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Presentation Title: Why Didn't You Tell Me Earlier? A New Way for Evaluation to Inform Implementation Before Project Approval

Abstract: The determination of custom project baselines can be a difficult balance between the customer's specific situation and what's known about common practice in the industry. Often an implementer in the thick of a program year is directed to determine the baseline based on customer input and their own expertise in the industry. While made in good faith and with sound logic, the site-by-site nature of implementation baseline selection can lead to different outcomes depending on who the project engineer is and who at the facility they work with. Evaluators, who may revisit the project several years later, are faced with the same balancing act, but also tasked with ensuring uniformity and consistency across the sampled projects.

Prescriptive measures often rely on an annual Technical Reference Manual (TRM) for baseline and savings information, serving the implementer's need for predictable savings and the regulator's need for accurate savings by providing a common vetted savings reference. Custom projects have no such reliable reference material for any party to rely on, leading to inconsistencies in baseline selection and evaluation risk. To address this issue, the Massachusetts stakeholders are in the process of compiling information and creating a "Baseline Repository" that is intended to serve as a reference, like a TRM, but strictly for measure baselines. The components of the envisioned process include a baseline repository database (a draft is in review) and procedures governing updating of the database, baseline expiration dates, and similar provisions. The repository is produced by evaluators in the state, but will be made available to implementers as well, enabling baseline consistency from project development all the way to evaluation. The repository is expected to be available to implementers and operational in 2019.

This paper explores the repository creation and baseline management process which seeks to aid implementers in defining accurate standard practice baselines, provide guidance where standard practice baselines are not available or are unclear, and in some cases provide guidance on interpreting code requirements. The repository is intended to reduce project evaluation risk by providing high quality evaluation baselines while the project is under development. To populate the repository, evaluators have performed secondary research and compiled information from other available sources for an initial set of 140 measures. Measure guidance in the repository may range from specific ISP recommendations to acknowledgement that site specific information must be used for the technology baseline. The team has created a variety of statuses available for each measure that indicates the level of information available for each.

The paper will discuss not only the process of creation, but challenges and successes associated with creating the repository. The tool must be structured enough to be useful, but also flexible enough to acknowledge that there may be individual project needs that cannot be captured through industry standard practice. Meeting the needs of the broad range of target audiences is an exciting challenge that encourages collaboration between all parties, ultimately providing clarity and efficiency for projects from implementation all the way through evaluation.