



## Memorandum

To EEAC  
From Eric Belliveau and the EEAC Consultant Team  
Date 15 August 2013  
Subject July Monthly Report

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

---

### Highlights from the Advisory Groups

#### Planning & Analysis Advisory Group

- Prepared for and attended the EEAC meeting on July 9 and participated in the Executive Committee meeting on July 31. Briefed individual Councilors in advance of the EEAC meeting.
- Provided support to the EEAC Executive Committee in meetings and through briefings and written materials on DPU 11-120 reporting streamlining, the statewide database, and the AESC/avoided cost study updates.
- Met with the PAs in a small group coordination meeting on July 9.
- Prepared for, participated in, and co-presented at the DPU 11-120 reporting streamlining working group subcommittee meeting on July 2, as part of the DPU's working group process regarding the regulatory review, reporting, and approval of performance reports, performance incentives, energy efficiency surcharges, and mid-term modifications. Worked on reporting issues, needs, and priorities related to the DPU 11-120 working group with individual Councilors and the PAs. Continued work on reporting streamlining topics, including on the Annual Implementation Update for the 2014 and 2015 program years. Presented an update on reporting streamlining and the reports and purposes table at the EEAC meeting on July 9. Continued working with the PAs on reporting scheduling and processes, and on proposals for an Implementation Update template.
- With the input from Councilors, worked with the PAs to implement additional improvements to the quarterly report template, focusing on the benefits section, to be used for Q2 and Q4 quarterly reports in 2013. Received feedback and review comments on the revised/improved format used for the Q1 report from Councilors.
- Supported the design and development of the statewide database, as directed by the Council and the Council's statewide database subcommittee. Reviewed and commented on responses to the Request

# MA EEAC



## CONSULTANT TEAM

- for Responses (RFR/RFO) for a database consultant and facilitator. Participated in the statewide database Subcommittee as assigned.
- Continued making progress with DOER and the PAs on the consultant-recommended interim approach to data and data management, focused on improving effectiveness and efficiency, to ensure reliable and internally-consistent data in the interim while the statewide database is being developed.
  - Continued work on the regional avoided costs study (also known as the Avoided Energy Supply Component or AESC study) being conducted in 2013. Reviewed and commented on the revised final draft report (including the revised sections in early July), the final executive summary, and all work products and deliverables for the regional six-state study. The study results were presented on June 21, and the final report was distributed on July 12. Reviewed the final report. Provided an update to the Council and answered questions from individual Councilors.
  - Interacted with the PAs and the management committees in June to discuss and ensure the early and effective implementation of the key components of the 2013-2015 Three-Year Plan, including the key program enhancements, strategies, and action plans, in order to achieve the savings and benefits goals, maximize the use of best practices, serve all segments of MA customers, and support the Council's priorities, while also encouraging the cost-efficient use of ratepayer funding. Reviewed the action plans being developed and implemented by the PAs.
  - Reviewed and commented on the final version of the 2012 Report Technical Reference Manual (TRM), per the TRM process and schedule.

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

- Worked with PAs and DEP to address issues raised by DEP with water/wastewater segment.
- Assisted PAs in development of content for EEAC C&I presentation.
- Assisted PAs with interpretation of 2012 metrics achievement.
- Organized PA support for new appliance standards bill.
- Began discussions with PAs on progress towards goals and spending. Analyzed progress to date compared to previous years.
- Continued to support Commercial Real Estate Working Group. Organized Webinar with Director of Connecticut Commercial PACE financing program. Developed list of research topics and questions for forthcoming CRE market research.
- Continued work on Restaurants/Lodging Best Practice research. The goal of this research is to provide recommendations for strategic enhancements to programs to support achievement of three year plan commitments and targets. Research topics are aligned with specific Plan commitments, Council Priorities, and/or areas where there is potential for greater or lower cost efficiency savings. The first three topics to be researched are: 1) National Best Practices with Restaurants and Lodging, 2) National



Best Practices with Healthcare and Hospitals, and 3) National Best Practices with Commissioning/Retro-commissioning.

- Continued to work with PAs to address issues in multifamily initiatives to support greater comprehensiveness and seamless delivery. Provided review and input to multifamily checklist.
- Began discussions with PAs to expand successful upstream lighting initiative to more products.
- Continued to work with PAs to support completion of Three-Year Plan Commitments and associated Action Plans. A status of key near-term plan commitments follows:
  - Process for Stakeholder Input by Q2 2013 – Complete
  - New Consistent Dedicated Approach to Municipalities – a new consistent statewide municipal model will be announced and implemented at the beginning of the next calendar year, January 1, 2014.
  - Community Mobilization – PAs are working to design new community based delivery model that will target “Main Street” areas of municipalities. NSTAR is now piloting this model in two communities. Other PAs have selected potential communities in their respective territories. Once the results of the NSTAR pilot are complete, the model will be considered for adoption by Q4 2013.
  - Improved Financial Tools – PAs have developed a new spreadsheet financial tool to assist customers in evaluating efficiency investments. The tool is being rolled out for review by PA Sales and Account Managers. Once complete, statewide training will be provided.
  - Targeted Strategies for Wastewater Treatment Plants – Consultant team continues to work with PAs and DEP to address this plan commitment to develop recommendations for a sustainable financial assistance model for the Water/Wastewater segment.
  - Targeted Strategies for Grocery – PAs are in final stages of development of a new go-to-market strategy for the small to medium-sized grocery segment. The new offering combines targeted messaging with bundled incentives to increase participation and depth of savings with the small and medium-sized grocery segment. The new offering will be implemented in Q3 2013.
  - Upstream HVAC – PAs expanded the highly successful upstream lighting approach to HVAC equipment on April 1, 2013. The new upstream model is the first of its kind in the Eastern US and is expected to significantly increase participation and savings with commercial HVAC equipment. PAs have successfully recruited most manufacturers and distributors into the initiative and are awaiting initial results.
- Reviewed recent CHP evaluations. Identified and rectified deficiencies in evaluation reports.



### **Residential and Low Income Advisory Group**

The Residential Advisory Group covered key program areas by engaging with the Residential Management Committee (RMC) and key initiative working groups and on several topics.

- **General:** Engaged the PAs on high-level Residential Sector issues at the Residential Management Committee (RMC) meetings, and through individual communications with RMC members. Monitored PA progress on new initiative enhancements and action plans. Communicated and coordinated with the DOER Residential Team liaison regarding residential sector issues. Participated in quarterly PA/consulting leads, weekly EEAC Consulting Team call and RES Consulting Team coordination calls. Conducted introductory meetings by telephone with PA leads for the Multifamily Retrofit, Home Energy Services, HVAC/Gas Networks, and Low Income Best Practice Working Groups. Met with MUG in person. Sought and received updates on behavior programs and provided verbal input suggesting gas/electric coordination. Discussed strategic planning. Reviewed July data dashboard.
- **Lighting & Products:** Revised and distributed draft lighting best practices paper and PowerPoint presentation to RMC. Continued to monitor proposed lighting market lift activities. Monitored continued progress of both regional (all homes) and MA-specific low income lighting hours of use studies.
- **HVAC:** Participated in NEEP HPWH sub-committee and committee discussions. Reviewed HVAC/Gas Networks agenda and meeting minutes.
- **HES:** Reviewed councilor questions to PAs and draft HES presentation to Council. Sought and received update from PAs on Efficient Neighborhoods Plus program. Reviewed and provided comments on draft Efficient Neighborhoods Plus evaluation scope of work. Reviewed HES realization rates evaluation report
- **Multifamily:** With refined scope of work as a result of PA input, continued work on research paper on best practices for overcoming multifamily retrofit program barriers. Provided input to Multifamily Retrofit Working Group on draft multifamily report template.
- **Low Income:** Reviewed Low Income Best Practices working group meeting agenda, minutes, assignments, and meeting materials.
- **Evaluation Coordination:** Continued work with lead Evaluation Consultant on review and comment of HEHE/Cool Smart program evaluation findings and memo on revised HEHE and Cool Smart NEI.

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

- **EM&V Implementation.** Continued to advance toward completion ten 2012-2013 studies that are still in progress. These studies are generally expected to be completed between Fall and early Winter.
- **TRM.** Concluded work on the 2012 report version of the TRM.
- **EM&V Reporting:** Concluded work on the EM&V section of the 2012 annual reports. Worked with the PAs to develop a new format for regular summary reports on EM&V status, for review by DOER and



other interested Council members. Posted final reports for 25 completed studies that were filed with the 2012 annual reports on the EEAC web-site.

- **EM&V Planning.** Continued scoping and detailed planning of new high-priority 2013-2014 studies agreed upon in the evaluation planning summit meetings held in February and May. Worked with EEAC consultants Planning and Analysis team and PAs to develop approaches for studies negotiated in the term sheets and included in the orders for the three-year plans. Worked with the PAs to develop a format for integrated 12-18 month overall evaluation plans for each major research area (Residential, Non-Residential, Cross-Cutting). Provided input on the Northeast EM&V Forum's research agenda for 2014-2016. Attended July EMC meeting.
- **EM&V Policy Issues.** Advised DOER and DPU staff regarding the EM&V Forum's proposed Model State Guidelines project. Worked with the PAs, EEAC consultant planning and residential program teams, and DOER to clarify the implications of evaluation results indicating that program-induced oil-to-gas fuel switching is quite prevalent in the HEHE program. Coordinated between Existing Building Market Characterization and CRE working group to ensure that the CRE activities planned for the EBMC group support the efforts of the CRE group and provide supplemental information.
- **Miscellaneous.** Developed and gave an in-depth presentation at the July 9 Council meeting, discussing EM&V framework, history, status, recent results, and planned changes. Fielded follow-up inquiries from Councilors.

---

## Upcoming Activities

The sections below detail expected project efforts in the coming month.

### Planning & Analysis Advisory Group

The Planning & Analysis group will undertake several tasks in the next few months:

- Continue meeting with the PAs and management committees to discuss and ensure the early and effective implementation of the key components of the 2013-2015 Three-Year Plan, including the key program enhancements, strategies, and action plans, in order to achieve the savings and benefits goals, maximize the use of best practices, serve all segments of MA customers, and support the Council's priorities, while also ensuring the cost-efficient use of ratepayer funding.
- Review and brief the Council on the regional avoided costs study (the Avoided Energy Supply Component or AESC study) being conducted in 2013. The final report was distributed on July 12. Review the final report and provide a summary/update to the Council as directed. This regional avoided cost study is the single most important analysis for the EE programs in MA, because it will impact the benefits and cost-effectiveness of all EE programs, electric and gas, for several years.
- Review, analyze, and comment on the 2013 quarterly reports and the dashboard monthly reports and trends. Also, working with the PAs, complete the new template for the quarterly reports, focusing on the



reporting of benefits and GHG emissions reductions (Q2 and Q4 reporting), and implement any additional revisions identified and directed by the Council as a result of EEAC review of the revised template used for the Q1 and Q2 reports.

- Support the design and development of the statewide database, as directed by the Council and the Council's statewide database Subcommittee. Support the procurement of a database consultant and facilitator to assist in the design of the statewide database. Participate in the statewide database working group as assigned.
- Complete work with the PAs on developing and implementing a more effective and efficient *interim* approach to data and data management, to ensure reliable and internally-consistent data in the interim while the statewide database is being developed.
- Support the Council, as directed, in its review and analysis of the DPU NOI Phase II order and the EE Guidelines, through the DPU 11-120 reporting streamlining process regarding the regulatory review, reporting, and approval of performance reports, performance incentives, energy efficiency surcharges, and mid-term modifications. Participate in the DPU 11-120 reporting streamlining working group and subcommittee as directed by the Council. Complete work on the template for an Annual Implementation Update to be used for the 2014 and 2015 program years.
- Support the Council by continuing analysis and work on the DPU EE Guidelines Phase I NOI regarding net savings and environmental/carbon compliance costs, as directed by the Council. Participate in additional discussions or follow up as directed, including in future technical sessions or in meetings with the PAs and others. (The DPU Technical Session on the implementation of multi-year, market-focused approaches for determining net savings, originally scheduled for September 2012, was postponed and will be rescheduled in 2013.)
- Continue to work on future tasks related to the Technical Reference Manual (TRM), including the TRM application, schedule, and process.
- Participate on behalf of the Council in any other DPU 08-50 or 11-120 processes, as scheduled and as assigned by the Council.

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

The C&I Advisory Group will continue to support the implementation of the Plan. Specific areas of focus in coming months will include:

- Continuing to work with the PAs to support achievement of Three-Year Plan Commitments.
- Continuing to work with PAs, stakeholders, Council, and others to develop an integrated solution for utility-owned street lights.
- Continuing to work with PAs and DEP on Water/Wastewater strategy.



- Continuing to work with PAs to make a stronger connection and feedback loop between evaluation and implementation.
- Continuing to support the Commercial Real Estate Working Group and development of a PA roadmap to address the segment.
- Continuing National Best Practice Research to support PA strategy and achievement of Plan commitments.
- Monitoring PA achievement towards goals and spending.

### **Residential and Low Income Advisory Group**

The Residential Advisory Group will continue to work with the PAs on planning tasks and preparation activities toward the successful implementation of the 2013-2015 statewide plan.

- Continue program planning discussions with the PAs at the Residential Management Committee (RMC), including on monitoring progress on the key Three Year Plan implementation tasks
- Review and provide comments to Council on PAs' annual reports
- Present lighting best practices research to RMC; discuss and identify next steps
- Provide input on draft scopes of work for residential evaluation studies
- Continue work to turn best practices multifamily recommendations into actionable program strategies
- Prepare comments on HES realization rates evaluation report and discuss same with PAs
- Continue to identify other best practice research opportunities to continue progress toward deeper residential savings
- Continue work to introduce new consulting team members to RMC working groups and plug them into their workflow
- Work with Council and PAs on compiling data to support consideration of program results for HES initiative and opportunities for additional efficiencies and savings
- Continue to monitor proposed or ongoing residential upstream HVAC and DHW activities in CT and RI to inform possible MA efforts
- Work with other Consultants to determine best approach to address PAs' refrigerator and TV planning assumptions. Consider possible impact on PAs' appliance initiative efforts
- Review and comment on draft NEEP consumer electronics market strategies report



- Monitor progress of regional residential lighting hours of use study

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

- In August we expect to turn our attention increasingly to the development of integrated 12-18 month evaluation plans for each of the three major research areas. We will also continue moving forward in-progress studies, as well as moving new 2013-2014 studies into the implementation stage.