

MEMORANDUM

To: Energy Efficiency Advisory Council

From: Paul Horowitz

Date: September 13, 2010

Subject: August Team Monthly Report – Activities Undertaken, Six-Week Look Forward,
Assessment

Councilors – Enclosed below are reports from the consultant team groups (Planning & Analysis, Residential and Low Income, C&I, EM&V) on activities undertaken during August and a look forward to the following six weeks. An assessment of the state of activities based on the experiences of the month and the upcoming tasks is also included. Also included is a brief summary of project management activities.

Monthly Consultant Report on Activities – August 2010

Planning and Analysis Team

I. Activities during August 2010

Planning and Analysis

- Developed revised draft schedule and process for 2011 Mid-Term Modifications, to be filed by October 29, 2010, and reviewed list of potential topics/modifications; presented schedule and list to the Council.
- Reviewed and discussed proposals for “triggers” for Mid-Term Modifications to be applied for DPU approval vs. notification (currently unresolved; revised straw proposal from the PAs being developed).
- Analyzed options for reallocation of the Performance Incentives, per DPU Order, and reviewed the additional PA analysis of options received on July 30. Developed straw proposal for Performance Incentives and PI Metrics for 2011, and reviewed the consultant straw proposal with the PAs.
- Reviewed proposed 2010 mid-year modifications from CLC.
- Followed up on issues and enhancements for the Mass Save Home Energy program, including opportunities for contractor participation in residential programs.
- Supported development of rental housing landlord strategy and reviewed proposals for serving renters and 60-X% of median income customers.
- Reviewed C&I activities related to deeper savings, multi-year projects and relationships, and C&I financing with PAs.
- Updated EEAC calendar and schedule, and presented to the Council. Assisted in developing the EEAC meeting agenda.

Financing

- Reviewed revised draft OBR rental financing task force report.
- Reviewed PA status report on other program funding and financing capital in the 2009 Annual Reports.
- Worked with DOER to make progress on key financing issues, for both customer repayment and outside capital, including consideration of other options for financing and outside capital.

Reporting

- Reviewed reporting issues and DPU orders/guidelines for Annual Reports, and participated in the 08-50 working group meeting on August 12.
- Reviewed Q2 quarterly reports (part 2, data) from the PAs. Analyzed data and tables, with a focus on deeper savings. Presented initial analysis of Q2 data and indicators of deeper savings to the Council.
- Provided additional analysis of Q2 quarterly report data to the PAs, with some observations and concerns identified; needs follow up with the PAs.

TRM (Technical Reference Manual)

- The TRM working draft was delivered to the PAs via the High Level Working Group on August 10. Since then, the PAs have assumed responsibility for finalizing the draft. A target date of September 24 was established by the PAs to finalize all sections that define savings numbers so that PAs will have time to update 2011 plan numbers as needed. Activities will

then focus on finalizing other sections and the overall assembly of the document, leading to submittal with the Mid-Term Modifications on October 29.

II. Anticipated activities over next six weeks

- Major activity and primary focus will be to perform planning tasks/coordination with PAs for Mid-Term Modifications for 2011 (e.g., modifications to budgets, savings, benefits, performance incentives, metrics, programs, etc.). See revised schedule and list of topics (separate documents distributed to the Council).
- Resolve issue of “triggers” for Mid-Term Modifications through discussions with PAs and others. Develop revised straw proposal for triggers for notification and DPU approval.
- Review proposals for rental housing/landlord strategies and serving 60-X% of median income customers, either as part of Mid-Term Modifications process or separately.
- Resolve outstanding/unresolved financing and repayment issues (e.g., financing for rental properties), and assist in completing the OBR rental financing task force report to EEAC.
- Coordinate with DOER (Tom Darling/others) and PAs on development of sources and approaches to attain outside capital for financing, as well as other program funding. Assist in developing options or alternatives, including revised Heat Loan as an interim/hybrid approach. Work on C&I financing with the PAs in parallel.
- Consider appropriate levels of incentives (rebates) vs. attractive financing in key programs, for 2011.
- Review and work on improvements for bill and rate impact analysis, considering the issues raised in the DPU decisions, and continue work with the 08-50 working group (participate in WG meeting on September 2).
- Follow up on marketing and messaging concerns related to encouraging deeper savings, and on fully integrated financing in the programs for 2010.
- Participate in 08-50 working group on Annual Reports and 2011 Midterm Modifications, as scheduled by DPU.
- Review any PA-proposed mid-year modifications for 2010.
- Prepare for EEAC meetings in September and October (including document preparation and documents related to Mid-Term Modifications filings).
- TRM: The PAs have assumed responsibility to complete and finalize the document sufficient for the purposes of submitting the final TRM with the 2011 Mid-Term Modifications on October 29, which will inform the tracking of all prescriptive measure savings effective 1/1/2011. To support these efforts, the TRM Core Working Group will reinstitute its weekly meeting schedule to coordinate the process through September. The Consultant Team will also provide review and comment of the final drafts on behalf of the EEAC.

III. Overall assessment of project

Massachusetts is more than half way through 2010 and the Council can use the Q2 quarterly reports (part 2, quantitative) and the consultants’ analysis of the quarterly reports to assess progress to date compared to the goals, objectives, and priorities for the year. In sum, the message is mixed, with good progress in some areas, and activity and savings to date on track to achieve the goals in some programs for some PAs – but with some programs and PA portfolios lagging. See the quarterly reports for the details.

See the notes on activities and anticipated activities above, which provide a summary of many of the activities and issues that are in progress; we are making headway on many of these.

However, overall progress is slower than it needs to be if MA expects to achieve the 2011 and 2012 goals and benefits set forth in the three-year plan, which continue to ramp up ambitiously and rely on strategic groundwork being laid and early implementation during 2010 (i.e., deeper first, then broader). The EE programs are behind on many of the key foundational building blocks necessary to achieve 2% savings in 2011 and 2.4% savings in 2012 (on the electric side; 0.9% and 1.15% on the gas side). See prior monthly reports for additional details.

Development of the TRM (Technical Reference Manual) is on track for inclusion with the 2011 Mid-Term Modifications filing in October, and the responsibility is now in the hands of the PAs.

The primary planning and analysis focus in September and October is on the planning process for 2011 Mid-Term Modifications, with the filing due on October 29. This will require significant effort, with modifications and their interactions in the various planning documents (e.g., budgets, revenues, savings, benefits, net benefits/cost-effectiveness, performance incentives, performance incentive metrics, other funding, financing, program modifications, etc.).

One overarching challenge seems to be for the PAs to find adequate time to look ahead and work on the key building blocks for the future, while also focusing on the annual goals for 2010 and being faced with immediate fires to fight and near-term assignments. The overall goals in the three-year plans will not be achieved unless everyone looks and plans ahead, to lay the building blocks in 2010 for achieving the higher savings goals in 2011 and 2012.

Residential & Low-Income Team

I. Activities during August 2010

The principal focus of the residential consulting team in August has been on working with the PAs to implement planned 2010 program activities, while starting to prepare for the mid-term modification filing. Efforts have been made in each of the major program areas, particularly concentrated on the two programs highlighted in the ‘Council Priorities and Key Actions for 2010’ document, MassSAVE/Weatherization (Mass Save Home Energy Services) and Residential Lighting and Appliances (Products).

MassSAVE/Weatherization (Mass Save Home Energy Services)

The Residential Management Committee (RMC) continued to meet bi-weekly in August to address on-going MassSAVE/Weatherization program implementation issues, and to respond to data and input requests from the Residential Steering Committee. Proposals that have been and continue to be addressed for the Steering Committee include common measure pricing, common audit software, vendor structure/market model, and packaging of measures/incentives.

The PAs made additional progress in the following key areas in August:

- Building on successes to date, continued design work to more effectively serve landlords and tenants through the program. The PAs met with key members of the Massachusetts Rental Housing Association (MRHA) and discussed how the program could work more closely with the organization to penetrate the rental housing market. The PAs, in response to the consultants’ white paper “Mass Save Action Plan for Rental Housing,” have been actively working on a consensus document outlining the program strategy for reaching the rental housing market in 2011. It is envisioned that the consensus strategy document will be included in the mid-term modification (MTM) filing. The development of a Landlord brochure is also nearing completion.
- Keeping abreast of the status and potential impacts of the pending Federal Home Star legislation through an update presentation from Steve Cowell (CSG).

Steering Committee: The Residential Steering Committee, which has been charged with making specific high-level structural program design decisions, met weekly in August. The committee, chaired by the PAs with guidance from the consultants, has made some significant progress on the five areas outlined in the committee’s scope. The committee has directionally approved common pricing, common audit software, and a revised market model, and has assigned to the RMC the task of developing an action plan and timeline for each for committee review. To assist with the market model discussion, three very successful focus groups were held in August, led by Paul Gromer and Fran Cummings, to solicit input from contractors on the proposed market model concepts. The committee will next be taking up Customer Experience and Deep Energy Savings.

Residential Lighting and Appliances (Products)

The Program remains largely on track with the PAs exceeding goal for several key measures (spiral CFLs, refrigerators, etc.). The PAs continue to plan for a consumer electronics (TV) roll out and were awaiting the release of the first ENERGY STAR solid state lighting (SSL) lamps at the end of the month. Depending on product type, availability and other considerations, the PAs may offer incentives for SSL lamps later in the year. Key 2011 planning issues that the PAs have been addressing include the net to gross (NTG) ratios for spiral CFLs and for refrigerators. In

their Three-Year Plans the PAs stated that they would assume a zero NTG ratio for spiral CFLs in 2011. This would effectively eliminate spiral CFLs from their portfolio next year. The EEAC consultants have suggested that this assumption be revisited as indications are that the market for spiral CFLs is not fully transformed and that continued PA support of this measure in 2011 may be warranted.

Other Key Programs/Pilots:

- Residential New Construction: The Joint Management Committee (JMC) overseeing the Massachusetts New Homes with ENERGY STAR Program reports that they are on track to exceed goals for this year. The Program is wrestling with a multitude of changing factors which will come into play over the next year. The national ENERGY STAR Homes standards ramp up in 2011, an increasing number of communities are interested in establishing stretch codes, the new IECC 2009 statewide code will play a larger role as more permits are issued for new homes, and the baseline against which savings is calculated is ramping up, resulting in diminished savings. All of these factors are under consideration as the PAs conduct their analysis to examine potential program changes for next year. As part of the mid-term correction filing process, the JMC is analyzing the impacts and implications of all these changes to determine what the program goals, tier levels, incentives and savings should be for 2011, and then, whether or not these modifications will result in having to submit a revised filing. While preliminary results seem to indicate that the current program tiers and incentives may need to be adjusted to remain cost-effective, additional work will need to be completed before making any final assessment. That analysis is currently under way and will be reported out at the next JMC meeting on September 10.
- HVAC – Gas & Electric: The PAs' HVAC programs are largely on track to meet their 2010 goals and the PAs have had notable success with their new (for 2010) brushless fan motor (BFM) fan retrofit effort through Cool Smart. Further, the realigning of Cool Smart incentives towards the HVAC contractor also appears to have been successful. For 2011, the Cool Smart PAs have expressed some reluctance to make any of the quality installation and verification (QIV) program components (proper sizing, charge and airflow) absolute eligibility requirements for equipment incentives, though the PAs recognize the additional benefits from QIV. This will be a continued area of discussion with the EEAC consultants in September.

II. Anticipated activities over next six weeks

The focus of our activities over the next six weeks will be continued engagement with the PAs on program implementation and on planning discussions. Some of the primary themes that we will be addressing include the following.

- Lighting: Continue to plan for 2011, including discussions as to whether any adjustments should be made to CFL measure life assumptions for CFLs installed in 2011 and 2012.
- HVAC (Gas & Electric): The High Efficiency Heating and Hot Water Program faces some significant challenges based on the draft impact evaluation of the Program. Overall, the estimated free-ridership rate for the program 62%. If this value holds, then many of the Program's measures may no longer be cost-effective. A presentation and discussion of the draft results is scheduled for early September.
- Residential New Construction: NEEP is planning a September 28 regional workshop in Marlborough, Mass. on examining policies and procedures associated with claiming savings for code support work. Massachusetts will be featured as an example of how this process can be put into place. Residential Steering Committee: The Consultants will continue to

participate on the Steering Committee to encourage the necessary key program design decisions on the Mass Save Home Energy Services program for 2011.

III. Overall assessment of project

The PAs are progressing well toward meeting 2010 program and pilot goals. They continue to be challenged with handling the increased reporting requirements associated with the 3-year plans, while they want to be focusing primarily on implementation. The PAs have several timely opportunities to improve key elements of existing program designs, particularly in the Mass Save Home Energy Services program. There continues to be productive cooperation among the PAs, and with the Consultants, in the various program working groups. Some key issues that still need to be addressed/resolved include: 1) residential retrofit program key program design modification recommendations from Steering Committee, including Rental Housing strategy for 2011, and incorporation of modifications in upcoming vendor RFP scopes of work, 2) gas and electric integration (plan & timeline) of primary elements of the HVAC programs, 3) successful integration of the new MassSAVE program collateral pieces (Energy Assessment Report, Comprehensive Education Package) into the program marketing strategy, and 4) successful mid-term modification discussion and implementation process.

C&I Team

I Activities during August 2010

- August was a relatively quiet month, due to vacations and participation by PA staff and Council consultants at the ACEEE “Energy Efficiency in Buildings” Summer Study program. The PA Managers meet only once during the month.
- The consultants participated in an initial meeting between the C&I Managers and DOER senior management, the objective of which was to better coordinate PA program offerings to municipalities with those of DOER, specifically the Green Communities Division, thereby both presenting more seamless offerings to consumers in the Commonwealth and maximizing the potential of all ratepayer and non-ratepayer (principally US DOE and ARRA) funding. The meeting was initiated in order to first provide better coordination of all offerings to municipalities. The specific issue was the role of “audits” in determining municipal service offerings.

The PAs maintained that they have run targeted, successful municipal efforts for a number of years and that these programs have been refined based on their own experiences and those of other programs around the nation. They use “audits,” which can mean anything from a simple walk-through to a full engineering study, along with other tools, to move municipal customers to implement projects. Because all the projects must be cost-effective and their results are measured on energy saved, the PAs link the level of their effort to their clients’ commitment to (and resources available for) action. They wished to continue their municipal partnership with the Green Communities Division to enable them to continue within that basic construct: that is, “audits” (in all their variants) would be offered to municipal customers when there was a reasonable expectation that these investments would produce projects.

Historically, the metric for the Energy Audit Program (EAP) within DOER has been driven by the number of audits completed, with each audit being of a high grade. The expense of these engineering audits was covered by federal funds, with no PA or municipal funding, and without any implementation commitment. The PAs position was that they could not assume the EAP program obligation without some modification that would allow it to fall inside the parameters of their approved program offering.

The outcome of the meeting, captured in a memorandum from the C&I program managers to DOER, is an agreement that:

“... the Green Communities Division has the expertise and the understanding of the current municipal environment to work with the PAs and communities to help bring identified projects to fruition. The GC field staff can perform services ranging from facilitation and coaching through to acting as the “owner’s agent” for communities that are overwhelmed with other challenges or lack the internal resources or technical expertise to act on opportunities that have been identified. The Green Communities Division also has the ability act as a “gap filler” – providing incentives for measures that improve the efficiency in the buildings serviced by unregulated fuels (oil, propane, biomass) and providing access to targeted supplemental funding when PA incentives and local funding are not “enough” to make good projects happen.”

The next step is to develop a workplan that outlines the roles of the PAs and the Green Communities Division in sufficient detail that both parties, and their client municipalities, are clear on their responsibilities going forward.

The consultants believe that this outcome is a good one, in that it: (a) provides integrated services to municipalities; (a) leverages both state and PA resources without redundancy; and (c) allows both parties to focus on their core competencies.

- The PAs applied their “Process for Managing Unsolicited Proposals” to their first proposal – from Interfaith Power and Light to provide services to a sample of sixty house of worship. The reviewers determined that houses of worship could be most effectively served by adding them to the PAs’ Small Business Services program. As one of the principles of the unsolicited proposal criteria is that no new initiative should be funded when the market targeted can be included in an existing approved PA program, the consultants agree that this was an appropriate decision. (Apparently this outcome satisfied the IP&L proposers.)
- The PAs are considering a proposal from Les Tumidaj of Strategic Energy Group in Oregon to deliver a “Continuous Energy Improvement Cohort Program” for a sample of large (primarily industrial) customers. SEG managed a similar cohort of eleven companies in Oregon that have energy costs of at least \$250,000 per year. The goal was for each firm for to reduce energy use by 5-10% a year from low cost/no cost improvements alone. After 13 months, the average savings was 7%, with a range of 2% to 17%. All savings resulted from process improvements, not investments in measures, which produced additional savings.

Additional activities that are ongoing include:

- The PAs have developed a team to complete development of a common project-level Statewide Combined Screening tool. The consultants will monitor.
- The Residential Managers and consultants have progressed significantly on a plan to capture and verify energy savings attributable to PA support of enhanced energy code compliance in the state. The C&I consultants expect to capitalize on that work to establish similar protocols for C&I savings. The consultants agreed to research the California attribution model, which is viewed as the most mature and sophisticated.
- The consultants facilitated a meeting with one of their counterparts to the Energy Conservation Management Board in Connecticut – Les Tumidaj of Strategic Energy Group of Portland, Oregon – to exchange information of common interest between the states. Priority items in both states are “deep dives” in buildings and third party financing. In addition to a commitment to continue the information exchange on a regular basis, at least at the consultant level, the Massachusetts PAs also agreed to contract with SEG to conduct secondary research on the current state of best practices in deep retrofits nationally and internationally. The consultants supported this effort, as it advances two major Plan goals.

II. Outstanding/Notable Issues:

- The PA managers' meeting with DOER management around the issue of audits appears to have produced an outcome that will improve the efficiency of delivery of services to municipalities. The consultants have suggested that the discussion continue, to address better coordination of the Green Communities Division's grant funding process and criteria with PA programs. In our view, the Division should first leverage all available PA resources and then access Green Communities funding for either unmet co-pay on projects or, more ideally, to fund applications that are beyond the scope of the ratepayer-funded programs, such as those involving oil or propane. All projects should also be screened through the same cost-effectiveness criteria, irrespective of funding source. If implemented, these enhancements would maximize the delivery impact and reach of both funding sources, as well as send consistent project eligibility criteria to all municipal customers.
- The consultants have recommended that all PAs develop protocols or parameters for principled incentive negotiations and that all PAs negotiate incentives on all custom projects, including municipal projects, in order to acquire savings at the least cost. This process has advanced somewhat, but needs to be fully embraced, particularly since custom projects constitute the largest block of PA savings activity in the C&I sector.
- Managing third party requests to direct resources towards their preferred constituency continue to be challenge, and a very significant diversion of management time. Because these requests are generally in the form of proposals to provide "activity" (leads, promotion, linkage to certain constituencies, etc.), but not necessarily savings, they have very limited utility. (With access to all customer energy use data, the PAs really have all the lead information they need.

III. Anticipated activities over next six weeks

- Work with the PAs to develop strategies to reduce overall program costs, which could include increased administrative and delivery efficiencies and/or targeted incentive adjustments.
- Continue to monitor PA program coordination and implementation tasks, particularly with regard to treatment of unsolicited proposals and PA-proposed pilots, using the approved protocols for each.
- Continue to assist PAs in developing strategies to pursuing deep retrofits, building off any relevant experience from neighboring jurisdictions or a scan of national best practices.
- Continue to work with the PAs and the EEAC, DOER and other state agencies to better understand and integrate other state and federal-level initiatives (*e.g.*, the Green Communities Division of DOER and the stimulus-funded efforts of DOER and DEP, and direct energy stimulus funding to cities through the US Department of Energy) with the PA programs to provide consistent services across all Massachusetts energy efficiency efforts. This will avoid confusion and disruption in the market.
- Continue review of 2009 Annual Reports and latest Quarterly reports, to provide critical feedback to PAs and the EEAC.

II. Overall assessment of project

The PAs are focusing on deep retrofit and financing leveraging goals, but complex and multiyear projects have long lead times. We anticipate that the ground-breaking negotiated multiyear agreement between MIT and NSTAR will be the first of several.

The drag of the economy continues to be a major challenge to the achievement of goals. A quick and unscientific survey of other programs finds them all similarly situated – behind goals and struggling to adjust incentives and offerings to boost demand.

In the next month the consultants will be working with the PAs to identify strategies to address challenges to goal achievement – short term tactics that may assist in 2010 and early 2011, as well as longer term enhancements to programs that may have larger impact in the out years.

We continue to be concerned that some companies are not adequately staff resourced to fully address the challenges of the goals in the Three Year Plans.

EM&V Team

I. Activities during August 2010

New Study. In August, following discussions with DOER, we added a small, very fast-turnaround study aimed at informing possible upcoming discussions about changes in incentive levels for 2011. The study consists of: (1) using secondary data sources to characterize incentive levels in some other leading states and compare them with Massachusetts; (2) interviewing program planners and policymakers in some of the same states regarding their history and views regarding setting of incentive levels; and (3) a quick literature review. Because the study covers all customer sectors, we decided to house it in the Cross-Cutting Research Area. We invited short proposals from the two contractor teams covering this research area, and ended up selecting Tetra Tech¹ with assistance from the Energy Center of Wisconsin. This project is scheduled to be complete by the end of September.

Studies in Progress. The bulk of our time in August was spent in moving forward the 2010-2011 studies. We thought the Council might find it helpful to see from time to time a complete listing of all of the studies that are under way, along with a brief indication of their status. We have therefore prepared Table 1. A few explanatory notes:

- Studies are organized by research area. In the case of the Cross-Cutting area, there are two contractor teams, so studies are also broken down by team.
- What constitutes “a study” is to some extent a judgment call, but in general the criteria include: (1) a set of research activities that feature a coherent set of inter-related researchable questions addressing the same topic; (2) being performed by a single contractor or team of contractors; and (3) being the subject of a specific workplan submitted by the contractor(s). Not all of the studies on the table meet all three of these criteria, but all probably meet at least two of the three.
- All told, by our reckoning there are approximately 40 studies to be performed from mid-2010 through mid-2011. There is a large range in the scope and magnitude of each of these studies, with perhaps a 30-to-1 range in the budgets between the largest and the smallest. Some of the studies might alternatively be described as sets of closely related studies, but are treated as a single study because they are the subject of a single workplan. Examples include evaluations of behavioral programs and of community-based efforts.
- There are two columns pertaining to study status. The first shows whether we believe a study to be on schedule based on the tentative plans that were established in each research area earlier this year. The second characterizes the objective status of the study.
- Regarding the status column: typically, the last planning hurdle before a contractor begins full-scale data collection and analysis activities is the approval of a detailed workplan specifying activities, budgets, hours, assignments, and timeline. Most of the indicators in the status column pertain to these workplans. Projects for which there is an approved workplan, and for which contractors are thus now in the field collecting data are described as “in the

¹ Until recently, PA Consulting. The name has changed due to a merger.

field.” For projects for which there is not yet an approved workplan, progress toward reaching an approved workplan is summarized. For various reasons (frequently because they are dependent on the completion of other milestones), some studies were never scheduled to have begun yet. Where appropriate, this is indicated.

- Because some projects were never scheduled to have begun by this date, it is possible for a study not to have begun but still be on schedule.
- Most of the studies are on schedule. However, we estimate that roughly 20% are behind schedule, for a variety of reasons. We are working with the PAs and contractors to move studies that are behind schedule forward as quickly as possible.

We currently anticipate providing the Council with updated versions of this table every few months (we could provide it every month if desired, but suspect it may be more detail than the Council wants to see every month).

III. Overall assessment of project

The implementation of the statewide EM&V framework is generally going well. Fielding of the 2010-2011 studies is now in full swing, and there have been no major administrative, policy or technical problems. Neither have there been any disagreements between the PAs and EEAC consultants that could not be resolved informally.

TABLE 1. STATUS OF 2010-2011 EM&V STUDIES, AUGUST 31, 2010

STUDY	ON SCHEDULE?	STATUS
Large C&I		
<ul style="list-style-type: none"> • Non-Residential New Construction Market Assessment Study 	Yes	In the field
<ul style="list-style-type: none"> • Chain and Franchise Market Assessment Study 	Yes	In the field
<ul style="list-style-type: none"> • High-Bay Lighting Market Effects Study 	Yes	In the field
<ul style="list-style-type: none"> • Prescriptive VSD Impact Evaluation Study 	Yes	Not scheduled to have begun yet
<ul style="list-style-type: none"> • Custom HVAC Impact Evaluation 	Yes	In the field
<ul style="list-style-type: none"> • CHP Performance Evaluation and Market Assessment Study 	Slightly behind schedule	2 nd draft of workplan under review
<ul style="list-style-type: none"> • Custom Gas Impact Evaluation 	Yes	In the field
<ul style="list-style-type: none"> • Prescriptive Gas Impact Evaluation 	Slightly behind schedule	Awaiting 2 nd draft of workplan
<ul style="list-style-type: none"> • Comprehensive Design Assistance Process Evaluation 	Yes	In the field
<ul style="list-style-type: none"> • Comprehensive Design Assistance Impact Evaluation 	Yes	In the field
<ul style="list-style-type: none"> • Overall Large C&I Process Evaluation 	Yes	In the field
Small C&I		
<ul style="list-style-type: none"> • Lighting Controls Impact Evaluation 	Yes	In the field
<ul style="list-style-type: none"> • Lighting Operating Hour Logger Study 	Yes	Not scheduled to have begun yet
<ul style="list-style-type: none"> • Multi-Tier Program Structure Assessment 	Yes	Not scheduled to have begun yet
<ul style="list-style-type: none"> • Efficiency Opportunities Survey 	Yes	Not scheduled to have begun yet
<ul style="list-style-type: none"> • Staff Interviews 	Yes	In the field
Res Retail Products		
<ul style="list-style-type: none"> • Market, Impact and Process Evaluation of Residential Lighting program 	Yes	In the field
<ul style="list-style-type: none"> • Market, Impact and Process Evaluation of Appliance Recycling Program 	Yes	In the field
<ul style="list-style-type: none"> • Evaluation of Smart Powerstrip Promotions 	Yes	Not scheduled to

		have begun yet
Cross-Cutting Contractor Team 1		
• Evaluations of Behavioral Programs	Yes	In the field
• Evaluations of Community-Based Efforts	Yes	2 nd draft of workplan under review
• Evaluation of Umbrella Marketing Efforts	Yes	In the field
Cross-Cutting Contractor Team 2		
• Updating of C&I Standard Net-to-Gross Method	Slightly behind schedule	1 st draft of workplan under review.
• Residential and Low-Income Non-Energy Benefits Study	Yes	In the field
• Quick-Turnaround Study on Incentive Levels	Yes	In the field

Res New Construction		
• Codes and Standards Analyses	Yes	In the field
• DOER Code Pilot Study	Yes	In the field
• Process Evaluation of Major Renovation Pilot	Yes	In the field
• Process Evaluation of Energy Star Homes Version 3 Pilot	Yes	In the field
• Process Evaluation of Multi-Family Pilot Program	Yes	Not scheduled to have begun yet
• Mystery Shopping Study	Yes	Not scheduled to have begun yet
• Baseline Study Preparation	Yes	Not scheduled to have begun yet
Res Retrofit		
• Process and Impact Evaluation of Gas High-Efficiency Home Energy programs	Yes	Draft report circulated
• Study of MassSAVE Audit Report Formats	Yes	In the field
• Process Evaluation of MassSAVE	Slightly behind schedule	1 st draft of workplan under review.
• Process Evaluation of Deep Retrofit Pilot	Behind schedule	Waiting draft of workplan
• Evaluation of Brushless Fan Pilot	Behind schedule	Waiting draft of workplan
• Multi-family Potential Study	Behind Schedule	Waiting draft of workplan
• Process Evaluation of Low-Income Programs	Slightly behind schedule	1 st draft of workplan under review.
• Non-Participant Panel Study	Yes	Not scheduled to have begun yet

Project Management

I. Activities in August 2010

- Kept team informed of directives from the Council and DPU's orders regarding focus of activities in August and upcoming in September;
- Maintained regular communication with team regarding on-going activities, issues, updates
- Initiated internal discussions to enhance the team's ability to respond to Council priorities
- Maintained regular communication with DOER about project updates and issues

II. Anticipated activities over next six weeks

- Coordinate consultant team input into preparation of Council meeting materials;
- Continue regular communications with team regarding on-going activities, issues, updates, including planning and coordinating the team's involvement in the 2011 mid-term modification activities;
- Manage new or enhanced team assignments in the context of approved workplan and budget.
- Continue regular communications with DOER.