

CREATING THE FUTURE – MAKING EVALUATION COUNT

Moderator: Carol White, National Grid

PAPERS *(in order of appearance)*:

When Failure Can Be a Resounding Success: The Demonstration Project

Arlis Reynolds, Cadmus, Irvine, CA

Keith Miller, National Grid, Waltham, MA

Kimberly Crossman, National Grid, Waltham, MA

Evaluation and Regulatory Teamwork: Closing the Custom M&V Gap

Kris Bradley, Itron, Inc., Oakland, CA

Kay Hardy, California Public Utility Commission, San Francisco, CA

Peter Lai, California Public Utility Commission, Los Angeles, CA

How to Show the Implementer What to Do Next

Erik Mellen, Eversource, Westwood, Massachusetts

Susan Haselhorst, ERS, North Andover, Massachusetts

Isaac Wainstein, ERS, New York, New York

Quality is Job #1

Bill Saxonis, New York State Department of Public Service, Albany, NY

SESSION SUMMARY:

Evaluation studies often get used more as doorstops than as tools for improvement. At this session, you will learn how timely and actionable evaluation results contributed to program improvements, including increased data reliability and better program designs. We also will explore how to make future evaluations more responsive to the needs of program implementers and policy makers.

Reynolds et al focus on the important role of evaluation when conducting demonstration projects. Examples from several years of technology demonstrations are used to discuss key components of a successful demonstration project, including study designs, sampling strategies, participant recruitment, data collection approaches, and methods for integrating evaluation, measurement, and verification (EM&V) activities into program planning and implementation.

Bradley et al examine an on-going multi-year improvement process for custom energy efficiency projects and programs targeted at the non-residential sector. The process uses a combination of policy guidelines, ex-ante review, program requirements, ex-post evaluation, and QA/QC procedures to improve both custom impact estimates and custom incentive programs.

Mellen et al present a heuristic approach called the “allocation method” for systematically capturing the discrepancies revealed in the M&V process, aggregating the results, and reporting findings in a manner that can guide implementer action. This is followed by a presentation of a discrepancy summary developed using the cascade method, a more computationally straightforward and traditional method, but one that can lead to incorrect aggregate results. Finally, the authors describe the design elements of the allocation method, including an analytical framework, an approach to systematic site characterization, and a method for synthesizing the results, all with an emphasis on making results actionable for the implementer.

Saxonis focuses on the importance of quality evaluation to the future of energy efficiency programs and offers eight lessons learned for improving evaluation quality based on the experience of

reviewing hundreds of evaluation reports. Bill's mission is not to critique, rank or debate the performance of specific Program Administrators, evaluation studies or evaluation firms, but rather to provide a holistic view, emphasizing lessons learned for improving evaluation that will find wide applicability to both the public and private sector energy efficiency community.