

\*Note: This is a working draft of the planning schedule

**Electric and Gas Energy Efficiency Plan Filings, 2010-2012**  
**Three Phases: to April 30, May 1 to July 29, and July 30 to October 31**

**Proposed Timeline, with Proposed Revisions by the Council Consultants**  
**April 20, 2009 (revised draft)**

*Phase I: Development of Statewide Energy Efficiency Plans*

[Note that the schedule to April 30 below is organized primarily around the Council meetings.]

- February 10/24, 2009 - Council meetings. Council develops and communicates draft priorities (Council Resolution) for the three year Plans and considers initial responses from Program Administrators.
- March 5, 2009 - Consultants develop and DOER distributes draft outline and draft timeline for the April 30 statewide Plans (Electric and Gas), for Council consideration. Additional documents for Council review and consideration distributed prior to the Council meeting.
- March 10, 2009 - Council meeting. Council reviews (1) outline and (2) timeline for the April 30 statewide Plans. (3) Council, with the support of the Consultant presentation, reviews MA energy and environmental policies, including the GCA and GWSA statutes, and considers electric energy savings necessary to achieve the policy goals and GCA requirements. (4) PAs present highlights and themes of some proposed key program strategies as an informational update, with Consultant recommendations, for Council discussion. (5) Council reviews and discusses revised Resolution.
- March 24, 2009 - Council meeting. Council reviews additional progress on key concepts and information for the April 30 Plans, primarily: (1) updates on the Plan outline and timeline; (2) summary of 08-50-A decision; (3) Council Resolution; (4) the program strategies for “broader and deeper” savings, including those strategies that respond to the Council Resolution; (5) preliminary electric energy savings levels developed by the Consultant, at the portfolio and sector levels (and for at least some major market segments), and initial estimates of electric benefits, costs, and net economic benefits; (6) preliminary gas savings levels; (7) the proposed approach for the GCA-required assessment of the potential for all available cost-effective energy efficiency; and (8) initial concepts for other related Plan topics (e.g., evaluation/M&V, performance incentives, etc.).

- April 14, 2009 - Council meeting. Council reviews additional progress on key concepts and information for the April 30 Plans, primarily: (1) summary of DPU 08-50-A Decision from Commissioner Tim Woolf; (2) environmental benefits and economic analysis background; (3) Three Year Plans: schedule, process, and template (Plan Template from 08-50 working group process, schedule for development of April 30 Statewide Plans with update from the PAs, and process and timeline for review of April 30 Statewide Plans focusing on the April 30 through July 29 period); (4) electric bill impact analysis, preliminary approach from EEAC Consultants; (5) gas energy savings estimates and initial economic analysis by the EEAC Consultants; (6) follow up on key program strategies for “deeper and broader” savings (customer repayment/on-bill financing, and electric and gas integration); (7) performance incentives, review of current electric mechanism; (8) scope and process for the assessment of all available cost-effective potential; and (9) Council website update.
- April 21, 2009 - Council meeting. Council reviews additional progress on key concepts and information for the April 30 Plans, primarily: (1) Three Year Plans: process and schedule, revised timeline (process and revised timeline for review of the April 30 Statewide Plans focusing on the April 30 through July 29 period; May 5<sup>th</sup> PA briefing on April 30 Statewide Plans, with a Council working session in the afternoon); (2) bill impact analysis, working group process and schedule; (3) evaluation (EM&V) administration and framework; (4) performance incentives: overview of incentive designs and practices in other states; (5) scope and process for the assessment of all available cost-effective potential; (6) proposed process for addressing new measures (technologies and strategies); and (7) marketing, education, and outreach.
- April 30, 2009 - Initial filing of (1) statewide Electric three-year energy efficiency Plan, and (2) statewide Gas three-year energy efficiency Plan. Electronic filing of the Plans with the Council (with hard copies to follow).

Phase II: Council Review of Initial Plans and Development of Updated Efficiency Plans

[Notes:

1. Some of the dates initially proposed by the PAs were changed to line up with the Council meetings. Council work plan and schedule for the review of the Plans, developed on May 12 and posted on May 15, likely will revise and fill out the steps in the Council's review process.
2. Some Council meetings might need to be longer or be scheduled in two parts, with a technical working session (or working groups) as well as the regular meeting, to allow for more detailed discussions of specific topics. For example, working groups on specific topics could be scheduled immediately prior to the regular Council meetings, at 1:00/1:30 pm (or in the morning), and the working groups could report to the full Council during the regular meeting. Also, some of the discussions will be iterative, with interactions and communications outside of formal technical sessions, e.g., there will likely be some working groups and some PA/Consultant meetings to address details.
3. In order to ensure adequate data for the Council's review of the statewide Plans, at some point between May 1 and July 29 (by late May/early June?), the Council will need to receive the PA comparison data tables (savings, benefits, costs and other data by individual PA, summing to the statewide totals) and the historical comparison tables. These data tables are necessary to complete the Council's review of the statewide Plans prior to July 29.]

- May 5, 2009 - PA Briefing on 2009 Statewide Plans (morning) and Council Working Session (afternoon).
- PA briefing and overview of Electric and Gas Plans; PA presentations with questions and initial Council discussion (10:00 to noon).
  - Council working session (1:00 to 4:15). Council asks additional questions, discusses the statewide Plans, and identifies topics or issues to address during its review. Consultants compile initial list of topics and issues to address during the Council's review. Consultants provide initial review comments.
- May 12, 2009 - Council meeting and possible technical working session or working groups. Council identifies and reviews initial list of topics and issues to address during its review of the Plans (list compiled by Consultants with input from Councilors), and develops Council work plan and schedule for the review. Council Consultants provide review comments, following up on the May 5 briefing, for Council consideration. Council asks additional questions, discusses the statewide Plans, and provides initial comments orally.
- May 15, 2009 - Council distributes/posts the work plan and schedule for its review of the Plans, and notifies PAs regarding areas of interest/topics for review in further technical working sessions or working groups.
- May 13-26, 2009 - Working groups continue discussions.

- May 26, 2009 - Council meeting and possible technical working session or working groups. PA responses to questions (those that required follow up) and identified topics and issues. Council identifies any additional questions or information needed from the PAs. Council discusses the Electric and Gas Plans, and develops preliminary comments on the Plans. [Other topics TBD.]
- May 29, 2009 - Council distributes/posts its preliminary comments on the statewide Electric and Gas Plans. Additional questions or requests for additional information issued by the Council. (Requests for information can also be issued before this date, and the PAs will seek to respond within 10 days as a general rule.)
- June 9, 2009 - Council meeting and possible technical working session or working groups. Council follow up on outstanding topics and issues, PA responses to requests for information, and PA responses to preliminary Council comments. Council reviews preliminary analysis of rate and average bill impacts, and preliminary assessment of all available cost-effective energy efficiency, among other topics. Council reviews PA comparison tables and historical data tables from the PAs. Council continues drafting its written comments on the Plans. [Other topics TBD.]
- June 23, 2009 - Council meeting and possible technical working session or working groups. Council completes its written comments on the (then current) statewide Plans. Council reviews analysis of rate and average bill impacts, and assessment of all available cost-effective energy efficiency, among other topics. [Other topics TBD.]
- June 26, 2009 - Council distributes/posts its comments on the statewide Plans.
- July 9, 2009 - Updated draft statewide Plans (Electric and Gas) submitted by PAs (addressing Council comments and suggestions).
- July 14, 2009 - Council meeting. Council reviews updated draft statewide Plans and provides any additional comments and suggestions.
- July 23, 2009 - Updated revised/final statewide Plans submitted by the PAs.
- July 23-28, 2009 - Council reviews updated revised/final statewide Plans (Electric and Gas) and completes drafting of its comments on the Plans. [Is there a need for another Council meeting during this time? Or is July 14 meeting above adequate?]
- July 29, 2009 - Council submits approval, conditional approval, or comments on the updated statewide Electric and Gas Plans.

Phase III: Development of Program Administrator-Specific Plans

(Note: Process and specific schedule to be developed further at a later date. Add interactive and review steps between July and October 31. Council Consultants will be working with the PAs on the development of the individual PA Plans. The Council should review work products and have the opportunity to ask questions and provide comments during the development process. Also, the Council should review and comment on a draft of each of the PA-specific Plans prior to the Plans being filed with the DPU. This interactive and iterative process will be filled out at a later date.)

October 31, 2009 - PA-specific Plans filed at the DPU.

October 31, 2009 - Updated, integrated statewide Plans (Electric and Gas) filed that include any updated information revised through the process of developing the separate PA-specific October 31 Plans filed by the PAs.

(Note: This should be done only to the extent necessary. The PA-specific Plans should really follow and be developed from the updated statewide Plans (July 29). Therefore, the updated statewide Plans (if approved by the Council in July) should need little if any “updating” themselves in October. However, if the Council does not approve the updated statewide Plans in July, or if additional development continues in the separate PA-specific Plans and it is important to reflect such development in the statewide Plans, then at some point between July and October the PAs will need to produce revised, updated statewide Plans for Council review. Final draft updated statewide Plans would have to be available for Council review at least three weeks prior to the October 31, 2009 filing date.)

January 1, 2010 - PA-specific three year Plans go into effect.

Notes:

- 1) This schedule seeks to allow for the iterative discussion contemplated at the Council session of January 30, 2009 and reaffirmed in discussions since then.
- 2) The April 30 statewide Plans will follow an outline that is reasonably consistent with (though less detailed than) the final template outline (including tables) developed by the PAs and the DPU 08-50 working groups, with Council input.
- 3) The April 30 filing will, necessarily, present some information on an aggregated (e.g., by sector and major market segment) basis, and some information will be preliminary and/or general. Final detail on specific program delivery mechanics and measure mixes will be presented in the October 31, 2009 PA-specific filings.

- 4) In the period between July 29, 2009 and October 31, 2009, the PAs will be able to prepare refined PA-specific plans and address any items in Council comments due on July 29, 2009.
- 5) DPU review of the October 31, 2009 filings is being addressed by the DPU separately and is beyond the scope of this draft timeline.