**Supporting Information for Items in October 2019 Evaluation Committee Meeting Agenda – will be walked through during meeting – you do NOT have to read this prior to the meeting.**

**10/7/19 – from EA Team**

**Item 3b: C1644 Request for additional funds – preliminary info to committee / no action today:**

EMI has requested an additional $10,000 in funding for the CT EO 1644 NTG study.  You will recall we had to enlist the utilities to step in with additional help and contacts in trying to reach reasonable response rates for the target interviews (much appreciated). While the project did not go perfectly (some staff turnover, etc.) they stepped up and provided more senior / expensive staff when the project reached critical problems in getting responses. Some of the elements that led to higher costs included:

increasing customer incentive higher than budgeted to get responses, time with the utilities asking for data/contact info, messier data than they thought (5 years after their last CT C&I project and they expected improved tracking system), etc.  This request is approximately 5% of the project budget. Their justification for the specific extra costs are outlined below:

* $2,625 for increased incentives – 52 additional incentives at an incremental cost of $50 per interview plus a $25 processing fee.
* $1,000 for restarting CATI efforts – a flat fee charged by Blackstone given the pause between calling efforts to retrain interviewers.
* $6,375 for 47 additional hours of effort for participant recruiting.

**EA Team Recommendation last month (September)**: We recognize it is not policy to borrow between 3-year plans. However, we may have funds available from R1603, depending on the committee’s discussion and selections regarding the “drill down/ phase 2” work for that project. We will be discussing those options this month and will come to Committee in October’s meeting with our recommendation on both R1603 and this project. Request from Jacobson.

**Updated this month (October)**: R1603 discussions on extra analyses have been delayed (discussion later); action is delayed. Funds may be available from R1603 (or possibly in association with 2019 Plan update, or possibly not).

**Item 3b: Information / Billing for C1634**: The Evaluation Committee approved a project budget amendment months ago; however, the contract change for this for UI is stuck behind the 2019-2021 Evaluation Plan projects. The invoicing for this is expected to go to Eversource first, with the percentages “caught up” at UI as soon as UI’s contract change is in place – the same as may be happening for early phases of the 2019-2021 projects. (from Chiodo) **Potential** **Update from Chiodo or Utility in meeting.**

**Item 3c: Invoice / separate memo attached.**

**Item 4a: Update - Contracts Status for the 2019-2021 Evaluation Projects:**

* **Contracts**: We believe all contracts are complete from UI and Eversource. UI has one last internal step related to budgeting that holds up (CONFIRM THIS STATUS WITH UI)
  + 1) UI staff providing data or potentially participating in the project development work, or
  + 2) having projects bill for the work efforts.
* We appreciate Oswald’s assistance in participating in development / Q&A calls, and
* For any contracts not complete by UI, we will bill Eversource first and then adjust the next bills as soon as the UI contracts are complete, as per committee agreement.
* Invoicing – received updated percentage matrix from Eversource. QUESTION: Clarify that UI percentages that should be billed are from UI contracts? Are UI invoices per PROJECT (last year) or grouped by FIRM (per Eversource change)?
* Development work has begun on all projects (see Gantt, etc.).

**Item 4b: Contractor Pools:** See memo with recommendation / vote request. These pools represent the firms that will be considered eligible for the next round of RFPs under the Plan.

**Item 4c: 2019 Evaluation Plan Update beginning**

Evaluation plan update process to refine the 3-year Evaluation Plan approved last year – ID additional priority project needs. Not large process like last year. RELATED ATTACHMENTS: 2019-2021 Evaluation Plan plus form for submitting ideas if you identify priority gaps. List of previous studies at bottom of this document. Next steps:

1. EA Team reviews Plan for our assessment of gaps, tweaks.
2. EA Team reviews concepts submitted by Evaluation Committee
3. Prioritized according to existing criteria (Page 3 of attached adopted Plan; impact, process, not recently evaluated, high C&LM Plan savings, ISO/FCM, numbers/gaps in PSD, need or program design, part of series, co-funded, other considerations; budget)
4. Provide recommended / prioritized modifications
5. Discuss with committee (in person or by phone, depending on degree of changes).
6. Committee votes to adopt 2020 Update to the 2019-2021 Evaluation Plan; submitted to EEB.

**Item 4d:**  This month we plan to start crafting the mini-RFPs to eligible pool candidates for the 2020 or 2020/2021 projects in the Plan. The process steps are:

1. develop RFP with objectives / deliverables / scopes and evaluation criteria and scoring process (similar to previous RFP; QUESTION – do we need updated terms & conditions or from previous RFP?),
2. submit draft for committee comment,
3. revise / finalize and release RFPs; respond to Q&A
4. score and recommend winners; provide memo to committee documenting scores and recommendations for review by Committee.
5. Contracting process follows.

**Item 4e:**  **CARRYOVER – We usually begin to discuss carryover amounts in October. We have a huge carryover issue for amounts from 2019 that need to be added to 2020, as projects have barely begun.** *Very significant carryover with late year contracting. QUESTION - Need utilities to clearly state procedures or documentation needed for accrual / carryover.*

**Item 5: Process for adopting evaluation results into PSD - Issue**. Meeting was held to discuss evaluation results that were not integrated into 2020 PSD update. Immediate Action Items:

1. EA Team develops written response to utility writeup of treatment of evaluation results into PSD (timing)
2. EEB votes on a C&LM Plan, with contingencies / conditions related to this specific item (PSD value adjustments). ***EA Team requests the opportunity to review the language of the condition related to this issue prior to the vote*.**
3. EA team arranges dedicated call to discuss issue(s) raised inviting utility EM&V staff and Eval Committee.

Going forward, the Evaluation Roadmap steps are re-installed. The finalized reports provide PSD recommendations, and the Utilities provide memos on how the results will be integrated into the PSD, highlighting any deviations from report findings / recommendations. The EA Team reviews this and prepares a response. At the next Evaluation Committee meeting, the PSD implications and any differences between the EA Team and utility memo are discussed. This process happens in association with completed reports (as per the adopted Roadmap), not in an annual roll-up, as had been proposed. Timing is also provided in the Roadmap. <https://www.energizect.com/sites/default/files/CTEvalRoadmap_Final_2014_Updated_Dec2014.pdf>

ADDITIONAL CONTENT related to Update to Evaluation Plan: List of previous Evaluation Projects for considerations related to update of 2019-2021 Evaluation Plan. List of the projects from 2014 on (rough chronological order: leading R=residential, C=commercial). Ignore the initials at the end. There are a few projects that pre-date this as well, but are not listed here. Link to the website with the project reports and presentations: <https://www.energizect.com/connecticut-energy-efficiency-board/evaluation-reports>

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| R1.CL&P & UI Behavior (HER) Pilot Studies 2011 (S)  R2.CL&P Behavior (HER) Pilot Studies 2012 Yr. 2 (S)  R3.Regional Lighting Hours of Use (D)  R4.HES Persistence and Process Evaluations (S)  R4.HES & IE Process Eval (w/H&S, EUL/Persist, NEI) (S)  R5.SF Weatherization Baseline 2012 (S)  R6.Housing Characterization (D)  R7.Ground Source Heat Pump Study (impact & Mkt assess) (D)  R8.Central Air Conditioning - 2 year project (D)  C9. Small Business impact Study (L)  C10. Small Business Data Mining Study (L)  C11. Small Business Barriers Study focusing on program cancellations, financing and repeat participation  C12. Small Business Barriers Study focusing on Ltd English / Low Income (L)  C13.Lge C&I Quick Start Market Assessment/Trend Analy (L).  C14.EO Impact and Process Evaluation (L)  R15.Potential for Res. Measures in SF Homes: Follow-on to Weatherization Study (S)  R16. HES/HES-IE Impact Evaluation study (S)  C17. C&I Market Assessment (L)  C18. SBEA Process Evaluation (L)  C19. C&I New Construction and Code Compliance Baseline Study(L)  R31 Real Time Data Collection(S)  R32. CL&P Behavior Year 2 (Opower program) (S)  R33. Database Improvement(S)  R46 Financing Evaluations  R48 Market Assessment for HES Measures(D)  R67. Lighting Interactive Effects  R84 Consumer Electronics Potential(D)  R86. LED Mkt Assessment & Lighting NTG (D) | R91. Engineering Disconnect (Residential study drilling down on billing analysis / engineering options and results differences)  R113. Ductless Heat Pump Impact Evaluation  R151. HES Air Sealing, Duct Sealing, and Insulation Practices Study  R152. Process Evaluation of Community Based Programs  R154. Lighting Onsites  R157. Multifamily Process  C1630 Largest Energy & Demand Savers Evaluation  C1639. SBEA Impact & Process Evaluation  C1641. BES and PRIME Impact Evaluation  C1634. ECB Impact Eval  C1635. EO Impact Eval  C1644. EO Baseline & NTG  R1602. RNC Billing Analysis, Process Evaluation, and Baseline  R1606. HER Behavioral Program Impact Persistence (Opower program) (follow-on to R32)  R1613/1614. Residential HVAC and Hot Water Program, Impact and Process Evaluation and Residential Heat Pump Water Heater Impact Evaluation (LS&RW)  R1615. LED NTG  R1616/R1708. Residential Lighting Impact Saturation Study  R1617. Residential Ductless Heat Pumps / Cold Climate Heat Pump Measure Cost-effectiveness and Effects  R1702/R1710. Codes and Standards Assessment  R1706. Residential Appliance Saturation Survey  R1707. NTG Study of Residential New Construction  R1709. Non-Energy Impacts (res & com’l)  R1603. HES Impact Eval  R1705/R1609. Multifamily Baseline and Weatherization Study |