



**REGIONAL EVALUATION,  
MEASUREMENT & VERIFICATION FORUM**

**Quarterly Project Committees Meeting  
February 14, 2011, Teleconference Notes and Action Items**

**Participants:**

Name	Organization	Name	Organization
Phil Moffitt	Cape Light Compact	Julie Michals	NEEP
Cindy Jacobs	Connecticut Department of Public Utility Control	Elizabeth Titus	NEEP
Kim Oswald	Connecticut EEB, Consultant	Katie Mammen	New York Department of Public Service
Jeff Schlegel	Connecticut EEB and Massachusetts EEAC, Consultant	Mary Cahill	New York Power Authority
Steve Waite	Consultant	Gene Fry	Northeast Utilities
Jim Harvilla	Customized Energy Solutions (NY EAG member)	Earle Taylor	Northeast Utilities, Consultant
Crissy Godfrey	Maryland Public Service Commission	Laura Magee	PEPCO
Marilyn Ross	Massachusetts Department of Public Utilities	Dave Pirtle	PEPCO
Paul Horowitz	Massachusetts EEAC, Advisor	John Zabliski	Rochester Gas & Electric
Ralph Prah	Massachusetts EEAC, Advisor	Ruth Gay	United Illuminating
Donald Gilligan	NAESCO	Paul Gray	United Illuminating
Dave Jacobson	National Grid	Mike Wickenden	Vermont Energy Investment Corporation
Cecily McChalicher	NEEP	Pam Stonier	Vermont Public Service Board

*This meeting was digitally recorded*

**Meeting Action Items:**

1. **Project Committees Co-Chairs:** NEEP to send an email to Forum participants announcing the new Project Committees co-chairs once they are confirmed.
2. **Forum Funding:** NEEP to consider other funding sources for the Forum for 2012 as part of the Forum Evaluation this year, including new states, air quality agencies, and relevant regional organizations.
3. **Loadshape Project:** Forum participants to contact Elizabeth Titus ([etitus@neep.org](mailto:etitus@neep.org)) if they want to join the loadshape project subcommittee in order to review the Unitary HVAC loadshape tool demonstrated at the meeting in more detail. NEEP will schedule a formal demonstration in late February/early March for KEMA to present the results of the Unitary HVAC loadshape project.
4. **Forum Project Tracking Spreadsheets:** NEEP to post the Project Tracking Spreadsheets presented at the meeting to the Forum's private portal website, and welcomes any feedback from Forum participants about the spreadsheets.
5. **National EM&V Protocols:** NEEP to continue to provide regular updates on important NAESB developments for both the retail and wholesale efforts, as well as SEE Action projects.



6. **Project Subcommittee Membership:** Forum participants to fill out and submit [this spreadsheet](#) to Cecily McChalicher ([cmcchalicher@neep.org](mailto:cmcchalicher@neep.org)) by March 1 please if they want to be added to or removed from a project subcommittee. NEEP is currently recruiting new subcommittee members for projects that will begin in Q1 and Q2 of 2011: Statewide Energy Efficiency On-Line Reporting Tool and Support, Impact of EE Programs on Building Codes and Appliance Standards, Net Savings Methods, Develop Savings Assumptions for Emerging Technologies and Program Designs, and the Forum Evaluation.
7. **Net Savings Project:** Massachusetts program administrators have kindly shared their recent study on recommended net savings methodologies with Forum members. NEEP has posted the study to the private net savings subcommittee website and private Policy Committee website.
8. **Program Administrators to reference Forum products (Glossary of Terms, Common EM&V Methods Guidelines) in their RFP solicitations for evaluations and/or evaluation reports.** We encourage PAs to reference the [Glossary of Terms](#) and the [Common EM&V Methods Guidelines](#) in their RFPs. In the case of the Glossary, note that an updated version is forthcoming in March. If RFPs have already been issued and/or contracts sign, we encourage PAs to ask their contractors to apply the Guidelines as applicable/appropriate, and reference them in the final evaluation reports/studies, including describing the extent to which the Guidelines were applicable/useful. This type of information will help to inform future Forum products and identify how the existing Guideline can be improved or expanded.
9. **May 2011 State Evaluation Webinar:** NEEP has confirmed **May 4, 1-4pm** as the date for this webinar, which will be dedicated to hearing from each of the Forum states/PAs about their evaluation activities (current and planned). *Please mark your calendars!*
10. **2011 Quarterly Forum Project Committees Meetings:** Forum Participations to mark their calendars for upcoming Quarterly Meetings this year: **May 26 from 2-4pm, July 28 from 2-4pm, and November 17 from 2-4pm**

## Meeting Overview:

Julie Michals (NEEP) opened the meeting, introduced the meeting attendees, and thanked everyone for attending. She reviewed the meeting agenda, which includes: Introductions; Steering Committee Decisions from the December 16 Meeting; Loadshape Study - Unitary HVAC Database Demo; Forum Project Status Updates; 2011 Project Plans; and Forum Outreach, Education and Information Access.

### A. Introductions

Julie Michals stated that Sheldon Switzer (BG&E), Dan Cleverdon (DC PSC), and Dave Jacobson (National Grid) have completed a one year term as a Project Committees co-chair. Dave Jacobson will be continuing as a co-chair for another one year term, while Sheldon Switzer and Dan Cleverdon will be stepping down. She thanked the departing co-chairs for their valuable work over the past year. To replace the departing co-chairs, NEEP has invited Tom Belair (PSNH) to serve as a Research & Evaluation co-chair, Jeff Schlegel (Consultant to CT EEB & MA EEAC) to serve as a Protocol Development co-chair, and Crissy Godfrey (MD PSC) to serve as an Education and Information Access co-chair. NEEP will communicate with Forum participants when the new co-chairs are confirmed, and may do a second round of outreach/recruiting if those who are invited elect not to serve as co-chairs this year. Meanwhile, the other Project Committees co-chairs, Helen Eisenfeld and Mary Cahill (NYPA) and Pam Stonier (Vermont PSB) will continue as co-chairs until the end of June. Julie explained that the role of the co-chairs is to participate in monthly calls that include discussing issues such as the Forum agenda and budget, and providing feedback about new Forum developments.

### Action Item:

1. **Project Committees Co-Chairs:** NEEP to send an email to Forum participants announcing the new Project Committees co-chairs once they are confirmed.

## B. Steering Committee Decisions: December 16 Meeting

Julie Michals explained that at its last meeting on December 16, the Steering Committee adopted the Common Statewide Energy Efficiency Reporting Guidelines, the Project Cost Modification Guidelines, and 2011 Agenda & Budget Option B, which is a reduced agenda with a \$1.9 million budget. The projects on the Option B agenda are:

- *PD11-1*: Emerging Technologies Savings Assumptions
- *PD11-3*: Statewide EE Reporting Guidelines Implementation
- *PD11-5*: Mid-Atlantic TRM Phase 3
- *RE11-1*: Loadshape Research
- *RE11-3*: Add on research (to support continued 2010 research)
- Forum Evaluation

The Steering Committee agreed to further consider in the first quarter of 2011 other projects proposed that otherwise may be deferred to 2012 including:

- *PD10-1*: Net Savings Project
- *PD11-2*: Guidelines for Incorporating EE in System Planning
- *PD11-4*: Effective Useful Life in Early Replacement Programs
- *RE11-2*: Estimate EE Impact on Building Codes & Appliance Standards

Julie Michals shared that the Policy Committee met on January 27 and provided guidance on a scope of work for the Net Savings Project. It was decided that this project will be conducted this year, as it was initially part of the 2010 budget (and its estimate cost is not including the 2011 budget). With regard to the Codes and Standards project, NEEP is pursuing funding from US DOE and will not be seeking state funding for this project. DOE has expressed interest in funding the project, and NEEP will be sending DOE a more detailed scope of work based on the outcome of the September 28 Codes and Standards workshop for their consideration.

Julie Michals explained that the Guidelines for Incorporating EE in System Planning project is on hold, and may be pursued at some level (e.g., sub-region) depending on needs and current process to address this issue underway in New England. The Effective Useful Life in Early Replacement Programs project will be reconsidered as a 2012 project.

Julie Michals reviewed the 2011 Project Descriptions document, which provides a summary and budget for each project, and the 2011 cost allocation for each state. She stated that Steering Committee adoption of the Option B agenda does not mean a state has committed to funding the projects but confirms that they are interested in the projects. NEEP has reached out to Forum funders to get a better sense of their commitment to funding projects on the Option B agenda, and most states have confirmed their ability to fully fund the projects (including any carry over costs from 2010 projects). Funding still needs to be confirmed in Delaware, Maryland, and New York. For Delaware, there is a risk that the SEO will not be able to fund 2011 projects beyond the Mid-Atlantic TRM project, which is already underway. For Maryland, the Maryland Energy Administration is providing funding for the first half of the year, but funding for the second half of the year is uncertain, and the MD PSC will consider in late March whether to allow the Maryland utilities/program administrators to co-fund the Forum activities with MEA. For New York, NEEP is pursuing formal approval from New York DPS, as required on an annual basis. There is also some concern about New Hampshire funding and the PSNH evaluation budget, and discussions are in process.

Julie Michals explained that it takes several months at the start of the year to sort out all funding issues. If NEEP finds that there is a significant funding issue, Forum participants will be notified and options for addressing any project funding shortfalls will be reviewed/discussed by all Forum states.

Pam Stonier (Vermont Public Service Board) asked if NEEP has reached out to all potential funders in the region who may be willing to support the Forum. She added that there is a core group of funders, but it may be worthwhile to consider others who may also contribute. Julie Michals replied that NEEP staff and a few Steering Committee members reached out to Pennsylvania last year, but Pennsylvania was not yet ready to participate. They are overwhelmed with ramping up their efficiency programs and could not manage another process. She suggested that there may be some value in reaching out to other states including Virginia or Ohio. NEEP staff plans to attend the MACRUC conference in June and will meet with Commissioners to invite broader membership. There will not be additional funders this year, but part of the Forum Evaluation will be to carefully and systematically look at other funding sources. She suggested that two other sources for potential future Forum funding are air quality regulators/planners and system planners.

Pam Stonier asked about funding from state committees like NESCOE, who represent states but have separate funding from states. Julie Michals replied that the Forum may consider funding from these types of sources in the future.

**Action Item:**

2. **Forum Funding:** NEEP to consider other funding sources for the Forum for 2012 as part of the Forum Evaluation this year, including new states, air quality agencies, and relevant regional organizations.

**C. Loadshape Study - Unitary HVAC Database Demo**

Elizabeth Titus (NEEP) provided an overview of the Unitary HVAC loadshape study. She explained that KEMA, the project contractor, metered HVAC units during last year's cooling season and has now analyzed the collected data and developed a spreadsheet tool. The spreadsheet tool is one of two deliverables, the other being a final report with tables and study information.

Elizabeth Titus shared that this study was challenging from a budgeting perspective because two years of funding for loadshape research were combined, and the overall budget allocation was shared with the commercial lighting loadshape project. The project contract with KEMA is for \$598,000, but the subcommittee developed a target budget of \$568,000 when the sample design was complete. The target project budget of \$568,000 has been spent, and KEMA is working to finish the project efficiently and promptly without requiring a significant use of contingency funds. She will soon be confirming the schedule for wrapping up the project with the project subcommittee. Project subcommittee members should also be aware that she will be sending the subcommittee draft products for review in an effort to finish the project as soon as possible.

Consultant Steve Waite provided an overview of the Unitary HVAC spreadsheet tool. The intent of the spreadsheet, which is in Excel format, is to package most of the data in an easily accessible and flexible way. The data in the spreadsheet tool was drawn from a stratified sample of various program participant populations. KEMA collected data for 12 strata consisting of six weather zones, with the population of rebated units divided into small and large units. A random sample was drawn within each of those strata, and over 400 HVAC units were metered to determine hourly demand. KEMA also leveraged existing data. The spreadsheet tool has two primary functions:

- 1) It is a basic load shape database that provides an 8760 hourly loadshape, disaggregated by weather zone and unit size.

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- 2) It is a calculation tool. The user can input weather zone and connected load, and the tool calculates demand reduction and coincidence factors, and annual kWh savings.

Dave Jacobson (National Grid) asked if the dates the equipment was turned on and off in the season is included in KEMA's analysis. He knows that KEMA could not measure from April-October for each unit and had to do some extrapolation.

Steve Waite explained that raw, unit level data was collected at each site, which provides backup data to the loadshapes that were derived, and this raw data will be available. The hourly demand reduction is restricted to the hours where the compressor was operating. If the unit was operating (the fan was on), but the compressor was not, it would produce a loadshape value of zero. He added that KEMA considered when the unit was turned on and off in the season and assumes that this would have been the overriding factor in KEMA's analysis, but he will confirm this with KEMA.

Steve Waite reviewed the 'Read Me' worksheet in the spreadsheet tool. He explained that the user can input an overall kW of load reduction, either for one HVAC unit or an entire population of participating units, and the spreadsheet tool will report what the average demand reduction in kW would be over some selected period of time, from one hour to one year.

Steve Waite reviewed the other worksheets in the spreadsheet tool. The 'Calculation Tool' worksheet is the basic user interface where data is entered and the output is reviewed. The 'Loadshape EEI Format' worksheet provides data for an entire year for a selected weather zone in modified EEI format, scaled by connected load reduction. The 'Weather' worksheet provides the hourly weather used for the loadshape, broken out by each weather zone. The 'Regional Profiles' worksheet provides the basic database of loadshapes, and the statistical precision for each of those data. The 'Analysis' worksheet is where the calculations are performed that produce the results presented in the 'Calculation Tool' worksheet.

Steve Waite provided more information about the 'Calculation Tool' worksheet. In this worksheet, the user first selects the weather zone/region and the peak demand definition. The user then specifies the connected load reduction. The user can also specify the breakdown between large and small units. If the user does not define the large/small breakdown, the default large/small breakdown will be utilized based on region. The output/results provided in the 'Calculation Tool' worksheet show average demand reduction over a selected time period (demand savings kW), annual energy savings (kWh), and the peak demand coincidence factor.

Ruth Gay (United Illuminating) asked if there is a graphic that shows which areas are covered by each of the six regions.

Steve Waite replied that there is not, but this should be included in the 'Read Me' worksheet.

Dave Jacobson asked if this study will result in an average single diversity factor for a given region and a single EFLH without the user having to do anything. For example, if someone had a large AC program in New York, could they obtain the average coincidence factor and full load hours?

Steve Waite replied that those numbers will be provided in the final report in tabular format and could also be calculated using the spreadsheet tool.

Elizabeth Titus added that anything that comes out of this project separate from the tool will be covered in the report. She added that the tool is posted in the 'Draft Documents for Comment' private subcommittee webpage for any project subcommittee member to access and review it.

Dave Pirtle (PEPCO) asked if the tool would apply to different system types and varying unit sizes.

Elizabeth Titus stated that she does not know exactly what types of units were in the sample, but KEMA could provide this information.

Steve Waite added that these are aggregated, and the only disaggregation performed by size is the division between small and large units (small = 1-11.25 tons, and large = 11.26-100 tons).

Elizabeth Titus asked those who want to join the loadshape subcommittee in order to review the spreadsheet tool in more detail to contact her at [etitus@neep.org](mailto:etitus@neep.org). She added that all Forum participants will be able to review the report, but NEEP will not send everything out for full Project Committees review. NEEP will schedule a formal demonstration in late February or early March for KEMA to present the project results in more detail.

**Action Item:**

3. **Loadshape Project:** Forum participants to contact Elizabeth Titus ([etitus@neep.org](mailto:etitus@neep.org)) if they want to join the loadshape project subcommittee in order to review the Unitary HVAC loadshape tool demonstrated at the meeting in more detail. NEEP will schedule a formal demonstration in late February/early March for KEMA to present the results of the Unitary HVAC loadshape project.

**D. Forum Project Status Updates**

Julie Michals explained that NEEP will be providing Project Status Spreadsheets for more regular updates of the status of Forum projects. The spreadsheets will be posted on the Forum's private portal website. She reviewed the format of the Project Status Spreadsheets, using the Loadshape project as an example. The spreadsheets provide a project overview and information about participating states, participants, project budget, project tasks/deliverables and schedule, key project uncertainties, and the status of fieldwork, if applicable. In most cases, the status spreadsheets will be used by the project subcommittees. They will help guide and inform projects and alert us to anything going on with the budget that is problematic.

Elizabeth Titus provided an overview about the C&I Lighting Measure Persistence project. This project has been delayed several times due to issues with nondisclosure agreements and the sample design, and problems with data that sponsors provided. KEMA's fieldwork was also slowed down due to a demanding winter season. NEEP will be reengaging the subcommittee later this month.

Elizabeth Titus provided an overview about the C&I Lighting Loadshape project. She shared that draft products will be ready for review soon, including a spreadsheet tool similar to what was presented for the Unitary HVAC Loadshape project. She added that the loadshape project subcommittee should be prepared to review materials for both the Unitary HVAC and Lighting projects.

Elizabeth Titus provided an overview about the Incremental Cost project. Draft protocols for survey questionnaires for the gas measures are now available for subcommittee review, and feedback is requested by the end of week. The draft survey protocols for the electric measures will be posted for review soon. Once the protocols have been finalized, Navigant will aggressively collect data and move forward with the project. She added that consultant Denise Rouleau is managing this project for NEEP.

Julie Michals asked if the Project Status Spreadsheets are helpful and provide the right amount of information. She added that NEEP welcomes any feedback about the spreadsheets.

Earle Taylor (Consultant to Northeast Utilities) stated that they will be very beneficial in trying to keep track of the status of Forum projects.

Elizabeth Titus provided an update about the NAESB wholesale EE M&V standards project. She stated that NEEP participated last fall in the informal comment period for the draft standards, and some revisions were made thanks to NEEP's participation. A formal comment period on the draft standards ended in mid-January. The NAESB working group will be meeting this week to review the formal comments. These comments do not make any major changes to the previous draft, but there are minor places where the standards may have become more restrictive. After review by the working group, the NAESB Executive Committee will vote on the standards.

Jeff Schlegel (Consultant to CT EEB and MA EEAC) stated that it is very time consuming to participate in the NAESB processes and asked if NEEP will alert Forum participants when there are items that require attention. Julie Michals stated that NEEP has been keeping Forum participants informed of NAESB key developments and opportunities to comment, and will continue to do so. Julie further stated that Forum representatives who are also NAESB members, including BG&E, National Grid, Northeast Utilities, and others, need to participate in the process as voting members of NAESB. NEEP can draft comments, but it cannot vote. Julie Michals stated that NEEP will reach out to other NAESB voting members in our region. Elizabeth Titus added that CEE is also monitoring this, and NEEP is trying to coordinate its efforts with CEE.

Julie Michals provided an update about the NAESB retail EE M&V model business practices (MBPs) project. The draft model business practices are being developed, and an initial rough [draft is posted](#) for working group review. Julie invited Forum participants to take a look at the draft MBPs to get a flavor of its contents, but warned they are still pretty rough. The Forum has resources in its budget to review drafts and may be asking KEMA to assist. The retail effort is a slow moving process since working group members are drafting the sections. NEEP is not engaging Forum participants at this time, but we should know in next month what the schedule for comment etc will be, and will circulate a draft for Forum review at appropriate juncture.

Julie Michals also provided an update about US DOE/EPA SEE Action Network activities. SEE Action will be scoping a national savings database and will be exploring two to three types of public databases. A large part of this effort is to provide data to states that do not currently have data. SEE Action will also be issuing the results of a scoping paper on developing a national EM&V standard, and has also developed a one page reporting framework. NEEP continues to monitor these activities on the national level, and will report back to Forum participants on milestones and Forum input into the projects.

#### Action Items:

4. **Forum Project Tracking Spreadsheets:** NEEP to post the Project Tracking Spreadsheets presented at the meeting to the Forum's private portal website, and welcomes any feedback from Forum participants about the spreadsheets.
5. **National EM&V Protocols:** NEEP to continue to provide regular updates on important NAESB developments for both the retail and wholesale efforts, as well as SEE Action projects.

#### E. 2011 Projects Plans - Proposed Schedules and Recruiting Subcommittees

Julie Michals reviewed the 2011 Forum project schedule. The timelines for priority projects are:

- Mid-Atlantic TRM Update: in process, will be complete in March
- Develop Online EE Reporting Tool: Q1
- Impact of EE Programs on Building Codes & Appliance Standards: Q1 will develop scope of work for US DOE funding
- Net Savings Project: Q2
- Savings Assumptions for Emerging Technologies & Program Designs: Q2
- Evaluation of Forum: Q2

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- Loadshape Research - Phase 3: Q3
  - "Add-on" Research Budget: Q3

Julie Michals invited Forum participants to indicate if they want to be removed from or added to any of the project subcommittees by filling out and submitting [this spreadsheet](#) to Cecily McChalicher ([cmcchalicher@neep.org](mailto:cmcchalicher@neep.org)) by March 1. The spreadsheet includes a link to a summary of all the current subcommittee member lists.

Pam Stonier thanked Forum staff for their organizational style. She added that the lists are helpful to show how the different entities in Vermont are involved in the Forum.

Julie Michals explained the role of project subcommittee members. They are asked to participate in project subcommittee calls and review and comment on draft materials. NEEP encourages wide representation from Forum states on the different subcommittees to help share the work. Julie Michals explained that NEEP is actively recruiting subcommittee members for two upcoming projects: Develop Online EE Reporting Tool and Net Savings.

For the Develop Online EE Reporting Tool project, Julie Michals reported that NEEP is requesting \$40,000-60,000 in funding from DOE and \$20,000 from the states. She has received verbal confirmation of DOE's support, and NEEP will be sending a full project proposal to DOE soon. She recognized that some states, including Massachusetts and New York, have their own reporting databases for their program administrators. This project will interface with these state efforts and determine if they can feed into the online tool. This project will also coordinate with ISO-NE, as they are working to determine what energy efficiency data is needed for system planning purposes.

For the Net Savings project, Elizabeth Titus reported that a Policy Committee meeting was held in January in order to discuss the scope of the net savings project. The committee found the most value in moving forward towards common definitions. Massachusetts is producing an evaluation study that addresses recommended methodologies for net savings. Massachusetts program administrators have kindly shared the report, and it is posted in the net savings subcommittee private website. The Policy Committee also recommended that the project look at the big picture and examine broader policy issues. NEEP thanks all the current net savings subcommittee members who participated in the Net Saving Scoping Paper project and welcomes others to join the subcommittee.

#### Action Items:

6. **Project Subcommittee Membership:** Forum participants to fill out and submit [this spreadsheet](#) to Cecily McChalicher ([cmcchalicher@neep.org](mailto:cmcchalicher@neep.org)) by March 1 please if they want to be added to or removed from a project subcommittee. NEEP is currently recruiting new subcommittee members for projects that will begin in Q1 and Q2 of 2011: Statewide Energy Efficiency On-Line Reporting Tool and Support, Impact of EE Programs on Building Codes and Appliance Standards, Net Savings Methods, Develop Savings Assumptions for Emerging Technologies and Program Designs, and the Forum Evaluation.
7. **Net Savings Project:** Massachusetts program administrators have kindly shared their recent study on recommended net savings methodologies with Forum members. NEEP has posted the study to the private net savings subcommittee website and private Policy Committee website.

#### F. Forum Outreach, Education and Information

Cecily McChalicher (NEEP) provided a summary of Education and Information Access activities. She reminded Forum participants to please use, cite and reference Forum products in their evaluation activities and RFPs. She added that NEEP will develop a strategy to encourage and track state implementation and use of Forum products this spring, with guidance from the Education and Information Access Committee.



Cecily McChalicher reviewed upcoming 2011 events related to Education & Information Access activities. On May 4 from 1-4pm, NEEP will hold a webinar for states to share their evaluation activities and plans. At this webinar, a representative from each state will present on behalf of their state. The purpose of the webinar is for states to learn about evaluation plans throughout the region and potentially highlight areas for cooperation and collaboration. The webinar will also assist the Forum in further building its Resource Library and shaping its project agenda. Planning for the Forum's Annual Public Meeting, which will take place in October, will begin this summer.

Cecily McChalicher shared other Education & Information activities of note. NEEP regularly updates the EM&V Resource Library and Forum website. NEEP will be producing new, high-level completed Forum project summaries that will be available on the Forum website in March. Finally, the Education and Information Access Committee may take a leadership role for the Forum Evaluation in the second quarter. The committee will meet next in mid to late March.

To close out the meeting, Julie Michals provided an overview of upcoming meetings. The proposed dates for the Forum's quarterly Project Committees meetings are: May 26 from 2-4pm, July 28 from 2-4pm, and November 17 from 2-4pm. Other meetings to note include the [Market Transformation Symposium](#) in Washington, DC on April 10-12, the [Northeast Energy Efficiency Summit](#) on June 7-8 in Rhode Island, and the [Energy Program Evaluation Conference \(IEPEC\)](#) in Boston on August 15-18.

**Action Item:**

8. *Program Administrators to reference Forum products (Glossary of Terms, Common EM&V Methods Guidelines) in their RFP solicitations for evaluations and/or evaluation reports.* We encourage PAs to reference the [Glossary of Terms](#) and the [Common EM&V Methods Guidelines](#) in their RFPs. In the case of the Glossary, note that an updated version is forthcoming in March. If RFPs have already been issued and/or contracts sign, we encourage PAs to ask their contractors to apply the Guidelines as applicable/appropriate, and reference them in the final evaluation reports/studies, including describing the extent to which the Guidelines were applicable/useful. This type of information will help to inform future Forum products and identify how the existing Guideline can be improved or expanded.
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