



## Memorandum

To EEAC  
From Eric Belliveau and the EEAC Consultant Team  
Date 9 June 2011  
Subject Monthly Report – May 2011

The Consultant Team is pleased to provide this monthly update to the Council on our recent activities. May produced further positive returns on the PAs' and EEAC's investments in collaboration and discussion.

### Planning Activities

- Supported the Council and DOER in developing its 2010 Annual Report to the legislature by drafting text and providing summary data and figures. Reviewed draft materials for the Annual Report.
- Reviewed and commented on interim deliverables including energy price forecasts, energy avoided costs, capacity avoided costs, and other values developed in the Regional Avoided Cost Study.
- Reviewed and analyzed the first quarter 2011 quantitative quarterly reports, and developed a summary presentation for the May Council meeting. Reviewed additional information on the financing offerings.
- Developed a joint presentation with the PAs regarding cost-effectiveness and the TRC test, which was presented at the May Council meeting.
- Coordinated with DOER regarding the DPU proceeding on the Memorandum of Agreement (proposed settlement) for the 2011 MTM issues.
- Reviewed the DPU order on the Annual Report templates, and coordinated with the PAs regarding a schedule and process for the 2010 Annual Reports and EM&V studies.
- Reviewed a draft of the Blackstone Gas 2011 MTM submission.

### Highlights from the Implementation Oversight Groups and EM&V Group

The sections below highlight activity in each of the major oversight areas.

#### C&I Team

The Team worked on several issues over the past month, covering a wide variety of topics.



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## CONSULTANT TEAM

- Worked with PAs and contractor to finalize "deep dive" overview of best practices, state of the industry, and recommendations for Massachusetts. These results will be synthesized in a future Council briefing, or briefing paper.
- Reviewed and commented on a large number of program evaluation reports, all coming in for the June 15<sup>th</sup> deadline. Coordinated with the Evaluation Team on combined feedback to the report authors and PAs.
- Continued support for PA efforts to develop an upstream lighting program, which, properly executed, could capture a majority market share of the linear florescent light bulb sales in Massachusetts.

### **Residential Team**

The Residential Team covered key program areas by engaging with several working groups. High level developments by PAs in these areas include the following.

- **General:** Worked with Mike Sommer, Jim Carey, and Mike Guerard to develop a proposal to restructure the residential working groups for greater efficiency and effectiveness. Drafted the scope for the new residential senior management group, the Residential Management Committee (RMC). Worked collaboratively with PAs to help move proposal forward and to schedule first RMC meeting in June. Reviewed and commented on PA first quarter 2011 report; provided feedback and comments on draft ENERGY STAR Homes V3 pilot evaluation and lighting program evaluation report; provided input into Codes & Standards attribution project kick-off meeting. Supported preparation of the Council's annual Legislative Report.
- **Products:** assessed adequacy of Mass Save direct install lighting component.
- **Massachusetts Technical Assessment Committee (MTAC):** Attended May 3rd meeting at National Grid and engaged in follow-up e-mail discussions with PAs. Discussions at this meeting informed subsequent engagement with PAs on ECM fans (see below).
- **HVAC:** Continued to engage PAs on the need to expand ECM furnace offering beyond gas-fired units. While oil and propane furnace ECMs are supported through Mass Save HES, there has been very limited uptake through the program. The Team continued to request regular reporting of program activity-to-date relative to goals.
- **Multifamily:** Participated in MF Working Group meeting on May 24 by phone. Provided continued review and comment of PAs efforts to coordinate and harmonize their disparate MF Program incentive offerings.
- **Home Energy Services:** Participated in Residential Steering Committee (RSC), Mass Save HES, and contractor meetings. Examined the PAs' process and methodology for developing set pricing for the Mass Save HES program and drafted a memo for the Council documenting the findings.



- Deep Energy Retrofit Pilot: Engaged in discussions with evaluation and PA program personnel on future direction for the deep energy retrofit pilot, in preparation for the 3-year plan discussions.

### **Evaluation, Measurement & Verification**

- Continued to interact with the PAs on the completion of key EM&V impact, net-to-gross studies, and best-available information work (per the Memorandum of Agreement) in time for the June 15 deadline, so results can be included in the PAs' 2010 Annual Reports. Several process evaluations were also addressed.
- Continued engagement with the PAs in several research areas to plan Round 2 studies, expected to begin in mid-2011 or later..

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### **Upcoming Activities**

The Planning group will undertake several tasks in the next few months.

- Supporting the Memorandum of Agreement (proposed settlement) on the 2011 MTM issues, in the ongoing DPU proceeding.
- Supporting the Council and DOER in completing its 2010 Annual Report to the legislature.
- Supporting and analyzing progress towards full incorporation of the key building blocks for accomplishing the goals of the Three-Year Plans to achieve deeper savings and other key priorities.
- Reviewing interim deliverables in the Regional Avoided Cost Study, and participating in finalizing the study in July.
- Participating in DPU 08-50 processes including reporting and bill impacts, as scheduled.
- Reviewing and analyzing future qualitative and quantitative quarterly reports (in July and August).
- Initial planning for the 2012 Mid-Term Modifications process, including working with the PAs on improving the MTM process, and developing a proposed schedule.

Upcoming activity in the C&I, Residential, and EM&V groups include the following.

- The Evaluation team will continue to interact with the PAs on the various studies and related activities that are moving toward conclusion by June 15. The team will then interact with the PAs to finalize the application of these results in the 2010 Annual Reports. The team will also continue to engage in other studies still underway (primarily market assessments and process evaluations) and on Round 2 planning.



The C&I Team will:

- Continue work on the upstream model, with pressure to bring the development phase to a conclusion and plan a program launch.
- Advocate for PA adherence to their own established unsolicited proposal process and procedures. In particular, PA senior management and other non-program staff should be reminded that this process applies to all PA decisions for funding allocations, not just those that arrive at the C&I Management Committee
- Analyze PA-provided data on "comprehensive facility treatments" (a/k/a "Deep dives") to date and provide a summary observation to the PAs and the Council.
- The Residential Team will be working on several priorities in June including:
  - Reviewing and responding to Codes and Standards Consultant's work plan (anticipated in June)
  - Will attend JMC meeting (6/28) focused on reporting results from pilots (ENERGY STAR Homes v.3, lighting design, renovations and multifamily/RNC) and discussions about which pilots will be ready for introduction in 2012 and/or the next three-year plan
  - Continuing engagement with Cool Smart Sponsors to develop and implement more specific ECM fan installation guidelines and contractor training.
  - Recommending the Cool Smart PAs leverage their QA/QC visits to assess whether contractors are properly sizing central air conditioners and heat pumps. (PAs have agreed to make proper sizing a requirement for efficient equipment incentives in 2012.)
  - Working with Products Sponsors to advance "market lift" implementation model for lighting products.
  - Launching the new residential senior management group, the RMC.
  - Engaging in 3-year planning discussions with the RMC, and with specific residential working groups, as needed.