Making BIG plans: Collaborative Research Planning

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2019 IEPEC, Denver
What’s in Store?

- Structure of the Massachusetts Evaluation Framework
- Key Ingredients of Successful Collaboration
- What Collaboration Has to Offer...

... And What it Doesn’t!

Image: Michael J. Ermarth
Thank you co-authors!

- Ralph Prahl, Prahl & Associates
- Lauren Gage, Apex Analytics
- Gail Azulay, Cape Light Compact
- Monica Cohen, Columbia Gas
Dimensions of EM&V Structure

**EM&V Administration**
- PA Administered
- Third-Party Administered
- Regulator Administered

**EM&V Oversight**
- PA Administered
- Third-Party Administered
- Regulator Administered
Pre-2010 MA EM&V Framework

PAs operated independently in the previous framework
Green Communities Act (GCA) of 2008

- Required all cost-effective EE -- Greatly increased the scale of energy efficiency programs in MA
- Created statewide, collaborative programs
- Increased program and EM&V spending

2019 Program Budget: $837 million
2019 EM&V Budget: $23 million
Considerations: EM&V Administration and Oversight

- PAs have advantages in admin
- Statewide programs don’t fit existing framework
- Conflict of Interest
2009 MA EM&V Resolution (Framework)

Goal is Consensus

PAs Administer EM&V

Appeals Process

Inherent Flexibility

EM&V Framework

Statewide EM&V Focus with Flexibility for PA-Specific Studies

EEAC Oversight with Final Decision-making Authority

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EEAC Oversight with Final Decision-making Authority
Current MA EM&V Framework

Oversight
- DPU and DOER
- EEAC and its delegates: EEAC Evaluation Consultants

Evaluation Management Committee
- C&I Research Area
  - Impact: Study 1, Study 2
  - Process: Study 1, Study 2

- Residential Research Area
  - HVAC: Study 1, Study 2
  - Products: Study 1, Study 2

- Cross-cutting Research Area
  - Non-Energy Impacts: Study 1, Study 2
  - Market Effects: Study 1, Study 2
Collaboration is Worth the Effort…

Multiple Perspectives

Sharing of Effort

1. Multiple Perspectives
2. Increasing Engagement
3. Minimizing Traditional Regulatory Processes
4. Sharing of Effort
But It’s Not Easy

Collaboration Requires
Significant Staff Resources

Collaboration Requires
Time

Collaboration Requires
Communication

Collaboration Can
Require Somewhat
More Money
Teamwork & relationship building are essential
- EMC meets monthly and in-person

Collaboration occurs at many levels
- Among PAs, among committees, and within PAs
Key Ingredient #2: Well-Defined Roles & Responsibilities

- Well-defined structure of roles and responsibilities
- EMC, committees have PA chairs
- Logistical support
Key Ingredient #3: Give Subcommittees Autonomy

Autonomy on studies, funding, deliverables, etc.

EEAC consultants have rep on every subcommittee

Issues raised to EMC if not resolved
A Few More Points

- Anticipate Differences in Interests
  - PAs and EEAC Consultants
  - Large and small PAs
  - Electric and gas PAs

- Finding Balance is an On-going Process
In Summary

- Collaboration is possible
- Collaboration is worth the effort
  - Improved research quality
  - Improved buy-in of results from stakeholders
  - Better offerings for program participants
- Successful collaboration requires many elements
  - Relationship building & communication
  - A balance of structure and flexibility
  - Willingness to compromise among all stakeholders
Thank you
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