

Making BIG plans: Collaborative Research Planning



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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 Prael, Prael & Associates*
- *Lauren Gage, Apex Analytics*
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EM&V Administration

- PA Administered
- Third-Party Administered
- Regulator Administered



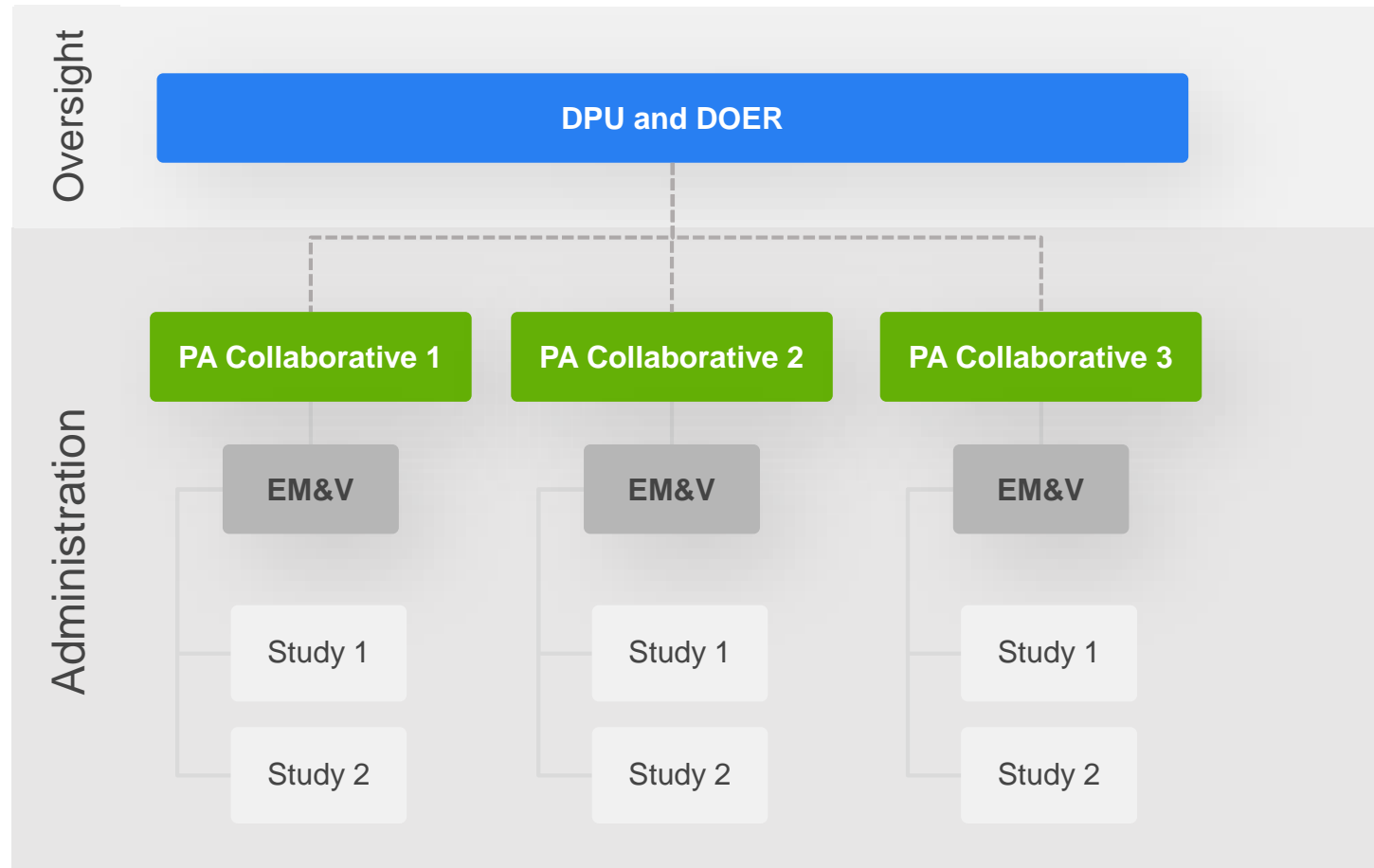
EM&V Oversight

- 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



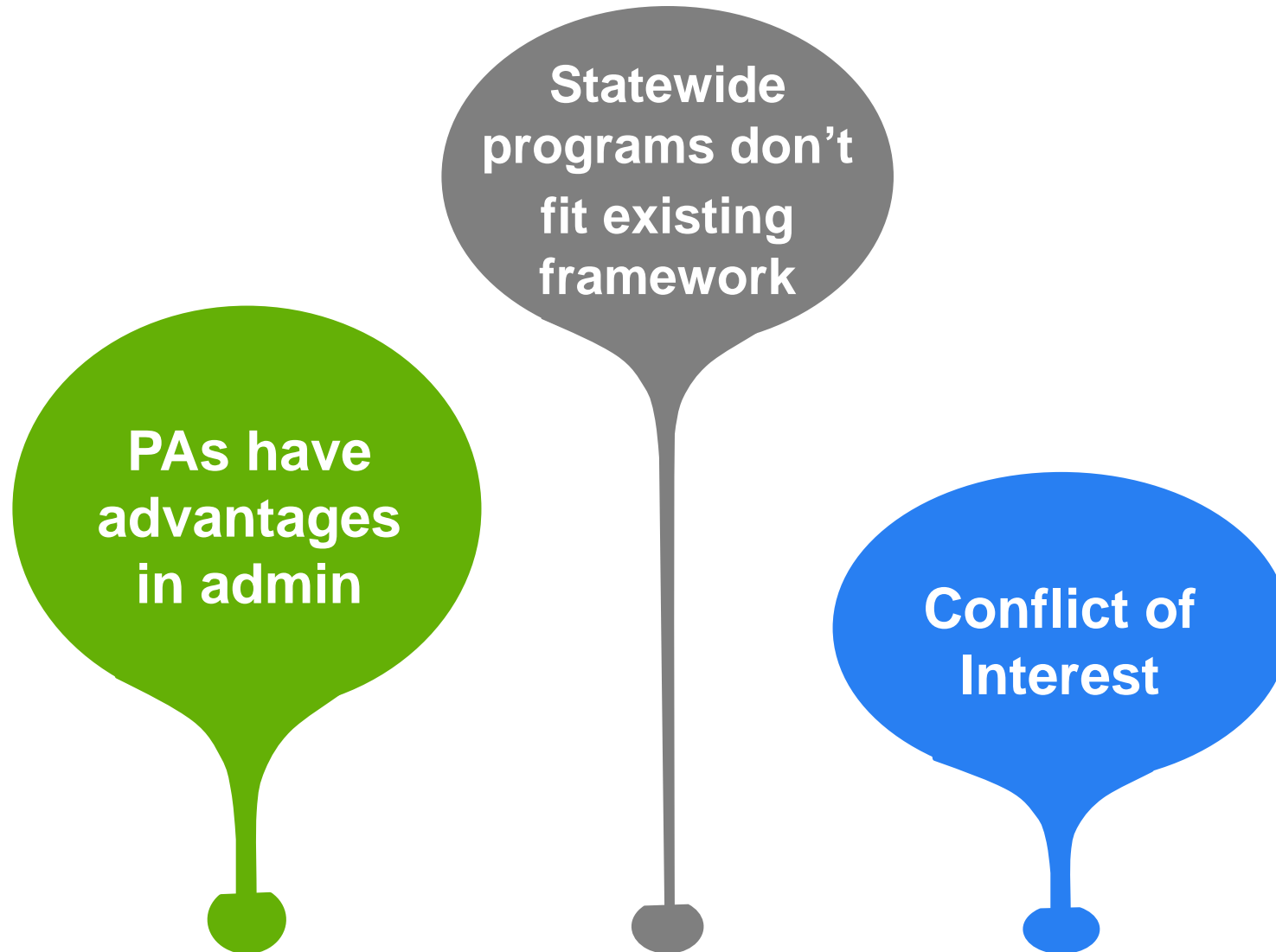
2019 Program Budget



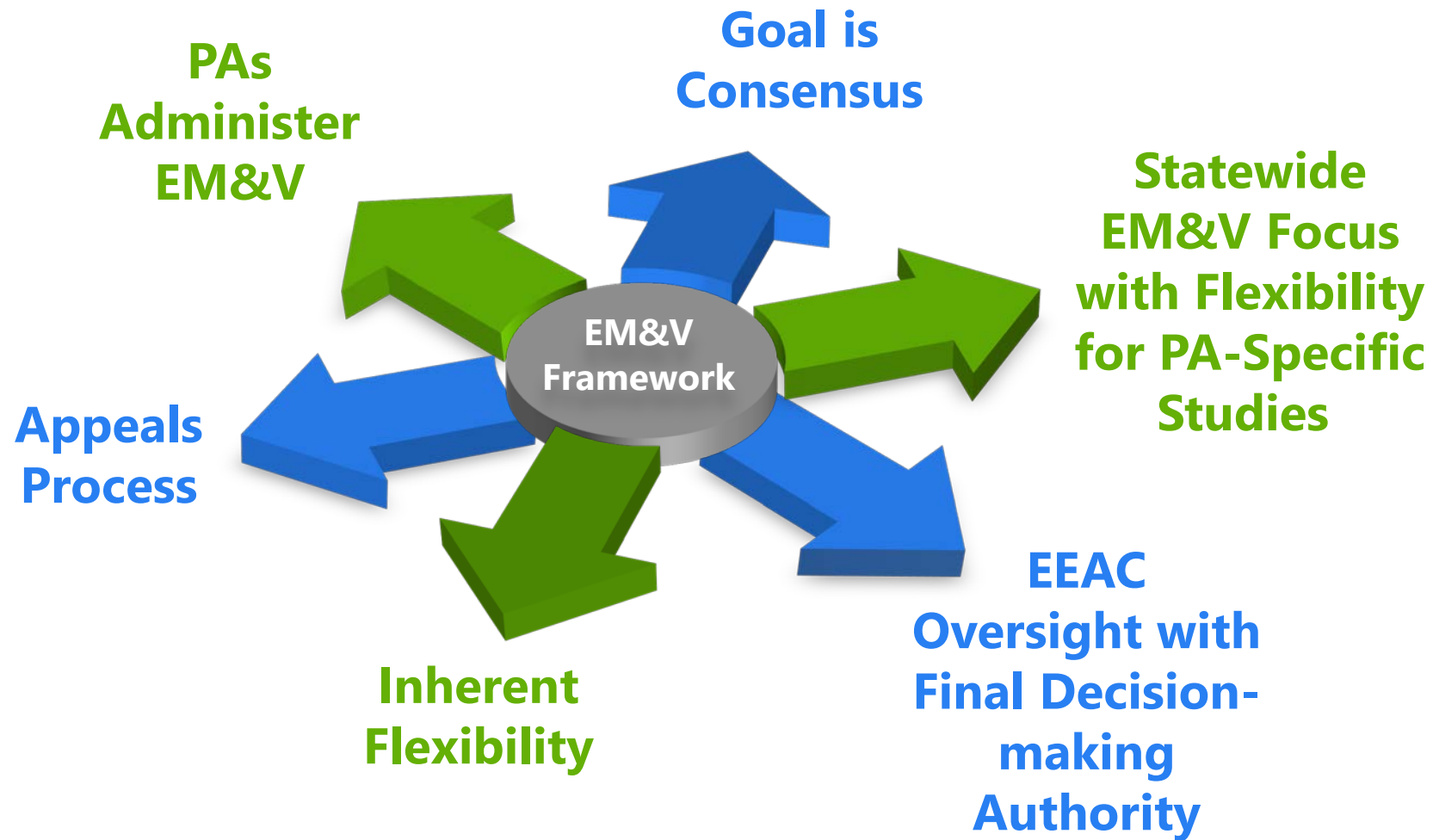
2019 EM&V Budget



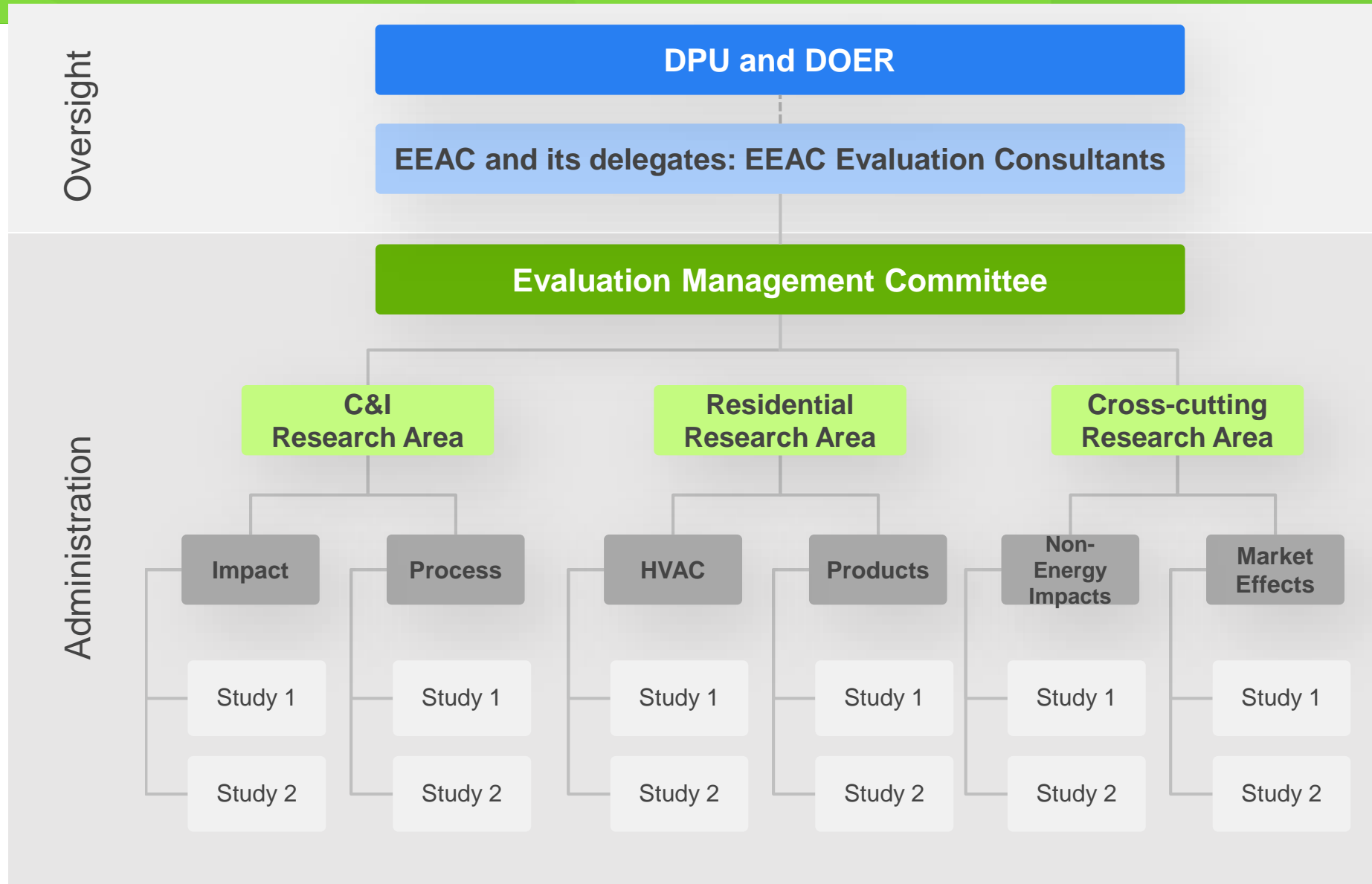
Considerations: EM&V Administration and Oversight



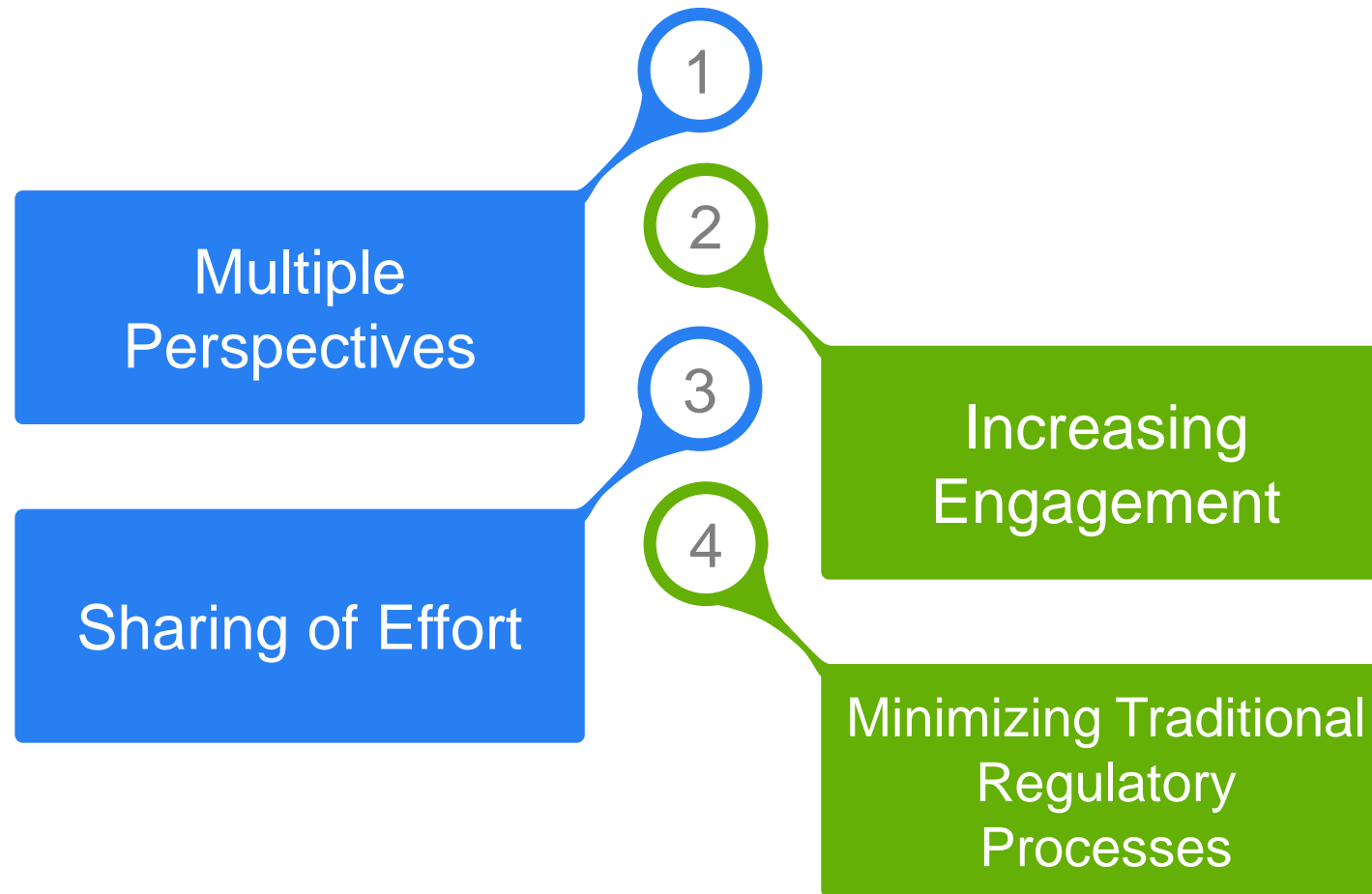
2009 MA EM&V Resolution (Framework)



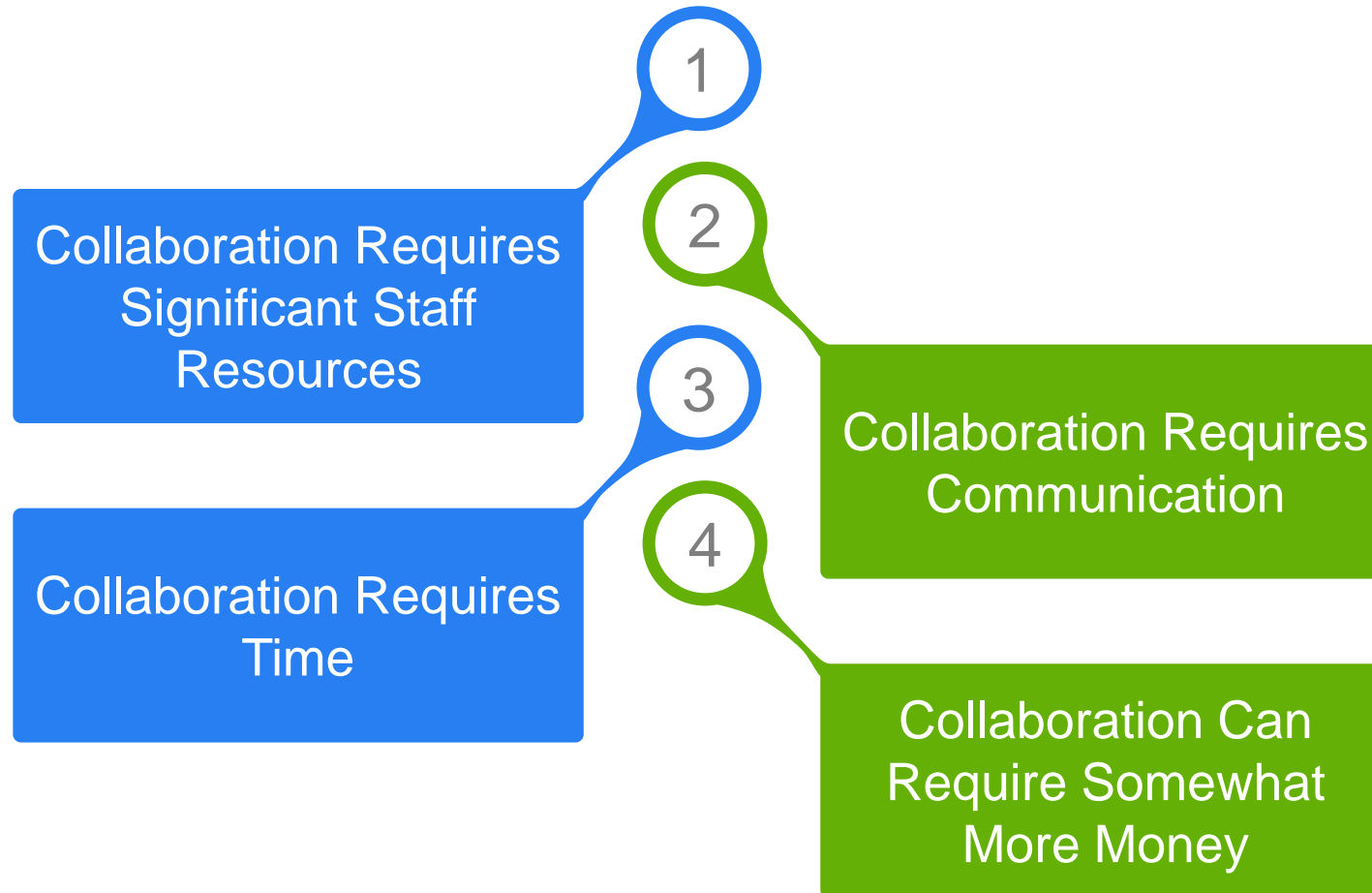
Current MA EM&V Framework



Collaboration is Worth the Effort...



But It's Not Easy



Key Ingredient #1: Relationships

- Teamwork & relationship building are essential
 - EMC meets monthly and in-person
- Collaboration occurs at many levels
 - Among PAs, among committees, and within PAs



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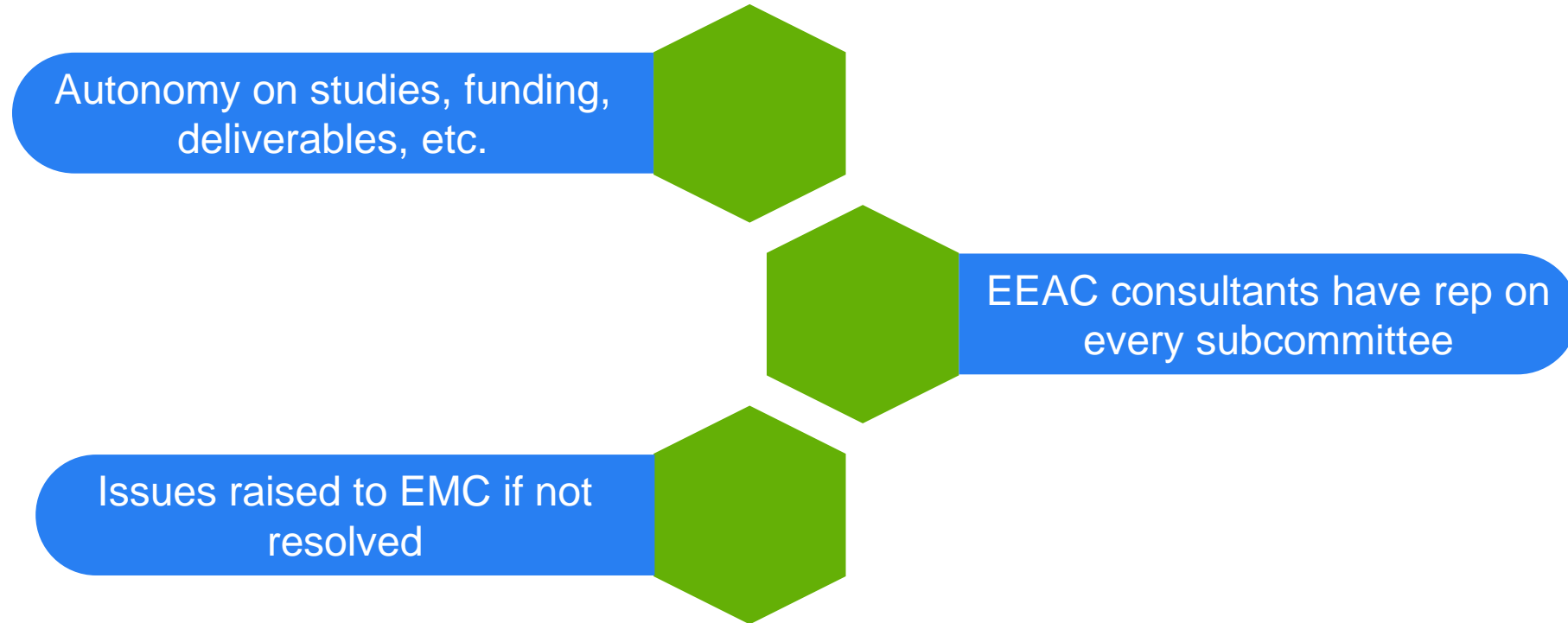


Key Ingredient #2: Well-Defined Roles & Responsibilities

- Well-defined structure of roles and responsibilities
- EMC, committees have PA chairs
- Logistical support



Key Ingredient #3: Give Subcommittees Autonomy



- Anticipate Differences in Interests
 - PAs and EEAC Consultants
 - Large and small PAs
 - Electric and gas PAs
- Finding Balance is an On-going Process



- 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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