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2	<b>CT-EEB EVALUATION PROJECTS UPDATE -</b>							Summ All SERA 22 040822 v278	<b>PART 1 - MONTHLY STATUS SUMMARY</b>		
3	<b>4/8/22</b>									Reports on tasks completed by Project Contractors	
4	Project (and last initial of consultant)	Description/Outcomes	Budget	Invoiced	% Spent	% Done	Are there Current Challenges / Concerns / Issues		Last Task Completed	Current task, status, expected finish date	Next step and its deadline
63	C1906 SEM Design and Evaluation	<i>The C1906 project will focus on evaluating the Strategic Energy Management (SEM), a specific initiative of the Business and Energy Sustainability (BES) program to achieve energy and non-energy benefits. The Connecticut utilities currently do not claim savings from the SEM program; this project will primarily identify methods to estimate energy savings from the program from an evaluation perspective. Over the course of this study, the evaluation team will gather information about the current state of the SEM program and barriers to claiming savings, identify effective and cost-efficient methods for collecting the data for claiming defensible savings from SEM, research and advise on program processes to support the utilities in documenting and claiming savings from the initiative, and enable an eventual impact evaluation of the SEM initiative after methods to claim savings have been established.</i>	\$264,880	\$168,360	64%	55%	No		12/21/2021 - Finalize process evaluation IDIs for PA and Vendors	Process evaluation in-depth interviews; April 30, 2022	Process evaluation in-depth interviews; April 30, 2022
64	C2014 C&I Lighting Saturation and Remaining Potential	<i>The primary objective of this study is to characterize the current status of the Connecticut C&amp;I lighting market and then forecast the remaining potential for lighting programs. Phase 2 of this study is designed to better understand remaining potential in specific areas.</i>	\$400,000	\$280,000	70%	60%	No		Phase 2 Kick off on 11/19/21	Sample design for NTG surveys is the critical path item. Data is being cleaned, stacked, and merged to create sample frame. Sample design will be depending on level of measure aggregation.	Implement recent customer survey 4/11/22-5/13/22
81	C1902 ECB NTG and Baseline	<i>This study integrates NTG and market baseline research and analysis components to support improved accuracy of gross and net savings estimates for the ECB program. The study also includes non-residential new construction code compliance and estimation of NTG values for the Upstream non-lighting program. The outcomes can then be used to inform future program changes to increase program attribution.</i>	\$688,000	\$562,522	82%	80%	None		Received EA Team's comments on Upstream NTG draft report (3/25)	Baseline data collection (Apr), Code compliance analysis (mid-Apr), Revision of ECB NTG questionnaire (Apr)	Wrap up baseline data collection & code compliance analysis by mid-Apr, finalize ECB NTG questionnaire (Apr), draw ECB NTG sample from latest tracking data (Apr)
84	X1931-5 Comm Refrigeration Efficiency Update Study	<i>Update aggregate commercial refrigeration efficiency values through primary and secondary research (COP and ACOP). Recommend an approach to quantify HVAC interactive savings for measures with refrigeration savings.</i>	\$29,600	\$33,000	111%	90%	No		Draft report submitted and under review by EA Team 1/14/2022	Addressing EA Team comments on draft report	Presentation of results to utilities March 2022

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89	R1965 HP/HPWH Baseline and Potential Assessment	<i>The study will incorporate multiple primary and secondary data sources to estimate the size of the market in CT, including previous baseline studies, purchased sales data, as well as shipment data. The team will also solicit feedback from manufacturers, distributors, and installers through interviews and surveys to better understand the future of the market for heat pumps, as well as system configurations that are dominating the market. Finally, the team will perform cost effectiveness testing at the measure level, focusing on particular system configurations of interest.</i>	\$381,000	\$302,496	79%	98%	Waiting on stakeholder comments on review draft report; due 4/7	Review draft report circulated to stakeholders on 3/25	Waiting on stakeholder comments on review draft report; will revise report in April.	Revise/finalize report based on stakeholder comments; April	
91	R1982.HVAC/DHW Performance and Potential Evaluation	<i>R1982.Circuit-level monitoring of electric HVAC and DHW loads in single family homes. Data analysis to inform fuel use, seasonal efficiencies, and peak demand for HVAC and DHW equipment in single family Connecticut residences.</i>	\$1,015,000	\$640,000	63%	60%	No	Completed 148 monitoring equipment installations.	Ongoing QC, site management	Analysis and reporting; dates TBD.	
93	R2027 HP/HPWH Reliability	<i>A study looking at the reliability, satisfaction, and repair costs of HP/HPWH</i>	\$75,000	\$67,522	90%	98%	None	With R1965: Review draft report circulated to stakeholders on 3/25	With R1965: Waiting on stakeholder comments on review draft report; will revise report in April.	With R1965: Revise/finalize report based on stakeholder comments; April	
94	R1983 HES/HES-IE Impact and Process Evaluation	<i>The study will utilize multiple primary and secondary data sources to determine the gross and net energy savings associated with HES/HES-IE measures, as well as the effectiveness of the programs' delivery to residential customers in Connecticut. In addition to core impact (e.g., billing and engineering analysis) and process (e.g., interviews and survey) tasks, the study also includes a customer profiling effort that will combine program tracking, Census, and third-party data sources (where available) to identify geographic areas within the state that participate at higher- or lower-than-expected levels.</i>	\$945,400	\$769,752	81%	75%	No, with the recent receipt of the approved program tracking and billing data from UI we have what we need to continue/wrap up the evaluation.	Presented preliminary NTG findings	Re-starting the billing analysis (and other impact evaluation tasks) now that we have final program data.	Finish billing analysis once UI data are available	
95	R2029 SF Weatherization Assessment and Update	<i>This study will provide an updated assessment of the state's progress toward its weatherization targets and will assess opportunities to revise the current draft weatherization standard.</i>	\$135,000	\$53,149	39%	30%	Waiting on minor clarifications regarding data provided by Eversource, but Eversource has responded to questions quickly. Data was a new data set that was provided separately for R2029, though data was initially requested about a year ago as a part of the R1983 study.	Study kickoff (3/17)	Reviewing data newly provided by Eversource, which was requested about a year ago as part of the R1983 data request, but has recently become available (complete review in April); also working on drafting a memo describing the pros and cons of the weatherization metrics DEEP proposed to replace the 2012 draft Wx standard (April).	Review newly provided Eversource data, and potentially submit a new data request for updated data (from Eversource and UI), now that data are available that were not provided as a part of the R1983 request (April); memo assessing DEEP metrics (April)	
98	X1939 Early Retirement	<i>This is an evaluation of early retirement programs in CT. In addition to evaluating the CT programs directly, it also includes secondary research and interviews on other programs throughout the country to provide program design and process guidance.</i>	\$284,543	\$166,134	58%	50%	N/A	Phase 1 final report	Phase 2 Impact Evaluation of ER programs	Desk reviews/customer interviews end of April 2022	

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100	CT X2022 - Education and Engagement Evaluation	We are conducting an evaluation of the Workforce Development, Education, and Community Outreach initiatives of Energize CT. The evaluation will include cataloging the education, training, and engagement activities; conducting secondary research around best practices and lessons learned in education, workforce development, and community engagement efforts elsewhere; and primary evaluation research with program participants across selected program efforts and activities to understand potential behavior changes and identify potential energy savings related to behavior changes.	\$457,000	\$402,102	88%	90%	We have an outstanding information request regarding the community partnerships program team; we have a call scheduled for mid-April and have requested data by April 29.	Presented findings, conclusions, and recommendations to utilities on 12/10/2021	Reporting across all efforts, expected by 4/2022; planning for primary research on community partnerships initiative will take place in April-May 2022 once we receive the updated information on program efforts. We anticipate conducting this research in May and June 2022 and will provide a memo to update the report in July 2022.	Continue drafting report; plan primary research on community partnerships efforts.	
101	X2001 - EUL	Study to provide statistically-defensible, upated, CT-appropriate EULs for several major residential and C&I measures.	\$275,000	\$242,823	88%	85%	We have received all data and materials requested to date.	Follow up interviews with Measure Group 1 and 2 respondents	Measure Group 3 survey in field. Expected completion in mid-late April	Measure Group 3 survey fielding - April 2022	
102	X1932 DR EM&V Support	The project will assess if UI DR pilots and projects are delivered in a way that allows evaluation of results in consistent and valid manner. This effort will also involve developing defensible estimates of kW savings from UI DR programs/pilots.	\$225,000	\$183,939	82%	90%	None	Submitted draft report 3/17	Revising draft report based on EA Team comments	Revising draft report (April 2022)	
103	X1942 NEIs	This study will provide data and information to support expected revisions to Connecticut's cost-effectiveness tests. The research will address the high priority gaps in NEIs in the Connecticut PSD: (1) utility NEIs associated with low-income programs, such as HES-IE and EAP discounts; (2) health and safety NEIs associated with low-income programs such as HES-IE; (3) residential HP/HPWH NEIs; and (4) commercial participant NEIs.	\$325,000	\$224,233	69%	53%	None	HES/HES-IE survey finalized (Mar 22)	Programming HES/HES IE Surveys; Developing SBEA sample (Jan 2022 through Apr 2022)	Field HES / HES IE and SBEA surveys (Q2 2022)	
106	X1931-4 New Measure Advanced Lighting Controls	This study will incorporate a new measure in the PSD for Advanced Lighting Controls. Additional Primary research to be conducted starting in July 2021 for completion in fall 2021.	\$50,000	\$40,200	80%	55%	No	Interview guides complete. 3/12/2022	Conducting expert and market actor interviews. Processing utility data.	Finalize and interviews and synthesize data.	
108	R2015. Low Load and All-Electric Residential New Construction	R2015. Secondary research study on various issues related to next generation residential new construction programs and approaches. Exploring strategies, approaches, outcomes, market factors, and benefits and costs concerning advanced approaches to residential new construction that inform programs in their effort to stay ahead of industry practices.	\$75,000	\$53,000	71%	50%	None	Stakeholder briefing (January 10, 2022)	Deeper dive research, mid April	Completion of program manager interviews and related data review, now projected for mid April	
109	C2117 - RCx Persistence Study	Study to develop better estimates of retro-commissioning savings persistence.	\$50,000	\$23,655	47%	50%	Utilities have provided all requested data.	Held utility kickoff meeting on 3/10/22	Literature review and stakeholder interviews in progress, expected to be completed by end of April	Literature review and stakeholder interviews in progress, expected to be completed by end of April	
110	R1968 RNC Baseline and Code Compliance	RNC Baseline study involving on-site inspections of homes built under the current building code.	\$370,000	\$10,770	3%	5%	No	Held kickoff meetings on 2/15 and 3/4; finalized work plan 3/31.	Data Request in progress, April 2022	Submit data request (Apr-22) and begin data collection tool development.	