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**EEB Evaluation Committee Monthly Meeting MINUTES**

***MONDAY July 12, 2021 – 10:00-11:34***

ALL VIRTUAL MEETING – NO MEETING ROOM (recordings posted)

Meeting Materials in Box folder: is <https://app.box.com/s/>xxx

**Call-In Number: 303/900-3524; WEB Access:** [**www.uberconference.com/skumatz**](http://www.uberconference.com/skumatz)

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*(Backup number – only if primary # doesn’t work –* [*https://zoom.us/j/2534751779*](https://zoom.us/j/2534751779)*; and use computer for voice.*

**COMMITTEE MEETING MINUTES**

***Attendees:*** *McLean\*, Viglione\*, Donatelli\*, Li, Roman, Oswald, Ghani, Wethern, Dyke-Redmond, Reed, Jacobs, Skumatz, Prahl, Wirtshafter, Gowans****.***

1. **Public Comment -** none
2. **Minutes and invoices - VOTES** 
   1. Minutes for May and June 2021 for vote. They were distributed earlier and with packet.
      * **Motion Passed – accept May & June Minutes**: Motion to accept minutes for May – Motion McLean, second Viglione. In favor, McLean, abstain Donatelli and Viglione. Motion to accept minutes for June – Motion McLean, second Viglione. In favor, McLean, abstain Donatelli and Viglione.
   2. EA Team Apr/May/June invoice for discussion, issued Wed/Thursday last week. Decision to **e-vote**. Skumatz apologized for delay in invoices. Notes the totals are greater than proportional for the percent of year, and totals include the recently-approved budget augmentation. Noted especially the heavy load in June (stewarding 15 project in stage of prep, review, and meetings for the summer presentations for the vast majority of current projects to allow incorporation of latest results into the PSD. Team will watch billings to be as frugal as possible and keep Committee informed.
3. **Non-Project Updates and Issues** 
   1. Review Interim progress / highlights. Skumatz reviewed the list at the bottom of the agenda.
   2. Interim e-votes and meetings – Skumatz reviewed the list at the bottom of the agenda. The ones noted in particular are the meetings between the EA team and the utilities to button up the final 2020 PSD. We believe we are finished with our last meeting. That process ends, but now we begin the process of review / vetting and integrating result of the summer presentations and reports into what will be the 2021 PSD. We are assuming each item gets 2 weeks of review, and so on.
   3. Status of Data requests and deliverables – The major unresolved items are shown in red in the separate data tracking document. Scrolling down, we see the major items are:
      * SF weatherization awaiting WAP data
      * 1942 awaiting NEBs arrearage data
      * 1983 HES & IE: there are pages and pages of nearly daily contact related to timing and quality of data requests representing an enormous amount of back-and-forth and time to get complete datasets, corrections, data with personal customer information in it by mistake, and other issues. There are real headaches on this project’s data requests. The consultants indicate the problems are 80% UI, 20% ES.
      * Utilities note there is a new request as well. Eversource also notes that 1983 involves getting some data from a third party, and are working hard on it. Roman reminds ES has changes in IT as well, but are working hard on 1983, but most pieces are delivered. UI notes they are working diligently with IT / CSR team to get arrearage data but proved to be more difficult than expected, and are awaiting response from NMR on review of the data they recently sent. Many many parts to it. Skumatz thought data request organized under one project, but maybe it is turning to out to feel oppressive for the utilities. UI is having the biggest issue with the large billing data request, and the magnitude is straining their data people. Skumatz offered calls on data at any time to clear up request. Skumatz noted the most important project – HES – could not have any summer results presentations because they do not have the needed data.
   4. DEEP staff changes - Donna Wells retired. Donatelli is new contact, and will be moving to C&I, with Giuliana covering residential. Most of the committees will be staffed the same as before. Eversource will also have staff changes. Miles Ingram left in October and Roman has focused on most of calls and hired Megan Wethern who will help in CT also. Others have been helping in the crunch, but are primarily in other states (Alex, Kiersten, etc.).
   5. Quarterly sum-up of data for DEEP (status report / Skumatz & DEEP) – Form from last time. Talked with Donna Wells on it before she left, and scheduling a call with new DEEP folks to see how to update it, and will also solicit feedback from utilities before updating it.
   6. Covid Updates – important to know if any changes coming for project planning. No new updates.
   7. Update on data sharing authorized by EA Team to reduce data requests / leverage data. None noted by EA Team.
4. **Evaluation Budget Discussion** – VOTE a 20 min
   1. Evaluation budget for 2022 C&LM Plan – Memo circulated in packet. There are two key evaluation-related items in the C&LM plan budget summary tables (Table 1?) – Evaluation Project budgets and the associated EA Team budget. In previous C&LM plan drafts, the same Evaluation Project and EA Team budgets had kept rolling over old numbers, that didn’t reflect contracts or budgets. This year, Reed got the EA Team inserted into the phase of the C&LM Plan discussions in time to make sure these numbers get set appropriately up front, instead of as a last-minute change that is out of synch. In the 2012 / 2013 timeframe, the ratio of Evaluation projects as a share of C&LM programs was over 2%. Over the last almost-decade, this number has fallen to just 1.07% (highlighted in the Legislative Report every year). Skumatz reviewed data from E-Source on typical percentage that Evaluation represents relative to Programs. Esource percentages show over 2% nationally, and higher numbers in Northeast. Going back to at least 2% seems very important for CT to be in league nationally, even if not regionally. The C&LM plan group agreed that was an appropriate goal, but that the first year a full ramp might be hard, so the first year would be a move from $3 million to $4.5 million, and then $6 million in years thereafter. Discussion requested. Donatelli asked what other background beyond E-Source and also whether there were projects that couldn’t get done because of the lack of budget. Skumatz noted: next measures, sample size stinginess that limits analysis, and not robust analysis and we end up piggybacking in MASS where that isn’t fair, or CT results would be more appropriate. Other EA Team members mentioned: Piggybacking, don’t do individual types of studies as often as should (5-year impacts when maybe 3 years would be better), and magnitude is $3 million in CT for evaluation studies and MA spends 6 times that amount ($18 million). Overall program budgets in MA are higher, but in CT, the evaluation budget is disproportionately low – 2% in MA, 1% in CT. Impacts of Sample sizes – metering study undertaking is very limited sample size, which prevents ability to see differences between low income / non, or different types of appliances / heating systems. We get useful data (and metering is especially valuable) but are limited in how far we can take that information. One more example: C&I process evaluation, had to have contractor do much data massaging and integrated from multiple sources that chewed up a lot of budget – but those effort are a key annual effort in Massachusetts, integrating data for customer profiling. So, it was a major effort for CT, and couldn’t do as much as we would want and stay within budget. Another issue – data collection and retrieval. Much more burden on the projects in CT (there is a specially-budgeted data management / separate effort. Utility notes that the quantity of studies coming in in MA is quite significant. CT this month has been daunting, but even more so in MA. Need to think about how much the programs can integrate at once, with consideration of staging of results and results can be well-integrated to be useful. Note, that even with increasing to $4.5 million, we are at ¼ of MA budget, and still a fraction. And Skumatz noted that this year /last year’s PSD results were an anomaly because it included the major true-up of the entire PSD. That is not normal / daunting going forward. Sample sizes are a big issue, as it limits applications to equity, climate zones, etc. Couldn’t touch it with the limited sample sizes and we are losing information needed for designing programs. And sample sizes increase the cost and efforts by contractors, but does not increase EA or PA time.
   2. **EA Budget share** relative to the increased Evaluation Project Budget: Memo was circulated on items that increase proportionally and not proportionally. In past, we shortcutted some of the Roadmap requirements because of budget. Increases in sample size don’t’ affect EA proportionally. Other savings are from 3-year contracts, and the training / retraining and meetings represent economies. EA’s estimate is 50% increase in budget 🡺 35% increase in EA budget. This is our recommendation. Discussion / Comments / Objections? Base budget $329K for EA Team. Assuming 35% increase in that when Evaluation projects move from $3 million to $4.5 million – EA budget increases to $444K. Understood. No additional comments or disagreements.
   3. 2021 – Recommendations for reallocating individual project budgets within the current Three-Year Evaluation Plan budget.
      * Recommending cancelling emerging issues and R1963 lighting study. Residential lighting study not recommended now (stocking or sales study). However, with what is happening with lighting market and with Biden / EISA, and recommending deleting this project as there are not any major changes and there is consensus in CT about the timing for phasing out lighting projects. McLean: If relative consensus, then there may not be a need. Utilities have been doing investigations of this and numbers, so maybe isn’t a necessary item right now. Yes, that is EA read of the issue. Reed: Proposed language in Plan points to cessation of market rate lighting activities next year and then cessation of income eligible direct install the following year, and given that, not sure there is an overriding need to look at sales and shelf-stocking data. Consistent.
      * Now claims on funds: April increase for EA team ($69K). $10K to 2015 low energy homes project, rebid at a higher budget to get interest in the RFP. Other proposed: 1982 already approved extending the meters to a second-year last year, but delayed that budget allocation because the meters weren’t in for the first year yet. In addition, there is about $30K that they had to spend delaying, replanning, delaying the project’s design because of Covid, which very much affected on-site work. The next recommended item is: 1983 needs additional $55.4K. This is for the major data issues (noted in our pages of data review) plus translating surveys into Spanish to better reflect equity needs. If we don’t do this, firms will refuse to bid in CT. Other possibilities: C1901 did much data prep work used by multiple projects. We will ask for firmer decision in upcoming meetings.
      * Questions: McLean - important because EE Board meetings, they are being asked by stakeholders what kind of evaluation programs are the funds paying for, what’s their value, what are we learning? There is a desire for resources to go to things that are tangible like outreach to low income that may not be getting all the services. Important to know the value and reception of evaluations we are doing now. Important for HES-IE. Need great information from that to translate why evaluations are important to general public.
5. **PSD Update Process – 2020 and 2021** 
   1. PSD Update for C&LM Plan – 2020 process complete. Got many 2020 items completed by end of calendar year, but there were others deferred to this year. There is now EA and Utility agreement on remaining 2020 PSD update recommendations. Markup / verification by ERS underway.
   2. 2021 process is starting, with reactions to several of the summer presentations received from Utilities. EA team preparing responses. Tabular tracking is attached. There are the steps to getting the findings finalized, and then the step of how the utilities will plan to implement those steps in the PSD.
6. **Roadmap - VOTE** 
   1. Discussion of final version. Comments integrated in line with discussion last month and follow-up with utilities and technical consultants. Major types of changes were: PSD update once a year, with EA/utility interactive process that precedes it. Updated the pictures / flow charts, including a new one on data process. Overarching changes: 3-year research area approach to get out of contracting problems (plus efficiencies in data knowledge etc.); data steps; data sensitivities procedures; cleanup of assuring more stakeholder explicitly / consistently listed, and increased communication for better initial input and opportunities for questions – retaining the Chinese wall for independent evaluation. Giving 1 wee for final review and e-vote.
7. **Discussion of Project Status** (*Gantt, Project Summaries Provided monthly w/spend*)
   1. *Gantt Includes information on projects with results expected in time for 2022 PSD & Planning (also included as attachment).* C&I Projects (Gowans & Jacobs). Residential Projects (Wirtshafter & Skumatz)

* C1901. Review Draft report is out for Committee review (6/25). Comments due 2-3 weeks from then (July 9 or 16). Final results meeting was held 6/24 10am.
* C1906. Phase I Completed - Research and Development of SEM Evaluation Methods (4/15/21 presentation). Working on refining approach for Phase 2.
* C2014. Working on prioritizing options for Phase 2 for discussion / consideration.
* C1902. Programming surveys, fielding IDIs
* C1931-1. Address comments from utilities on presentation.
* C1931-2. Address comments from utilities on presentation.
* C1931-5. Data collection from facility and expert interviews is underway; facility recruitment slow to obtain design docs and unresponsive contacts are challenging. Expert interviews complete, but detailed / specific data not as robust as hoped. Reviewing site-specific data from EO Eval and other NE studies for use to augment project's limited facility interview data. Considering web and rep/distributor sources also to augment market-level data. Have developed draft template for calculating COP value; aiming to develop draft results by end of month.
* C1931-6. Address comments from utilities on presentation. Complete Realization Rate adjustments.
* R1959. Summer results presentation provided in June; finishing Review Draft report for submittal 7/9/21.
* R1965. Significant delays and costs due to data from Companies and coordination with other studies, but on track to deliver draft report by August 2021.
* R1982. Working towards metering installations by CT-based electricians in late August (for a test week).
* R2023. Small budget left awaiting other database update needs / requests.
* R2027.Data collection done, draft report as part of R1965 to be delivered in July 2021
* R1983. On track so far. Still missing a few items from data request but reviewing provided data, beginning impact and customer profile analysis, and initial process eval tasks, including finalizing interview guides; program staff and DEEP IDIs completed as of 6/2.
* R2029. CRT WAP data provided, but negotiating with CRT for unredacted dataset; HES data request not complete yet, leaving study design in flux.
* R2120. Project was delayed by delays in the related Massachusetts study and Utility concerns about postcard; will result in about a month delay in delivery of incentives memo
* X1931. Redline PSD based on last of 2020 PSD update agreements between EA / Utilities. Expect to complete in July. 2021 round from June / July in progress by EA / Utilities.
* X1939. Phase 1 presentation completed on 6/14, reviewing comments and working on report / edits.
* X2022. Completed and presented secondary research on best practices in community and customer engagement; presented overall recommendations across the programs to the committee (June 29); completed analysis of the workforce development participant survey; developed instruments for education primary research and workforce development primary research. Provided specific feedback on Community Engagement Program description / application to utilities 7/6/21.
* X2001. Measure Group 1 results are complete / provided updated measure lifetimes for some HPs in Summer presentation. Measure Group 2 survey is being fielded.
* X1932. Received and reviewed UI AMI data. Eversource part of study in progress as of May 2021.
* X1942. Analyzing the HVAC survey; Eversource data request pending
* X1931-7. Address comments from utilities on presentation. Complete Realization Rate adjustments.
* X1931-3. Address comments from utilities on presentation.
* X1931-4. Address comments from utilities on presentation.
* X1931-8. Address comments from utilities on presentation.
* R2015. In contracting process
* R2117. Just getting under way

1. **Status of EA Team non-project assignments for 2020/21:** 
   1. 2021 - Contracting documents for 2021 add-on projects - COMPLETE
   2. 2021 – Legislative report – COMPLETE
   3. Roadmap –complete
   4. 2021 RFPs –complete
   5. Contracting for 2021 RFP projects - complete
   6. PSD process 2020 – Complete
   7. Review of C&LM Plan elements related to Eval - underway
   8. PSD process 2021 from summer presentations - underway
   9. 2022-24 Evaluation Plan – Sept or Nov 2021 start
   10. RFPs for 2022-24 3 year subject areas – Nov/Dec 2021
2. **Other items** –
   1. Quarterly report for use in EEB meetings
3. **RECAP**
   1. **To do:**

\*\*\* Supporting Materials in Box folder and attached before meeting, including:

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| --- | --- |
| * Updated Gantt Chart & Project Status Summary & data timeline report * E-votes / call notes (attached / bottom of agenda) * Roadmap (attached – final revised) * Status of utility / EA responses to summer meetings | * May and June minutes * April / May /June EA Team Invoice * Evaluation Budget Recommendations * EA Team budget for 2022 Plan |

***Summary of 2020-21 Votes To Date - Updated***

|  | Minutes for the month | SERA Invoice |
| --- | --- | --- |
| Jun 2021 | *Sent for e-vote 7/1/21* | *Avail for July meeting* |
| May 2021 | *Sent for e-vote 7/1/21* | *Avail for July meeting* |
| April 2021 | *Approved - Sent for evote 4/12, 4/22 (In favor, Wells, McLean, and Viglione 4/22/21)* | *Available for July meeting* |
| Mar 2021 | *Approved , Sent for evote 3,8, 4/12, 4/22 (In favor, Wells, Viglione 4/22/21, McLean abstain)* | *Approved , Sent for evote 4/12, 4/22 (In favor, Wells, McLean, and Viglione 4/22/21)* |
| Feb 2021 | *Passed. Sent for Evote 2/8, 3/8, 4/12, 7/1 (In Favor: McLean 3/8, Viglione 3/8, Wells 7/1)* | *Approved , Sent for evote 4/12, 4/22 (In favor, Wells, McLean, and Viglione 4/22/21)* |
| Jan 2021 | *Passed. Sent for Evote 2/8, 3/8, 4/12, 7/1 (In Favor: McLean 3/8, Viglione 3/8, Wells 7/1)* | *Approved , Sent for Evote 2/8, 3/8, 4/12, 4/22 (In favor, Wells, McLean, and Viglione 4/22/21)* |
| Dec 2020 | *Passed, Sent for Evote 2/8, 3/8, 4/12; 4/12, 7/1 (In Favor: McLean 3/8, Viglione 3/8, Wells 7/1)* | Approved Evote 12/18 (Wells, Viglione, McLean) |
| Nov 2020 | Approved / Evote Wells, McLean, Viglione (12/15/20) | Approved (with Oct) Evote Wells, McLean, Viglione (12/15/20) |
| Oct 2020 | Passed*: Sent for Evote 2/8, 3/8, 4/12, 7/1 (In Favor: McLean 3/8, Viglione 3/8, , Wells 7/1)* | Approved (with Nov) Evote Wells, McLean, Viglione (12/15/20) |
| Sep  2020 | Passed Evote –McLean (11/5), Wells and Viglione (11/9) | Passed (with Aug) – Evote McLean (11/5), Wells and Viglione (11/9) |
| Aug 2020 | Passed Evote McLean, Wells, Viglione (8/17 all; sent 8/10) | Passed – Evote– in favor McLean (11/5), Viglione and Wells (11/9) |
| July 2020 | Passed sent for evote 2/8, 3/8, 4/12 *(In Favor: McLean 3/8, Viglione 3/8)* | Passed Evote McLean, Wells, Viglione (8/17 all; sent 8/10) |
| June 2020 | Passed Evote McLean, Wells, Viglione (8/17 all; sent 8/10) | Passed Evote McLean, Wells, Viglione (8/17 all; sent 8/10) |
| May 2020 | Passed via Evote: In favor, McLean, Viglione, Wells (6/5, 6/5, 6/8) | Passed via Evote: In favor McLean, Viglione, Wells (all 9/2, 8/17) |
| Apr 2020 | In meeting – Motion to approve SERA Invoice for April Passed. MOTION / 2nd (Wells / McLean). Passed with Wells / McLean in favor. Via evote, Viglione in favor 4/7 – Skumatz check / reversed | Passed in Meeting: Wells / McLean: in favor, Wells / McLean. Viglione in favor via evote 6/5. Skumatz check / reversed |
| Mar 2020 | Passed in April meeting: In favor McLean, Wells (4/6); Viglione E-vote 4/7 | Passed in April meeting: In favor: McLean, Wells, Viglione (4/6/20) |
| Feb 2020 | Evote Passed: In favor McLean (2/10); Wells 4/6; Viglione 4/7 | Evote Passed: In favor McLean (4/1); Wells 4/6 ; Viglione 4/7 |
| Jan 2020 | Evote passed: In favor O’Connor (1/16), Wells (2/10), abstain McLean (1/16). | Evote passed. In favor Li and McLean, 2/10. (No vote from OCC / Taren and John in transition) |

**Other Votes / Meetings / Tracking (2020-2021) – Updated**

July 2021

* 7/8/21 - PSD 2020 update discussion meeting with EA / Utilities held; all dispositions for 2020 complete / agreed; forwarded to ERS for redlining and verification.
* 7/1 - Multiple Summer Presentation meetings held for use in PSD / Plan including: R2027 HP/HPWH Reliability & R1965 HP/HPWH Baseline & Potential (7/1); and C2014 C&I Lighting Sat & Remaining Potential (7/1).
* 7/1/21 - PSD 2020 update discussion meeting with EA / Utilities held

June 2021

* 6/25 – C1901 C&I Sector Wide Process Evalion Review Draft out for Review; 1 extra week means due 7/16.
* 6/22 – X1939 Early Retirement Report out for review; 1 extra week for review (due 7/13)
* 6/8-6/30 Multiple Summer Presentation meetings held for use in PSD / Plan including: X1941 MF (final presentation; 6/8 and 6/17); X1939 Early Retirement (6/14); R1959 SF Reno & Addn (6/17); X1931-6 Hours of Use (6/21); X1931-7 Degree Days (6/21); X1931-4 New Measure-Lighting Controls Res/C&I (6/23); C1901 C&I Sector-Wide Process Eval (6/24); X1931-1 ISP Com’l Boiler & Furnaces (6/28); X2001 EUL C&I (6/28); X2022 Educ/Workforce Initiatives (6/29); X1931-2 Coincidence Factor & Loadshape (6/30); New Measure Compressed Air (6/30); New Measure R/C&I Thermostats (6/30).
* 6/3, 6/10, 6/17, 6/24 - PSD update meeting / EA & companies
* ***Passed***: Evote approving recommended contractor (Evergreen) for project R2015. (McLean 6/9, Viglione and Li 6/11). Should be contracted by utilities along with R1968 asap.
* 6/3 PSD update meeting / EA & companies

May 2021

* 5/21 X2022 Phase 1 presentation / methods / best practices
* 5/19 SEM Phase 1 repeat presentation
* 5/6 Kickoff 3 “New Measure” projects (air compressor, advanced thermostats, advanced lighting controls)
* 5/6 - PSD update meeting / EA & companies

April 2021

* 4/15 C1906 SEM Phase 1 Presentation
* 4/7 R1973 Retail Products Final Presentation
* 4/1, 4/8 - PSD update meeting / EA & companies

March 2021

* 3/30 C1902 ECB NTG and Baseline K/O
* 3/22 X1942 NEI Kickoff
* ***PASSED***: 3/15 Evote Approval of Memo on RFP Project Award Recommendations (Viglione 4/15; Wells 3/30, McLean 3/29)
* 3/12 RFP responses due to EA Team
* 3/12 Repeat Kickoff X2022 Engagement project for those that couldn’t attend 3/3 (added due to storm duties)
* **Possible EVOTE OUTSTANDING/checking**: 3/8 Legislative report sent for evote, resent 4/12; In favor Viglione 3/16.
* 3/8 Kickoff for X1931-6 HOU/Load Shapes Project
* 3/ 4, 3/18 EA Team / utility meeting on PSD update process
* 3/3 Kickoff X2022 Engagement

February 2021

* 2/18 EA Team / utility meeting on PSD update process
* 2/5 R1973 Retail Products Review Draft Report sent to Committee for Review – due 2/19.
* 2/4 EATeam / Utility meeting on PSD update process
* 2/4 Legislative Report sent to committee for Review – due 2/19

January 2021

* 1/27 – 2021 Evaluation Plan Update ***Evoted and passed*** (1/27 McLean, 1/27 Wells, 1/28 Viglione)
* 1/25 Eval Committee Discussion on the 2021 Evaluation Plan Update
* 1/25 C1906 SEM Phase 1 (Eval Best Practices) Review Draft Report sent to committee for review - due 2/8
* 1/22 Eval Committee Discussion on the 2021 Evaluation Plan Update
* 1/4 - PSD update meeting / EA & companies

December 2020

* Additional discussions / memos on PSD – to be updated / specified; memo issued 12/23/20
* 12/16, 9-10:30 Kickoff for 4 PSD Phase 2 projects (ISP, Refrig ACOP, HOU, Inland/Coastal adjustments)
* 12/1, Discussion with UI / ES / EA on priority PSD updates not yet integrated – EOY priorities. Scheduling follow-up

November 2020

* 11/3 – R1963b Final presentation
* 11/18, 11/19 meetings on Evaluation Plan Update Project concepts

October 2020

* 10/6 meeting with Utilities on PSD and C&LM Plan
* 10/14, 9-10:30 – X1931 PSD Phase 2 project prioritization discussion with Eval Cmte

September 2020

* 9/2 8-9 Final presentation C1635 EO
* 9/30, 10/1 – multi-state discussions of R1963a – a few refinements

August 2020

* 8/28 **Vote/Passed**: Committee discussion of EA budget amendment; Passed (Motion / 2nd (McLean / Wells) in meeting, in favor of budget addition of $55K, with funds to come from unused approved funds for R1982 residential metering project funds. Vote in favor via Evote, Viglione, 8/28. Memo provided.
* 8/14 Kickoff meeting HES/HES-IE Impact & Process evaluation and Customer Segmentation
* 8/13 Meeting with utilities on contracting progress
* 8/10 Monthly evaluation committee meeting

July 2020

* 7/31 – PSD (X1931 & X1941) matrix, markup of PSD document
* 7/31 – R1973 Updated memo including gas findings released
* 7/22 – PSD (X1931 & X1941) matrix product distributed
* 7/16 – R1965 HP memo distributed
* 7/16 – Memo on R1959 Renovations findings released
* 7/15 – X1931 Prospective RR memo released
* 7/15 – R1973 Interim memo on Retail Products released
* 7/15- Interim meeting PSD X1931 (with X1942) – 2nd meeting continuation; briefing slides sent
* 7/10 – X1931/X1942 batch 3 comments answered by email spreadsheet
* 7/14 - R1963b lighting memo released
* 7/14 – R1963a lighting memo released **(comments requested 7/28)**
* 7/10 – X1931 Interim meeting PSD (with X1942) – 1st meeting – discuss controversial results and recommendations; briefing slides sent
* 7/10 – X1931/X1942 batch 1&2 comments answered by email spreadsheet
* 7/8 – Briefing C1635 / briefing slides sent
* 7/8 – C1634 Review Draft Report released (**comments requested by 7/22**)
* 7/6 – sent updated / collated covid procedures
* 7/2 – released Review Draft C1635 for Committee (**comments requested by 7/16**)
* 7/2 – Briefing R1973 ESRPP / briefing slides sent
* 7/2 – Briefing C1634 / slides sent
* 7/3 – 3rd batch PSD results released for committee review
* 7/1 – Briefing R1963a ST lighting / briefing slides sent 7/2
* 7/1 – meeting on data needs for planning upcoming 1982

June 2020

* 6/26 – 2nd batch PSD results released for committee review
* 6/25 Data call on R1965 UI
* 6/19 – 1st batch PSD results released for committee review
* 6/17 Data call with UI X1939
* 6/5 – **EVOTE/passed** for legislative report from McLean, Viglione.

May 2020

* 5/11: **Passed**/Approved EA Team’s memo, endorsing the recommended contractors for the 2020 evaluation work, and endorsing starting the utility contracting process with these firms. (Motion/2nd McLean / Wells, approved by both).

April 2020

* 4/23/20 RFP responses

March 2020

* 3/26 Final RFP released to pre-qualified bidders (due 4/16)
* 3/19 Legislative report for review – still out for review or approval
* 3/19 RFP provided for review for committee
* 3/18 EA Team provides requested summary of conservation kits and Covid impacts on Evaluation
* 3/11 Multiple project data meeting with UI
* 3/11 EEB concurs with Eval Plan / ok to proceed with RFPs etc.; in meeting / no objections.
* **EVOTE/Passed:** 3/9 Eval Committee approval of Eval Plan Update (by email: Viglione and McLean 3/9)

Feb 2020

* 2/28 – Evaluation Plan discussion with EC
* 2/19 – Evaluation Plan discussion with EC
* 2/6, 2nd kickoff for R1982 Res HP / HVAC / DHW project

Jan 2020

* 1/31, X1931 PSD Kickoff
* 1/29, C1906 SEM Kickoff
* 1/23, C1901 C&I process kickoff
* 1/15, 11-12, X1939 Early retirement kickoff
* 1/10, 1-2 MF Final Presentation
* 1/8 11-12, X1931 PSD Kickoff