Memo

MA ENERGY EFFICIENCY ADVISORY COUNCIL

→ CONSULTANT TEAM

To: **Energy Efficiency Advisory Council**

From: **Gretchen Calcagni and the Consultant Team**

Date: **January 15, 2025**

Subject: **EEAC Consultant Team Proposed 2025 Work Plan and Budget Request**

SUMMARY

Strategy for this Work Plan

At a high level, the Consultant Team expects much of its focus in 2025 to be on supporting and guiding implementation of the numerous new elements and areas of focus included in the Program Administrators' (PAs') 2025-2027 Plan. The Consultant Team looks forward to working collaboratively with the PAs, DOER, and the Council to support the rollout of the new plan and ensure successful program outcomes.

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 PA programs. Within each advisory group description, 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. In addition to the tasks described below, 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 other topics/issues as they arise. The budget described in this work plan reflects a 12-month period from January 1- December 31, 2025.

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 advise the Program Administrators on effective program and portfolio performance and to achieve the 2025-2027 Three-Year Plan goals. This includes providing guidance related to new elements in the Plan.
- → 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.
- → Providing technical analysis to support implementation of any Massachusetts policy changes that may impact Mass Save and the energy efficiency landscape in Massachusetts such as the Decarbonization Clearinghouse and Clean Heat Standard.

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 work plan, the Consultant Team will establish a proposed 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 progress towards achieving the 2025 goals. This includes a variety of deliverables including emails, spreadsheets, memos and presentations.
    - In 2025, the Team plans to revisit and revise our presentation templates to ensure presentations are as effective as possible for Councilors and other stakeholders.
- → Provide individual briefings to Councilors on a rotating basis with the 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 historical information the new councilor may need.
- → Support subgroups of the Council as directed, including the C&I working group and Equity working group.

TECHNICAL ANALYSIS

- → Review and analyze results of 2022-2024 program implementation.
    - Review and analyze the 2022-2024 Performance Term Report in August 2025. This will be a significant review of the results and performance of the 2022-2024 Plan, based on the final data and Evaluation, Measurement and Verification (EM&V) results that are available in 2025. A key task will be to identify lessons learned from past performance review.
- → Support planning and analysis for implementation of 2025-2027 Plan; review and analyze results.
    - Review and analyze available information to guide implementation, evaluation, and reporting of new elements in the Plan such as the renter offering, heat pump water heater marketplace, roll out of existing building commissioning support, and the five schools initiative.
    - Review, analyze, and assess the PAs' 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 2025 and 2025-2027 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.
    - As directed, 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.
    - Participate in PA-led working groups to identify opportunities for continued improvement and enhancement in priority areas including: data, income-eligible sector, outside funding, and HEAT Loans.
- → Support cost-effectiveness screening, benefits analysis, and EM&V activities.
    - 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**.**
    - Review, comment on and contribute to the electronic Technical Reference Manual (eTRM) including reviewing the benefit cost ratio (BCR) model inputs for consistency with the eTRM where applicable.
- → Coordinate strategic planning

→ 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.
    - This may include technical assistance to support the implementation of any Massachusetts policy changes that may impact Mass Save and energy efficiency landscape in Massachusetts such as the Decarbonization Clearinghouse and Clean Heat Standard.
- Monitor active demand coordination needs including:
    - Implementation and potential coordination with other Commonwealth efforts to utilize demand resources such as locational based services.
    - The roll out of advanced metering infrastructure and potential coordination with PAs on potential impacts to program design and offerings.

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).

→ Review and analyze any DPU-proposed or potential revisions to the DPU EE Guidelines coming out of Plan review and DPU approval or Performance Term Report review.

→ Help interpret DPU order on 2025-2027 Plan for the Council and support implementation implications as necessary.

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

RESIDENTIAL AND INCOME ELIGIBLE SECTORS

Context

2025 will be a demanding year for the Mass Save Residential and Low Income[1] Sectors as the PAs and LEAN work to launch and implement ambitious electrification and equity commitments in this first year of the 2025–2027 Plan. The Consultants' primary focus this year will be on monitoring and supporting the PAs and LEAN in implementing their Plan commitments and reporting to the EEAC on their progress. Additional context, details, and work efforts are provided for three work areas below: Residential Program Support, Low-Income Program Support, and Equity.

Work Areas

RESIDENTIAL PROGRAM SUPPORT

Presuming the Department of Public Utilities approves the Residential Sector strategies in the 2025-2027 Plan, the Consultants will work in 2025 to support and assess the PAs' progress in laying the groundwork for achieving their

[1] In the 2022-2024 Term, programs for low-income customers (up to 60% State Median Income) were delivered through the Income Eligible Services (IES) Sector. As moderate-income services (60%-80% AMI or SMI) are also predicated on income, the sector name has been changed to Low Income to more accurately reflect its applicability.

commitments, with a focus on meeting heat pump and weatherization goals, building out additional support for decarbonization by residential customers, and transitioning the Home Energy Assessment (HEA) to include a strong decarbonization focus. While many equity-related efforts are encompassed by the Residential Sector (e.g., moderate income offers), the Residential Program Support work area will focus primarily on non-equity related matters, as those are treated separately below.

The Consultants' work for the Residential Sector in 2025 will include the following:

- → Track, provide input on, and report on PA progress towards meeting 2025-2027 Plan goals and commitments, including:
  - Meeting heat pump and heat pump water heater (HPWH) installation goals from the 2025-2027 Plan
  - Implementing customer supports for decarbonization through the Rebates Core Initiative including:
    - Decarbonization Consultations, including quote comparisons
    - Heat pump pricing transparency tool(s)
    - Rebate pre-qualification (optional)
    - Local decarbonization advocates
    - Additional differentiation within the Heat Pump Installers Network
    - Online marketplace for heat pump water heaters
  - Meeting weatherization goals from the 2025-2027 Plan
  - Transitioning the Home Energy Assessment to a broader decarbonization focus, including the customer report
  - Providing turnkey support and enhanced incentives (barrier remediation, weatherization, heat pumps, heat pump water heaters) to moderate income customers with a view to planned expansion to all residential customers in 2027
  - HEAT Loan revisions, including new income tiers
  - Achieving production goals for new homes and renovations
  - Providing a standard all-electric offer for new homes and other New Homes and Renovations program enhancements
  - Including an embodied carbon component for new homes
  - Leveraging advanced metering infrastructure to capture behavioral savings
- → Support ongoing work of the Council
  - Review and analyze residential information and data in the PAs' monthly data dashboards, quarterly reports and key performance indicators, Term Report and periodic reporting on relevant indicators as well as any ad hoc reports. Use data to identify trends, successes and challenges, and PA differences
  - Participate in Residential Management (RMC) meetings twice per month to discuss progress and provide support to PA efforts to achieve their commitments for the 2025-2027 Plan Term. The schedule of focused topics for discussion will be developed with the RMC in Q1.
  - Participate in Council meetings with a residential focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors
  - Participate in HEAT Loan Working Group
  - Respond to requests for information from Councilors and other stakeholders
  - Participate in regular residential meetings with DOER to discuss progress and provide support

LOW INCOME PROGRAM SUPPORT

The Consultants' work for the Low Income Sector in 2025 will also be focused on achieving planned goals and commitments, with a particular focus on heat pump, heat pump water heater, and weatherization unit goals as well as expansion of income verification services. The Consultants will also collaborate with DOER, the PAs, and LEAN in a Low-Income Working Group to review and discuss opportunities for the low-income program delivery infrastructure to increase efficiency, improve customer service, and support achievement of the Plan's ambitious goals.

In 2025, the Consultants' work for the Income Eligible Sector will include the following:

- → Track, provide input on, and report on PA and LEAN progress towards meeting 2025-2027 Plan goals and commitments, including:
  - Meet production goals for heat pumps for space and water heating for all PAs
  - Meet production goals for weatherization
  - Meet production goals for other measures
  - Proactive electrification of fossil fuel systems, customers who have previously weatherized, and buildings that heat with electric resistance and delivered fuels
  - Implement comprehensive assessments
  - Launch year-round income verification services
  - Introduce additional energy savings measures
  - Provide barrier mitigation funding for small multifamily units
- → Support ongoing work of the Council
  - Review and analyze low-income information and data in the PAs' monthly data dashboards, quarterly reports and key performance indicators, and periodic reporting on relevant indicators and as well as any ad hoc reports. Use data to identify trends, successes and challenges, and PA differences
  - Gather data and analyze performance differences in Community Action Partnership (CAP) territories to inform potential strategies for low income services to be delivered more uniformly throughout the Commonwealth
  - Participate in Council meetings with a low income focus, including preparing meeting materials as appropriate, reviewing PA and LEAN draft presentations, and briefing Councilors
  - Participate in new Low Income Working Group
  - Respond to requests for information from Councilors and other stakeholders
  - Participate in periodic 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/or provide support for regular DOER/LEAN meetings

EQUITY

The 2025-2027 Plan includes ambitious PA budgetary and programmatic commitments to improve equity of service and distributive justice, including plans for enhanced services and incentives for moderate income customers and renters and a focus on 21 Designated Equity Communities. Equity issues apply to all sectors (Residential, Low Income, and C&I), though this section of the Work Plan applies specifically to Residential and Low-Income Sectors.

The Consultants' work in 2025 for the Equity work area regarding Residential and Low-Income Sectors will include the following:

- → Participate in and support the Equity Working Group—including the PAs—to support and assess the PAs' achievement of equity commitments for the 2025-2027 Plan, including:
  - Increased barrier mitigation and electrification support for moderate income customers and renters in Designated Equity Communities
  - No-cost residential turnkey services for moderate income customers
  - Self attestation of income for moderate income weatherization and expansion of eligibility to Area Median Income
  - Increased funding, flexibility, and data access for Community First Partners
  - Enhanced support for customers who speak a language other than English (LOTE) throughout the customer journey, including multilingual support through the new Statewide Contact Center
  - Increasing support for supplier diversity, including an aspirational benchmark to spend 15% of dollar volume of direct contracts with diverse suppliers
  - Collaborating with Massachusetts Clean Energy Center to increase workforce diversity
  - Achieving Equity Targets approved by the EEAC in January 2025
- → Support ongoing work of the Council
  - Participate in Equity Working Group meetings and support the group with best practices research, compilation of relevant information, and other preparations as requested by the EWG and its co-chairs
- → Review, analyze/assess, and report on PAs' reporting of progress toward achieving the Plan's equity goals and commitments, including 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
  - Respond to requests for information from Councilors and other stakeholders
  - Participate in regular equity meetings with DOER to discuss progress and provide support

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

- → Regularly coordinate with EM&V Advisory Group to exchange updates on relevant work efforts
- → Review draft study plan and 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
- → Participate in HP Market Theory / Transformation Subcommittee for activities relevant to the Residential sector

COMMERCIAL AND INDUSTRIAL SECTOR

Context

The 2025 Plan year will continue to build on the 2022-2024 Three-Year Plan, during which the PAs completed key evaluation studies and engaged customers through a Commercial and Industrial (C&I) Working Group to inform program design improvements for 2025-2027. C&I Electrification, increased participation in custom projects and enhanced weatherization incentives for small business rental customers are priorities for the Council in 2025. To achieve plan goals, the PAs will need to accelerate the transformation of heating market with emphasis both on increasing volume through residential-sized heat pumps and on developing larger and more complex electrification projects. The PAs are expected to roll out a new

existing building commissioning offer in mid-2025 while continuing to expand the monitoring based commissioning initiative which is currently available only to National Grid customers. The PAs are offering a suite of studies to support customers in supporting a variety of different project types and development timeframes; it will be essential to monitor this new strategy for market acceptance or potential confusion.

The EEAC Consultants will also need to monitor the PAs' progress toward goals and effectiveness of new offerings, which will be facilitated by reviewing a 2025-2027 Plan Commitments Tracker and increased granularity of quarterly data reports. 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 2025-2027 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 Greenhouse 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).
  - Monitor and assess improvements to the Existing Buildings program related to customer experience, timeliness, technical review processes, technical assistance, electrification planning, and measure performance and persistence.
  - Monitor PA progress; in expanding participation in heat pump offerings, reaching delivered fuel customers and pairing weatherization with heat pump projects. Monitor 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. Monitor increased efforts to integrate demand management with energy efficiency offers.
  - Monitor development and roll-out of new Existing-Building Commissioning (EBCx) offering and monitor participation, support pursuit of real-time feedback through embedded evaluation. Monitor expansion of the National Grid Monitoring-Based Commissioning (MBCx) offering and participation and savings related to prescriptive and custom Building Management Systems & Controls (BMS) 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. Increase the PAs' interest in focusing on the quality of weatherization, potentially through embedded evaluation.
  - Review the revised lighting strategy, program structure, and incentive levels to phase out uncontrolled lighting
  - Collaborate with DOER to successfully decarbonize public schools in EJ communities by leveraging funds from the MassSave PAs, Massachusetts Clean Energy Center (MassCEC), and Massachusetts School Building Authority (MSBA).
  - Monitor quarterly progress toward planned 2025-2027 goals and identify measure-level

deficiencies in performance.

- Review program application forms revised such that they align with the required phaseout of incentives for fossil fuel equipment.

→ 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.

→ Participation and savings from EBCx.

- Small business turnkey projects.

→ 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 2025-2027 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 will be developed with DOER and the CIMC in January and tracks Council and DOER priorities for 2025.

→ 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.

→ 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 for the 2025-2027 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 2025 for Equity work in the C&I sector will include the following:

→ Participate in Equity Working Group meetings relevant to C&I customer segments such as small businesses, 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 PA offerings to engage those small business customers and the workforce that serves them

→ Increase participation and savings by small and micro businesses, particularly for building envelope and weatherization measures

→ Continue to advance the partnership models explored in 2022-2024 as better methods for serving

commercial renters, small and micro businesses, and limited English proficiency customers, particularly in Designated Equity 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 in 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.
- → Summarize and report important study findings and recommendations to the Council, and direct Councilors to relevant materials should they seek to conduct detailed review

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 and 2024 Council resolutions that first established and then refined the Commonwealth's current EM&V framework, assigning 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.

Highlighted EM&V team objectives in 2025 include:

- → Ensure that the EM&V program optimally supports the implementation of the 2025-2027 Three-Year Plan.
- → Develop and implement EM&V research in support of the Council's priorities, including strategic electrification, customer equity, and moderate-income customers.
- → Carry out and further develop the EM&V policy changes adopted by the EEAC and elaborated during the planning process for the 2025-2027 Strategic Evaluation Plan (SEP).
- → Build out the new Embedded Evaluation track intended to provide more timely, targeted feedback to help improve program implementation.
- → Plan and implement studies laid out in the 2025-2027 SEP.
- → 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

- → Ensure that the EM&V program optimally supports the implementation of the 2025-2027 Three-Year Plan. The new three-year plan constitutes a watershed change in the state's energy efficiency programming, including unprecedented levels of funding for heat pumps, sharply increased attention to equity issues, and the delineation of some program areas as market transformation initiatives. It will be critical for the EM&V program to help ensure these new initiatives are successful. The following are some examples of key related EM&V activities:
  - Tracking the market effects from residential and small commercial heat pump programming.
  - Supporting the development of a new program theory for the residential New Construction

program and using the results to develop a new gross-savings approach.

- Performing a study to assess the availability of cost-effective electrification options for large C&I customers.
- Conducting a process evaluation of the Heat Loan.

→ Carry out the EM&V policy changes adopted by the EEAC and elaborated during the planning process for the 2025-2027 SEP. These changes include ensuring that EM&V study results should not reduce the attribution of savings to the Mass Save programs when participating customers also leverage federal, state, and local initiatives and/or funding, and establishing procedures for differentiating between market-driven and program driven-major renovations. While agreements were reached on these policy issues as part of the 2025-2027 SEP process, those agreements call for some follow-up actions by the EM&V program (for example, in the case of the attribution issue, revamping self-report attribution methods to focus on the joint effect of all state-level public interventions jointly).

→ Build out the new Embedded Evaluation track intended to provide more timely, targeted feedback to improve program implementation. Under this new track, evaluators are intended to work side by side with implementers to provide early feedback on program changes using streamlined and flexible planning processes. There is little practical experience with the Embedded Evaluation track thus far, but in 2025 the EM&V program will begin to accumulate such experience, beginning with a study of the Language Access Plan (LAP).

→ 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.

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 in a timely manner.

WEBSITE UPDATES, REVISIONS, AND MAINTENANCE

- → Regular and timely updates of the website content.
- → Identify opportunities for improvement to the structure and organization of the website to optimize its functionality for the Council and other stakeholders.

CONSULTANT TEAM QUARTERLY REPORTS

- → Provide timely and meaningful report of Consultant Team activities. The Consultant Team will produce activity reports on a quarterly basis.

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 retain flexibility to respond to the Council as new topics/issues arise. However, there are also many known deliverables we intend to complete in 2025. The sections below provide details on those known work products. We expect that schedules may change over time and will adjust to best meet the needs of the Council.

Month	Category	Topic	Description	Advisory Group(s)
January	Memo	2025 Work Plan	Memo describing Consultant Team tasks, deliverables, and budget for 2024	All
	Presentation	2025 Work Plan	Presentation summarizing Consultant Team tasks and deliverables for 2021	All
February	Presentation	C&I Working Group/C&I Update	A presentation to update the Council on the work of the C&I working group and topics specific to C&I	C&I
March	Presentation	2024 Q4 Report	Observations on KPIs, PA differences, areas PAs not on track to meet goals or council priorities	P&A Residential C&I

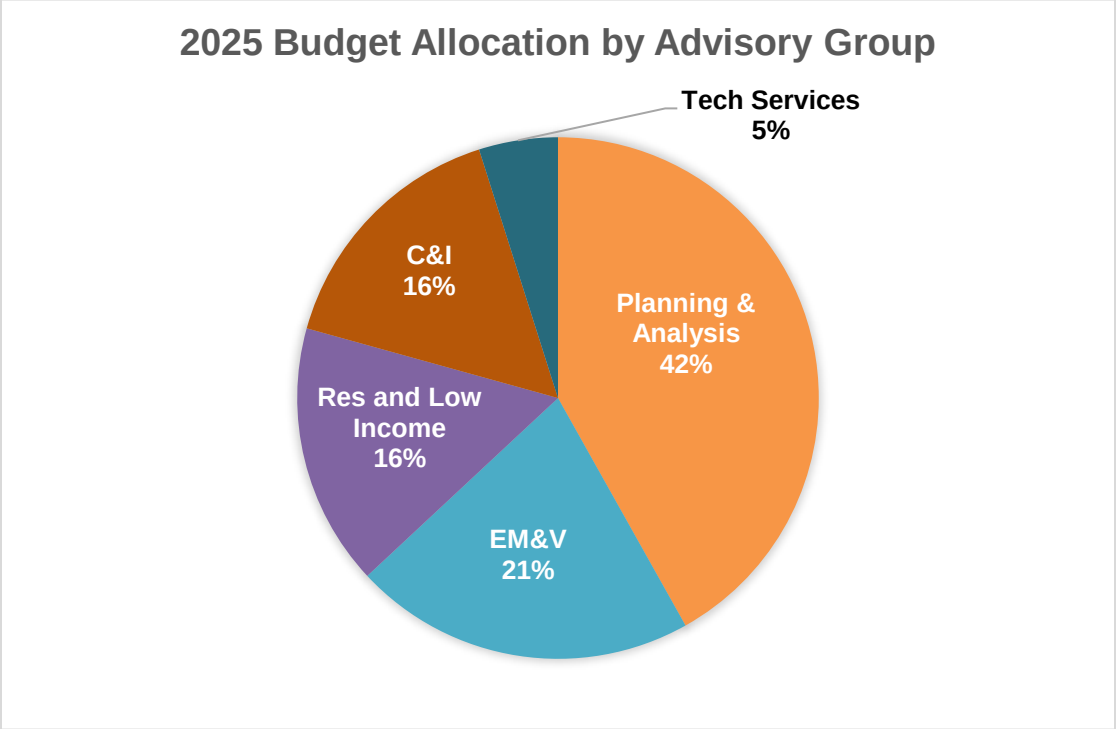
April	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q1 of 2025.	All
May	Presentation	EM&V	A presentation on an EM&V topic TBD	EM&V
	Presentation	Low Income	A presentation on a Low-Income Sector topic TBD	Residential
June	Presentation	2025 Q1 Report	Observations on KPIs, PA differences, areas PAs not on track to meet goals or council priorities	P&A Residential C&I
July	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q2 of 2024	All
August	Presentation	2022-2024 Term Report	Assess results of the PA 2022-2024 Term included lessons learned for 2025-2027 and differences between residential and IES achievement.	P&A Residential C&I
September	Presentation	2025 Q2 Report	Observations on KPIs, PA differences, areas PAs are not on track to meet goals or council priorities	P&A Residential C&I
October	Memo	Consultant Team Quarterly Report	Report on Consultant Team activities for Q3 of 2024	All
November	Presentation	Active Demand Management (ADM)	A presentation on ADM results and planned efforts	P&A
December	Presentation	2025 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 2025)

The table below provides an overview of the Consultant Team's 2025 budget by budget category. As always, the Consultant Team only invoices for time and materials spent.

	Strategic Planning	Planning & Implementation	EM&V	Technical Services	Total
Total 2024 Approved Budget	$1,045,397	$679,035	$339,614	$106,667	**$2,173,080**
2025 New Budget Request	$462,796	$614,378	$302,979	$71,012	**$1,451,165**

The chart below shows the allocation of the Team's requested 2025 budget by advisory group. This allocation is similar to recent years.



The table below provides an overview of the Consultant Team's 2025 budget by team member, role, and budget category.

YEAR 3

	Staff	Role	Strategic Planning	Planning & Implementation	Oversight of EM&V	Coordinate Technical Services	Total Hours
NV5	Gretchen Calcagni	Project Lead	300	375	25	50	750
	Adrian Caesar	C&I Lead, Technical Services Lead	300	300	0	50	650
	Griff Keating	Planning and Analysis Lead	300	350	25		675
	Kim DiGiovanni	SME: Marketing And Web Design				75	75
	Cliff McDonald	SME: C&I Programs	25	75			100
	Collin Smith	SME: Residential and IES Programs	75	75			150
	Matt Socks	SME: AESC Study, Potential Studies, TRM	100	75			175
	Melissa Persechini	Project Coordinator & Technical Services Core Member	50	50		75	175
	Analyst	Analyst Support	100	300		150	550
Individuals	Jeff Schlegel	SME: Active Demand, Avoided Cost study, ISO issues, Policy	75	75			150
	Ralph Prahl	EM&V Lead			650		650
	Bob Wirtshafter	EM&V Core Member			230		230
	Other Consultants (TBD)	SME TBD if necessary (average projected rates)	100	100			200
AEC	Lori Lewis	EM&V Core Member			40		40
BuildingMetrics	Peter Jacobs	EM&V Core Member			175		175
Caerbannog Consulting	George Lawrence	SME: C&I Programs	25	75			100
CEI	Margaret Lynch	Residential and Low Income Lead	300	400			700
DiversityMC	Susan Cohen	SME: Marketing and Outreach/Equity		50			50
	Kristy Ranieri	SME: Marketing and Outreach/Equity		100			100
GDR	Glenn Reed	Residential and Low Income Core Member	100	150			250
JLC	Jennifer Chiodo	C&I Core Member and EM&V Core Member	150	200	175		525
SparkPlug	Sean Becker	SME: Energy Storage and ADR	75	75			150
	LABOR Totals	Hours	2,075	2,825	1,320	400	6,620
		Amount	$458,796	$609,378	$302,979	$70,012	$1,441,165
		Travel	$4,000	$5,000	$0	$1,000	**$10,000**
		DIRECT COSTS TOTAL	$4,000	$5,000	$0	$1,000	$10,000
		TOTALS	$462,796	$614,378	$302,979	$71,012	$1,451,165