

Technical Reference Manual (TRM)

MA EE Advisory Council Meeting
February 9, 2010

Intent, Objectives and Uses of the TRM

- The TRM is intended to be a repository of information documenting how program and measure impacts are calculated and the sources of information used in these calculations.
- The goal of the project is to create consistent and transparent documentation on how Massachusetts energy efficiency program administrators plan for, quantify, and report savings
- It will serve as a reference source to this information for the PAs, regulators, customers, and other stakeholders
- Once in effect, the TRM will flow through PA tracking systems and screening models into the DOER PARIS database in a clear, accountable and traceable path.

Scope of the TRM

- Electric and gas measures
- All sectors
- The first version of TRM will focus on prescriptive measures

[Prescriptive measures are defined as measures for which PAs offer and publish a set incentive amount per measure, and do not rely on site-specific analyses (custom measures) to develop incentive offers, estimated savings, or cost-effectiveness]

Timeline to Complete V 1.0

What's Been Done

2007-2008: Optimal Energy engages PAs, on behalf of NUPs, to develop a Statewide TRM

Spring 2009: New process developed with EEAC and DOER. Current TRM data collected from PAs

Oct 2009: Optimal Energy distributed draft Statewide TRM for prescriptive electric and gas measures to PAs

Timeline to Complete V 1.0

What Remains to be Done

- Feb. to June 1 - bulk of analysis of PA specific data, collaboration, and negotiation undertaken to achieve consensus
- June - Finalize high level details and process issues
- June 30 - TRM version 1.0 completed
- July 1 – PAs initiate process to utilize TRM to implement changes to tracking systems for use in the 2011 program year
- Starting January 1, 2011, all PAs will track and report savings based on the TRM

How TRM is being conducted

A core TRM Working Group has been re-established and met on 1/25/10 for the first of weekly meetings

The Working Group includes representatives from

- Program Administrators - National Grid and NSTAR as co-leads
- DOER
- Council Consultant team

Additional Resources during the Process

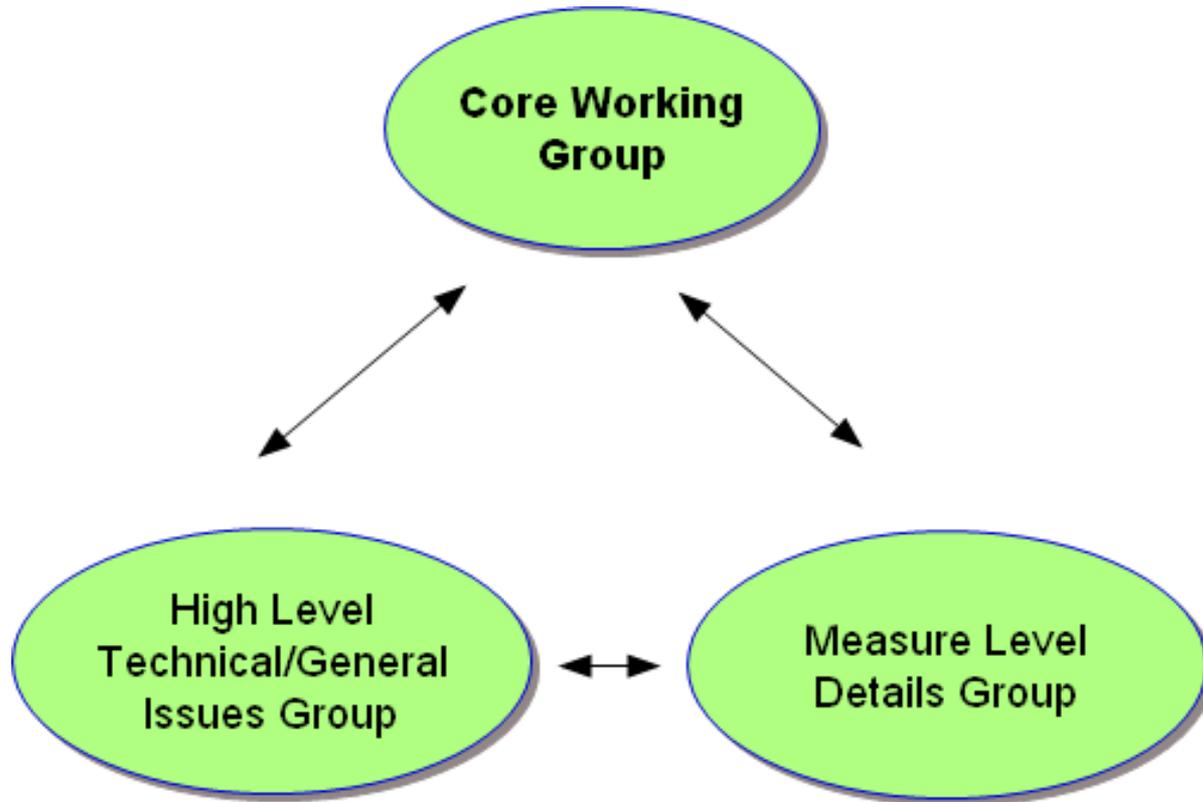
High Level Technical/General Issues Group

- Covering items such as database format options; glossary development; program/measure naming conventions
- Meeting schedule and representatives to be determined based on subject, expediency and urgency factors

Measure Level Details Group

- Work to achieve consensus on specific inputs and algorithms for all TRM measures
- Meeting schedule will vary based on scale and potential initial divergence of measures values between PAs
- Representatives to be determined by knowledge base, and include all applicable PAs and a consultant team area specialist.

TRM Working Group Organization



Next Steps for EEAC

Comments, Questions?

Updates on the status of the TRM effort will be provided at the Council's monthly meetings

Thanks