



PA Response to Draft Resolution Program Requests & Schedule of Key Dates



Introduction

- The PAs appreciate the hard work of all Councilors and the efforts to come to agreement on the Plan
- PAs have reviewed the draft resolution program design requests carefully, with the goal of achieving a Resolution that is supported by the full Council, and the overarching goal of achieving nation-leading energy savings in 2016-2018 and beyond

Renter and Moderate Income

- A renter-specific initiative to be rolled out in Q1 2016, *including periodic PA reports to the EEAC that will include timely rental visit metrics including participation levels and conversion rates by renters and their landlords by PA, and qualitative information on any barriers encountered and plans to address them.*
 - *PA's have no additional comments*
- A moderate income initiative beginning in Q1 2016, *including periodic PA reports to the EEAC on participation rates by PA.*
 - *PA's have no additional comments*

Public Housing Funding Agencies

- *PAs will continue to work with public housing funding agencies (with mutual expectations and deliverables) and LEAN to develop and implement enhanced approaches to will-leverage multi-family refinancing events to maximize retrofit potential and develop a. The parties will specifically consider performance-based retrofit product for these situationsproducts. The PAs will present the results of these efforts and specific proposals derived from them by the close of Q1 2016.*
 - *PAs, after consultation with LEAN, suggest the revisions above because (1) PAs and LEAN already have done meaningful work with these agencies and will continue to do so; and (2) it is premature to define the exact implementation strategy (performance-based product) before design enhancement work is completed; PAs will consider this strategy, with input from the agencies, in determining the best path to achieve the objective set forth above*

MTAC and CHP

- More detail about the PA's Massachusetts Technology Assessment Committee (MTAC), *and semi-annual updates to the Council on progress reviewing and implementing new technologies into programs.*
 - *PA's have no additional comments*
- A clear commitment to Combined Heat and Power (CHP) installations, *and tracking CHP project savings and expenditures (subject to customer confidentiality requirements) against PA's CHP Plan projections in semi-annual presentations to the EEAC and in data sets provided on Mass Save Data.*
 - *Project level data includes confidential customer information that must be protected by the PAs; alternatively, PAs suggest removing the word "project" to mitigate confidentiality concerns (which must still be considered in all instances)*

C&I Programs

- Regular and specific updates to the Council on C&I program progress and penetration (including segment specific approaches - especially for challenging subsectors such as small and mid-size commercial, small hospitals, non-profits, and multifamily - measures such as street lighting and LED costs and conversion, and innovations such as strategic energy management) *through semi-annual presentations to the EEAC. The PAs will collaborate with DOER in Q4 2015 to consider how best to present this information (e.g., potential use of roundtables, webinars, etc.) and to develop a schedule for updates on specific topics.*
 - *PAs have no additional comments*

Schedule of Key Dates

Date	Activity
October 21	EEAC Meeting
October 22/23	PAs to incorporate changes from resolution into program descriptions and provide updated program description section to Council
October 23	PAs to submit updated Attachment A to Council
October 26	PAs to complete PI model and submit to Council
October 26	EEAC Meeting and Vote
October 30	PAs to file final Plan with DPU and Council (to include bill impacts, statewide tables, full narrative, evaluation studies, appendices, etc.)

Other Recent Milestones

Date	Activity
October 17-20	Work on savings assumptions/TRM work with consulting team
October 20	PAs “lock” current TRM assumptions
October 20	Initial draft updated Attachment A shared with consulting team (based upon savings assumption work)

Appendix



Commitment to Continuous Improvement and Optimization- Examples of Plan Quotes

- **A central theme running through each generation of Three-Year Plans has been the ongoing PA commitment to work collaboratively on a daily basis to ensure that: (a) all eligible customers in Massachusetts experience seamless programs, with common application procedures, incentives, and supportive educational and technical services; and (b) those programs are subject to continuous improvement in order to retain their status as among the best in North America.**
- The PAs will continue to optimize systems and expand offerings while recognizing the key role that PA partners play.
- The PAs are committed to optimizing the customer experience and connection points through the existing market rate HES initiative and the Low-Income program.
- Each PA is represented in the Multi-Family working group, which will continue to be responsible for oversight of the initiative and promote continuous improvement/best practices with regard to the multi-family market.
- The C&IMC regularly reviews its processes and operations in order to continuously optimize the balance between innovation and consistency and will continue these efforts throughout 2016-2018.
- For the 2016-2018 period, the program will concentrate on continuous improvement and refinement to core program elements and expansion of more customized services into relatively underserved markets such as the tenant fit-up/TI processes and deeper savings in small and medium building markets as described above.
- For the 2016-2018 Plan period, the program will concentrate on continuous improvement to our processes and exploration of targeted additions.
- The PAs interact with a broad range of stakeholders on a regular basis in order to capture all good ideas and optimize program development and delivery.

EM&V Recommendations

- PAs provide extensive information on completed studies in Plan-Year and Term Reports and Plans, including:
 - Study Objective and Summary of Results
 - Core Initiatives to which the Results of the Study Apply
 - Explanation Whether or Not the PAs Decided to Adopt the Recommendations from the Study
 - How the Study Affected Program Results
 - Overview of Study Method
 - Application of Results
- PAs will provide a table in the Plan summarizing EM&V study recommendations from 2013-2015 that indicates whether the PA has implemented the recommendation and if not, why not – per the DPU H.O. memo of 10/2/2015
- Plan will include a comprehensive Strategic Evaluation Plan developed by the EMC