***MEMORANDUM***

**DATE**: 12/23/2020

**TO**: CT-EEB Evaluation Committee, DEEP, Eversource, UI, and Technical Consultants

**FROM**: EA Team

**SUBJECT**: Resolution of Analysis of Adoption of PSD Update Recommendations

**Abstract**

The EA Team and Utilities have reached an agreement on a subset of easy-to-incorporate high priority PSD updates that will be incorporated into an end-of-year PSD and used to develop the March update to the 2021 C&LM Plan. The remaining recommended PSD updates will be incorporated in time to be used for the 2022 Plan update, with EA team involvement.

**Findings**

The EM&V study conducting a comprehensive PSD review led to hundreds of recommendations for PSD updates, including Algorithm update, editorial updates, new measure updates (and removals of old measures), new methodology updates, parameter updates, updates based on recent evaluation updates, and updated references.[[1]](#footnote-1)

Per the Roadmap, the EA Team undertook a review to identify whether or not the EM&V recommendations were appropriately adopted, or whether rationales for non-adoption were acceptable to the EA team. A memo of the results of the EA Team’s review[[2]](#footnote-2) of the latest PSD provided by the utilities found that a large number of the recommended updates were not integrated[[3]](#footnote-3), and the EA Team provided that summary in a 10/2/20 memo to the Evaluation Committee.

During a follow-up meeting with Utilities and Technical consultants on 10/6/20, the EA Team discussed these findings, and the utilities noted that there was a later version of the PSD which had been used in developing the 2021 C&LM Plan. In the meeting, it was decided that the EA Team would provide its initial list of high priority recommendations from the initial review (provided 10/10), and would conduct a review of this second document and identify high priority changes that were not adopted but should be integrated into the March update of the 2021 C&LM Plan. The other changes would be integrated into the next year’s C&LM Plan. The near-term recommendations should:

* Be high priority, preferably focusing on easy-to-incorporate parameter changes, but try to avoid recommendations that involved algorithm changes or other changes that would be very difficult to implement immediately and would disrupt tracking activities that utilities implement and begin on January 1.
* Be discussed with the utilities and the EA Team and Utilities should come to an agreement on these near-term changes by the end of Calendar Year 2020.

A brief update call was conducted 12/1/20 to identify the key utility staff to be included in next stages of the process. The EA Team then provided the results of the review of the second PSD document in a 12/10/20 memo[[4]](#footnote-4) and it included a list of 28 recommendations that were considered high priority and fell within the caveats bulleted above. These items were discussed in a meeting on 12/14, with immediate resolution / adoption of the majority of recommendations (16 of 28). For several others, the EA Team agreed to enhance the explanation of our rationale for including the recommendation as a high priority and forwarded this memo on 12/18. After review of more detailed rationales, the utilities agreed with all but one item (3.4.6 - Add Doors to Open Refrigerated Display Cases), which was discussed briefly on 12/16 and 12/21. For this measure, after reviewing the concerns of the utility and discussions / calculations with ERS, the EA Team agreed this change would be complicated to incorporate into the March update, and agreed to defer this recommendation to integration in next year’s update.

The attached spreadsheet identifies the specific high priority PSD changes that are to be included in the March 2021 C&LM Plan update. A brief list is provided in Figure 1.

Note the following resolution reached:

* As of 12/23/20, the Utilities and the EA Team are in agreement with this list.
* Following up on this, according to the decisions in the October meeting, the utilities will produce a revised PSD document incorporating these recommended changes by December 31, 2020.
* The EA Team will work closely with the utilities as the remaining recommendations are implemented for use in developing the 2022 PSD and the 2022 C&LM Plan. As part of this process, the utilities will incorporate the remaining recommended PSD changes or provide rationales / information on why specific recommendations are not recommended to be included.

**Table 1: High Priority PSD Update – Measure / Section List Affected (some with multiple updates)**

|  |  |  |  |
| --- | --- | --- | --- |
| Section | Measure Name | Section | Measure Name |
| 2.1.1 | Standard Lighting | 4.2.15 | Clean, Tune and Test |
| 2.2.3 | Water and Ground Source Heat Pump | 4.2.2 | Heat Pump |
| 2.2.4 | Enthalpy Economizers | 4.2.6 | Heat Pump – Ductless |
| 2.6.3 | Lost Opportunity – Custom | 4.2.7 | Package Terminal Heat Pump |
| 3.1.1 | Standard Lighting | 4.4.10 | Floor Insulation |
| 3.2.1 | Water Saving Measures | 4.4.2 | Infiltration Reduction Testing (blower Door Test) |
| 4.1.1 | Lighting | 4.5.1 | Showerheads |
| Appendix 3 | Table A3-1 Realization Rates for Energy Conscious Blueprint | | |

1. The Roadmap requires the utilities to inform the EA Team how they plan to incorporate (and not incorporate) recommendations from EM&V studies into the PSD and the C&LM Plan. This year, the Evaluation Plan included a thorough PSD review, which provided many evaluation-based recommendations for updated PSD values and settings by measures and sector. The contractor, ERS, provided a workbook of individual recommendations for each PSD entry, with specific rationale, comparison, and backup for the recommendations, and also provided a redline of the PSD to the utilities. [↑](#footnote-ref-1)
2. Because markups were not available, the EA Team conducted a detailed document compare, the recommended and adopted changes were tabulated and categorized in Excel, and then the team ranked the types and importance of updates not made. A similar method was used to conduct the review of the second document. [↑](#footnote-ref-2)
3. EA Team found only 160 of 550 actionable recommendations were implemented (29%). [↑](#footnote-ref-3)
4. In this review, the EA Team found a number of additional actionable recommendations were implemented but quite a few remained. The EA team conducted a prioritization activity, assigning a high, medium or low priority to the remaining unadopted PSD change recommendations. We then filtered the list to include only high priority parameter updates and other changes that can be readily adopted. The resulting list provides a set of 28 additional high priority recommendations for incorporation into a year-end update of the PSD. [↑](#footnote-ref-4)