

The Uniform Methods Project: A Crash Course on Phase II Activities and Next Steps

Instructors: Michael Li, U.S. Department of Energy, Arlis Reynolds, Cadmus, and UMP Authors and Contributors

Monday, August 7 | 1:15 – 5:15pm

\$75 | Includes 1 break

Scope and Topics: Since 2011, the U.S. Department of Energy (DOE) has sponsored the Uniform Methods Project (UMP) to develop and maintain a national set of consensus-based protocols for estimating savings from energy efficiency programs. To date, the DOE has published fifteen protocols for energy efficiency measures (such as whole building retrofit or behavior programs) that make up the majority of savings in typical energy efficiency portfolios – and seven cross-cutting protocols for evaluation methods (such as sampling, surveys, and net-to-gross estimation). The protocols can be found on the Uniform Methods Project (UMP) website.

Since the last IEPEC conference in 2015, the Uniform Methods Project will have updated up to nine of its original protocols based new data collect or methods developed in recent years; completed its two most challenging new protocols for Combined Heat and Power (CHP) and Strategic Energy Management (SEM) programs; and begun development of its 24th protocol for a measure nominated by the evaluation community.

This half-day workshop will provide all energy efficiency program stakeholders a solid understanding of the scope and objectives of the Uniform Methods Project and insight into the most recent developments – including updates to highest-saving measures in EE portfolios (commercial and residential lighting). Attendees will participate in strategic discussions to increase awareness, adoptions, and usefulness of the protocols and contribute to the design to ongoing update and maintenance of existing protocols.

Workshop Format: This half-day workshop will include five parts:

- Brief introduction to the Uniform Methods Project goals and history;
- Presentation of the three protocols recently completed – CHP and SEM;
- Interactive discussions on awareness and adoption of UMP protocols;
- Lightning presentations of additional or revisions to up to nine existing protocols, including measures that have big impacts on EE portfolios; and
- Interactive discussion on strategies to maintain UMP protocols, including soliciting feedback and updating the protocols at appropriate frequencies.

Level of Experience: The UMP team conducted similar workshops at the two previous IEPEC conferences (Chicago in 2013 and Long Beach in 2015) to discuss the current project status, topics developed since the previous conference, and future direction of the project. The presenters both participated in the previous workshop in Long Beach 2015, have participated in multiple presentations about the Uniform Methods Project, and are regular presenters at other conferences.

Intended Audience: This workshop is intended for all stakeholders in energy-efficiency EM&V regardless of their familiarity with the Uniform Methods Project, but attendees should have some familiarity with basic evaluation methods and purpose.

The Uniform Methods Project is applicable to any stakeholder interested in understanding:

- Efforts to develop national protocols for methods to verify energy-efficiency resources;
- The latest developments in the Uniform Methods Project, including new protocols and recent updates to existing protocols;
- Current awareness and adoption levels of UMP protocols;
- Efforts and requirements to maintain current protocols and maintain or increase relevance of the UMP protocols in an evolving industry.

Learning Objectives: Workshop attendees will learn the following:

- Objectives, history, and scope of the Uniform Methods Project;
- Recently-developed UMP method for evaluating SEM programs;
- Recently-developed UMP method for evaluating CHP programs;
- In-progress development of a new (TBD) protocol;
- Recent Additions and revisions for up to nine original protocols, including measures that make up a majority of savings in typical EE portfolios; and
- Existing awareness and adoptions levels and efforts to improve both.

Workshop attendees will have opportunities to ask questions of authors/contributors of completed protocols, provide input on the in-progress protocol, and also participate in strategic discussions to increase awareness, adoptions, and usefulness of the protocols and contribute to the design to ongoing update and maintenance of existing protocols.

About the Instructors:



Michael Li, Senior Policy Advisor, U.S. Department of Energy

Michael Li is a senior policy advisor in the Office of Energy Efficiency and Renewable Energy. Mr. Li works on a variety of energy efficiency issues primarily focused on evaluation, measurement, and verification, data access and privacy, state policy and behavior based efficiency. Mr. Li has also worked in the Office of Electricity and the Office of the Secretary while at DOE.

Prior to joining DOE, Mr. Li was a senior policy advisor on climate change at the British Embassy in Washington and served as the chief of staff at the Maryland Energy Administration. He was a key author of many of Maryland's landmark energy policies, including Maryland's renewable portfolio standard and its statewide energy efficiency goal.



Arlis Reynolds, Principal, Cadmus

Arlis Reynolds is a principal in Cadmus' Energy Services Division and provides evaluation, measurement, and verification (EM&V) expertise to stakeholders in the utility, government, non-profit, and private sectors. Ms. Reynolds designs evaluations to efficiently meet project objectives and skillfully communicates results to a variety of audiences including program managers, evaluation managers, technical assistance engineers, and third-party contractors.

During her career, Ms. Reynolds has provided technical oversight for impact evaluations in the residential and commercial sectors, conducted on-site inspections and analysis for complex energy-efficiency projects, performed commercial building energy-efficiency audits, and led development of technical reference manuals.

Before joining Cadmus, Ms. Reynolds was a senior analyst in the Energy Efficiency Evaluation and Policy group at National Grid. Her key responsibilities were managing impact and process evaluations of energy-efficiency projects, developing the first statewide TRMs for Massachusetts and Rhode Island, and supporting development for the program tracking database. Ms. Reynolds holds a B.S. in Mechanical Engineering from the Massachusetts Institute of Technology.

AGENDA

Topic	Minutes	Description
Introduction	15	<p><i>Led by Mike Li, US DOE</i></p> <p>The UMP project team will introduce the Uniform Method Project (UMP) including a brief history of the project, activities and accomplishments to date, and results from years of tracking use of the protocols by different stakeholder groups. This will likely include a discussion of the use of UMP within the context of a new federal administration and among the evolving efforts for standardizing and documenting EM&V methods and EM&V certification.</p>
Present New Protocols	45	<p><i>Presentations, Led by UMP Authors and Contributors</i></p> <p>UMP Authors and Contributors will present the two new protocols developed since the last IEPEC conference in 2015, and introduce the methods and ongoing discussion regarding the new protocol in development. These include:</p> <ol style="list-style-type: none"> 1. Combined Heat and Power 2. Strategic Energy Management 3. New Protocol TBD
Awareness and Adoption	30	<p><i>Interactive Discussion, Led by Arlis Reynolds, Cadmus</i></p> <p>The UMP team will discuss the project goals around awareness and adoption of UMP protocols, including results of a recent awareness study and a detailed summary of the regions where UMP protocols are currently in use or not.</p> <p>Workshop attendees will participate in a brainstorm and discussion about how to increase both awareness and adoption of the UMP protocols, including the requirements and challenges for adoption of the protocols.</p>
BREAK	10	<i>BREAK</i>
Updated Protocols	90	<p><i>Presentations, Led by UMP Authors and Contributors</i></p> <p>UMP authors and contributors will discuss revisions and additions to protocols for the most common energy efficiency measures and crosscutting topics. The presenters will discuss the feedback received regarding needed updates, the changes made to the protocols, and any significant outstanding discussions regarding the protocol topic.</p> <p>The measures to be discussed include:</p> <ul style="list-style-type: none"> • Commercial and Industrial Lighting • Residential Lighting • Residential and Commercial Unitary HVAC • Refrigerator Recycling • Residential Behavior • Whole Building Retrofit • Compressed Air <p>The cross-cutting topics to be discussed include:</p> <ul style="list-style-type: none"> • Estimating Net Savings: Common Practices • Peak Demand and Time-Differentiated Energy Savings
BREAK	10	<i>BREAK</i>

Future Updates and Process	25	<p><i>Interactive Discussion; Led by Project Manager Arlis Reynolds</i></p> <p>The UMP team will discuss the approach used for the first round of updated protocols (presented above) and solicit feedback from the authors and contributors who participated in that first round to discuss the process, challenges, and any improvements.</p> <p>Workshop attendees will participate in a brainstorm and discussion about the best methods for soliciting continuous feedback and updating the protocols to incorporate feedback, new findings, or evolving methods.</p>
Summary and UMP Next Steps	15	<p><i>Led by Mike Li, US DOE and Arlis Reynolds, Cadmus</i></p> <p>The UMP Project team will review the outcomes of the workshop discussions (regarding awareness, adoption, and updated) and discuss the planned or potential next steps for the UMP project.</p>