

## SESSION 4D

### WE ARE ALL IN THIS TOGETHER: CREATING CONSISTENCY IN EVALUATION AND REPORTING

*Moderator: William P. Saxonis, New York State Department of Public Service, Albany NY*

#### PAPERS:

##### **Developing State and National Evaluation Infrastructures-Guidance for the Challenges and Opportunities of EM&V**

Steven R. Schiller, Schiller Consulting, Inc., Piedmont, CA

Charles A. Goldman, Lawrence Berkeley National Laboratory, Berkeley, CA

##### **Driving to Consistent Evaluation Protocols in the U.S.: Are we There Yet? (...and if Not How Much Farther?)**

Niko Dietsch, US EPA, Washington DC

Dave Jacobson, National Grid, Waltham MA

Michael Li, US DOE, Washington DC

Julie Michals, NEEP, Lexington MA

Kevin Warren, Warren Engineering

##### **Different but the Same: Assessing the Statewide Standardization of Historically Independent Programs**

Doug Bruchs, The Cadmus Group, Inc. Portland, OR

Gail Azulay, NSTAR, Boston, MA

Robert Wirtshafter, Wirtshafter Associates, Inc., Rydal, PA

##### **A Common Evaluation Framework for Comparison of Smart Grid Program Impacts Across Utilities**

Stuart Schare, Navigant Consulting, Boulder, CO

Mike Sherman, Navigant Consulting, Burlington, MA

#### SESSION SUMMARY:

Consistency in evaluation and reporting protocols across state and utility jurisdictions can offer multiple advantages, but also can result in many complex challenges. This session explores this timely topic by highlighting experiences at the national, regional and state levels. The first two papers focus on “big picture” policy issues, the barriers, the advantages and challenges related to implementing a common evaluation framework and updates key developments in this area. Our third and fourth papers focus more on the actual implementation of standardized evaluation protocols for specific program portfolios.

Our first paper (Schiller, Goldman), summarizes three recent research projects involving the authors -- (1) a study that identified and analyzed challenges in improving and scaling up EM&V activities; (2) a scoping study that identified issues involved in developing a national efficiency EM&V standard; and (3) observations from providing technical assistance on EM&V issues to states ramping up energy efficiency programs. The authors also summarize the lessons learned from this research, presenting 13 EM&V issues for policy makers to consider.

The second paper (Dietsch, Jacobson, Li, Michals, Warren) looks at specific evaluation protocols designed to coordinate, standardize and increase the transparency of evaluation. The paper examines evaluation protocols from around the nation, some developed decades ago and others still under development, including the recent push for national standards. The paper attempts to identify commonalities across these efforts and pinpoint opportunities for greater coordination.

Our third paper (Bruchs, Azulay, Wirtshafter) focuses on the efforts of eight program administrators in Massachusetts to standardize their historically independent residential programs. An evaluation of this effort found some successes, but also substantial differences regarding data collection and management across program administrators. The paper offers a case study with valuable insights into the challenges of standardization from both an implementation and an evaluation perspective.

Our final paper (Schare, Sherman), looks at an effort to incorporate a common evaluation framework into four smart grid pilot programs operating in Massachusetts. The paper reviews the common data and evaluation approaches established for the pilots and analyzes the successes, challenges and limitations of the collaborative evaluation approach.