

Regional EM&V Forum 2016 Project Agenda & Deliverables

Adopted by the Forum Steering Committee - December 22, 2015

TASK AREAS	1. Steering Committee Facilitation and EM&V Exchange	2. EM&V Methods – Reporting Tools and Training	3. EM&V 2.0 - Data Analytics and Auto M&V	4. EM&V for EE Integration with Other Demand-side Energy Resources (DERs)	5. EM&V for New Technologies and Program Models	6. State EE Data Analysis & Trends
3-YEAR ROLLING AGENDA SCOPE	Facilitate collaborative learning of state EM&V practices and opportunities through new tools and research via a regional platform for state official exchange on EM&V and related EE issues	Build understanding and transparency of EM&V methods and practices through the use of standardized EMV methods reporting forms; and inform national EM&V efforts	Support state understanding of evolving EM&V landscape, focusing on opportunities for streamlining and improving EM&V through use of advanced data collection tools and data analytics (auto-M&V)	Support state efforts to integrate EE with other DERs by building understanding of EM&V in context of integrated EE and DERs and providing guidance	Forum Subscription program brings other NEEP research, products, and information to Forum members regarding EM&V issues and approaches for a range of program strategies and technologies	Support benchmarking state EE programs through better understanding of program impacts using REED data and supporting analyses of TRM assumptions and EM&V methods used
DELIVERABLES	1.1 Quarterly Steering Committee Meetings on Forum projects and other key EE/EM&V topics focusing on: EM&V 2.0, Standardized Reporting, Key EM&V Trends and Evolving Best Practices	2.1 Pilot Test Training and technical support for 2 states on use and implementation of the Standardized EM&V Methods Reporting Forms	3.1 Facilitate Demonstration of M&V 2.0 Tools - select 1-2 states to test M&V 2.0 tools, in conjunction with Lawrence Berkely National Lab (LBNL) project to assess auto M&V tool accuracy	4.1 Briefing Report on Recent Geo-targeting Demand-Side Resources - Regional developments and implications for EM&V	5.1 Regional Market Transformation Planning & Tracking - EM&V Best Practice Guidance - Briefing Report and Webinar (from overall NEEP 2016 Market Transformation Best Practice Report)	6.1 Regional Energy Efficiency Database 2011-2014 Data - Post 2014 data, and maintain REED functionality and access for EM&V Forum Subscribers
	1.2 Annual Public EM&V Forum Meeting (APM) for state officials and other EE B2stakeholders on topical EM&V issues such as: <i>Changing EM&V Paradigm and M&V 2.0 Experience; EM&V Under 111(d); and Forum Net Savings Guidelines</i>	2.2 Updated Standardized EM&V Methods Reporting Forms based on 2015 MA pilot and 2016 state tests (Version 2.0). (2017 to focus on supporting use of forms in other Forum states)	3.2 Protocols to Assess Automated EM&V Tool Accuracy. Building on <i>Changing EM&V Paradigm</i> 2015 research, and leveraging LBNL M&V 2.0 protocol pilot work, develop SOW for protocol guidelines. Project Sub-Committee, SOW, Briefing Report, Webinar (Protocols in 2017)	4.2 Scope of Work for Research Report on EM&V Issues and Approaches for Integrated Demand-Side Resources - <i>prepare project for future funding</i>	5.2 Industrial Efficiency - Best Practice Guidance for Cost-Effectiveness Screening and EM&V for Strategic Energy Management - Briefing Report and Webinar (from NEEP 2016 Regional Industrial Efficiency Market Transformation Strategy development)	6.2 Regional Energy Efficiency Database - Collect 2015 energy efficiency program data from across region; Update REED list of State EM&V Documents, Reports and Key Information
	1.3 Forum Operations and Communications (monthly updates, blogs/newsletters, up-to-date website, EM&V On-Line Resource Directory and Forum private portal support)	2.3 EPA Clean Power Plan EM&V Guidelines - Coordinated regional and national comments due mid-January	3.3 Bi-Annual EM&V 2.0 Report with Case Studies and Updated Vendor Profile - relevant developments and experience with advanced data analytics including auto-M&V tools		5.3 Claiming Savings from Home Energy Management Systems (HEMS) - EM&V Issues and Approaches - Briefing Report and Webinar (from NEEP 2016 HEMS Market Transformation Strategy Development & Working Group)	6.3 Scope of Work for Two (2) Deep Dive Topical Briefs (e.g., program/measure research on TRMs savings assumption values and underlying EM&V methods) <i>for funding 2016-17</i>
		2.4 Quarterly Updates on National EM&V Developments and Efforts - EPA CAA 111(d) EM&V guidance, US DOE Uniform Methods Project			5.4 Claiming Savings from Air Source Heat Pumps (ASHP) - EM&V Issues and Approaches - Briefing Report and Webinar (from NEEP 2016 ASHP Market Transformation Strategy Development & Working Group)	6.4 Scope of Work to Align State Program Reporting with National Reporting Protocols - modify program typology to better align with national report formats (e.g., LBNL) <i>for funding 2016-17</i>

Pink shaded areas - contingent upon new funding sources.

Carry over Projects From 2015: Net Savings Guidelines (January); Incremental Cost Research - Emerging Technologies (May); Loadshape Data Catalog (May)