



## Memorandum

To EEAC  
From Eric Belliveau and the EEAC Consultant Team  
Date 5 January 2012  
Subject Monthly Report – December 2011

The Consultant Team is pleased to provide this monthly update to the Council on our recent activities. Although December was a slightly slower month compared to the rest of 2011, we worked on several important issues, many of which will carry over into 2012.

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### Highlights from the Advisory Groups

#### Planning & Analysis Advisory Group

- Worked with the PAs to monitor 2011 program performance and achievement of goals late in the year. Reviewed the 2011 preliminary year-end estimates and the third quarter (Q3) qualitative and quantitative reports on 2011 program performance to date, reviewed the PA slides for presentation to the EEAC, and prepared summary slides regarding consultant review and analysis of the preliminary year-end estimates and quarterly reports for the December EEAC meeting.
- Compiled the data in the PAs' monthly dashboard reports to show the 2011 trends; commented to the EEAC on the dashboard reports and the trends during a presentation to the Council.
- Conducted follow-up analysis regarding the PA-proposed and filed 2012 Mid-Term Modifications, including review of the underlying detailed data on energy savings and benefits (relative to the EEAC-adopted goals), budgets, cost-effectiveness, and planning details for the 2012 MTMs. Reviewed the DPU 08-50 data tables for the 2012 MTMs.
- Reviewed the 2010 Annual Reports and performance incentive metrics submitted to the DPU by the PAs.
- Discussed initial planning and analysis activities for the early stages of the development of the next Three-Year Plans (2013-2015), including the market analysis being conducted by several PAs, information available in EM&V studies and reports, C&I surveys/interviews and market analysis, and analysis of the economy and its effects.
- Conducted initial work on the DPU EE Guidelines NOI regarding net savings and environmental/carbon compliance costs. Participated in discussions of approaches for documenting energy savings and baselines for future planning, including in meetings with the PAs.



### **C&I Advisory Group**

- Continued ongoing engagement with PAs on C&I planning and implementation issues. These included specific efforts on monitoring and reassessing the upstream lighting progress, clarifying year-to-date progress and monitoring likely year-end achievements, discussion of Point380 market analysis project and early results, and monitoring of community-based initiatives in Northampton and Pittsfield.
- Monitoring Northampton and Pittsfield pilots, which are requiring considerable direction from the PAs to stay focused on acquiring actual projects that are additive to, and not duplicative of, the existing DI program.
- Monitored the upstream lighting approach for HPT8 lamps and LED launch in November, which has exceeded expectations. Considered and discussion implementation and design issues, including whether to move to a hybrid up- and down-stream approach. Worked with PAs to modify program rules slightly to ensure that products are installed rather than hoarded, transshipped, or shelved.
- Engaged PAs on topics of efficient street lighting and the integration of Advanced Lighting Guidelines into their programs.
- Continued to address CHP and gas-electric integration issues. Reviewed CHP impact evaluation which demonstrated a very impressive result in terms of the accuracy of PA CHP savings estimates and the importance of proper analysis and monitoring/metering and commissioning of these complex projects. MA evaluation results are significantly better than recent NY and CA results, and we believe this is due to some of the quality assurance requirements the PAs have required.
- Met with the PAs and DOER on plans for codes & standards initiative. We resolved to focus on efforts to enhance code compliance through education, training, and “facilitation” of enforcement implementation efforts (e.g., assisting towns with a tracking system to know whether permits have been approved, compliance has been checked, etc.). We expect that significant details of plans and budgets will be worked out over the next few months and included in the 3-yr plans.
- Provided suggestions and charter amendment language to assist the Massachusetts Technology Assessment Committee in expanding its scope and resources to better proactively identify emerging technologies and to better link with other ongoing research and technology assessment programs in other areas in the country.

### **Residential Advisory Group**

The Residential Advisory Group covered key program areas by engaging with several working groups.

- General: Engaged the PAs on high level Residential Sector issues at the bi-weekly Residential Management Committee (RMC) meeting, including pre-weatherization plan and old boiler retirement. Communicated with the DOER Residential Team, at their weekly calls, about residential sector issues. Participated in weekly EEAC Consulting Team calls and weekly RES Consulting Advisory Group coordination calls. Reviewed and provided feedback on 2010 residential metrics documentation.

# MA EEAC



## CONSULTANT TEAM

- **Products:** Participated in Efficient Products meeting. Reviewed and commented on PAs' recent lighting catalog. Engaged MA evaluation contractors, Consultant team evaluation lead, and national experts as to impacts on 2012 lighting program of federal budget decision to not fund enforcement of EISA lamp standards. Communicated assessment to PA program staff. Engaged PAs as to how well their upstream incentive process offered equal opportunities to all participating lighting retailers.
- **HVAC:** Participated in Cool Smart meeting. Inquired as to plans for HPWH QA/QC. Continued participation in RMC discussions on expanded boiler replacement opportunity. Worked with Cool Smart PAs, DOER and RMC to seek approval on proposed HEAT Loan eligibility of high efficiency CAC measure. Discussed PAs' oil to HPWH conversion measure with DOER in context of fuel switching. Attended Aeroseal duct sealing demonstration in Medfield (cross-billed with RI and CT work).
- **Multifamily:** Attended Multifamily Working Group meeting in Westborough. Engaged PAs on Program results to date versus 2011 goals.
- **Residential New Construction:** Attended (by phone) Joint Management Committee meeting. Reviewed and commented on "mini-baseline" RNC evaluation report. Attended (by phone) HERS rater 2012 program changes meeting.
- **Home Energy Services:** Reviewed and monitored progress of the HES working group and Best Practices group.
- **Deep Energy Renovation pilot:** Attended ad hoc DER pilot planning meeting with DOER and others. Revised a discussion draft proposal, for presentation to the RMC in January, of a cost-effective DER offering for 2013 that integrates more closely with the HES program.
- **Residential Technical Advisory Committee:** Participated (by phone) in quarterly group meeting. Reviewed potential of new technologies, including Aero Gel insulation and NEST thermostats.
- **Codes and Standards:** Participated in C&S summit with PAs, their consultants, DOER and consultant team staff. Reviewed and discussed proposed plans and came to agreement on direction and some specific tasks.

### **Evaluation, Measurement & Verification Advisory Group**

- Received, commented on, and disseminated draft final reports on the Multifamily Market Characterization and Potential, Residential New Construction Mini-Baseline, and Forum Emerging Technologies Protocols studies.
- Moved forward approximately 25 studies already in the implementation phase, including a range of market assessment, impact evaluation and process evaluation studies.
- To facilitate coordination between EM&V and program planners, attended meetings of the RMC and MA and PA groups.
- Pinned down 2012 EM&V activities in the umbrella marketing, behavioral, and small C&I areas.



- Helped to launch a number of new regional studies being administered by the EM&V Forum, including a second phase of research into the incremental costs of energy efficiency measures, a review of the handling of net savings across the region, and a study of savings loadshapes associated with HVAC variable speed drive applications.
- Launched 150 residential on-site visits to estimate current saturation of efficient lighting, plug loads, and potential for heat pump water heaters.
- Worked with evaluators, program planners, and Forum staff to lay the groundwork for a residential lighting Market Lift pilot.
- Provided EM&V input to the legislatively mandated savings potential analysis and on plans and policies regarding codes and standards-related programming.
- Helped respond to a formal information request from LEAN regarding the residential and low-income NEBs study completed in mid-2011.
- Discussed with CLC a possible evaluation of its K-12 education and training activities.

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## Upcoming Activities

### Planning & Analysis Advisory Group

Three year planning activities are ramping up quickly and will be the major focus of nearly the entire Consultant Team for the next several months. Some of the specific tasks we anticipate are:

- Initial work on the development of the 2013-2015 Three-Year Plans. Will include review of and input on analyses such as the market analysis being conducted by several PAs, information available in EM&V studies and reports, C&I surveys/interviews and market analysis, and analysis of the economy and its effects. Work with the PAs to develop a proposed schedule for the Three-Year Plan process and review the schedule with the Council. Develop templates and processes for completion of the Initial Draft Plans to be submitted to the Council in April 2012. Work with the Council and the PAs to prepare the Initial Draft Three-Year Plans.
- Support the EEAC by working on the DPU EE Guidelines NOI regarding net savings and environmental/carbon compliance costs. Draft memos on the two topics including options for addressing the issues identified in the NOI. Follow up with the Council as required. Continue discussions of approaches for documenting energy savings and baselines for future planning, including in meetings with the PAs.
- Participate on behalf of the Council in any other DPU 08-50 processes, potentially including reporting and bill impacts, as scheduled and as assigned.
- Review and assess achievement of the 2011 year-end savings and benefits goals and other Council priorities by analyzing PA-provided preliminary year-end updates that may be available in January and



the 2011 year-end qualitative and quantitative quarterly reports. Review and comment on 2012 dashboard monthly reports.

- Complete the follow-up analysis regarding the PA-proposed 2012 Mid-Term Modifications, including review of the underlying detailed data on energy savings and benefits relative to the EEAC-adopted goals, budgets, cost-effectiveness, and planning details for the 2012 MTMs and in the DPU 08-50 data tables for the MTMs.
- Analyze progress towards full incorporation of the key building blocks for accomplishing the goals of the Three-Year Plans to achieve deeper savings and other key priorities.
- Support the EEAC as needed during the DPU review the 2010 Annual Reports, including the PA performance incentive and metric claims in the Annual Reports.

### **Residential Advisory Group**

Most of the effort for the Residential Advisory Group in the coming months will be related to the upcoming three-year plan. In addition, the Group will continue to have on-going engagement, monitoring and review of PA plans, activities, and accomplishments throughout the residential sector.

### **C&I Advisory Group**

The C&I Advisory Group will continue to have on-going engagement, monitoring and review of PA plans, activities and accomplishments.

- Continue monitoring upstream lighting programs and continue to push PAs to address efficient street lighting and the integration of Advanced Lighting Guidelines
- Engage with the PAs on CHP application requirements to assess whether there are ways to streamline this process, enhance participation and vendor satisfaction, and continue to ensure accurate and cost-effective projects
- Finalize plans for the codes & standards initiative for use in the 3-yr plan as well as to identify steps necessary for 2012

### **EM&V Advisory Group**

- Develop EM&V portion of 2012 workplan
- Continue moving in-progress studies through the implementation process
- Finalize a number of studies, including the Multifamily Market Characterization and Potential, Residential new Construction Mini-Baseline, and CHP Impact studies
- Begin implementation of the job creation and 300-750 kW studies