CONSULTANT TEAM
2023 WORK PLAN

- April 12, 2023

OVERVIEW

- **First year of C-Team contract**
- **Covers 9-month period from April – December 2022**
- **Work divided into several advisory groups**
- **Focus of 2023 will be foreword-looking to support development of the 2025-2027 Plan**
  - Given the revised Plan submission timeline and determination GHG reduction goal, most planning activities must be completed earlier than past
- **Assumes limited travel**
- **Team leads the same as 2022 Team**
  - Some new subject matter experts/supporting team members

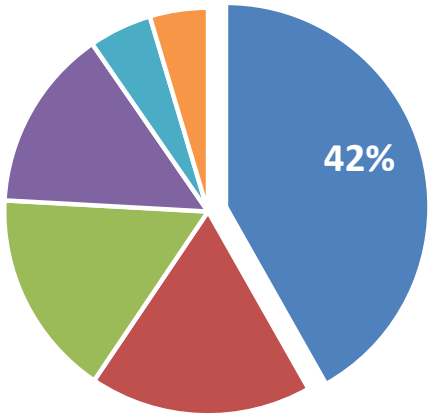
NEW TEAM MEMBERS

	Staff	Advisory Group	Work Areas
NV5	Alek Antczak	Planning & Analysis	Strategic planning, program implementation best practices, policy support
	Kim DiGiovanni	Technical Services	Marketing and web design
	Collin Smith	Res/IES	Res and IES best practices including experience in California
	Melissa Persechini	Technical Services	Meeting minutes, website management, reporting, meeting attendance
BuildingMetrics	Peter Jacobs	EM&V	Support EM&V study planning, implementation and reporting
DiversityMC	Susan Cohen	Planning & Analysis	Input and subject matter expertise on marketing and outreach strategies for reaching underserved customers
	Kristy Ranieri	Planning & Analysis	Input and subject matter expertise on marketing and outreach strategies for reaching underserved customers

PLANNING AND ANALYSIS WORK

- **Key Topics**
  - Reviewing and assessing PA Potential Studies
  - Supporting Avoided Energy Supply Cost Study
  - Strategic planning for 2025-2027 Plan
  - Technical assistance for GHG goal

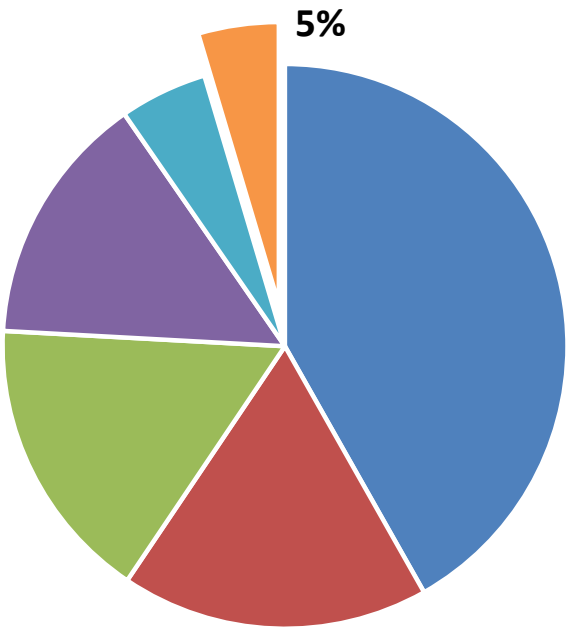
2023 Budget Allocation – Planning & Analysis



ACTIVE DEMAND MANAGEMENT (ADM) WORK

- **Key Topics**
  - Resilience values for storage: Income Eligible and Market Rate
  - Planning for integrated storage, efficiency, and renewables program offering

2023 Budget Allocation – Active Demand

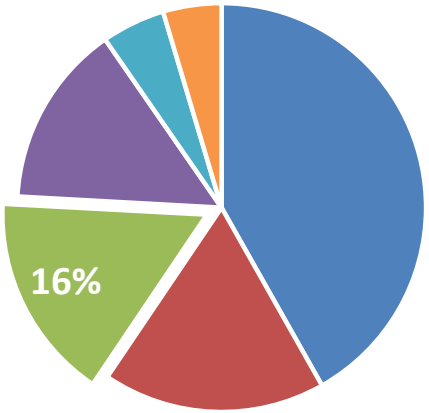


RESIDENTIAL AND INCOME ELIGIBLE WORK

Key Topics

- Transition away from fossil fuel heating, beginning with new construction
- Alternative res program models for bundling weatherization and heat pumps
- New strategies and techniques for reaching underserved customers
- Model for streamlined customer participation
- Opportunities to co-promote and leverage Inflation Reduction Act funding
- Opportunities to leverage recent DPU approvals of advanced metering infrastructure for achievement of energy efficiency program goals
- New technologies for targeting, customer experience, and data management

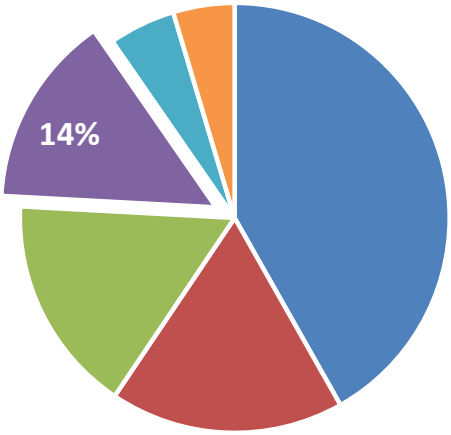
2023 Budget Allocation – Res/IES



COMMERCIAL & INDUSTRIAL WORK

- **Key Topics**
  - Reporting needs for more frequent deep analysis into C&I sector performance data
  - Energy efficiency efforts as a prerequisite to effective electrification
  - C&I electrification opportunities beyond HVAC applications
  - Additional strategies for reaching underserved small and micro business customer populations, particularly for weatherization
  - Streamlining Custom Project process and communication to enhance large C&I customer participation in all measures

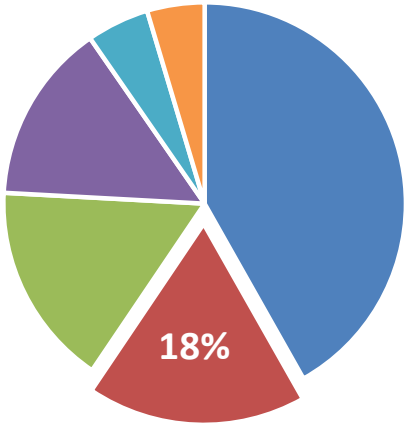
2023 Budget Allocation – C&I



EM&V WORK

- **Key Topics**
  - Research supporting increased focus on electrification/heat pumps:
    - HP market effects baseline study
    - Multi-state HP metering study
    - Study to update tool for estimating C&I prescriptive heat pump impacts
  - Ensure EM&V supports development of the 2025-2027 Plan:
    - Studies needed to feed into the potential studies, notably the C&I baseline study
    - Input into the design and implementation of the potential studies
    - Discussions regarding EM&V policies in the next triennium, and contributing to term sheet agreements on EM&V issues
    - In-progress MWBE study

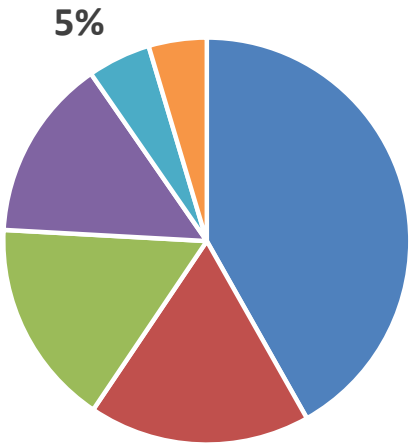
2023 Budget Allocation – EM&V



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

2023 Budget Allocation – Tech Service



DELIVERABLES

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

HIGH-LEVEL BUDGET PROPOSAL

$1,347,895

	Staff	Work Areas	Strategic Planning	Plan Implementation	Oversight of EM&V	Coordinate Technical Services	Total Hours
NV5	Eric Belliveau	Strategic planning, program review, policy direction, representing C-Team at Term sheet meetings, Councilor briefings and meeting participation	350	150	38	15	553
	Gretchen Calcagni	Project and deliverable management, strategic planning, policy support, program review, data anlaysis, website management, Councilor briefings and meeting participation	350	300	38	50	738
	Adrian Caesar	Meeting minutes, website management, reporting, meeting attendance, data analysis	50	50		150	250
	Griff Keating	Data management and analysis, strategic planning, policy support, program review, ADM topics, GHG goal, heat pump analysis, Councilor Briefings and meeting participation	250	150			400
	Michelle Keller	C&I strategic planning, program review, data analysis, and deliverable development, Councilor briefings and meeting participation, CIMC participation, C&I working group paricipation	350	250			600
	Alek Antczak	Strategic planning, program implementation best practices, policy support	60	60			120
	Kim DiGiovanni	Marketing and web design				75	75
	Phil Mosenthal	Input and subject matter expertise on codes and standards, performance incentive, policy support	25	25			50
	Collin Smith	Res and IES best practices including experience in California	60	60			120
	Matt Socks	Lead C-Team involvement in AESC, Assessment of Potential, TRM Review	300	100			400
	Melissa Persechini	Meeting minutes, website management, reporting, meeting attendance	50	50		75	175
	Analyst	TBD	75	100		25	200
Individuals	Jeff Schlegel	Input and subject matter expertise on Active Demand, AESC, ISO issues, market transformation, performance incentive, and policy	125	75			200
	Ralph Prahl	Oversee EM&V study planning, implementation and reporting			506		506
	Bob Wirtshafter	Support EM&V study planning, implementation and reporting			173		173
	Other Consultants (TBD)	TBD	50	50			100
AEC	Lori Lewis	Support EM&V study planning, implementation and reporting			61		61
BuildingMetrics	Peter Jacobs	Support EM&V study planning, implementation and reporting			131		131
Caerbannog	George Lawrence	Input and subject matter expertise on commercial and expecially industrial programs		50			50
CEI	Margaret Lynch	Res and IES strategic planning, program review, data analysis, and deliverable development, Councilor briefings and meeting participation, RMC participation, EWG participation	225	300			525
DiversityMC	Susan Cohen	Input and subject matter expertise on marketing and outreach strategies for reaching underserved customers		40			40
	Kristy Ranieri	Input and subject matter expertise on marketing and outreach strategies for reaching underserved customers		45			45
GDR Consulting	Glenn Reed	Input and subject matter expertise on residential programs including heat pumps, lighting and appliances	125	125			250
Good Trouble	Elizabeth Chant	Input and subject matter expertise on IES programs and equity topics	120				120
JLC	Jennifer Chiodo	Support EM&V study planning, implementation and reporting; Input and subject matter expertise on commercial programs and commmissioning and HVAC measures	150	120	132		402
SparkPlug	Sean Becker	Input and subject matter expertise on active demand and storage especially in MA	75	60			135
	LABOR TOTALS	Hours	2,790	2,160	1,078	390	6,418
		Amount	$591,702	$445,549	$236,394	$67,250	$1,340,895
		Travel	$4,000	$3,000	$0	$0	$7,000
		DIRECT COSTS TOTAL	$4,000	$3,000	$0	$0	$7,000
		TOTALS	$595,702	$448,549	$236,394	$67,250	$1,347,895

THANK YOU

Questions?

- April 12, 2023