

QUARTERLY REPORT FORMAT

Process Discussion

► February 17, 2016

CONTEXT AND PROCESS



- ▶ **Quarterly reports content and format has evolved over time, based on input from Council**
- ▶ **Format developed in joint effort of PAs and EEAC with technical assistance from EEAC consultants**
- ▶ **Excom approved of updating report**
- ▶ **Changes have been reviewed by PAs and they are open to making report more user friendly**
- ▶ **Consultant Team will meet with Planning and Analysis Group to review and suggest changes and timeframe**
- ▶ **The goal is to get this format in use for May 2016 Q1 report**

CURRENT FORMAT REFLECTS PAST COUNCIL INPUT AND REQUESTS

- ▶ **Performance of the electric and gas programs including summary charts and tables**
- ▶ **Forecasts of year-end and three-year-end performance in presentations to Council**
- ▶ **Status or updates on achieving the Council's priorities**
- ▶ **Program highlights that the PAs or Council feel are important to provide**
- ▶ **Other highlights (marketing, EM&V, MTAC)**
- ▶ **An Excel data set (pivot table) that can be used to analyze the underlying data by program and initiative**

REVISIONS TO QUARTERLY REPORTS OVER TIME

- ▶ **Early versions: performance data (savings and costs) and key highlights**
- ▶ **Common formats, labels, & color schemes – 2010**
- ▶ **Common charts and data formats – 2010-2011**
- ▶ **Added benefits in Q2 and Q4 reports – 2011**
- ▶ **Increased emphasis on EEAC priorities – 2011-2012**
- ▶ **Added other sections over time – financing, EM&V, marketing, MTAC – throughout the years**
- ▶ **Excel pivot table data formats, centralized and consistent quality assurance, *major revision* – 2013**
- ▶ **Forecasts on year-end and three-year basis added to presentations to the Council – 2013, 2014, 2015**



POTENTIAL CHANGES TO CURRENT FORMAT

GOALS OF FORMAT CHANGES

- ▶ **Make key updates part of upfront summary section**
- ▶ **Create the ability to easily skim report contents**
- ▶ **Present certain information in a way that shows quarter to quarter changes—not a snapshot**
- ▶ **Provide clear data association in presented information**

SECTIONS 1 AND 2



1. Introduction/Executive Summary

- ▶ Bring more of the highlights to a front section

2. 2016 Council Priorities Update

- ▶ This area will need updating to include the new Council priorities which are more varied than previous lists
- ▶ Items here should report directly on progress in the quarter for EEAC priorities
- ▶ Should provide summary data that shows program progress

SECTION 3 - GAS AND ELECTRIC PROGRAM HIGHLIGHTS

- ▶ **This section should provide information on measures, tactics, study results, and progress toward goal supported by data**
- ▶ **It might be better to update progress from report to report rather than as a single snapshot**
- ▶ **Where possible, standard format across sections should include:**
 - Topic
 - Relevant performance data
 - Current status
 - Progress in this quarter
 - Action steps and timeline

SECTION 4 - INNOVATION

(PREVIOUSLY - MASSACHUSETTS TECHNOLOGY ASSESSMENT COMMITTEE)

- ▶ **We will work with the PA to create this report section**
- ▶ **This will be the place to report on new and exciting technologies and practice suggestions for programs and MTAC**

SECTION 5 - MARKETING, EDUCATION, OUTREACH HIGHLIGHTS

- ▶ **Reports past quarter activities**
- ▶ **Might be changed to add context and significance to the information presented**
 - For instance, rather than reporting just the number of ads placed or run, report the numbers and the change in number/location and the reason that change was made

SECTION 6 - EM&V HIGHLIGHTS

- ▶ **Well received but could use updating**
- ▶ **Study summaries (including status) are valuable to many users of quarterly reports**
- ▶ **Explore more concise or clearer ways to present the cycle of creating each EM&V report—planning, solicitation, draft, and final**
 - Link to a table of all studies in progress on the website
 - Link to individual evaluation studies
 - More information on how EM&V results have or will be applied and when--could be addressed in a separate document

SECTION 7 - REGULATORY UPDATES

- ▶ **Reviewers thought this section was appropriately reported**

SECTION 8 - SPECIAL FOCUS TOPICS: COUNCIL DRIVEN TOPICS

- ▶ **Content could be the result of a Council process to identify, in advance, subjects of interest that may require information or data as a one-time request**
- ▶ **Other topics can be added upon Council request**

NEXT STEPS



- ▶ **PAs and EEAC consultants work on potential revisions (PAG meeting and other forums)**
- ▶ **Consider Councilor comments or questions on sections, content, and format**
- ▶ **Bring proposed revisions back to Council for review (March EEAC meeting)**
- ▶ **If Council approves, EEAC Consultants and PAs will work through PAG to implement changes in Q1 report**