



## Memorandum

To EEAC  
From Eric Belliveau and the EEAC Consultant Team  
Date 6 October 2011  
Subject Monthly Report – September 2011

The Consultant Team is pleased to provide this monthly update to the Council on our recent activities.

### Planning Activities

- Coordinated with the PAs and the Council regarding planning for the 2012 Mid-Term Modifications process, including working with the PAs on improving the MTM process, and jointly developing a proposed schedule and working templates for the MTM documents to be provided to the Council.
- Conducted initial analysis of the preliminary 2012 Mid-Term Modifications and discussed programs impacted through the MTMs and related issues (e.g., MTM triggers, informational notifications, impacts on savings goals and benefits, performance incentives, and outside funding), in advance of the Council meeting on September 20. Discussed and coordinated with the PAs on MTM issues. Developed and presented a summary of the consulting team initial analysis of the draft MTMs at the September EEAC meeting. Conducted additional analysis of the revised MTMs provided by the PAs in late September.
- Reviewed the PAs' 2010 Annual Reports and prepared a statewide summary and presentation of the 2010 data, for presentation to the EEAC at the September Council meeting. Reviewed the dashboard monthly reports and commented to the EEAC on the reports. Prepared summary charts and a presentation on the Second Quarter (Q2) quantitative reports on 2011 program performance to date, for presentation to the EEAC in September.
- Briefed DOER and Councilors on the results of the Regional Avoided Cost Study and key values in the report, and compared notes on the study results with the PAs. Identified MA-specific values and issues to be addressed in 2012 MTM analysis and screening.
- Participated in initial discussions of approaches for documenting energy savings and baselines.



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## Highlights from the Implementation Oversight Groups and EM&V Group

The sections below highlight activity in each of the major oversight areas.

### C&I Team

The Team worked on several issues over the past month, covering a wide variety of topics.

- Continued on-going engagement with PAs on all C&I planning and implementation issues. Specific focus in September included: negotiating 2012 metrics; major 2012 MTM changes; launch plans for upstream HPT8 lighting initiative and imminent addition of LED products to the initiative; and codes & standards plans for 2012.
- Reviewed and commented on first draft of a codes & standards initiative plan developed by PA consultants Heschong Mahone Group.
- Continued to provide high level assistance and advice to PAs related to the upstream lighting initiative, including assistance in understanding the distributor market in MA, and development of RFP and review of bids and selection of third party vendor.
- Reviewed and commented on second quarter results, as well as PA 2012 MTM filings.
- Completed negotiation of C&I 2012 Metrics with PAs.
- Engaged with PAs about the best approach to restructure various C&I working groups. Agreement is to have WGs aligned by major market or issue, rather than prescriptive forms. These WGs would have lead responsibility for on-going assessment and market intelligence about new opportunities, technologies, and program design issues related to capturing all cost-effective opportunities within their market. The WGs would report up to the C&I management committee (of which the EEAC Consultant Team is a member) through their designated chair on a regular basis.
- Discussed with PAs ways to ramp up the New Buildings Institute Core Performance initiative, and plans to modify the targets and incentives early in 2012 to reflect the latest MA code and achieve 20% savings over current code.
- Met with Katie O'Rourke and DOER staff to discuss all Green Communities activities DOER is involved with and how we can better coordinate DOER efforts with those of PAs. Agreed to have check-in calls every 2 weeks.

### Residential Team

The Residential Team covered key program areas by engaging with several working groups. High level developments by PAs in these areas include the following.



- General: Engaged the PAs on high level Residential Sector issues at the newly formed bi-weekly Residential Management Committee (RMC) meetings, including on the 2012 MTM and TRM processes. Coordinated with EM&V team to provide more seamless communication with the Residential program implementation staff on EM&V planning and study results. Reviewed all MTM documentation submitted by each of the PA's, and prepared comparison matrix and overall feedback. Developed 2012 performance metrics with the PAs.
- Products: Assessed possibility for greater lighting program activity and discussed with RMC. Worked to incorporate impacts of federal lamp standards (EISA) into TRM lighting measure characterizations. Reviewed and commented on draft PA Codes and Standards Plan, and communicated concern as to lack of focus and detail on standards opportunities.
- HVAC: Reviewed and discussed proposed and suggested 2012 CoolSmart program changes. Encouraged MA PAs to develop regional common installation protocols and contractor training for heat pump water heaters. Reviewed CoolSmart program reporting. Engaged HEHE sponsors to assess their proposed program changes for 2012. Continued initial research and stakeholder outreach to investigate opportunity for possible PA involvement to establish a state boiler standard.
- Residential New Construction: Participated in Joint Management Committee (JMC) meeting to review progress to date, discuss program elements and plan filings for 2012. Participated in discussions on several measure types. Reviewed MTM draft filing and discussed with PAs. Reviewed Codes & Standards proposed plan from PA's consultant, provided comments and suggestions and discussed with PAs. Investigated savings discrepancies with PAs and responded to AGO inquiries.
- Multifamily: Reviewed and commented on draft final marketing brochure. Communicated with PAs on lagging Q2 program savings.
- Home Energy Services: Communicated with PAs and Paul Gromer to document success of first HES Contractor Best Practices meeting. Developed 2012 HES 'Deeper Savings' metric with the PAs.
- Deep Energy Retrofit Pilot: Communicated with PAs and DOER on ideas for future directions for the Deep Energy Retrofit pilot that are cost-effective and integrate more closely with the HES program.
- MA Technical Advisory Committee (MTAC): Participated in quarterly MTAC meeting to review and discuss new program measure savings opportunities. Reviewed status of PAs' current residential pilot and R&D activities at meeting.
- Low Income: Participated in Low Income Best Practices working group meeting to review and discuss program activity and initiatives. Worked with LEAN and PAs to develop 2012 metrics, and to address LEAN's concerns about 3<sup>rd</sup> party QA/QC inspections. Coordinated with LEAN on involvement with RMC and MTAC.

### **Evaluation, Measurement & Verification**

- Worked with the PAs to complete 2012 EM&V plan for the MTM filing.

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## CONSULTANT TEAM

- Provided extensive comments to the PAs on various draft sections of the 2012 TRM, with particular emphasis on the application of EM&V results to savings assumptions.
- Oversaw the finalization of the C&I gas net-to-gross study
- Moved forward approximately 25 Round 2 EM&V studies that are in the implementation phase, including market assessment studies of the residential new construction, multi-family, and non-residential new construction markets.
- Worked with the C&I team and PAs to finalize plans for the future documentation of impacts from the C&I upstream lighting program
- Advanced the C&I code compliance study into the implementation phase.
- Participated in several EM&V Forum studies, and in the development of the Forum's 2012 research plan
- Worked with PAs and evaluation contractor in an attempt to lock down plans for ongoing assessment of the residential lighting market.

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### Upcoming Activities

The Planning group will undertake several tasks in the next few months.

- Review and analyze the 2012 Mid-Term Modifications, including following up on energy savings and benefits (relative to EEAC-adopted goals), budgets, cost-effectiveness, and planning issues for the 2012 MTMs. Review related issues, such as MTM triggers, informational notifications, performance incentives, and outside funding. Prepare MTM-related reports for the Council meetings in October and November.
- 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.
- Participate in DPU 08-50 processes including the Energy Efficiency Guidelines, reporting, and bill impacts, as scheduled. May include review, development, and analysis of options for energy savings documentation, adjusted gross savings, and improved baselines.
- Track progress towards achievement of the savings goals and other Council priorities by reviewing and analyzing future qualitative and quantitative quarterly reports (in October and November). Review and comment on dashboard monthly reports.
- Begin preparations for the development of the 2013-2015 Three Year Plans.

The C&I Team plans to continue working on the following issues:

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## CONSULTANT TEAM

- The C&I team will continue in October to be heavily engaged with the rest of the EEAC Consultant Team as well as the PAs on all issues related to 2012 MTMs, 2012 Metrics, and EM&V findings and applications.
- We expect to review 3<sup>rd</sup> Quarter qualitative report from PAs in October (quantitative report likely not available until November), and provide a critique to PAs and possibly EEAC.
- Continue to support the launch of the upstream initiative, with particular focus on the addition of LED products, and resolving EM&V and cost issues related to offering both down- and up-stream incentives simultaneously.
- Continue to monitor the PA pipeline of savings and expectations for meeting 2011 goals.
- Engage with DOER and PAs to coordinate better integration of DOER staff efforts as part of the Green Communities initiative and the PA programs.

### The Residential Team will:

- Review the MTMs, analyze the results, and critique.
- Engage the PAs, through the RMC, in planning discussions on developing the next 3-Year plan. Continue to explore and communicate opportunities to obtain additional energy savings.
- Coordinate with DOER and PAs on strategy to address Pre-Weatherization in 2012, and on gas and electric HVAC integration.
- Review and incorporate 2012 JMC program elements including Water Sense fixtures, reduced lighting incentives, master-metered multifamily building roles with C&I, and the "Major Renovation Pilot", including implementation aspects, potential savings, and increasing program cost-effectiveness.
- Continue to work to resolve the roles that the RNC and C&I New Construction programs should play with multifamily buildings regarding master-metered buildings, common spaces and residential units, which program should serve which projects and how savings are claimed.
- Continue to explore how to redesign the "Deep Energy Retrofit Pilot" to provide customers with a more cost-effective avenue to deeper residential energy savings.

### The EM&V Team will:

- Complete work on the 2012 draft TRM and EM&V plan
- Continue moving in-progress studies through the implementation process
- Oversee the finalization and reporting of a number of studies
- Develop and plan EM&V market assessment efforts as needed to support the legislatively mandated savings potential analysis and the next 3-year plan