

# **Technical Reference Manual (TRM)**

MA EE Advisory Council Meeting  
February 9, 2010

# Intent, Objectives and Uses of the TRM

- The TRM is intended to be a repository of information documenting how program and measure impacts are calculated and the sources of information used in these calculations.
- The goal of the project is to create consistent and transparent documentation on how Massachusetts energy efficiency program administrators plan for, quantify, and report savings
- It will serve as a reference source to this information for the PAs, regulators, customers, and other stakeholders
- Once in effect, the TRM will flow through PA tracking systems and screening models into the DOER PARIS database in a clear, accountable and traceable path.

# Scope of the TRM

- Electric and gas measures
- All sectors
- The first version of TRM will focus on prescriptive measures

[Prescriptive measures are defined as measures for which PAs offer and publish a set incentive amount per measure, and do not rely on site-specific analyses (custom measures) to develop incentive offers, estimated savings, or cost-effectiveness]

# Timeline to Complete V 1.0

## What's Been Done

2007-2008: Optimal Energy engages PAs, on behalf of NUPs, to develop a Statewide TRM

Spring 2009: New process developed with EEAC and DOER. Current TRM data collected from PAs

Oct 2009: Optimal Energy distributed draft Statewide TRM for prescriptive electric and gas measures to PAs

# Timeline to Complete V 1.0

## What Remains to be Done

- Feb. to June 1 - bulk of analysis of PA specific data, collaboration, and negotiation undertaken to achieve consensus
- June - Finalize high level details and process issues
- June 30 - TRM version 1.0 completed
- July 1 – PAs initiate process to utilize TRM to implement changes to tracking systems for use in the 2011 program year
- Starting January 1, 2011, all PAs will track and report savings based on the TRM

# How TRM is being conducted

A core TRM Working Group has been re-established and met on 1/25/10 for the first of weekly meetings

The Working Group includes representatives from

- Program Administrators - National Grid and NSTAR as co-leads
- DOER
- Council Consultant team

# Additional Resources during the Process

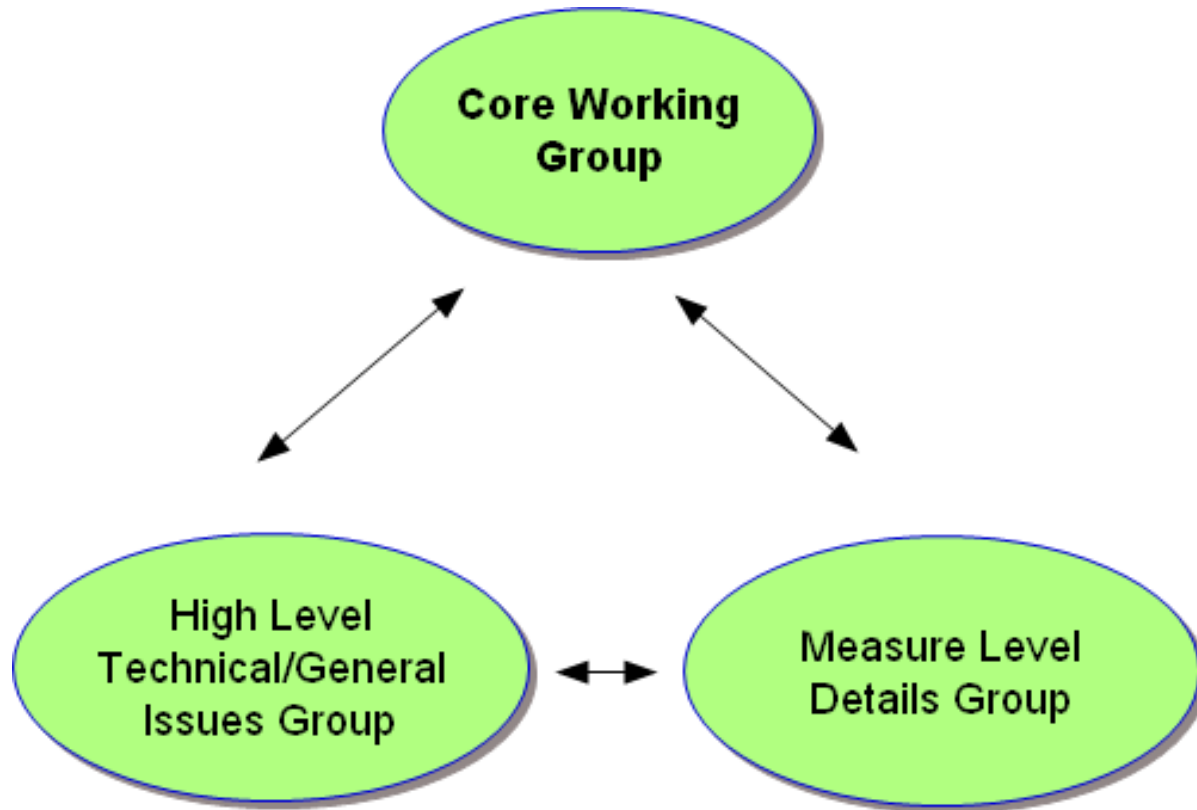
## **High Level Technical/General Issues Group**

- Covering items such as database format options; glossary development; program/measure naming conventions
- Meeting schedule and representatives to be determined based on subject, expediency and urgency factors

## **Measure Level Details Group**

- Work to achieve consensus on specific inputs and algorithms for all TRM measures
- Meeting schedule will vary based on scale and potential initial divergence of measures values between PAs
- Representatives to be determined by knowledge base, and include all applicable PAs and a consultant team area specialist.

# TRM Working Group Organization



# Next Steps for EEAC

Comments, Questions?

Updates on the status of the TRM effort will be provided at the Council's monthly meetings

Thanks