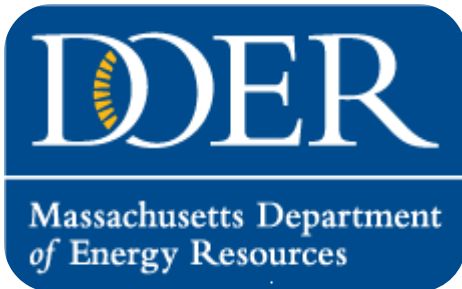


Creating A Cleaner Energy Future For the Commonwealth



Energy Efficiency Reporting & Streamlining

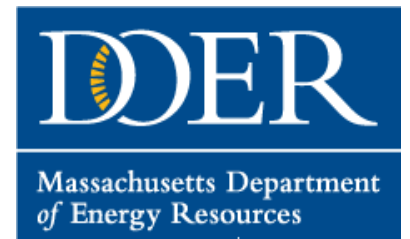
DPU 11-120 Reporting Working Group

**Christina Halfpenny
Division Director, Energy Efficiency**

5/7/2013

Needs for Streamlining

- In DOER's view, "streamlining" reporting should result in EE reporting that is:
 - Effective and useful
 - Efficient
 - Timely
 - Systematic and standardized
 - Automated (where appropriate)
 - Transparent and reasonably accessible
 - Centralized for statewide reporting, as needed
- "Streamlining" should not be about reducing the amount of valuable information or the level of understanding



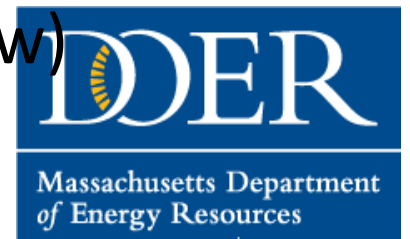
EE Reporting

- Original Plan (2013-2015 Three-Year Plan)
- Plan-Year Reports (for the first and second years)
- Three-Year Performance Report per DPU Order (use this report for the three-year review by the DPU and for the review of the third year)
- Plan Updates (for the second and third years; plan updates are needed with or without MTMs)
- Quarterly Reports
- Monthly Dashboards
- Improved Data Systems (a system for storing, analyzing, processing, & reporting data)



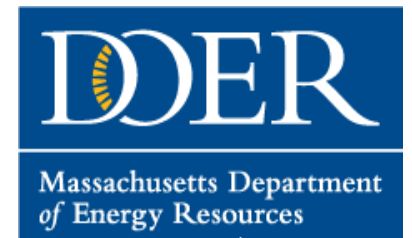
Original Plan

- 2013-2015 Three-Year Plan
 - Plan descriptions
 - Action Plans
 - 08-50 tables for 2013, 2014, 2015
 - Technical Reference Manual submitted using best available data through August 2012
 - AESC study conducted every two years
 - Evaluation plans submitted annually
- DOER expects to see annual Plan Updates to include the best available data (see below)



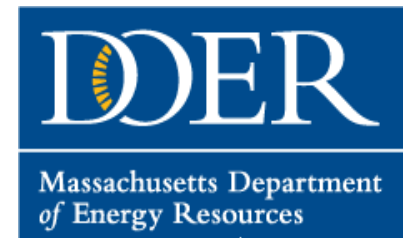
Original Plan data

- 08-50 tables are an excellent reference for information on MA EE programs
- 08-50 tables:
 - Are not easy to operate
 - Do not provide perspectives into initiative level, project level, or measure level data
- Original Plan (2013-2015) data does not share consistent naming conventions for easy data comparison – an easy fix
- Enter into (TBD) statewide database



Plan-Year Reports (Annual Reports)

- Need actual, annual results on a timely basis
- DPU 11-120 A order requires each PA to submit its Plan-Year report to the Council (p.12)
- Propose one statewide Plan-Year Report in addition to individual PA Plan-Year Report data
 - Statewide Plan-Year report as the primary document, and individual PA data in database; PAs provide standard output tables and PA explanations
- Plan-Year Reports no longer apply free ridership and NTG results retrospectively
- Plan-Year Reports do apply in-field evaluations and realization rates retrospectively

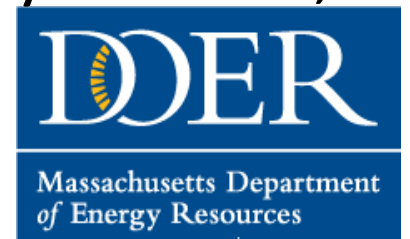


Plan-Year Report Data

- Plan-Year Reports must correlate with the Original Plan and Plan Updates to best track achievement toward goal
 - Reflect the hundreds of findings from EM&V
 - Baseline changes in standards or codes
 - Actual participation
 - Actual expenditures and costs
- Enter into (TBD) statewide database
- TRM Plan-Year Report version

Proposed Plan Updates

- Refine planning assumptions prospectively, annually
- Apply best available data to inform the investment of \$700-800 M each year
- Include all values and assumptions changed since the Original Plan, with an updated TRM to reflect:
 - Evaluation studies
 - Changes in standards or codes
- Allow us to track closer to the three-year goal
- Updates needed with or without triggered MTM
- Do not require an adjudicatory process by the DPU, if there is no MTM trigger



Data for Plan Updates

- Primarily an update of data, as input to the database
- Specific text to describe key updates
- Initiative level and measure level detail
- Consistent with the Original Plan (2013-2015)
- Consistent among and across all PAs
- Enter into TBD statewide database
- TRM – Plan Update version

Quarterly Reports

- Quarterly reports are helpful tools to track progress throughout the plan year
- Quarterly reports should include information on status of action plans and performance metrics
- Quarterly reports are currently under revision to allow for easier analysis of the information
 - Data system with flat data file (not data tables)
 - Automated production of key report tables
 - Standard tables and charts as outputs
 - Pivot tables for additional analysis

Data Needs

- Measure level data shows us what drives savings and benefits, and can inform planning and EE resource potential
- Project level data tells us what savings we are achieving per customer, another indicator for performance (participation is not a consistent metric)
- Geographic information can provide insight to finding customer equity solutions

Areas Where “Streamlining” can be Most Beneficial

- DPU Regulatory Proceedings
- Data systemization, data management, and data QA
 - Data systems and data processing
 - Automated standard reports and tables/charts
 - Automated data QA and data checking
- Statewide reporting vs. individual PA reports
 - Opportunity for one statewide Plan-Year Report vs. many individual PA annual reports