



A Consistent Reporting Framework for Energy Efficiency Impacts: *The Forum Adopts Common Reporting Guidelines*

In December 2010, the Regional EM&V Forum Steering Committee voted to adopt the *Common Statewide Energy Efficiency Reporting Guidelines*, which provide a platform for a common 'currency' of reported energy efficiency data to support multiple state and regional energy and environmental policy objectives.

Why Is Consistent Reporting Needed?

The newly adopted *Reporting Guidelines* come at a time when states in the Forum region are making unprecedented investments in energy efficiency to meet a range of policy objectives. Unlike the consistent reporting of electricity, natural gas, and oil use, energy efficiency impacts are largely reported differently from state to state, making it difficult to accurately track and compare the impacts of efficiency programs and policies across the region. In order to build the credibility of efficiency as a resource, consistency and transparency is more important than ever.

"By capturing [energy efficiency impacts] in a consistent way, we will be able to reap the benefits of what energy efficiency offers."

Kathleen Hogan, Deputy Assistant Secretary for Energy Efficiency in the Office of Energy Efficiency and Renewable Energy (EERE) at US DOE
October 2010 EM&V Forum Annual Public Meeting

"[The Common Statewide Reporting Guidelines] are a great product."

Rick Morgan, Commissioner of the District of Columbia Public Service Commission
on Forum Steering Committee adoption of the Guidelines December 2010

The intent of the *Reporting Guidelines* is to provide for consistent and/or transparent definitions and reporting of electric and natural gas energy efficiency program energy and demand savings and associated costs, and their emission and job impacts across the region.

Who Will Benefit from the Guidelines?

The *Reporting Guidelines* provide a series of tables that report on a range of energy, economic and environmental impacts of energy efficiency investments. Once implemented by states in the region, they will add value to the work of many stakeholders in the energy efficiency arena, including:

State Energy Offices / Public Utility Commissions can track program impacts against state energy and economic goals, and compare and aggregate state impacts to multi-state or regional levels;

Program Administrators / Regulators can review and compare consistently reported costs of saved energy and the relative effectiveness of programs to inform more effective program and policy design;

Air Quality Regulators can incorporate consistently reported efficiency

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To learn more about the EM&V Forum, visit the [Regional EM&V Forum Website](#)

Calendar of EM&V and Other Energy Efficiency Meetings

January 31 - February 3, 2011: [NASEO/ASERTTI Conference](#) in Washington, DC

February 13 - 17, 2011: [NARUC Winter Meeting](#) in Washington, DC

February 14, 2011: EM&V Forum [Quarterly Project Committees Meeting](#) in Lexington, MA

March 25, 2011: EM&V Forum [Quarterly Steering Committee Meeting](#)

April 10-12, 2011: ACEEE/CEE [National Symposium on Market Transformation](#) in Washington, DC

May 16-19, 2011: [AESP Spring Conference](#) in Atlanta, GA

May 26, 2011: EM&V Forum [Quarterly Project Committees Meeting](#), location TBD

June 7-8, 2011: [NEEP Summit](#) in Warwick, RI



savings data into air quality reporting and planning, and access efficiency data sources and supporting EM&V information; and

System Planners can use consistently reported efficiency data to support regional system plan forecasts, including energy, demand and transmission planning.

What's Next?

Steering Committee adoption of the *Reporting Guidelines* is just the first step towards consistent and transparent reporting across the Forum region. During 2011, the Forum will transfer the reporting tables into an online reporting tool, which will be developed with guidance from Forum participants. It is the Forum's hope that states across the region will use the online tool to report their respective statewide efficiency impacts starting in 2012 (for program year 2011). The Forum will provide technical support to each state's designated organization responsible for completing the statewide reporting tables and will support posting the statewide annual reports on the Forum website.

Finally, as efficiency becomes an increasingly prominent strategy in energy policy and climate change mitigation efforts across the country, we encourage other states and federal agencies to refer to these Guidelines to inform similar efforts in other regions and nationally. Please view the [Common Statewide Energy Efficiency Reporting Guidelines](#).

Common EE Reporting Guidelines Highlights

The Guidelines provide for consistent definitions and reporting of electric and natural gas energy efficiency program energy and demand savings and associated costs, and their emission and job impacts.

By collectively implementing the Guidelines, the states in the Forum region will benefit from a common 'currency' of reported energy efficiency data to support multiple state and regional energy and environmental policy objectives.

In 2011, the Forum will provide implementation support for states to use the Guidelines to report 2011 EE program impacts.

EM&V Forum 2011 Agenda and Budget

The EM&V Forum Steering Committee recently adopted the 2011 Forum project agenda with an estimated budget of \$1.9 million. Projects on the adopted 2011 agenda include:

- **Emerging Technologies Savings Assumptions:** to recommend EM&V methods and savings algorithms and assumptions to estimate initial gross savings for a set of emerging technologies and program designs.
- **Statewide Energy Efficiency Reporting Guidelines Implementation:** to develop an online tool that would incorporate the Guidelines' reporting templates and to provide support for users of the Guidelines.
- **Mid-Atlantic Technical Reference Manual—Phase 3:** to update Version 1 of the Mid-Atlantic TRM.
- **Loadshape Research—Phase 3:** to obtain 8760 loadshapes through primary research (metering) for a priority measure or set of measures.
- **Add-on Research:** to support continued research in 2010 project areas (such as measure persistence and/or incremental cost).
- **Forum Evaluation:** to determine the scope of the Forum beyond 2011.
- **Net Savings:** to be informed by the Forum's [Net Savings Scoping Paper](#) and Policy Committee.

The Steering Committee also agreed to further consider in the first quarter of 2011 other projects proposed that otherwise may be deferred to 2012 including: *Guidelines for Incorporating Energy Efficiency into System Planning*, *Calculating Effective Useful Life in Early Replacement Programs*, and *Estimating the Impact of Energy Efficiency on Building Codes and Standards*.

The Steering Committee decision reflects current regional interest in the projects coupled with uncertainty by some states about final 2011 budgets. For more information about the 2011 agenda, please view the [2011 Forum Project Descriptions](#).



EM&V Forum Projects Update

The EM&V Forum completed several projects in 2010 and continues to conduct Protocol Development, Research and Evaluation, and Education and Information Access projects. The following sections provide more information about the status of the following EM&V Forum projects: *Glossary of Terms & Definitions*, *M&V Protocol Development in Wholesale Capacity Markets*, *Mid-Atlantic TRM*, *Loadshape Research*, *C&I Lighting Measure Life and Persistence*, *Net Savings Scoping Paper*, *Incremental Cost Study*, *Annual Public Meeting*, and *Evaluation Activities Webinar*

Protocol Development Projects

A1: *Glossary of EM&V Terms & Definitions*: Version 2 of the Glossary is well underway. The updated Glossary will include terms and acronyms used in recently completed Forum projects that were not included in the first version of the Glossary. Version 2 is on track for completion in March and will be posted on the EM&V Forum website. For more information, contact [Cecily McChalicher](#).

A4: *M&V Protocol Development in Wholesale Capacity Markets*: NEEP continues its participation in the North American Energy Standards Board (NAESB) M&V project, which includes developing proposed model business practices and standards for retail and wholesale energy efficiency M&V. The retail work group is continuing to develop draft model business practice standards for calculating gross energy and demand savings, and may consider net savings in future efforts. The wholesale work group has completed draft M&V standards and is reviewing both formal and informal comments that it has received about the draft standards. NEEP submitted informal comments on the draft wholesale standards based on input from Forum participants. More information can be found at the [NAESB DSM/EE website](#) or contact [Julie Michals](#).

PD5: *Mid-Atlantic Technical Reference Manual (TRM) - Phases 2 and 3*: Phase 1 of the [Mid-Atlantic TRM](#), which was developed for Maryland, Delaware, and the District of Columbia, was completed in May 2010 and includes algorithms and savings input assumptions for a broad range of measures. Both Phases 2 and 3 of this project are now underway. For Phase 2, the project contractor, Vermont Energy Investment Corp (VEIC), is adding twenty gas and electric measures selected by the project subcommittee to Version 1 of the TRM. For Phase 3, VEIC is updating the measures in Version 1 of the TRM, based on a critical review of comments and recommendations provided by stakeholders. For more information, contact [Elizabeth Titus](#).

Protocol Development Projects Highlights

Version 2 of the *Glossary of EM&V Terms and Definitions* is nearing completion and will be finalized in March.

NEEP is participating in the retail and wholesale work groups for the NAESB M&V project to develop model business practices/standards for retail and wholesale energy efficiency markets.

Phases 2 and 3 of the *Mid-Atlantic TRM* are underway. Phase 2 will add about 20 additional gas and electric measures to Version 1 of the TRM, and Phase 3 will update Version 1 of the TRM based on a critical review of recommendations provided by stakeholders.

Research and Evaluation Projects

B1 Phase 2 - *Loadshape Research Project*: This project includes two studies, the *Unitary HVAC Study* and the *Commercial Lighting Study*, both of which are being conducted by KEMA. Each project will deliver a spreadsheet tool that enables program administrators to calculate coincidence factors for time periods they specify, and to develop weighted average

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Regional EM&V Forum

[Protocol Development and
Research and Evaluation
Products](#)



8760 loadshapes. *For the Unitary HVAC Study*, metering took place throughout the 2010 cooling season. KEMA has delivered a revised draft spreadsheet tool based on input from the project subcommittee on the initial draft. The project report is currently under preparation, and the project will be finalized in early 2011. *For the Commercial Lighting Study*, secondary data collection is complete, and a draft spreadsheet tool is under development. For more information, contact [Elizabeth Titus](#).

B2: C&I Lighting Measure Life and Persistence Project: This project will result in measure life estimates based on primary data collected from programs that have been in existence and measures that have been installed for many years. In 2010, the project schedule was extended to accommodate changes in the availability of data from project sponsors. The majority of on-site data collection is complete, and data analysis is underway. A final report will be completed by mid-2011. For more information, contact [Elizabeth Titus](#).

B3.1: Net Savings Scoping Paper: This scoping paper, completed in November 2010, was prepared by NMR Group and Research Into Action; it is based on secondary research and in-depth interviews with experts and input from Forum participants. The [Net Savings Scoping Paper](#) provides recommendations for future research. As a result of the paper, NEEP is convening a Policy Committee including Forum Steering Committee and other Forum members to help inform the development of a Net Savings research project to be conducted in 2011. For more information, contact [Elizabeth Titus](#).

RE1-RE5: Incremental Cost Study: In fall 2010, the Natural Gas Research (RE5) project subcommittee determined that joining the Incremental Cost Study (RE1) would be the most beneficial gas research project for 2010. This combined research project, conducted by Navigant Consulting, will provide updated incremental cost data for selected gas and electric efficiency measures that will help inform cost effectiveness analysis, measure screening, and program design. Several project subcommittee meetings have been held, and the project will be completed by mid-2011. Denise Rouleau is a contractor assisting the Forum with this project. For more information, contact [Elizabeth Titus](#).

Research and Evaluation Projects Highlights

Data collection is complete for the *Unitary HVAC Loadshape Study* and draft deliverables are being reviewed.

Primary research for the *C&I Lighting Measure Persistence* project is nearly complete.

The final *Net Savings Scoping Paper* is available on the Forum website.

The *Incremental Cost Study*, which addresses both electric and gas measures, is well underway and will be completed by mid-2011.

Meeting notes and action items from previous quarterly Steering Committee meetings and quarterly Project Committees meetings are posted to the EM&V Forum website:

[Steering Committee Meeting Notes & Action Items](#)

[Project Committees Meeting Notes & Action Items](#)

Education and Information Access

2010 EM&V Forum Annual Public Meeting: On October 19, 2010, the Forum held its second Annual Public Meeting in Baltimore, MD. Over 70 attendees from the region and beyond came to learn more about the Regional EM&V Forum and discuss several EM&V topics that play an important role in establishing legitimacy for energy efficiency programs, including: common reporting of energy efficiency impacts, the role of efficiency in system planning, and calculating net energy savings. For more information, please view the [meeting synopsis](#) or visit the EM&V Forum [Meetings and Events](#) website.

Sharing Sponsors' Evaluation Activities Webinar: The EM&V Forum is planning to hold a webinar in the first quarter of 2011 for Forum states/jurisdictions to present information about their planned energy efficiency evaluation activities. The webinar will provide a unique opportunity for states to learn about evaluation plans



throughout the region, and may highlight opportunities for cooperation and collaboration. The webinar will also assist the Forum in building its resource library and shaping its project agenda.

EM&V Resource Library: The online [EM&V Resource Library](#), which includes information about national, regional, and state EM&V policies and activities continues to be regularly updated. One of the main components of the Resource Library is a [repository](#) of state and topical EM&V studies that provides access to energy efficiency data across the northeast and Mid-Atlantic regions. The repository includes state Technical Reference Manuals or equivalent, as well as evaluation studies and reports for all jurisdictions that participate in the Regional EM&V Forum.

For more information about Education and Information Access projects, contact [Cecily McChalicher](#).

Thank You Forum Funders:

Connecticut

CT Energy Efficiency Fund

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*Pepco Holdings, Inc.
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Rhode Island

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Department of Public Service

US Department of Energy

US Environmental Protection Agency

The Energy Foundation

The Forum also includes many participants beyond the Forum funders who serve an important role in advising and informing Forum projects and plans. View a list of [Forum Participants](#).

Join the NEEP Partners Program

NEEP's Partners Program provides your organization with visibility, affiliation and an opportunity to support the work and mission of NEEP.

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