



EM&V Forum PC Monthly Update

October 2015

A message from EM&V Forum Director Julie Michals:



A Halloween-themed message is rather timely for this Forum's PC Monthly Update, as we have both scary and sweet news to share with you. First the sweet news: the Forum has several new products to share with you, and some exciting ones coming before year end. It's a busy time of year for the

Forum team, and we truly appreciate your participation in various upcoming webinars/meetings and draft report review. Meanwhile, the kind-of-scary news is that the Forum will not include participation from NY or MA next year, for reasons summarized in the Steering Committee meeting report below. The good news, however, is that the remaining 7 Forum states are interested in working together to map out a full 2016 project agenda building on the strategic agenda presented to the Steering Committee. The 2016 agenda will be narrower and more focused than in past years, and will look and feel different.... Stay tuned!

STEERING COMMITTEE OCTOBER 19 QUARTERLY CALL: Summary

The Forum Steering Committee met on October 19 to review and discuss a proposed multi-year strategic plan (2016-18) for the Forum with example projects and a proposed budget reflecting a new revenue structure. Prior to the meeting, NEEP was informed by the New York DPS of its decision to forgo participating in the Forum next year due to resource constraints at the DPS and NYSERDA given the state's comprehensive REV proceeding. While New York is interested in funding two regional research projects next year (HEMs and ASHP market characterizations), these will be undertaken separate from the Forum revenue structure. New York will reevaluate its participation in the Forum for 2017.

Separately, NEEP was also informed that Massachusetts will not be

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NEW FORUM PRODUCTS

Forum members – we hope you find these Forum products useful for incorporating new savings or cost assumptions into your TRMs, or to help inform your program and EM&V plan.

NEW [Loadshape Study on Loadshape-Commercial Refrigeration](#): Final Report and Spreadsheet Tools. This cutting edge study is now complete. Results, based on

participating in the Forum next year. This was confirmed at the Steering Committee meeting on October 12 by the Massachusetts DPU Chair Angie O' Connor and Commissioner Judith Judson (DOER), who stated that in efforts to reduce costs the DPU is reviewing all utility EE memberships, and that the Forum is seen as unnecessary given the evaluation services provided by the MA Energy Efficiency Advisory Council consultants.

Other Forum states confirmed their continued support for the Forum, with a focus on continuing to provide EM&V information, tools and resources to help streamline and improve on EM&V practices and standardized reporting. In the case of the Mid-Atlantic states, the multi-state TRM remains a priority Forum project, with further discussion in the next weeks with the states to confirm support for the full agenda, and how to appropriately fund the TRM given it's a sub-regional project.

Meeting materials and notes are posted to the Forum [private portal](#), with meeting action items as follows:

Oct 19, 2015 Forum Steering Committee Meeting Action Items:

1. Steering Committee members to share any questions or additional comments on the proposed strategic plan to Julie Michals at Jmichals@NEEP.org or by phone at 781-860-9177 x 135
2. NEEP will convene in November a 2016 project planning committee, including state regulatory staff and representative program administrators to review and provide input to 2016 proposed projects and prioritize activities 2016 given reduced Forum budget.
3. NEEP will follow up with the Mid-Atlantic States to discuss the Mid-Atlantic TRM and consideration of whether this project can be an a-la-carte option given its sub-region scope.
4. NEEP to prepare a cost breakdown of each 2016 project area.
5. NEEP to convene a Steering Committee call in mid-December to present and review an updated 2016 agenda and budget for adoption, reflecting further project scope development and prioritization with state input and confirmation of interest.

To access the [private portal](#), please enter your username (email address) and password. Your password is either the default password given to you by NEEP in the past, or your own password

pre-and-post metering and data from Massachusetts, New York, Connecticut and Maryland, produced savings loadshapes and several key parameters that can be used to update Technical Reference Manual entries for the following measures: ECM Motors, ECM Motor Controls, and Antisweat Doorheater Controls.

NEW [Home Energy Management Systems \(HEMS\)](#). This report demonstrates the potential for HEMS as an evolving avenue to deeper residential energy savings, explores the market and explain who the major market players are, and attempts to outline potential program solutions with HEMS at the core. Please contact Claire Miziolek with any questions at cmiziolek@neep.org

To see more Forum Products, [click here](#).

[NEEP issues EM&V Forum 2014 Annual Report](#)

This report covers Forum activities, key deliverables, feedback from stakeholders and users of Forum products, and a summary of the Forum's 2014 finances. Any questions, please contact Julie Michals at jmichals@neep.org

that you created. Should you not remember the default password provided by NEEP, please contact Colin Walker at cwalker@neep.org.

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MARK YOUR CALENDARS

Upcoming Forum Meetings (and other NEEP meetings of potential interest)

- **Thursday, November 5th from 3:00 to 4:30 PM Eastern:** The Value of Consistent, Transparent Energy Efficiency Reporting Across the Country: Current and Future Uses. Hear NEEP staff and others speak on EE databases and developments from around the country. [Register here.](#)
- **November 12:** Industrial Energy Efficiency Workshop in Bretton Woods, NH. For more information and to register, [click here.](#)
- **Mid-November:** Forum 2016 Project Planning Meeting - *invite forthcoming*
- **December 2 at 11:00AM–12:30PM:** Incremental Cost – Emerging Technology Subcommittee Teleconference
- **Week of December 7:** Net Savings Subcommittee call to review draft guidelines (date to be confirmed)
- **December 11 - Changing EM&V Paradigm Webinar** - details forthcoming
- **Week of December 14:** Forum Steering Committee call - TBD
- **December TBD:** REED Subcommittee call



Upcoming Webinars/Conferences

The Value of Consistent, Transparent Energy Efficiency Reporting Across the Country: Current and Future Uses.

[Register for the webinar now!](#)

Please join us on November 5th as we demonstrate the variety of ways that different organizations are using (or planning to use) consistently reported energy efficiency data across the country in order to demonstrate the value of commonly reported energy efficiency program information.

For a full description of this webinar, please [click here.](#)

Presenters include:

- Michael Li, U.S. Department of Energy
- Lakin Garth, Associate, Cadmus Group
- Patrick Wallace, REED Manager, NEEP
- Ian Hoffman, Principle Research Associate, Lawrence Berkeley National Labs
- Peggy Kellen, Director of Policy, The Climate Registry

EM&V Forum Staff Update

The Forum's REED Manager, Pat Wallace, will be leaving NEEP to take a position at the MA Clean Energy Center where his position will be to help manage the MA SREC database. We will miss Pat, and appreciate his contributions to managing REED this past year. Please join us in wishing Pat well in his new job. See the REED

- [The DER Moment an Online Conference](#): November 4, 2015 12:00PM – 4:00PM
- [ACEEE Intelligent Efficiency Conference](#): Boston, MA December 6 – December 8 2015
- [AESP 26th National Conference & Expo](#) – Phoenix, AZ February 1 – February 4 2016

Call for Abstracts:

- [ACEE Summer Study](#) - Call for abstracts extended until October 30
- [AESP Spring Conference & Expo](#): Vision 2.0/2.0 – Evaluation and Implementation – Philadelphia, Pennsylvania May 10 -12 2016
- [IEPPEC](#): International Policy and Programme Evaluation Conference – Amsterdam, June 2016

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FORUM PROJECT UPDATES

These short takes on Forum projects, along with subcommittee communications, are intended to keep you posted on the status of all active Forum Projects. If you have any questions, please contact Julie Michals at jmichals@neep.org.

Important Links:

[2015 Forum Project Schedule](#)
[Forthcoming Products](#)
[Completed Projects YTD](#)

PD13-1 Net Savings:

update herein on key activities for balance of year.



MEMBER PRIVATE PORTAL ACCESS

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EM&V Repository



Check out the current repository (October 2015) on our [website](#). to download the most current repository, look for this icon:

- The draft guidance document is expected to be available for review by the subcommittee in mid-November, with a subcommittee call likely during the week of December 7. Final guidelines will be presented to the Steering Committee for adoption in mid-December. The document will cover overarching principles (reviewed with subcommittee on September 18) along with background on policy trends and options that stakeholders face relating to net and gross savings.

PD15-1 Regional Energy Efficiency Database:

- REED Manager, Patrick Wallace will be presenting with a Lawrence Berkeley National Lab, Bonneville Power Administration, and The Climate Registry at a SEE Action webinar which will demonstrate the variety of ways that different organizations are using (or are planning to use) consistently reported energy efficiency data across the country in order to demonstrate the value of commonly reported energy efficiency program information. The webinar is scheduled for next Thursday, November 5th from 3:00 to 4:30 PM Eastern. [Register for the webinar now!](#)
- The program year 2014 data collection and QA/QC process is currently underway. We look forward to receiving your energy efficiency program information by this Friday, October 30th. Please let [Patrick Wallace](#) know if you have any questions!

PD15-2 EM&V Methods:

- This Forum project focuses on 2 key areas: 1) the Standardized EM&V Methods reporting project; and 2) monitoring national EM&V protocol developments.
- The [Standardized EM&V Methods Reporting Forms](#) pilot for MA is now complete. A subcommittee call was convened on Oct 5 to review the pilot results and key feedback. Additional input was also provided by some subcommittee members. Meeting materials and notes are saved to the Forum private portal. Next steps are to further test the forms with a couple other states, focusing on 1-2 programs for each state. By December, NEEP will issue a summary report with recommended changes to the forms based on the MA pilot and additional state input. 2016 will



We need your help! Please contact [Colin Walker](#) with any recently completed or posted evaluation studies from your state.

focus on supporting state implementation and use of the forms for interested states.

- An important element to the Forum's work on EM&V Methods is to track national EM&V protocol-related issues. The current focus is to inform the [EPA's Clean Power Plan and proposed EM&V requirements and guidance](#). NEEP held a Forum member webinar on October 23 to provide an overview of the EPA's proposed EM&V rules (via its draft Model Rule) and EM&V guidance document, and to review key EE issues and areas for potential joint comment to EPA. The Oct 23 presentation is saved to the private portal. Comments to EPA are due January 20 (or thereabouts). NEEP will circulate draft comments to interested Forum members for review in early December.

PD15-3 EM&V Paradigm:

- The contractor to the project (DNV GL) has concluded its research on case studies that provide examples of how big data and data collection tools (AMI, smart thermostats), and Software as a Service (SaaS) providers are changing or enhancing traditional EM&V practice. A draft report with findings and recommendations will be issued for peer review in early November, with a final report in December followed by a webinar (planned for December 10)) For background material, see the [presentation](#) provided by DNV GL in July 2015 that introduced the changing EM&V landscape.

RE14-1 Early Replacement / Measure Life Research:

- This unique research by Evergreen Economics and Michaels Energy spanning multiple states and residential gas and electric efficiency programs investigated remaining useful life of residential HVAC equipment – what customers and manufacturers think and methods and assumptions from program administrators. It proposes – and applies – a more accurate method for furnaces, boilers and central AC. It also provides insights pertaining to program design and discusses the savings and cost-effectiveness implications of the study findings.
- The draft is now available on the private portal. Comments from the subcommittee on the final draft are due to

NEEP on October 28. The final report will be publicly available in early November.

RE15-2 Incremental Cost:

- A memo from ERS, project consultant, identifying the 10 measure categories that are being investigated and discussing research strategies planned for the first five measure categories is now available on the private portal. The next memo which will discuss research strategies for the second five measure categories will be delivered prior to the subcommittee meeting scheduled for Dec 2.

RE15-4 Geo-targeting EE Programs:

- Based on discussions from Vermont and Massachusetts (project funders) and suggestions from MA DPU this project is deferred. Additional information on the scope and plans for its next phase of research in this area are expected in December.

RE15-5 Loadshape Data Catalog:

- **Table Inventory of Recent Metering Studies (Phase 1 deliverable) now available at www.neep.org.**
- The first deliverable in this project, prepared by NEEP staff and technical advisors, is posted to the website. The draft Scope of Work for Phase 2, which includes cataloging loadshape parameters and identifying information gaps is now undergoing subcommittee review and is available on the Forum private portal. The Forum plans to engage a contractor to begin work on Phase 2 in November or early December.

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HEADS UP: Forthcoming Forum products

- **Early Replacement & Remaining Useful Life of Residential HVAC Equipment** - The draft report is now available on the private portal for subcommittee comment, due to NEEP on October 28. The final report will be publicly available in November.

- **Net Savings Guidelines** – draft guidelines forthcoming in first half of November for subcommittee review
- **Changing EM&V Paradigm Report** – The draft report will peer reviewed in November, with a final report forthcoming in early December

All Forum Products can be downloaded from the Forum's [Products](#) page.

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Completed Projects Year to Date

Need a refresher on previously completed Forum Projects? Look no further! Please click the links below to explore.

- [Energy Efficiency as a Transmission and Distribution Resource Using Geotargeting](#)
- [Incremental Cost Project \(Master Worksheet-Results of all Phases and Phase 4 Study\)](#)
- [Mid-Atlantic TRM Update V5 June 2015](#)



- [Home Energy Management Systems \(HEMS\)](#) with associated [spreadsheet](#) assessing HEMS technology
- [Commercial Refrigeration Loadshape Project](#) and the associated [ASDH spreadsheet](#) and [Motor spreadhseet](#)

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SCOPING STUDY ON EVALUATOR CERTIFICATION

This project is being facilitated by NEEP and Elizabeth Titus at the request of the US Department of Energy (DOE), which is funding the research directly. A team from the International Energy Program

Evaluation Conference (IEPEC) in partnership with the Association of Energy Service Professionals (AESP) developed the proposal to conduct a study to assess competencies and identify options for development a Certification Process for Energy Efficiency Evaluators. A small team of consultants on a shoestring budget will conduct informational interviews with key industry stakeholders and secondary research and prepare a report for DOE, assisted by an advisory committee. The project begins in late October and is expected to be complete in mid-2016.

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Please contact us with any comments or questions!

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About NEEP

For the efficiency industry, communities, businesses, and policy makers in the Northeast and Mid-Atlantic regions, NEEP is a non-profit organization that transforms the way we use and think about energy. We do this through advocacy, collaboration, and education designed to accelerate energy efficiency and make visible impacts in the region, the economy, the planet, and future generations.

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