

**EEAC Work Plan for Review of 2010-2012 Statewide Electric and Gas Energy Efficiency Plans:  
Revisions to the Work Plan**

EEAC Consultants

June 19, 2009 (Revision of June 12 version)

Included in the following pages are the two tables (Other Topics, Program Topics) summarizing the Council's work plan and schedule for review of the April 30 statewide Plans, which have been revised per the discussion at the June 9 Council meeting and per comments received on the June 12 revised draft. In revising the work plan, the Council and its Consultants observed several challenges in the process and schedule. The Consultants summarize the challenges below, and highlight the changes the Council made to the schedule to address the challenges.

**Challenges:**

- The original working schedule was dominated (particularly in July) by the preparation of statewide Plans and the review of statewide Plans, with several rounds back and forth:
  - June 23/26 – Council comments on April 30 statewide Plans, electric and gas
  - July 9 – PAs submit draft updated statewide Plans
  - July 14 – Council reviews draft updated statewide Plans
  - July 23 – PAs submit revised/final updated statewide Plans
  - July 28/29 – Council action on statewide Plans
- The Plans are large documents and require significant resources to produce, as well as significant resources to review each time.
- In its recent meetings, the Council has indicated that the development of revised program designs, strategies, and delivery approaches to achieve deeper savings should be a priority for near-term planning and discussions.
- However, the ongoing work on the program designs, strategies, and delivery approaches will not be complete by late June or even late July for some programs (hence the need for roadmaps with a schedule for some programs).
- Other important Council work is being done in parallel, e.g., EM&V framework, performance incentives (see the Other Topics table on pages 3 and 4), and this work will also require Council attention in late June and July.

**Changes to the Work Plan:**

- The Council is focusing its review and the PA planning/development efforts on the topics that are the highest priority over the next 1.5 months, in terms of making progress on the topics or modules that are the most important to address early, in order to contribute to the development of excellent statewide and individual PA plans by October:
  - Revised program designs, strategies, and delivery approaches, with a focus on deeper savings approaches and the associated benefits and costs
  - Savings goals and ramp up for the 2010-2012 program years, including key drivers of savings and costs, and resolution of key differences between the PA Plans and the Consultant analysis
  - Assessment of all available cost-effective energy efficiency and CHP
  - Analysis of rate and average bill impacts, and identification and development of program and delivery strategies to mitigate the rate impacts and leverage ratepayer funding
  - Continue making progress on important topics (e.g., EM&V, performance incentives) in parallel
- The Council will review and provide feedback/take action on the highest priority topics as the topic modules (or sections of the Plans) are ready for review and action, as revisions to the Plans are developed by the PAs, often using a document module or section of the Plan focused on a particular topic rather than waiting for complete or fully-compiled statewide Plans. (The Council has been doing this to some extent already.)

- The Council will receive only one version of each compiled revised statewide Plan, on July 16, for Council review and action by July 28/29, instead of receiving two updated versions, on July 9 and July 23, according to the above (original) schedule.
- The Council hopes and expects to get all of the information and documentation necessary to make a determination on the April 30 statewide Plans by July 28. However, if the Council does not receive the necessary information, the Council will reserve the right to continue review and Council work (by voting and non-voting councilors) on the Plans until all PA revisions to the Plans are completed, and Council review of such revisions is completed.
- The Council understands that the PAs will continue developing some details of revised statewide Plans between late July and October, including details on some program designs, strategies, and delivery approaches plus supporting documentation (e.g., associated revisions to savings, benefits, and costs), partly in response to Council feedback and comments in late July. The Council understands that the PAs will submit any such revisions or additional details, possibly in the form of revised statewide Plans, for Council review by no later than early September. Therefore, Council review of revised modules or sections of the Plans containing such revisions or additional details will continue between July and October in order to review any such Plan revisions developed by the PAs.

**EEAC Work Plan for Review of 2010-2012 Statewide Electric and Gas Energy Efficiency Plans: Other Topics**

<b>Week of Date</b>	<b>Plan Review</b>	<b>Savings, Envir. Benefits, Costs</b>	<b>Net Benefits &amp; Cost-Eff.</b>	<b>Rate &amp; Avg. Bill Impacts</b>	<b>Assess All Avail. CE EE</b>	<b>Evaluation EM&amp;V</b>	<b>Performance Incentives</b>	<b>Jobs/Econ. Impacts</b>
<b>Week May 4</b>								
<b>May 5 EEAC Brief.</b>	PA Briefing on Statewide Plans (am); Council Working Session on Statewide Plans (pm), including consultant analysis and Q&A on Plans							
May 7				WG: Method & Framework				
<b>Week May 11</b>								
May 11		Receive PA-Spec. & Screening Data	Screening Data Received					
<b>May 12 EEAC Mtg.</b>	EEAC reviews initial list of topics, and develops its work plan and schedule for review of Plans. Consultants provide initial review comments. Council asks additional questions, discusses the Plans, and provides initial comments.							
		Program level data, when?						
May 14				WG: Method, Time Periods, Cust. Groups				
<b>Week May 18</b>								
May 21		Ongoing Analysis Savings, Environ. Benefits, Costs		WG: Inputs, Data, Analysis, Examples	Summary of Other Studies & Assessments			
May 22	Compile and Draft Prelim. Comments					EM&V Admin. Framework, PA Discussion		
<b>Week May 25</b>								
<b>May 26 EEAC Mtg.</b>	Review Preliminary Comments	Update Analysis Savings, Environ. Benefits, Costs			Summary of Other Studies & Assessments		Perf. Incentive Mechanism Concepts	
May 28				WG: Review Draft Method and Examples				
May 29	Councilors provide comments on the draft preliminary comments on the April 30 statewide Plans							
<b>Week June 1</b>								
June 3	Send Rev. Preliminary Comments							
June 4				WG: Prelim. Rate & Bill Imp. Examples	Send Draft Assessment All Available EE			
June 5		Initial Analysis & Proposed Approach Regarding PA vs. Consult. Savings, Benefits, Costs, and Net Benefits						
<b>Week June 8</b>								

<b>Week of Date</b>	<b>Plan Review</b>	<b>Savings, Envir. Benefits, Costs</b>	<b>Net Benefits &amp; Cost-Eff.</b>	<b>Rate &amp; Avg. Bill Impacts</b>	<b>Assess All Avail. CE EE</b>	<b>Evaluation EM&amp;V</b>	<b>Performance Incentives</b>	<b>Jobs/Econ. Impacts</b>
<b>June 9 EEAC Mtg.</b>	Review Revised Preliminary Comments	Review Initial Analysis & Approach to Identify Drivers of the Differences Between PA vs. Consultant Savings, Benefits, Costs, and Net Benefits		Status Update	Review Draft Assessment All Available Cost-Effective EE	Status Update		
June 11				WG: Issues, Method, Examples				
<b>Week June 15</b>								
June 18 & 19	Revised Work Plan			WG: Prelim. Analysis & Examples	Assessment of All Available Cost-Eff. EE			
<b>Week June 22</b>								
<b>June 23 EEAC Mtg.</b>	[Note: no additional written comments]	Update on Analysis and Drivers of Savings, Benefits, Costs, and Net Benefits; Approach for Development of Savings Goals for 2010-12 Plans		Review Rate & Average Bill Impact Method & Example	Resolution on Assessment of All Available Cost-Eff. EE			
June 24 to July 9		Continue Analysis of Savings, Envir. Benefits, and Costs; Draft Goals						
<b>Week June 29</b>			Draft AESC					
<b>Week July 6</b>			Consider Draft Avoided Cost Values/AESC					
July 9		Analysis of Savings, Envir. Benefits, and Costs; Draft/Proposed Savings Goals and Ramp Up, All Programs		WG: Revised Rate & Avg. Bill Analysis		EM&V Framework, Admin, Plan	Perf. Incentive Mechanism Framework	
<b>Week July 13</b>								
<b>July 14 EEAC Mtg.</b>		Review Analysis of Savings, Environmental Benefits, and Costs; Savings Goals and Ramp Up, for All Programs		Review Revised Rate & Average Bill Analysis		Review EM&V Framework, Admin, and Plan	Review Perf. Incentive Mechanism Framework	
July 16	Draft updated statewide Plans submitted by the PAs							
<b>Week July 20</b>								
	Council and Consultant review of the updated statewide Plans; discussions with PAs							
<b>Week July 27</b>			Final AESC					
<b>July 28 EEAC Mtg.</b>	EEAC action on updated statewide Plans							Review Inputs & Analysis in Plans
July 29	EEAC documents its action on the statewide Plans: approval, conditional approval, comments, or other action							

**EEAC Work Plan for Review of 2010-2012 Statewide Electric and Gas Energy Efficiency Plans: Program Topics**

<b>Week of Date</b>	<b>Residential</b>	<b>Low Income</b>	<b>Multifamily</b>	<b>Comm. &amp; Industrial</b>	<b>Gas &amp; Elec. Integration</b>	<b>Marketing &amp; Education</b>	<b>Competitive Procurement</b>	<b>Mid-Term Revisions</b>
<b>Week May 4</b>								
<b>May 5 EEAC Brief.</b>	PA Briefing on Statewide Plans (am); Council Working Session on Statewide Plans (pm), including consultant analysis and Q&A on Plans							
May 7								
<b>Week May 11</b>								
<b>May 12 EEAC Mtg.</b>	EEAC reviews initial list of topics, and develops its work plan and schedule for review of Plans. Consultants provide initial review comments. Council asks additional questions, discusses the Plans, and provides initial comments.							
May 13 - 26	Work with PAs to address EEAC and consultant questions on plans. Reconvene program working groups.							
May 14								
<b>Week May 18</b>								
May 21								
May 22	Program planning updates distributed to EEAC							
<b>Week May 25</b>			Add schedule for multifamily process					
<b>May 26 EEAC Mtg.</b>	EEAC reviews program planning updates, identifies follow up actions							
May 28								
May 29	Councilors provide comments on the draft preliminary comments on the April 30 statewide Plans							
<b>Week June 1</b>								
June 1 - 5	Program working group meetings to address all EEAC comments and provide direction to individual sub-working groups							
<b>Week June 8</b>								
<b>June 9 EEAC Mtg</b>	EEAC reviews program planning and program design updates and examples of deeper savings projects, and identifies follow up actions							
June 8 - 19	Program working groups continue to work on program designs and make necessary changes to program descriptions and roadmaps							
<b>Week June 15</b>								

<b>Week of Date</b>	<b>Residential</b>	<b>Low Income</b>	<b>Multifamily</b>	<b>Comm. &amp; Industrial</b>	<b>Gas &amp; Elec. Integration</b>	<b>Marketing &amp; Education</b>	<b>Competitive Procurement</b>	<b>Mid-Term Revisions</b>
June 19	Distribute updated program design draft outlines/descriptions (or alternatively, roadmaps) prepared by the program working groups, for three programs: Res. Retrofit/MassSAVE, Large C&I Retrofit, and CHP				<i>These two topics are being addressed to some extent in the program descriptions</i>			
<b>Week June 22</b>								
<b>June 23 EEAC Mtg.</b>	EEAC reviews program design draft outlines/descriptions or roadmaps for three programs: Res. Retrofit, Large C&I Retrofit, and CHP							
June 24 to July 9	Program working groups continue to work on program designs and make necessary changes to program descriptions and roadmaps							
<b>Week June 29</b>								
	Program working groups continue to work on program designs							
<b>Week July 6</b>								
July 9	Distribute updated program design draft outlines/descriptions (or alternatively, roadmaps) for the additional programs							
<b>Week July 13</b>								
<b>July 14 EEAC Mtg.</b>	EEAC reviews program design draft outlines/descriptions or roadmaps for all programs							
July 16	Draft updated statewide Plans submitted by the PAs							
<b>Week July 20</b>								
	Council and Consultant review of the updated statewide Plans; discussions with PAs							
<b>Week July 27</b>								
<b>July 28 EEAC Mtg.</b>	EEAC action on updated statewide Plans							
July 29	EEAC documents its action on the statewide Plans: approval, conditional approval, comments, or other action							