Management Committee (RMC)	Rollout of moderate income offers; heating and cooling consultations	Prepare discussion questions for agenda; secure participation of relevant PA staff	Updates from PAs	Complete
	July 20 EEAC	Various; res team to support presentation on income eligible active demand management	Prepare presentation	Historic and future planned production of IES ADM measures	Complete
	July 27 RMC	Water heating, with a focus on electrification	Prepare discussion questions for agenda; secure participation of relevant PA staff	Updates from PAs	Complete
August	August 8 EWG	Strategic Renters Plan	Prepare draft comments on plan for EWG review and discussion	Various comments on plan, including from public listening session	Complete
	August 10 RMC	Residential multifamily retrofit	Prepare draft presentation for EEAC	PAs' draft presentation	Complete
	August 17 EEAC	Residential multifamily retrofit	Prepare draft presentation for EEAC; provide comments on PAs' draft presentation	PAs' draft presentation	Complete
	August 24 RMC	Lighting program design for disadvantaged customers	Prepare discussion questions	EM&V results	Complete
September	September 14 RMC	Q2 results; additions and renovations offer	Review Q2 report; prepare discussion questions for agenda; secure participation of relevant PA staff	Q2 report	

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
	September 21 EEAC	Term report and Q2 results	Review Q2 and term reports; contribute to team presentations	Q2 report and term report	
	September 28 RMC	Heat pumps	Review relevant production data and PA updates; prepare discussion questions for agenda; secure participation of relevant PA staff	Updates from PAs	
On-going Q3	N/A	EM&V	Coordinate with res EM&V efforts, including providing input on draft res EM&V work products	Draft res EM&V reports	Reviewed Lighting Purchase Behavior Study and discussed application of results to PAs' programs; participated in Res Customer Profile StudyL Working Group and commented on content of results briefs
	N/A	Equity Working Group	Negotiate equity targets for EJ municipalities	Baseline data from PAs	Ongoing
	N/A	PA reporting	Review and analyze PA reporting, including term report, monthly data dashboards and 2022 Q2 report and KPIs	Term report; data dashboards; Q2 report	Complete
	N/A	Income Eligible Program	Coordinate with LEAN and DOER on an ongoing basis; participate in Low Income Best Practices Working Group and Low Income Multifamily Advisory Group	N/A	Ongoing

COMMERCIAL AND INDUSTRIAL

The C&I team’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, and newly added PA Subject Matter Expert (SME) calls. Where possible, substantive matters were discussed at CIMC to ensure a discussion and exchange of information and perspectives. In addition, there were ongoing matters we are attending to that stem from prior work with the CIMC, EEAC, and C&I stakeholders, including addressing the EEAC’s priorities and general work to monitor the PAs’ implementation of their 2021-2024 Plan commitments. 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	July 6 CIMC Meeting	1.C&I Efforts in EJ Communities 2.Equity	Review and provide feedback on PA Progress to engage with Community First Partnerships and Updates to strategic interventions outlined in the Plan		Complete.
	July 19 CIMC Meeting	Prescriptive (Rx) Weatherization (Wx) Offering	Review and provide feedback on evolving Rx Wx offering: measures, incentives, project evaluation tools, rollout plans		Complete. Will continue to follow up on details of the offering and its launch across the PAs.
	EEAC Meeting	1.Active Demand 2.New Construction 3.C&I Deep Energy Retrofit	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s)	Complete. C Team shared comments on new C&I DER offering.
August	August 3 CIMC Meeting	PA Marketing Efforts: GHG Reductions and Mass Save Portfolio in general	Review and provide feedback on GHG Marketing approach and any shared customer-facing materials	August	Complete

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
	August 16 CIMC Meeting	Equipment & Systems Performance Optimization (ESPO) / Existing building (EB) and Monitoring Based (MB) Commissioning	Review and provide feedback on ESPO offering and progress with commissioning efforts and results to date	New Construction Leads from National Grid and Eversource	Meeting canceled due to summer vacation absences. Topic moved to Q3 schedule.
	EEAC Meeting	Liberty MTM	Review and provide feedback on PA draft presentations; develop materials; brief DOER and Councilors	Draft presentation(s)	Complete
September	Sept 7 CIMC Meeting	Q2 2022 Review	Review and provide feedback on the results of the PA Q2 report and associated data		Complete
	Sept 20 CIMC Meeting	ESPO / EB and MB Commissioning	Review and provide feedback on ESPO offering and progress with commissioning efforts and results to date	NC Leads from National Grid and Eversource	Complete
	EEAC Meeting	1.2019-2021 Term Report 2.Q2 Report	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s); any updates to draft Q2 report from PAs	Complete
On-going Q3	Informal C&I PA Leads Call	Occasional informal check-ins with CIMC co-chairs and DOER	Agendas determined before meetings.		Calls held July 8, August 8, and September 28.
	PA SME calls	New C&I Deep Energy Retrofit (DER) offering	Review and provide feedback on evolving PA plans for new DER offering		Calls and e-mail discussions on this topic lead to agreement for a Nov launch. Calls held August 1, August 25, September 12.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
	PA SME Calls	Topics linked to CIMC calls	Meet with PA SMEs on selected topics to address C Team program and implementation questions in preparation for larger CIMC meetings.		No SME calls held during Q3.

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.

Time Period	Task	Information Needed	Status
Ongoing Q3	Continue working with the PAs to respond to EM&V-related provisions in the DPU Three-Year Plan order.	None	This task has been largely completed.
	Continue advancing studies currently in the implementation stage. A few examples include the Non-Residential New Construction NTG study, the Residential Language Isolated Customer Journey Mapping and Barriers study, and the Municipal Partnership Initiative study.	None	Good progress was made on study implementation in Q3. The studies listed to the left are all still in the implementation stage and are generally on schedule.
	Oversee final reporting on projects that are wrapping up. Some projects expected to be in the final reporting stage in Q3 include the C&I Comprehensive TRM Update study, the Heat Pump Crossover Temperature Optimization study, and the Induction Stovetop NEI study.	None	A number of reports were finalized in Q3, including two of the three studies listed to the left. The Induction Stovetop NEI study produced an interim report, with a final report expected in Q4.

Time Period	Task	Information Needed	Status
	Develop detailed plans for new studies, including both those called out in the 2022-2024 SEP and others as needed.	None	Several studies were moved from the planning to the implementation stage in Q3, including the Standards Promulgation Attribution study and the 2021 C&I Custom Electric Impact Evaluation.

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	Post meeting materials and public comments for the July-September EEAC Meetings.	On-going Q3	Complete
	Take meeting minutes at the July-September Executive Committee and EEAC meetings.	Meeting materials for the April-June 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	Active Demand Management	Slides on Active Demand Management in the Income Eligible Sector	Residential/Planning & Analysis	Complete. Presented at the July 20 EEAC meeting.
	Presentation	Alternative and Complimentary Implementation Models	A presentation on ways the PAs have and currently utilize third parties to support program implementation	Planning & Analysis	Complete. Slides were posted, but ultimately not presented due to meeting time constraints.
August	Presentation	Residential Multi-family updates	A presentation on multifamily program result and overcoming key barriers	Residential	Complete. Presented at the August 17 EEAC meeting.
	Memo	Consultant Team Q3 Work Plan	A memo identifying key tasks and deliverables of the Consultant Team in Q3 2022	All	Complete.
	Memo	Consultant Team Q2 report	A report summarizing the activities of the Consultant Team in Q2 2022	All	Complete.
September	Presentation	Q2 Results	A presentation highlighting results of the PA Q2 report and KPI data.	All	Complete. Presented at the September 21 EEAC meeting.
	Presentation	2019-2021 Term report	A presentation highlighting results from the 2019-2021 Term Report	All	Complete. Presented at the September 21 EEAC meeting.

	Presentation	Strategic Renter Plan	A presentation providing comments on the PA revised strategic renter plan.	Residential	Complete. Slides were posted, but ultimately not presented due to meeting time constraints.
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