

Regional EM&V Forum 2012 Project Agenda Overview February 2012

Introduction

Launched in 2008, the Regional Evaluation, Measurement and Verification Forum's (EM&V Forum) purpose is to support the development and use of consistent protocols to evaluate, measure, verify, and report the savings, costs, and associated avoided emissions of energy efficiency across a region that covers ten jurisdictions in the northeast and mid-Atlantic region.

The Forum conducts **Protocol Development** projects to develop common EM&V protocols or guidelines that support the calculation of energy efficiency and other demand-side resource impacts, including energy and demand savings, costs, and emissions, and the tracking and reporting of such impacts to support state and regional energy and environmental policy goals. The Forum conducts coordinated **Research and Evaluation** projects to inform the development and use of common EM&V protocols and savings assumptions, provide cost efficiencies for states' EM&V activities, and help ensure consistent, robust results in assessing the accuracy of demand-side resource impacts. Finally, the Forum undertakes a range **Education & Information Access** activities to ensure that Forum products are publicly available, easily accessible and understood through various venues to disseminate Forum results, recommendations and products; provides technical support for the use of Forum products; protects confidential information; and holds an Annual Forum Public Meeting.

Forum Project Selection Criteria

The Forum's projects are selected based on the following criteria:

1. The project makes sense to do regionally
 - o Project addresses a topical issue for many/most states
 - o Project leverages dollars across multiple states for large expensive projects, thereby saving states money (compared to the alternative of conducting study on its own)
2. If adopted and implemented by Forum states, the results of the project will:
 - o Improve the credibility of EE savings
 - o Reduce barriers to participation of EE resources in wholesale capacity markets
 - o Improve state and regional demand-side resource and energy planning, and air quality planning by having readily available and consistent inputs, protocols and reporting format and tools
3. The project results can inform/guide national EM&V protocol development efforts, where the region brings a single voice to the national dialog

Forum Project Development Process

The 2012 Forum agenda is informed by the following process:

- 1) NEEP develops an initial list of possible projects informed by: a) Forum Three-Year Plan; b) areas of interest identified informally throughout the year by Forum participants; c) input from Project Committee co-chairs (May/June);
- 2) NEEP conducts a survey of list of projects with Forum participants to prioritize projects of greatest interest by each state (July);
- 3) Based on survey results, NEEP develops a proposed project agenda and developed estimated budgets (based on feedback from Project Committee co-chairs and outreach to evaluation

- experts) and circulates to the Project Committees for further discussion, changes and refinement (August/September quarterly meeting);
- 4) NEEP conducts additional outreach to each Forum state to solicit further feedback and interest in the project areas, which also helps to further shape project scope/needs based on that feedback (September/October);
 - 5) Through the above process, a recommended agenda goes to the Forum Steering Committee for adoption, where a consensus resolution reflects a statement of interest to participate in specific Forum project, where subsequent consideration by the states is given for their support and financial commitment in a manner appropriate to each state (November/December). At this juncture, the statement of interest does not bind any state to fund any particular project;
 - 6) Following Steering Committee adoption of the proposed project agenda and budget, NEEP convenes project subcommittees, which play the critical role of informing the full development of project scopes (January/February); and
 - 7) Funding commitments are provided to NEEP upon further project scope and RFP development (1st quarter 2012)

The Forum is a participant driven process, and therefore relies on Forum stakeholders' input into the project priorities and scope development. At this juncture the project scopes are high level based on the best information available to NEEP at this time, and will be further developed based on additional feedback from Forum participants, and ultimately from the project subcommittees that will be formed to fully scope each project in early 2012.

PROTOCOL DEVELOPMENT PROJECTS:

PD12-1: Cost-Effectiveness Project

Project Overview: This project will review and build on a forthcoming ACEEE report "Energy Efficiency Evaluation Review Project" that will describe how each state handles analyzing the C/E of their energy efficiency programs. This project will identify and explore relevant issues for interested Forum states, which may include a review of the Total Resource Cost (TRC) test and how it is implemented throughout the region, opportunities to improve implementation of the test (e.g., examining input assumptions), and consideration of other recommendations for overcoming challenges with use of the TRC test. The goal of this project includes addressing how to increase transparency and potentially build consistency across the region, where appropriate, in applying C/E tests to help facilitate comparisons across states.

Forum Product: Scoping paper with recommendations, guidance on C/E testing.

PD12-2: Mid-Atlantic TRM Phase 4 (Sub-region project)

Project Overview: This project provides the mid-Atlantic EM&V Forum members with the opportunity to designate funds for a fourth phase of development of the mid-Atlantic technical reference manual (TRM). The project could add measures and/or update the existing TRM, or potentially scope/establish an online TRM database.

Forum Product: Expanded list of measures for TRM.

PD12-3: Estimate EE Impact on Advancing Energy Building Codes & Standards

Project Overview: The purpose of this project is to support states interested in attributing and claiming savings associated with EE program activities directed at improving C&S and compliance. The



project will build on the Forum's 2010 C&S workshop and other recent research (e.g., MA, IMT). Specific tasks are to: 1) prepare an overview of current policy and practice in the Forum region; 2) catalog activities suitable for PAs to support or influence development, adoption and compliance of national and state C&S; 3) develop high level estimate of energy savings associated with improved code and compliance levels by state; 4) prepare guidelines that recommend approaches for attributing savings associated with EE program activities; and 5) recommend roles/pathways for stakeholders to secure regulatory approval of selected activities and attribution frameworks. Project funding is from Edison Electric Institute (EEI), the Institute for Market Transformation (IMT), and NEEP Policy funds.

Forum Product: Framework of methods/materials and guidance on how to estimate savings from program administrator activities to advance or increase codes and standards compliance in the Forum region.

RESEARCH & EVALUATION PROJECTS

RE12-1: Loadshape Research (Phase 3) - (100% Carryover from 2011)

Project Overview: This project will address additional measure(s) to those researched in 2009-2011 projects (commercial lighting and unitary HVAC). Project subcommittee is currently reviewing priority measure(s). The goal of the Forum's loadshape studies is to make loadshape data (impact of electric energy efficiency programs during identified periods of time e.g., hourly, seasonal and annual consumption data used to analyze coincidence factors and other usage patterns) available to Forum participants for use in implementing EE programs, participation in capacity markets, and meeting air quality needs. The project will likely refer to metering data collection protocols being developed by the Forum that are intended to increase the transferability and usability of metering data by PAs.

Note: As a 100% carryover project from 2011, Forum funders who prepaid this project for 2011 will not have to fund their 2012 cost share.

Forum Product: Report with loadshape data and coincidence factors for next set of priority measures as identified by the project subcommittee.

RE12-2: Incremental Cost Research (Phase 2)

Project Overview: This project will develop incremental costs for new measures and/or program types (gas and/or electric) beyond those included in the Forum's 2010 Incremental Cost Study. The project will be an extension of Navigant's existing contract for the 2010 ICS, subject to Forum subcommittee recommendation, and will be supplemented with 2011 Add-On Research funds. The subcommittee has recently identified 2nd tier group of priority measures.

Forum Product: Report with common incremental cost assumptions for next set of priority measures.

RE12-3: Residential Lighting Sales Market Lift Project and Post EISA Lighting Sales Trends and Emerging Baselines

Project Overview: This project would provide insight into emerging and regional lighting sales trends developed over 12 months that allow for adjustments to lighting incentive design and execution. The project will include developing pilot projects in 2-3 states to test the efficacy of the "market lift" model in promoting sales of efficient lighting, using acquired full category retail lighting sales data for evaluating residential lighting sales trends and shifts in the baseline wattage of inefficient lamps.



Forum Product: Quarterly market sales data for range of residential lighting measures from selected retailers agreed upon between states and D&R.

FORUM OPERATIONS, PROJECT MANAGEMENT, REED AND EDUCATION & INFORMATION ACCESS (BASE COSTS)

Forum Operations

Overview:

1. Planning/facilitating quarterly Steering Committee, Project Committees meetings
2. Forum agenda/budget planning;
3. Securing Forum revenues from states / grants;
4. Serving as fiscal agent / Forum accounting/invoicing;
5. Coordinating / facilitating state PUC, PA and air regulatory efforts regarding access to energy efficiency data to support air quality and climate change planning;
6. Monitoring and participating in state, regional (ISO-NE, PJM), and national M&V meetings / efforts (NAPEE, NAESB M&V projects); and
7. Maintaining Forum operational policies, including ensuring access to Forum materials and protecting confidential information

Forum Products: Meetings, three-year plan, annual project agenda / budgets, contracts, billing / invoices

Forum Project Management

Overview: NEEP management of third-party contracts and projects plus technical advisors.

Regional EE Database (REED) Implementation

Overview: This effort involves implementing REED in the Forum region, working with Forum states to complete data collection tools, ensure quality control/data validation, and provide technical support/training to state reps using REED. The project also involves NEEP interaction with ISOs/RTOs in region to explore use of REED as potential data source for supporting EE forecasting in system planning, where helpful. NEEP is seeking funding from US EPA and US DOE to fund this effort.

Forum Products: State data collection spreadsheet tool, database, and web-based reports. Also includes state implementation support and training.

Education & Information Access

Overview:

1. EM&V library of studies/research and other EM&V resources;
2. EM&V Forum website;
3. Forum 2012 Annual Public Meeting;
4. Forum communications (monthly updates, quarterly newsletters); and
5. Outreach to states to support state adoption of Forum products (e.g., presentations, attend state evaluation meetings, submit public comments)

Forum Products: Updated EM&V library; improved Forum website; APM; updates and newsletters; and state outreach support on use of Forum products.