



EEB Evaluation Committee Monthly Meeting

Monday April 10, 2017 – 10:00-11:30

Department of Energy and Environmental Protection – Public Utilities Regulatory Authority,
Commissioner's Conference Room, OCC, 10 Franklin Sq., New Britain, CT

Meeting Materials in Box folder: <https://app.box.com/s/v6o8s5i75d0gpoopcyih6fzvjsjc48>

NEW Call-In Number: 303/900-3524; WEB Access: www.uberconference.com/skumatz
(Backup number – only if primary # doesn't work –720/820-1390 Code (1st caller) 8296#
www.join.me/SkumatzEconomics)

COMMITTEE MEETING AGENDA - Minutes

1. Attendees (* voting): Mascola, Melley, Duva*, McCree, Swift, O'Connor*, Lewis*, Gorthala*, Wirtshafter, Chiodo, Prah, Skumatz, McDonnell.
No guests.
2. Public Comment - None
3. Approval of Minutes from March meeting (Skumatz) - Send out for E-vote today
4. Non-Project Updates and Issues (Skumatz, all):
 - a. Review Thursday reports and highlights; review interim meetings & votes. Approved invoice and minutes after last meeting.
 - b. SERA team invoice- Skumatz notes that until this month the EA Team was keeping parallel to the percent of the year remaining. This month, we moved to spending a little more than proportional (75% of year left, 71% of budget left) but note that this month had a surge of work for the Mini-RFP process and we expected this shift. Include invoice in E-vote with minutes.
 - c. Data issues review –
 - Jacobson – Good news is that most of technical progress on Program participant and backup records needed for onsite work for SBEA and BES is mostly cleared up. Remaining unexpected problems are SBEA gas billing data, which we reported on last month. Worked to pull together a meeting and we apparently have what we expect from Eversource, but we remain behind with UI. There was a UI meeting this morning, but UI has difficulty getting gas billing data to support the analysis we expected to do, and we may need to move ahead analyzing gas with mostly Eversource. We have asked for 180 UI customer data, and have received 30 customers. UI is having another person work on it; UI does not keep billing data for as long as we'd like, so pre-data are missing / billing retrieval seems to be a problem. Question: Aren't data requests made clear at the beginning of the project in a meeting? Yes. Note UI is not a gas company – the issue is with CNG gas billing data that is most problematic (better for Southern Connecticut). CG requires manual download for each customer one at a time / labor intensive, so UI is picking

largest customers (30 of 80 were supplied, but only 1/3 to 2/3 had the full 36 month timespan needed). The data request was made 5 months ago. UI notes their staff have been out longer than expected, and aren't sure why it is a manual process if account numbers are provided. In general, **strong reminder** we have the up-front data request meeting right at the beginning and utilities clearly understand and confirm they can provide the data. McDonnell and the new people on the case will identify where Oswald was on data and will check on status and get on it quickly. Note / recall - Matching gas and electric is complicated / separate billing engines at UI companies. Differences in deliver speed from two utilities (billing vs. site).

- Residential – No critical outstanding requests. 1617 has a request for non-participating customers (UI is working on getting this together); and Eversource fulfilled a furnace rebate data request.

- d. Skumatz presented Data Cost memo. Data problems has led to substantial extra cost and time for the contractors we have to pay, who have agreed to a scope and budget with reasonable expectations about data. As an example, for R1602, specific costs include bad data / extractions, duplicate record, unclear identifiers, site descriptor problems. We have requested from the other contractors. Affects the ability of the projects to meet scope, and we have tried to address this with up-front data meetings. We see two options: 1) identify costs and it is requests from outside sources. 2) If all projects currently being RFP'd come in well under budget, the costs may be transferred from there. However, these costs are not reasonable evaluation project costs. We recognize that the utilities are trying to fulfil the requests provided and discussed, but somehow this has to rise in priority with the utilities. The costs are due to these delays and problems in acquiring data from the utilities, and really should not be extra expense to evaluation work. If you can't evaluate the data, claims of savings can't be made / supported. Data must support both implementation and evaluation (note R33 report).

Jacobson notes some of the costs are just the time – instead of 3 weeks, it takes 3-4 months to get everything, with interim reviews to say what is still missing, what you have / don't have, and sending emails, all of which takes staff time. Hard time identifying who is and is not a participant in the program for SBEA process side – even that has been well below expectations for the sophistication of a program. Staff time is made available, but then the data aren't correct, and ... We cannot evaluate whether saving have occurred and can those savings be claimed? Need to obtain costs, and explore where the hiccups came from. If the data requests are clearly spelled out and time is required for nagging and checking, that should not be happening. Data should be able to be used. This is an expensive problem. If the utilities cannot meet requests, we should hear that before the project kicks off. These up-front meetings occur. Get the remaining estimates. UI apologizes about Oswald timing (EA Team notes this has been an issue well past this specific absence). Note that the 80/20 rule does not apply to these data requests. The sample is not valid in those cases, and we have had problems with backup calculations and participation information – not even considering billing data. UI wants to see the specific missing data (including program participation data); most has been delivered at this point but it has taken more than 5 months and 3 months of hounding and extra costs. UI was faster on program data; billing data Eversource has been quicker (on the commercial side). Residential memo includes only one project that had the biggest costs; there have been issues on other programs, but they have not been included. Get rest of cost estimates in from the contractors. Mascola is the point person on UI side, transitioning back to Oswald. UI notes

that billing data issues are one thing (companies may move and may not have sufficient pre-data – but note – usually require 1 year pre, 1 year installation, 1 year post, so 3 years total). UI notes it is particularly alarming that program records are not provided by UI (EA Team concurs) – McDonnell wants to know about those asap. Question: two issues – slow and bad quality data. Should we talk separately about poor quality data, not just data that are missing? UI notes water heater data issues relate to move to an upstream program data collection and data are collected differently, but the up-front data meeting and nothing was mentioned at the meeting. Repeated point that this is an expensive problem, and if the utilities can't fulfil the request, we need to know up front at the meeting.

5. Discussion of Projects / Status (and data) – *see Gantt & Project summaries* **30 min**
- a. Walk-through of Projects / Monthly Status Report – focus on Gantt “changes” and status of new projects; update on results of call / meeting on “new” steps for projects
- C&I – Chiodo - Largest energy savers impact evaluation is moving forward without substantial issues or data problems. Having difficulty getting on-site at one or two sites, and utilities are engaged in helping. Expecting site reports in next month or so. Question: Draft for largest savers is due in November and BES / Prime is due in September. However, would like those moved a couple months sooner, as savings documentation for the year is locked down in August (including 2018 version). Data timing has made that impossible in some cases, and dates on Gantt has not been re-adjusted (because data still hadn't arrived / moving target). We will update those dates. In addition, some studies need summer metering data so it cannot be delivered earlier. That is the case with largest savers. Expected to do the metering in summer 2016, so the majority of sites will be metered this coming summer. They cannot provide report in August. C1663 Non-SBEA process evaluation is in contracting (has been for months; documents provided in responses to UI questions). Have produced data request already and that has been circulated. Given data issues we've been seeing (including from UI), EA Team requests UI look at the data request to identify if there are any likely hold-ups or problems. UI will not review data request at all without project / firm under contract.
 - Jacobson: 1639 site work is done and draft report is expected end of next month; process report for small business is being revised to add EA Team comments; Summer expect both process and impact evaluation by summer. 1641 moving forward and been out in field for more than half the sites for winter metering (completing that this week); one issue with this program is higher response rate from sample than expected for the metering, and that will be too costly; we are modifying the sampling plan.
 - Wirtshafter: lighting study has been reviewed and are doing edits for Review Draft and should be released to committee shortly.
 - Skumatz: R1606 project went out this morning; usually it is 2 week review, and short report, and parallel to past reports. R1602 RNC billing has submitted process evaluation draft to EA team and we are reviewing that report prior to distribution to committee. R1613/14 – doing field work and will response to Swift questions regarding timing of solicitation of customers. Metered boilers during season; this is pumps and don't need full season. R1617 – locking down savings assumptions by August; study scheduled to complete at end of year. Would like results for as many measures as possible by July / August. Release memo in July on whatever measures (furnaces / boilers gas interim results would be especially helpful). R1617 DHP – back and forth on modelling and inputs to DHP; meeting on that this afternoon.

6. Mini-RFPs – Status Report – Thanks to committee for reviews. Issued 31st, due 24th. Have answered one batch of Q&A and will send more out on the 13th. Residential and commercial pools are hard at work on the RFPs.
7. Legislative report will be sent out in next day or so for review.
8. DEEP report out on Fuel Conversions – presentation walk-through / discussion. Some data is collected and provided to PURA, and in C&LM Plan DEEP required as a condition that utilities to provide a plan and report on semi-annual basis on gas conversion numbers (insulation and equipment) and asked utilities to survey customers and contractors. Slides were presented at Residential meeting and some surveys completed over the summer. Asked about awareness (incentives) and decision-making. Primary barrier is cost. Contractors also surveyed and most contractors aware; 75% of contractors would like more training, and they recommend their favorite brands. Are aware of incentives and financing; but are self-conscious recommending higher priced equipment. Companies will do another survey this summer. DEEP requests documentation from utilities by July about contractor training; recognize they don't see all contractors. Also asked for survey plan by July 1, and survey results in November. Tabular results are provided to board in submittal. 45,000 conversions from January 2014, and detail on how many conversions can be documented. Question: what percent of equipment conversion is high efficiency; the table does not show that (raw data only). Questions about upstream programs / delivery – distributors make key decisions, and conversions are very low. Intertwines with many programs. Interesting facts, but need more drill down on the surveys about what elements of costs, and more information needed. Overlay with contractor information. Issue with limitations of the data in addressing conversion issues; perhaps utility staff should coordinate with people developing survey plan (due early July) to integrate relevant questions – also EA Team. Have done data collection with ongoing reporting to DEEP; also conducted some surveys and requesting survey plans. Comment: Much lost opportunity and don't really know why. Compare conversion rate to achievement across the market generally vs. fuel conversion market specifically and ask why it is low. And are fuel conversion lagging / need deeper drill down. DEEP stressed there is data on this issue; emphasize that it is not unexamined. Discussion of scheduling briefings; traditionally to residential committee, - information to be made available to board members. (see slides submitted).
9. Other items –
 - a. Update on DEEP / NEEP M&V 2.0 Grant – working on contracting documents with LBNL and NEEP. Mentioned they are discussing study design, and noted that people on the evaluation committee requested to be involved / informed. DEEP said this is separate research effort; Gorthala requested involvement. Study design is responsibility of LBNL for automation of M&V for scale-up, and DEEP will share what they can share. State of CT and DOE project. Most of study design is LBNL and will happen after contract in place. Not sure if LBNL will allow comments. Note these are public meetings; Gorthala etc. may be involved. DEEP trusting LBNL will follow traditional design practices; LBNL not asking DEEP for input. Will share the study design with committee. May expect periodic presentations.

To do: E-vote for minutes and invoice; Issue for committee review - legislative report and lighting report.

*** Supporting Materials in Box folder.

Summary of 2017 Votes To Date

April 2017

- Approved/Passed – March Meeting minutes (in favor O’Connor, Dornbos, Melley, Gorthala 4/13/17)
- Approved/Passed – March SERA Team Invoice (in favor O’Connor, Dornbos, Melley, Gorthala 4/13/17)
- Interim Meeting -1617 DHP Working Group – 4/10/17

March 2017

- Approved/Passed - 2/2017 Committee minutes (in favor O’Connor, Melley, Gorthala 3/9/17)
- Approved/Passed- January 2017 SERA Team invoice. (in favor O’Connor, Melley, Gorthala 3/9/17)
- Approved/Passed February 2017 SERA Team invoice (in favor O’Connor, Melley, Gorthala 3/9/17)

February 2017

- Approved/passed Evaluation Plan Update (votes in favor 2/8/17: O’Connor, Dornbos, Gorthala)

January 2017 Interim votes and interim committee meetings – not final

- Votes in favor of evaluation plan (in favor O’Connor & Gorthala 1/9/17; Dornbos 1/12 – passed). 1/24 DEEP votes against.
- December 2016 minutes passed (In favor 1/9 O’Connor, Melley, Dornbos; Gorthala abstains / not present).