

Memo



→ CONSULTANT TEAM

To: **Energy Efficiency Advisory Council**
From: **Eric Belliveau and the Consultant Team**
Date: **August 2, 2022**
Subject: **EEAC Consultant Team 2022 Second Quarter Report**

SUMMARY

This document summarizes the work completed by the EEAC Consultant Team during the second quarter of 2022. In each section below, the Consultants provide details on the status of key work areas undertaken during Q2. 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 Q2 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 Q2, the Planning and Analysis Advisory Group focused its efforts on reviewing the PA 2022-2024 Plan Compliance Filing, reviewing Q1 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
April	EEAC Executive Committee Meeting	Consultant Team Q2 Work Plan	Develop and present to the Executive Committee on Consultant Team Work Plan for Q2 2021		Complete.
	EEAC Meeting	1. WFD Update 2. Community Partnerships 3. Q4 Results 4. PA Compliance Filing	Review and provide feedback on PA draft presentations; develop materials brief Councilors	Draft presentation(s)	Complete. Although the Consultant Team developed slides on the 2022-2024 Plan Compliance Filings to the DPU, on the PAs presented given time constraints .
	N/A	2022-2024 PA Plan April 1 Compliance Filing	Review the elements of the PA April 1 Compliance Filing relative to the DPU order on the 2022-2024 Plan		Complete.
	N/A	PA Quarterly Reports	Provide suggestions for updated PA quarterly report template		The Consultant Team provided some high-level suggestions for the quarterly report template, including reporting benefits by type in its presentation on the Q1 results in June.

May	EEAC Meeting	<ol style="list-style-type: none"> 1. Mass CEC Workforce Development Update 2. Moderate Income Delivery Updates 3. EEAC By-laws and Remote Participation Policy 4. Weatherization Pricing Update 	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s)	Complete.
	N/A	Q1 Report	Review results of the PA Q1 report and associated data		Complete. The Consultant Team presented on this topic at the June EEAC meeting.
	N/A	2022-2024 PA Plan May 1 Compliance Filing	Review the elements of the PA May 1 Compliance Filing relative to the DPU order on the 2022-2024 Plan		Complete.
June	EEAC Meeting	<ol style="list-style-type: none"> 1. Moderate Income Delivery Update 2. EEAC By-laws and Remote Participation Policy 3. Q1 Report 4. Weatherization Pricing Update 	Review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s)	Complete.

ACTIVE DEMAND

In Q2, much of the work done on active demand was done through the sector teams and focused on integration with energy efficiency offers.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
May	N/A	Q1 Report	Review preliminary year end results of active demand offering performance provided in Bi-Annual #1		Complete

RESIDENTIAL AND INCOME ELIGIBLE

The Residential Advisory Group's quarterly report is structured primarily around the Residential Management Committee (RMC) meetings which took place twice per month. The primary focuses this quarter were review of early performance data from Q1 and assessment of progress in rollout of the PAs' enhanced moderate income incentives and program delivery.

Time Period	Meeting	Topic(s)	Task	Information Needed	Status
April	Residential Management Committee (RMC) 4/13	Low rise and multifamily high rise in Residential Coordinated Delivery Initiative	Prepare discussion questions for meeting and secure participation of appropriate personnel	Updates from PAs	Complete.
	EEAC	Workforce development update; Q4 Results	Provide input on presentation content; review and provide feedback on PA draft presentations; develop materials; brief Councilors	Draft presentation(s)	Complete.
May	RMC 5/3	Co-delivery of efficiency and active measures for Res and IES sectors	Prepare discussion questions for meeting and secure participation of appropriate personnel	Status updates from LEAN and PAs	Complete.
	RMC 5/11	Low income topics: Electronic audits; restrictions on rent	Prepare discussion questions for meeting and secure participation	Status updates from LEAN and PAs; examples of	Requested information received.

		increases that may result from EE upgrades	of appropriate personnel	agreements LEAN secures from participants re: rent increases	
	EEAC	Moderate income delivery update	Review and provide feedback on PA draft presentation; brief Councilors	Draft presentation(s)	Complete.
	RMC 5/25	Q1 residential and IES performance	Review and analyze Q1 data; prepare discussion questions	Q1 report	Complete.
	Equity Working Group 5/26	Moderate income	Contribute to development of agenda and meeting materials	Updates from PAs	Complete.
June	RMC 6/8	Discussion with NYSERDA about their heat pump market transformation efforts	Prepare discussion questions for meeting and secure participation of appropriate personnel	None	Discussion complete; provided follow up information to PAs.
	EEAC	PAs' Q1 report	Contribute to team presentation; brief Councilors	Q1 report	Complete.
	RMC 6/22	Partnerships with health service providers	Secure participation of appropriate personnel	None	Discussion complete; provided follow up information to PAs.
On-going Q2	N/A	EM&V	Coordinate with res EM&V efforts, including montly coordination meetings, providing input on draft res EM&V work products, and ongoing participation in Res Customer Profile Study working group	Draft res EM&V reports	Provided input on heat pump program theory, MWBE scope of work, gas stove replacement NEI and res heat pump NEI studies.

	N/A	PA reporting	Review and analyze PA reporting, including monthly data dashboards and 2022 Q1 report and KPIs	Data dashboards; Q1 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 LIMF 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
April	April 6 CIMC Meeting	Co-delivery of energy efficiency (EE) and active demand management (ADM) measures	Review PA efforts to co-deliver EE and ADM measures, including but not limited to marketing, cross-promotion, enhanced incentives, automatic enrollment for certain measures.	2021 enrollment and savings information	Complete. Will continue to follow up on ADM savings information and compare 2021 performance to 2022 data.
	April 19 CIMC Meeting	Small Business Turnkey Implementation	Detailed review of new and expanded Small Business Turnkey measures and strategies, including plans for	Updates from PAs for further review in Q3	Complete.

			meeting envelope goals outlined in equity targets.		
	April 27 EEAC	1. Workforce development update 2. Q4 2021 Results	Provide input on presentation content; review and provide feedback on PA draft presentations; develop materials; brief Councilors.	Draft presentation(s)	Complete.
May	May 4 CIMC Meeting	Customer Economics	Building the business case for comprehensive customer projects based on specific investment criteria, lifecycle replacement costs and environmental compliance considerations. Review and provide feedback on PA sales approaches. Explore best practices for EE sales.	Custom EE Sales approaches by PA, including tools, vendor/contractor training	Complete.
	May 13 PA SME Meeting	C&I New Construction	In depth review of Pathways details in NC offering.	NC Leads from National Grid and Eversource	Complete.
	May 18 EEAC	1. Weatherization Pricing 2. Workforce Development Update	Review and provide feedback on PA draft presentations; develop materials; brief Councilors.	Draft presentation(s)	Complete.
	May 26 CIMC Meeting	Q1 2022 Report	Review of Q1 2022 results for both electric and gas programs.	PA updates on environmental justice (EJ) community efforts, workforce development (WFD), Deep Energy Retrofit (DER) Offering in development. KPI	Mostly complete. Discussions continue about details of C&I DER.

				clarifications	
June	June 1 CIMC Meeting	New Construction and Major Renovations	Progress on the implementation of Paths 1 and 2, as well as enhancements to drive all electric new construction in all NC pathways.	PA updates	Complete.
	June 15 EEAC	1. Q1 2022 Report	C&I Review of Q1 2022 results for electric and gas programs. Introduction of new C-Team C&I Lead.	PA Q1 Report	Complete.
	June 21 CIMC Meeting	Commercial Lighting Market Cannabis Cultivation and Indoor Agriculture DLC Tech V.5.1	Review of the remaining C&I lighting retrofit opportunities including controls, streetlighting and small pockets of natural gas streetlamps in historic districts. Added Cannabis and DesignLights Consortium (DLC) updates to LED Qualified Products List.	PA decision about adopting DLC Qualified Products List V5.1 Plans for Cannabis sector	Complete.
On-going Q2	Informal C&I Leads Call	Monthly informal check-ins w/ CIMC co-chairs and DOER	Agendas determined before meetings.	Schedule has changed since Q1 to accommodate PA April request for fewer mtgs. Continues to be effective means to follow up on CIMC topics and prepare for future larger group discussions.	Calls held Apr 25, May 9, Jun 29.

EVALUATION, MEASUREMENT, AND VERIFICATION

In Q2, 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 Q2	Continue working with the PAs to respond to EM&V-related provisions in the DPU Three-Year Plan order, as well as carrying out EM&V-related term sheet agreements.	None	This task will be ongoing throughout the triennium, but there was good progress in Q2. Highlights included planning and launching a DPU-mandated study of lighting savings opportunities among disadvantaged customer groups; planning a state-level standards promulgation study; and negotiating savings assumptions for a temporary restart of lighting offerings in HES.
	Move studies currently in the implementation stage through to the reporting stage. A few examples include the C&I Comprehensive TRM Update study, the Residential Language Isolated Customer Journey Mapping and Barriers study, and the Municipal Partnership Initiative study.	None	Studies in the implementation stage generally advanced smoothly in Q2, including the three studies mentioned under the task column. The C&I comprehensive TRM update study has now reached the final reporting stage.
	Overseeing final reporting on projects that are wrapping up. Some projects expected to be in the final reporting stage in Q2 include the Solar Inverter Demonstration Evaluation, the C&I Custom Gas Impact Evaluation, and the Passive House Market Effects Baseline study.	None	Numerous final reports were completed in Q2, including all three reports mentioned under the task column.
	Developing detailed plans for new studies, including both those called out in the 2022-2024 SEP and others as needed.	None	This is an ongoing task but there was good progress in Q2. Examples of new studies moved from the planning to the implementation stage include one on the performance of integrated controls for residential heat pumps; one on NEIs

			associated with induction stovetops; and one on net-to-gross ratios for heat pump fuel switching in new commercial buildings.
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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 Q2 were:

Time Period	Task	Information Needed	Status
On-going Q2	Finalize the updated EEAC website.		Complete. The Consultant team resented an overview of the updated website prior to the June EEAC meeting.
	Post meeting materials and public comments for the April-June EEAC Meetings.	Meeting materials for the April-June EEAC Meetings	Complete.
	Take meeting minutes at the April-June Executive Committee and EEAC meetings.		Complete.

COUNCIL DELIVERABLES

The sections below provide details on Council work products for Q2:

Month	Category	Topic	Description	Advisory Group(s)	Status
April	Memo	Consultant Team Q2 Work Plan	A memo identifying key tasks and deliverables of the Consultant Team in Q2 2022	All	Complete.
	Memo	Consultant Team Q1 report	A report summarizing the activities of the Consultant Team in Q1 2022	All	Complete.
	Presentation	April 2022-2024 Plan Compliance Filing	A presentation summarizing differences between the October filed plan and the updated information included in the April compliance filing	Planning & Analysis	Complete. Although the Consultant Team developed slides on the 2022-2024 Plan Compliance Filings to the DPU, on the PAs presented given time constraints.
	Presentation	Q4 Results	A presentation highlighting results of the PA Q4 report and KPI data. The C-Team developed a presentation for the March Council meeting but did not have time to present, the presentation was moved to the April meeting.	All	Complete.
June	Presentation	Q1 Results	A presentation highlighting results of the PA Q1 report and KPI data.	All	Complete.

On-going Q2	Tracking Spreadsheet	EM&V Status Update	A spreadsheet summarizing the status of current and planning EM&V studies – Updated monthly	EM&V	Complete.
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