# CONSULTANT TEAM
# 2025 WORK PLAN

- January 22, 2025

# OVERVIEW

- **Third year of C-Team contract (Jan– Dec 2025)**
- **Work divided into several advisory groups**
- **2025 heavily focused on supporting the roll out of new elements in the 2025-2027 Plan**
- **Other areas of focus include:**
  - Reviewing final results of 2022-2024 Term
  - Supporting working groups to focus on priority areas: data, income-eligible sector, outside funding, and HEAT Loans
- **Assumes limited travel**

# PLANNING AND ANALYSIS WORK

- **Work Categories**
  - Council support
  - Technical analysis
  - Regulatory support
- **Key Focus Areas**
  - 2022-2024 Term Report
  - New elements in the Plan
  - 2025 program achievement
    - Quarterly Measure-level Program Performance Review
  - Tracking policy initiatives such as the Decarb Clearing House and Clean Heat Standard

**Core Team Members**

- Griff Keating
- Gretchen Calcagni

# RESIDENTIAL AND LOW INCOME WORK

- **Work Categories**
  - Residential Sector Program Support
  - Low Income Sector Program Support
  - Equity
  - Coordinate with EM&V Efforts

**Core Team Members**

- Margie Lynch
- Glenn Reed
- Griff Keating

- **Key Focus Areas**
  - Heat pump installation and weatherization (Wx) goals
  - Transitioning Home Energy Assessment to broader decarb focus
  - Enhanced offerings for moderate-income customers and renters, particularly in designated equity communities and through turnkey delivery
  - Low income program operations and capacity

# COMMERCIAL & INDUSTRIAL WORK

- **Work Categories**
  - C&I Program Support
  - Equity
  - Coordinate with EM&V Efforts
- **Key Focus Areas**
  - Electrification
  - Increased custom project participation
  - Enhanced Wx incentives for small business rental customers
  - C&I Stakeholder Working Group
  - Schools initiative
  - Roll out of existing building commissioning

**Core Team Members**

- Adrian Caesar
- Jen Chiodo

# EM&V WORK

- **Work Categories**
  - EM&V Planning
  - Study Implementation
  - EM&V Reporting
  - Stakeholder Engagement

**Core Team Members**

- Ralph Prahl
- Peter Jacobs
- Lori Lewis
- Bob Wirtshafter
- Jen Chiodo

- **Key Focus Areas**
  - Research supporting Council's priorities including strategic electrification, equity, and moderate-income
  - EM&V policy changes adopted by the EEAC
  - Building out Embedded Evaluation track
  - Implementing studies laid out in the 2025-2027 SEP; developing additional studies as needed

# TECHNICAL SERVICES WORK

- **On-going administrative tasks that support the Council's information sharing**
- **Work Areas**
  - Meeting minutes
  - Consultant Team Quarterly Reports and Work Plans
  - Website maintenance, updates, and document posting

**Core Team Members**

- Adrian Caesar
- Gretchen Calcagni

# DELIVERABLES

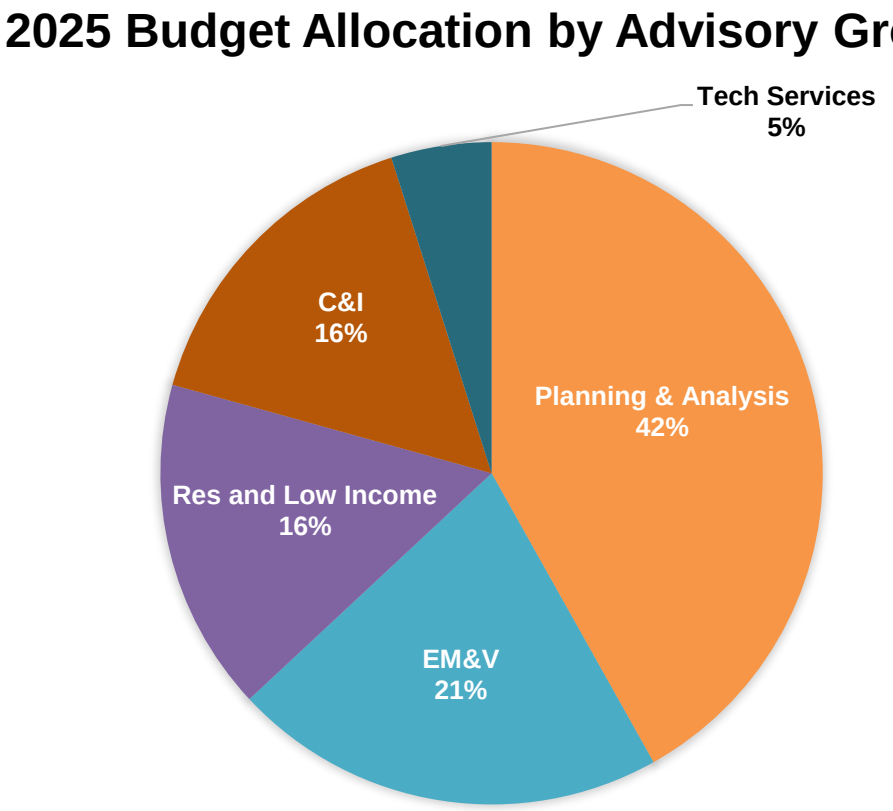
- **Work Plan focuses on topics to be covered and issues to be tracked**
- **Known deliverables include:**
  - Analysis and Presentations on final 2022-2024 results
  - Analysis and Presentations on roll out of 2025-2027 Plan and progress
  - Sector-specific presentations
  - Regular Tech. services activities
- **Flexible approach to deliverables will allow Consultants to prioritize developments as they arise**

# HIGH-LEVEL BUDGET PROPOSAL

- **Consultant Team requests 2025 of $1.45M**
  - Budget in 2024 included carry over from 2023
- **C-Team only invoices for time and materials spent**

| | Strategic Planning | Planning & Implementation | EM&V | Technical Services | Total |
|---|---|---|---|---|---|
| **2023 Approved Budget** | $595,702 | $448,549 | $236,394 | $67,250 | **$1,347,895** |
| **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** |

# 2025 BUDGET ALLOCATION BY ADVISORY GROUP



# THANK YOU

## Questions?