Memo

MA ENERGY EFFICIENCY ADVISORY COUNCIL

→ CONSULTANT TEAM

To: **Energy Efficiency Advisory Council**

From: **Eric Belliveau and the Consultant Team**

Date: **January 12, 2024**

Subject: **EEAC Consultant Team Proposed 2024 Work Plan and Budget Request**

SUMMARY

Strategy for this Work Plan

The Consultant Team expects much of its focus in 2024 to be on supporting the development of 2025-2027 Plan. We will also continue to track and report on PA progress towards 2022-2024 goals and Council priorities include electrification, GHG reductions, and equity, among others.

As in the past, our work is divided into several advisory groups, representing the major areas of effort across the entire range of Consultant Team responsibilities and portfolio of Program Administrator (PA) programs. Within each advisory group, several work areas further clarify the tasks and topics that we plan to address over the coming year. For budget tracking purposes, these tasks will be tracked against the budget categories submitted as part of the Consultant Team's response to the RFR for Council technical services. The Consultant Team will also be developing quarterly work plans during 2024 that will accommodate EEAC priorities not covered in this plan as necessary. We have included a separate deliverables section as well as a timeline of when these deliverables are expected to be completed but note that we retain flexibility to respond to the Council and as other topics/issues arise. Specific deliverables will also be included in each Consultant Team quarterly work plan. The budget described in this work plan reflects a 12-month period from January 1-December 31, 2024.

One task that will cut across all advisory group areas will be supporting the development of the 2025-2027 Plan. Rather than describe the same Three-Year planning process tasks in each advisory group individually, we have described the work of the whole Team related to this task in the section below. Additional three-year planning work specific to individual advisory groups, such as developing the EM&V 2025-2027 Strategic Evaluation Plan (SEP) and supporting the Avoided Energy Supply Cost Study (AESC), are covered in their respective sections.

THREE YEAR PLANNING

As previously stated, the 2025-2027 planning process will account for a significant amount of the Council's efforts in 2024. We understand that the Council desires a collaborative process for developing the Three-Year Plans and will work with the Council, individual Councilors, other stakeholders, and the PAs to get input and feedback and to seek outcomes that are developed collaboratively and have support of all or the majority of voting Councilors. We will take our direction from the Executive Committee and the Council at large in terms of how best to address deliverables for the planning process.

Since all advisory groups will be involved in these efforts, we've provided the table below to summarize the planning process activities and deliverables we expect to occur in 2024. We note that given the revised timeline for PA Plan submission as well as determination of the Plan GHG reduction goal, the majority of planning activities will need to be completed earlier that previous planning cycles.

Activity/Milestone	Description	Timeframe
PA Potential Studies	Review and assess PA draft and final potential study results	January 2024
GHG Goal	Complete analysis as needed to support the development of the 2025-2027 Plan GHG goal Provide analysis and input on ways to achieve GHG goal once developed	January-March 2024
Draft 2025-2027 Plan	Initial review of the PA draft Plan between March filing and April EEAC meeting	April 2024
	Assist the Council in reviewing the draft Plan. Assess in detail the aspects of draft Plan including goals, budgets, cost-effectiveness, etc.	May-June 2024
EEAC Comments on 2025-2027 Plan	Assist the EEAC in developing its comments and resolution on the draft Plan	June 2024
Analysis and Term Sheet Negotiations	Identify main assumptions that account for any difference in the proposed goals and budgets put forward by the PAs and analysis completed by the Consultants May include targeted analysis on specific topics and various discussions. Process results in final Term Sheet, which is included in the Plan and referenced in the Council Resolution on the Plan	May-August 2024
Final 2025-2027 Plan	Coordinate with the PAs on the development of the final Plan. Support the Council in developing its comments and resolution on the final Plan.	August-October 2024
Strategic planning	Work with DOER, AGO, and PAs to schedule and participate in meetings related to high priority topics identified as areas of focus for the next Three-Year Plan	On-going in 2024

PLANNING & ANALYSIS

Context

Our work in the area of planning and analysis will focus on several important Council support activities. These include:

- → Supporting the Council in its efforts to ensure effective program and portfolio performance and to achieve the 2022-2024 Three-Year Plan goals.
- → Reviewing and assessing the results of the 2022-2024 Three-Year Plan, including analyzing successes and missed opportunities.
- → Ensuring that the Council is effective in performing its responsibilities, and that Council processes are informative, effective, and efficient.
- → Aiding the Council as it works through 2025-2027 Three-Year planning process.
- → Providing technical analysis to support the development and implementation of a strategic vision for the future, in order to identify opportunities and implement crucial adjustments to the energy efficiency

landscape in Massachusetts.

To work towards and facilitate these outcomes, we will work in the three major planning and analysis areas described below. To the extent a task comes up that is not explicitly or fully listed in this plan, the Consultant Team will establish a scope and budget for its execution.

Work Areas

PARTICIPATE IN EEAC MEETINGS, BRIEF AND SUPPORT THE COUNCIL

- → Prepare for and attend all EEAC meetings and Executive Committee meetings as directed.
- → Provide independent technical support in advance of and during Council and Executive Committee meetings for all areas of energy efficiency and demand reduction planning, policy development, technical and economic analysis (cost-effectiveness), program design and implementation, and tracking and monitoring of progress towards achieving the 2024 goals. This includes a variety of deliverables including emails, spreadsheets, memos and presentations.
- → Provide individual briefings to Councilors on a rotating basis with a goal of talking to each Councilor at their desired frequency.
- → Assist with providing orientation for new(er) Councilors. This includes individual meetings, review and edit of the councilor handbook and any other historical information the new councilor may need.
- → Support newer processes and subgroups of the Council as directed including the Data Request Process, C&I working group, and Equity working group.

TECHNICAL ANALYSIS

- → Support planning and analysis for implementation of 2022-2024 Plan; review and analyze results.
  - Review and analyze available information to guide implementation, evaluation, and reporting of new elements in the Plan such as electrification, GHG targets, work force development efforts, and equity metrics, among others.
  - Review, analyze, and assess the PAs' reports and reporting, including the monthly dashboards and quarterly reports. Review trends and multi-year comparisons, review reporting on new elements of the Plan, and provide Consultant findings and recommendations to the Council. This task includes presentations to the Council throughout the year.
  - Use the PA reporting to assess and report to the Council on the status of program achievement towards the 2024 and 2022-2024 Three-Year Plan goals and related topics. Identify and assess any data or programmatic trends which portend successes or challenges in program delivery and savings. This may take the form of presentations and/or memos.
- → Identify reporting improvement opportunities.
  - Work with the PAs and the Council to design and implement further improvements to the PA reports and analysis, quarterly and otherwise, in response to Councilor feedback, including forward-looking projections and enhanced trend comparisons in the reports. This includes continuing to refine and clarify quarterly Key Performance Indicator (KPI) data.
  - Review Mass Save Data and recent revisions and provide feedback to the PAs. Provide input on future revisions and additions. Task includes ongoing discussions and written suggestions on potential changes.
- → Support cost-effectiveness screening, benefits analysis, and EM&V activities.
  - Review final work products for the Regional Avoided Energy Supply Component (AESC) avoided costs study and participate in the study group meetings with the PAs (and potentially with representatives from the participating states) and assess implications of results on 2025-2027 Plan.
  - Analyze cost-effectiveness screening, assessment of benefits and costs, and application of EM&V results and field experience; propose appropriate improvements for cost-effectiveness analysis and common screening tools**.** Task includes a memo reviewing current tools and suggestions for synthesis among MA PA tools.

- Review, comment on and contribute to the electronic Technical Reference Manual (eTRM) including reviewing the benefit cost ratio (BCR) models inputs for consistency with the eTRM where applicable.

→ Coordinate strategic planning

- Coordinate with the PAs and DOER on strategic planning efforts through the more regular meeting of the Planning and Analysis Group (PAG). This group provides a forum to discuss long term strategic planning issues that may not be part of the current plan. Examples of this for 2025-2027 include preparing for the phaseout of fossil fuels, key performance indicators, revised new construction offerings, and EM&V policy, among others. This is separate from the implementation teams' approach to the issues.

→ Contribute to other state and regional planning and analysis efforts

- As needed, contribute to and review ISO-NE efficiency forecasting efforts, ensure the consistent and appropriate treatment of efficiency in the ISO forecast, and review and provide comments on the work of the ISO-NE Energy Efficiency Forecast Working Group. Task includes participation in the working group and close coordination with DOER and reporting to the Council on outcomes and for decisions that determine key project direction.
- Provide technical assistance for reporting and tracking the Three-Year Goals and energy efficiency impacts for the Clean Energy and Climate Plan (CECP), including impacts of efficiency programs and other efficiency strategies on the 2030 CECP goals. Task includes memos and/or presentations to the Council as needed.

SUPPORT THE COUNCIL ON REGULATORY ISSUES AND DPU PROCEEDINGS

→ Track, monitor, review, summarize, and present to the Council information on all relevant DPU proceedings affecting energy efficiency and demand reduction programs, as assigned.

- Assess Mid-Term Modification (MTM) requests filed by the PAs and provide recommended actions to the Council in the form of a memo(s).

→ Support additional proceedings that the Council wishes the Consultants to cover as they relate to the continued delivery of the Three-Year Plan.

ACTIVE DEMAND MANAGEMENT

Context

The PAs' 2022-2024 Plan includes an expansion of active demand offerings first made available statewide in the 2019-2021 Plan. Program enrolled active demand capacity from things like residential direct load control for Wi-Fi thermostats and energy storage is expected to increase dramatically over the course of the Plan. Commercial interruptible load curtailment programs will be going through a transition period as fossil fuel generators are phased out, and controls/operations-based curtailment strategies will become the core mechanism for larger customers to participate. The PAs made new commitments to deliver more Wi-Fi thermostats through IES programs, creating additional opportunities for these customers to participate in ADM offerings. The 2022-2024 Plan also provides new guidance for storage developers on daily dispatch's 5-year incentive lock, providing clarity to the market. In 2022 "An Act Driving Clean Energy and Offshore Wind" was signed into law, giving the PAs the ability to propose the integration of storage and renewables with efficiency and electrification in future plans. In 2024, the Active Demand Group will focus on ensuring this provision is appropriately considered during the planning process while also monitoring PA commitments in the 2022-2024 Plan pertaining to expanding active demand capacity in Mass Save.

Work Areas

PLANNING, TECHNICAL, ANALYTICAL, AND STRATEGIC SUPPORT FOR IMPLEMENTATION OF THE 2022-2024 PLAN

→ Review and analyze available information to guide implementation, evaluation, and reporting of ADM elements of the Plan.

→ ADM supporting tasks will include:

- Coordinate with the Active Demand PA staff on the 2023 ADM results and planned efforts for the summer of 2024 through continued regular meetings.
- Coordinate with sector-specific consultant team members, PA staff, councilors, and external stakeholders on further integration of EE and ADM measure offerings through Mass Save.
- Support the PAs with identifying lessons learned from the ADM and daily dispatch field experience, results, and market feedback. Ensure new guidance on 5-year incentive lock is effectively communicated to the market.
- Track residential discount-rate enrollment through updated ADM reporting and ensuring PAs and LEAN market the Connected Solutions program to IES customers.

IDENTIFY AND REVIEW NEW OPPORTUNITIES AND EM&V IMPACTS

→ Complete review of the Active Demand EM&V results of 2023 study efforts.

→ Review work plans and evaluations proposed in the 2022-2024 Strategic Evaluation Plan; Planned studies include a combined impact/process evaluation of the C&I Curtailment Program as well as a Literature review of EE/DR integration in other jurisdictions.

→ Coordinate with the PAs on gas demand management opportunities and potential benefits and monitor PA gas demand response pilots initiated through other non-energy efficiency rate cases (EGMA and National Grid).

→ Advocate for potential LMI benefits for ADM in the next AESC.

→ Track progress on electric system investments that could require changes in 2025-2027 Energy Efficiency Investment Plan.

RESIDENTIAL AND INCOME ELIGIBLE SECTORS

Context

2024 will be a demanding year for the Mass Save Residential and Income Eligible Sectors as the PAs and LEAN strive to implement ambitious electrification and equity commitments for the 2022–2024 Plan while bringing forward draft and final plans for the 2025-2027 Term that are responsive to the Secretary's greenhouse gas goals and the EEAC's December 2023 resolution. While there were notable areas of success for the PAs in 2023—namely in meeting heat pump production goals—success has been harder to come by in achieving equity commitments, most notably in serving moderate income customers.

The Consultants' work for the Residential and Income Eligible Sectors this year will have two primary areas of focus:

1. Working with the PAs and LEAN to support successful achievement of their commitments and goals in the final year of the 2022-2024 Plan Term and tracking, assessing, and reporting to the EEAC on progress in doing so. This will include an intensive focus on achievement of the heat pump installation goals for space and water heating in the Term Sheet and weatherization goals for both Sectors. In addition, the Consultants will continue to work to advance equitable delivery of Mass Save programs and services to all Residential and Income Eligible customers, with a specific focus on improving performance of moderate income programs and achievement of the Equity Targets negotiated with the PAs for the 2022-2024 Term.
2. Working to ensure the Council's recommendations for the 2025-2027 Plan are fully considered by the Program Administrators and incorporated to the maximum extent possible in the final Plan.

Additional context, details, and work efforts are provided for three work areas below—Residential Program Support, Income Eligible Program Support, and Equity.

Work Areas

RESIDENTIAL PROGRAM SUPPORT

In this third year of the 2022-2024 Term, the Mass Save Residential programs are faced with the dual challenges of achieving commitments for the full current Term and developing an ambitious plan for the 2025-2027 Term. Heat pump installations (unit numbers, types, savings realization, quality of installations) will continue to be a primary focus, as will

meeting planned values for weatherization installations. The Consultants' work for the Residential Sector in 2024 will include the following:

- → Track, provide input on, and report on PA progress towards meeting 2022-2024 Plan goals and commitments, including:
  - Meeting heat pump installation goals from the 2022-2024 Term Sheet
  - Ongoing assessment and advancement of opportunities to improve promotion, education, and installation of heat pumps for space and water heating
  - Weatherizing as many homes as possible to reduce greenhouse gas emissions and prepare for electrification.
  - Transitioning production in new construction from gas and propane to electricity under the PAs' all-electric new construction offer
  - Enhancing services to multifamily customers—both property owners and tenants—with an emphasis on electrification of multifamily properties
  - Easing participation in residential programs through streamlining, reducing eligibility criteria, virtual tools, and other efforts
  - Maximizing opportunities to secure savings from residential appliances
  - Workforce development for new and existing workers including heat pump dedicated training and market transformation, Clean Energy Pathways, and PA workforce development collaboration status with MassCEC
  - Reviewing status of PA efforts to claim behavioral savings and examine opportunities to leverage recent DPU approvals of advanced metering infrastructure
  - Advancing opportunities to co-promote and leverage Inflation Reduction Act incentives and rebates with those of Mass Save
  - Monitor rollout of home energy scorecards
- → Advance incorporation of Council recommendations in the 2025-2027 Plan, including:
  - Collaborating with PAs in the Residential Management Committee and other forums on new program strategies to achieve priorities for electrification and enhanced customer experience
  - Integrated delivery of weatherization and heat pumps
  - Transitioning altogether away from fossil fuel heating in retrofits and new construction
  - Enhanced data reporting and management
- → Support ongoing work of the Council
  - Review and analyze residential information and data in the PAs' monthly data dashboards, quarterly reports, Term Report and periodic reporting on relevant indicators and other term sheet commitments as well as any ad hoc reports. Use data to identify trends, successes and challenges, and PA differences
  - Participate in RMC meetings twice per month to discuss progress and provide support to PA efforts to achieve their commitments for the 2022-2024 Plan Term. The schedule of focused topics for discussion will be developed with the RMC in Q1 and is expected to track Council priorities for 2023
  - Participate in Council meetings with a residential focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors

INCOME ELIGIBLE PROGRAM SUPPORT

As with the Residential Sector the Consultants' work for the Income Eligible Sector in 2024 will include dual focuses on achieving goals for the 2022-24 Term and planning for ambitious goals for the 2025-2027 Term. Primary focuses will be on electrification and customer experience. In 2024, the Consultants' work for the Income Eligible Sector will include the following:

- → Work collaboratively with PAs and LEAN to provide support for 2024 IES efforts to meet goals for the 2022-2024 Term, including to:
  - Meet production goals for heat pumps for space and water heating for all PAs
  - Provide analytic support to determine appropriate strategic direction for IES support of fossil fuel heating
  - Monitor rollout of the new Statewide Client Service Center
  - Assess expansion of service delivery to Home Performance Contractors
  - Gather data and analyze differences in CAPs to inform potential strategies for IES to be delivered more uniformly throughout the Commonwealth
  - Develop a dedicated IES offer for battery storage
- → Advance incorporation of Council recommendations in the 2025-2027 Plan, including:
  - Continuing to advance electrification of space and water heating
  - Phasing out support for lighting and fossil fuels
  - Assessing and improving equitable service to low income customers
  - Implementing continuous improvements in co-delivery of federal and Mass Save funds
- → Support ongoing work of the Council
  - Review and analyze income eligible information and data in the PAs' monthly data dashboards, quarterly reports, and periodic reporting on relevant indicators and other term sheet commitments as well as any ad hoc reports. Use data to identify trends, successes and challenges, and PA differences
  - Participate in Council meetings with an income eligible focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors.
  - Participate in monthly Low Income Best Practice meetings and provide support for new and continuing initiatives of group
  - Participate in regular Income Eligible meetings with DOER to discuss progress and provide support
  - When appropriate, participate in and provide support for regular DOER/LEAN meetings

EQUITY

This work plan category was added in 2022 to reflect the focus on equity in the 2022-2024 Plan. The 2022-2024 Plan includes ambitious PA commitments to improve equity of service, including a robust set of Equity Targets. Equity issues apply to all sectors (Residential, Income Eligible, and C&I), though this section of the Work Plan applies specifically to Residential and Income Eligible Sectors. The Consultants' work in 2024 for the Equity work area regarding Residential and Income Eligible Sectors will include the following:

- → Collaborate with Equity Working Group—including the PAs—to incorporate the EEAC's equity recommendations in the 2025-2027 Plan, including revising Equity Targets
- → Work with the PAs and their partners to improve results for moderate income customers
- → Monitor and assess progress in executing the commitments of the Strategic Renters Plan and in developing and implementing a Language Access Plan
- → Monitor and assess Community First Partnership program as well as efforts to foster alternative

partnership models

- → Monitor and assess efforts to develop and support a diverse workforce
- → Participate in Equity Working Group meetings and support group with best practices research, compilation of relevant information, and other preparations as requested by the Group and its co-chairs
- → Review, analyze/assess, and report on PAs' reporting of progress toward achieving the Equity Targets
- → Review, analyze/assess, and report on other regular PA reporting on equity matters (monthly, quarterly, biannual, annual, Term and ad hoc)
- → Participate in Council meetings with an equity focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors

COORDINATE WITH EVALUATION MEASUREMENT & VERIFICATION (EM&V) EFFORTS

- → Contribute research priorities for the Strategic Evaluation Plan
- → Regularly coordinate with EM&V Advisory Group to exchange updates on relevant work efforts
- → Review draft study reports and provide input to ensure they will yield useful and actionable information to assess and enhance implementation efforts
- → Identify outcomes and recommendations in final studies and reports that should prompt responsive actions by PAs and determine whether they are being implemented effectively.

COMMERCIAL AND INDUSTRIAL SECTOR

Context

The 2024 Plan year, the third and final year of this transformational Three-Year Plan, is critical for the Commercial and Industrial (C&I) sector as the PAs continue to struggle to engage C&I customers in the multiple new offerings developed and launched late in 2022 to achieve the ambitious portfolio goals. C&I Deep Energy Retrofit, C&I New Construction (based on energy-use intensity), and enhanced weatherization incentives for small business rental customers all remain priorities for the Council in 2024.C&I lighting savings from controls remain a challenge, although the program was starting to see an uptick in participation by the end of 2023. To achieve plan goals, the PAs will need to accelerate the transformation of the HVAC and refrigeration markets with an emphasis on larger and more complex projects, increased focus on existing building commissioning and commissioned controls, larger electric heat pumps and variable refrigerant flow systems, tighter building envelopes and increased support for overall decarbonization efforts. In addition to new incentives, the PAs will need to provide greater programmatic assistance and communication to help customers and their technical and implementation contractors navigate programs more easily. Comprehensive identification of energy efficiency opportunities and accurate evaluation of savings is a critical input in making the business case for C&I stakeholders to prioritize energy and carbon reduction strategies as practical and climate-forward investments. The C&I Working Group continues to provide a bi-directional forum for the PAs to learn directly from the market and to provide guidance to market participants about directional changes in the Mass Save program. Additional details and work efforts are provided below.

Work Areas

The C&I Consultant Team anticipates a continuation of work with the DOER and the PAs in a few key areas of activity:

C&I PROGRAM SUPPORT

- → Track, provide input, and report on PA progress towards 2022-2024 Plan goals and commitments, including but not limited to:
  - Monitor and support PA increased contractual requirements for Small Business Turnkey vendors to develop and install comprehensive lists of efficiency measures as well as track and document marketing efforts and their impacts.
  - Monitor PA progress in capturing projects that contribute to Green House Gas reduction goals with specific focus on electrification and communicating the relationship between energy savings progress and this target.

- Monitor PA progress in marketing and processing customer applications for Deep Energy Retrofits offering; monitor PA efforts to establish Energy Star Portfolio Manager accounts (or equivalent) for Term Sheet commitments about tracking data for these participants.
- Increase participation in lighting controls-focused efficiency measures.
- Meet heat pump unit benefit goals from the 2022-2024 Term Sheet including displaced fossil fuel usage and overall square footage electrified.
- Monitor PA progress in developing new heat pump incentive offerings for customers of all sizes and baseline fuels; monitoring PA progress in educating customers about non-HP opportunities for electrification, particularly in the Industrial & Manufacturing sectors.
- Expand C&I demand management offers to increase demand savings and manage peak loads.
- Increase participation in Monitoring-Based Commissioning (MBCx), Building Management Systems & Controls (BMS) and Equipment System Performance Optimization (ESPO) offerings for existing buildings.
- Expand the volume of weatherization (Wx) projects that are completed for Small Business customers and ensuring that they are done in conjunction with other electrification projects. Continue to focus on Main Street events to drive Wx projects.
- Document areas where the need for more BCR measure-level data in Quarterly PA reporting is essential to accomplish this tracking for HVAC in Large C&I.

→ Analyze historic, and communicate current, program performance to identify pipelines, expected future forecasts, trends, opportunities, and deficiencies (including possible solutions to fixing identified deficiencies) including:

- Custom HVAC projects including early replacement and replace-on-fail measures, retro-commissioning, energy management system and system optimization.
- Electrification and fuel switching HVAC projects, including air and ground-source heat pumps and variable refrigerant flow (VRF) systems in both new construction and existing buildings.
- Electrification and fuel switching for non-HVAC projects, including process equipment upgrades in manufacturing facilities.
- New construction offerings, including performance-based design, zero net energy, and Passive House projects.
- Technical assistance and training for contractors and distributors, especially with respect to HVAC, building envelope, and electrification projects.
- Delivery of lighting projects with controls and finishing the conversion of the Commonwealth's streetlighting to LEDs, the latter with wireless controls.
- BMS, ESPO, and MBCx participation and savings.

→ Participate in C&I Management Committee (CIMC) meetings twice per month to discuss progress and provide support to PA efforts to achieve their commitments for the 2022-2024 Plan Term. This also includes associated meetings with Subject Matter Experts (SMEs) ahead of the regular CIMC meetings and periodic coordination calls with the CIMC Co-Chairs. The schedule of focused topics for discussion was developed with the CIMC in January and tracks Council and DOER priorities for 2024.

→ Participate in C&I Working Group (CIWG) and C&I Stakeholder Hour meetings focusing on PA efforts to make program design, delivery and implementation changes based on CIWG feedback with continued emphasis on creative ways to achieve C&I deep energy retrofits.

→ Support DOER, PAs, the EEAC and external C&I stakeholders to ensure the CIWG provides the necessary forum to develop collaborative program enhancements in the key areas of custom project processing, electrification, and deep energy retrofits as noted in the Council's July 2021 Resolution regarding alternative implementation models and as prioritized by the founding members of the CIWG in their 2022 meetings.

→ Participate in weekly meetings with DOER to review PA and C&I program progress, areas of program

deficiencies and expected solutions, quarterly and annual PA reports, CIWG action items, and other topics as requested by DOER C&I lead.

- → Participate in Council meetings with a C&I focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors.

EQUITY

This category for the work plan reflects the increased significance and volume of this work area in the 2022-2024 Plan and for the Consultants. Equity issues apply to all sectors (Residential, Income Eligible, and C&I), though this section of the Work Plan applies specifically to the C&I Sector. The Consultants' work in 2023 for the Equity work area for C&I will include the following:

- → Participate in Equity Working Group proceedings relevant to C&I customer segments such as small business, municipalities, and non-profits, as well as relevant workforce development issues
- → Drive adoption of cost-effective building envelope measures in all size commercial customers, with an initial emphasis on small business per Equity Targets and through new-in-2022 PA offerings to engage those small business customers and the workforce that serves them
- → Increase participation and savings by small and micro businesses, particularly from building envelope and weatherization measures committed to in the Equity Targets
- → Advance the new partnership models explored in 2022 as better methods for serving commercial renters, small and micro businesses, and limited English proficiency customers, particularly in EJ communities
- → Increase effectiveness of portfolio-wide efforts to enroll rental property owners in Mass Save
- → Participate in Council meetings with an equity focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors

COORDINATE WITH EM&V EFFORTS

- → Regularly coordinate with EM&V Advisory Group to exchange updates on relevant work efforts
- → Review draft study reports and provide input to ensure they will yield useful and actionable information to assess and enhance implementation efforts
- → Participate with HP Market Theory / Transformation subcommittee for activities relevant to the C&I sector
- → Identify outcomes and recommendations in final studies and reports that should prompt responsive actions by PAs and determine whether they are being implemented effectively.

EVALUATION, MEASUREMENT, AND VERIFICATION

Our work in the area of Evaluation, Measurement, and Verification (EM&V) continues 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. While we must work closely and collaboratively with the PAs, the resolution specifies that if consensus cannot be reached between the PAs and the Council Consultant, decision-making authority (subject to a system of appeals) rests with the Council Consultant as the Council's agent.

Highlighted EM&V team objectives in 2024 include:

- → Develop and implement EM&V research in support of the Council's priorities, including strategic electrification, customer equity, and moderate-income customers.
- → Ensure that the EM&V program optimally supports the development of the 2025-2027 Three-Year Plan.
- → Carry out EM&V-related term sheet agreements.
- → Reprioritize planned studies to ensure that the overall deployment of available EM&V study funds is in

alignment with EEAC priorities.

- → Develop additional studies as needed to support the evolution of programs, policies, and markets.

We will work with DOER and the Council to determine the specific functions or studies to be covered as necessary.

Work Areas

OVERSEE EM&V PLANNING

- → Work with the PAs to develop a Strategic Evaluation Plan (SEP) to guide EM&V efforts in the 2025-2027 triennium.
- → Ensure that the EM&V research agenda optimally supports the development of the 2025-2027 three-year plan. This includes completing EM&V studies needed to support the PA potential studies, such as C&I and residential baseline studies that are already underway. It also encompasses providing input into the potential studies themselves. It may also include participating in discussions among the parties regarding EM&V policies to be followed in the next triennium, as well as contributing to term sheet agreements on EM&V issues.
- → Plan and implement research needed to support the Council's priorities and EM&V-related term sheet agreements. Anticipated areas of focus include: studies on the savings and market effects associated with the promotion of heat pumps; a study of the representation of minority and women-owned businesses in the PAs' energy efficiency procurement efforts; and the development of new approaches for handling the effects of local energy initiatives such as the Boston Building Energy Reporting and Disclosure Ordinance (BERDO) on net program impacts.
- → Plan new EM&V studies as needed to support impact reporting, program planning and implementation, and policymaking. Planning for individual EM&V projects focuses on refining research objectives, determining data collection and analysis activities, setting budgets, assigning contractor staff, and laying out project schedules. In order to ensure consensus and maximize opportunities for stakeholder input, the planning process for individual studies includes three separate planning stages from the time a study is conceived to the time it is implemented.
- → Continue to reprioritize planned studies to adjust to ensure that the overall deployment of available EM&V study funds is in alignment with EEAC priorities. As a result of a reduction in the overall EM&V program budget from the 2019-2021 to the 2022-2024 plan period after the SEP was produced, the EM&V program will reprioritize planned studies on an on-going basis through both EMC meetings and regular check-in calls for individual research areas.

OVERSEE EM&V STUDY IMPLEMENTATION

- → Oversee the implementation of individual EM&V studies once they have completed the detailed planning stage. EM&V study implementation can include a wide range of data collection and analysis activities, the specific nature of which varies by type of study. Each study can have as many as eight stages from draft scope to survey instruments to draft and final reports.

OVERSEE EM&V REPORTING

- → Oversee the development and dissemination of interim and final reports on EM&V studies. Final EM&V reports in Massachusetts generally need to go through multiple drafts, as various stakeholders provide comments that must be processed collaboratively. This work area also encompasses overseeing the incorporation of impact evaluation results into the eTRM.

COUNCIL AND STAKEHOLDER ENGAGEMENT

- → Work with the Council, individual Councilors, and stakeholders, both to incorporate their input into EM&V plans and reports and to brief them on study results through presentations and other forms of outreach.

TECHNICAL SERVICES

Context

The Technical Services team is responsible for a variety of administrative tasks that support the Council's information sharing through the website. These tasks are described in more detail below.

Work Areas

PRODUCE MINUTES FROM ALL EEAC MEETINGS

- → Ensure meeting minutes are collected from all EEAC, Executive Committee, and Equity Working Group meetings subject to the open meeting law and that these minutes are circulated for comment, corrected, and issued in final form for posting to the EEAC website.

WEBSITE UPDATES, REVISIONS, AND MAINTENANCE

- → Regular and timely updates of the website content.
- → Make changes or expansions in structure or organization of the website that were previously suggested by the Council. These will include updates such as improving the search functionality, refreshing website images, and allowing for more streamlined public comment**.**

CONSULTANT TEAM QUARTERLY REPORTS AND WORK PLANS

- → Provided timely and meaningful report of Consultant Team activities. The Consultant Team will produce activity reports on a quarterly basis.
- → In 2024, the Consultant Team will also continue developing quarterly work plans. These plans will act as an update to this annual work plan as well as provide more granularity around anticipated tasks and deliverables as the year progresses.

SUPPORT DEVELOPMENT OF THE ANNUAL REPORT TO THE DPU AND LEGISLATURE

- → If requested by DOER, we will support development of the most recent Annual Report to the DPU and Legislature.

KNOWN DELIVERABLES

As previously noted, it has been helpful in previous years to we retain flexibility to respond to the Council and as other topics/issues arise. However, there are also many known deliverables we intend to complete in 2024. The sections below provide details on those known work products. We expect that schedules may change over time and will provide an updated list of known deliverables in each of the Consultant Team's quarterly work plans.

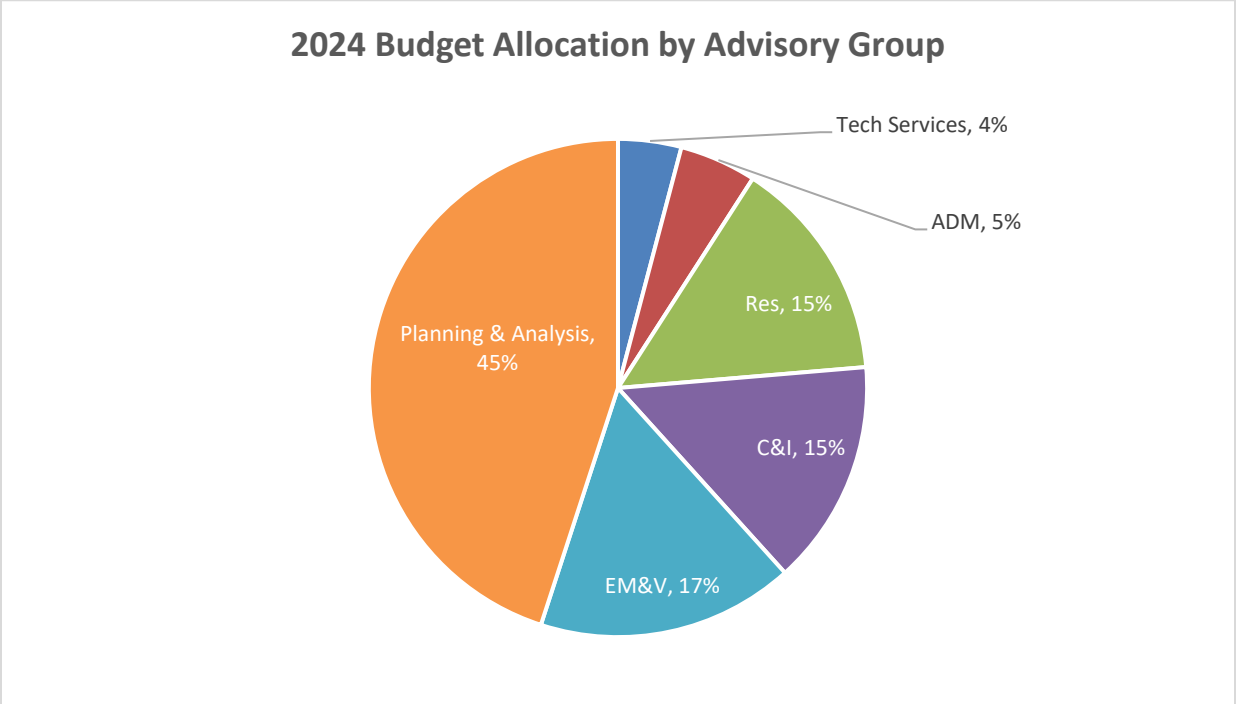
Month	Category	Topic	Description	Advisory Group(s)
January	Memo	2024 Work Plan	Memo describing Consultant Team tasks, deliverables, and budget for 2024	All
	Presentation	2024 Work Plan	Presentation summarizing Consultant Team tasks and deliverables for 2021	All
	Memo	MTMs	A memo describing the Consultant Team's analysis of MTMs submitted in November and December and recommendations for Council action	P&A Residential C&I

	Presentation	AESC study results	A presentation summarizing the results of the AESC study and potential considerations for the Three-Year Plan.	Planning & Analysis
February	Presentation	EM&V	A presentation on results of key EM&V studies and potential policy changes to support GHG reduction efforts	EM&V
	Presentation	Potential Study Results	A presentation on analysis of potential studies results and methodologies and recommendations for use in plan development	Planning & Analysis
March	Memo	Consultant Team Quarterly Work Plan	Plan for Consultant Team activities and deliverables in Q2 of 2024	All
	Presentation	2023 Q4 Report	Observations on KPIs, PA differences, areas PAs not on track to meet goals or council priorities	P&A Residential C&I
April	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q1 of 2024.	All
	Presentation	Draft 2025-2027 Plan	Initial C-Team response and analysis to PA draft Plan	All
May	Presentation	Draft 2025-2027 Plan	Deep dive and critical review and analysis of PA draft Plan	All
June	Presentation	2023 Q1 Report	Observations on KPIs, PA differences, areas PAs not on track to meet goals or council priorities	P&A Residential C&I
	Memo	Consultant Team Quarterly Work Plan	Plan for Consultant Team activities and deliverables in Q3 of 2024.	All
July	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q2 of 2024	All

August	Presentation	2023 Year End Results	Presentation on PA evaluated results from 2023	All
September	Presentation	2024 Q2 Report	Observations on KPIs, PA differences, areas PAs are not on track to meet goals or council priorities	P&A Residential C&I
	Memo	Consultant Team Quarterly Work Plan	Plan for Consultant Team activities and deliverables in Q4 of 2024	All
October	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q3 of 2024	All
November	Presentation	2025-2027 Plan	Final Plan Review	All
December	Presentation	2024 Q3 Report	Observations on KPIs, PA differences, areas PAs are not on track to meet goals or council priorities	P&A Residential C&I
On-Going	Tracking Spreadsheet	EM&V Status Update	A spreadsheet summarizing the status of current and planning EM&V studies	EM&V

PROPOSED BUDGET (JANUARY-DECEMBER 2024)

The table below provides an overview of the Consultant Team's 2024 budget by budget category. When the Consultant Team put together its proposal for the current three-year contract, we used our experience from past cycles to determine the relative weighting of the budget between years. We put more weight on 2023 than we typically have in the first year of our contract to account for some of the Three-Year Planning process work, such as the stakeholder workshops, occurring earlier than cycles in the past. Although we spent much of our first year, budget, approximately 16% or $213,165 remain at the end of the year. We would like the opportunity to move that remaining budget into our budget for 2024 to ensure we can effectively support the items discussed in our work plan. There were some planning related tasks that we expected to spend more time on in 2023 that will largely occur in 2024 including reviewing PA potentials studies and supporting the development of the Plan GHG reduction goal. As always, the Consultant Team only invoices for time and materials spent.

	Strategic Planning	Planning & Implementation	EM&V	Technical Services	Total
2024 New Budget Request	$931,935	$620,853	$326,023	$81,104	**$1,959,915**
2023 Remaining Budget	$113,463	$58,182	$13,591	$25,564	**$213,165**
Total 2024 Budget Request	**$1,045,397**	**$679,035**	**$339,614**	**$106,667**	**$2,173,080**

The chart below shows the allocation of the Team's requested 2024 budget by advisory group. This allocation is similar to recent years.