

Title: Uniform Methods Project Steering Committee Meeting

Date and Time: September 11, 2012, 1:00-2:30 PM

Purpose: To discuss the overview of comments received, and responses from the technical team and the Steering Committee feedback on non-technical/policy-related comments.

Attendees

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| Daniel Beckley | Mary Ann Ralls |
| Keith Dennis | Chuck Rea |
| Nikolaas Dietsch | Phyllis Reha |
| Tina Jayaweera | Alex Rekkas |
| Chuck Kurnik | Amy Royden-Bloom |
| Mike Li | Steve Schiller |
| Julie Michals | Nancy Seidman |
| William Miller | Rodney Sobin |
| William Newbold | |

- Comment overview – statistics
- Bill Miller – KEMA has large number of comments; are they worried about UMP? Is there any more detail available on these comments?
- SC Member – I wonder whether generally the nature of the comments is technical, in disagreement, in agreement, higher level, etc.? Some general feedback would be helpful.
- Chuck – Next slide shows general themes of comments.
- SC Member – Were the CEE comments from the whole organization? CEE would generally not provide comments unless the executives are on board.
- SC Member – CEE has an evaluation committee; I know several people contributed to the comments provided.
- SC Member – A comment I’ve heard from several people is what is the intent of the protocols.
- Tina – That gets to the scope of the protocols. There was some uncertainty as to what the purpose is and some comments suggest the protocols do not go deep enough. Others commented that the level of scope was good, more introductory, and useful for people who don’t have vast technical knowledge.
- Chuck – What have other SC members heard about protocol? Anything else?
- SC Member – I sent the protocol to review in June and did not receive questions back from members.
- SC Member – I wanted to note that as much as we circulated these in the Forum, we plan to bring final version back to Forum members for consideration to adopt as guidance document. Folks may look at this the same way they look at materials we have developed – some of which is covered in the introduction.
- Bill Miller – Mike Li gave a presentation at ACEEE on Thursday morning, about ¾ was used to describe UMP. Some discussion afterwards, many people in the community were seeing this for the first time. The question of “why” came up and how a uniform set of methods would work if

each program is a unique, special case. Mike described the context and the reasoning behind UMP. In the afternoon, Mike, Carla, and I (Bill) held an informal session with more dialogue, some good communication there in terms of what is the context and rationale.

- SC Member – Mike gave a presentation for the c-action committee (?), it has gone out to a broader audience.
- Chuck – Continuing with comments discussion. One note that I would like to make, after we scheduled this call, we realized that we should have invited the TEs as well. Over the next couple of weeks, we'll be working with the TE group. Opened up general comments for discussion.
- SC Member – Re: the suggestion that a program evaluation plan should be designed with program theory and logic. Need for coordination with program planning and evaluation folks. Feedback to help inform program and improve program design. I can see why someone would say you can't look at evaluation in isolation, but at the same time, the initial scope was to develop methods for evaluation. Perhaps there could be more thought given to the methods and the type of program, reference other material that would be useful to use in evaluation. May include the c-action (?) information guide and other sources that may be useful. Thinking about how to recognize the importance of this comment, while not agreeing that we should expand the scope – it would then become too large and broad.
- SC Member – I agree with Julie. You need to express in the introduction what the UMP's limitations are. The lack of lifecycle savings estimates and the focus on first year savings is another issue. If you aren't going to change the protocols, then it's important to say we didn't do it. Measurement and verification protocols are very specific. There is a disconnect between what the protocols can be used for and what they are.
- SC Member – The scope that was originally intended by DOE was simply to make numbers more comparable from jurisdiction to jurisdiction. Considering that, we have achieved that and these comments are going beyond that. We need to remember what we were trying to do.
- SC Member – We don't discuss baseline issues. For programs in the U.S., a majority of savings are determined using deemed savings values and those aren't addressed in UMP.
- Bill Miller – About a year and a half ago, as EERS' spread and became national, there was an emphasis on savings component, which gave rise to narrow scope of UMP. This project was an effort to see where we were in terms of accommodating savings calculations or to see where we need more work. I'm pleased as to where the UMP is going. In our discussion we should not lose sight of the fact that, in the future, there may be a more national reason to expand savings component.
- SC Member – The comments we've received may help identify what has and has not been covered and what the SC may prioritize as a subsequent phase. There was some discussion on providing guidance for developing deemed savings values.
- SC Member – We have report we did with GDS back in May, that report contained resources (TRMs, deemed savings resources).
- Bill Miller – Back to the deemed issue – there has been a lot of interest in deemed savings. We felt it was more productive to focus on methods. Once something is calculated with UMP, that calculation could be used on forward-looking basis, as deemed value.

- Chuck – Question of small utilities.
- SC Member – A number of options for small utilities.
- SC Member – That doesn't only apply to small utilities. It applies to any situation where budgets are tight, where expectations are small, with well-established programs, etc. Lots of reasons why various levels of impact evaluations take place. PG&E, for example: 73.1% of PG&E savings come from DEER database. Wouldn't want to necessary imply that everyone else needs to do these EM&V activities.
- SC Member – We never intended that our report be included verbatim into the UMP, what's going to be the practice for noting resources that are available that have been used in this process?
- Chuck – Julie made a similar point.
- Tina – Are you looking at the different perspectives of the protocols?
- SC Member – Chuck addressed it. We can say, here are the resources you can use.
- SC Member – What happens if you have two technical experts who differ on approach?
- Chuck – That's where the TAG comes in. We haven't come across that, but if we do, we would consult with them.
- Tina – We would also acknowledge that there are alternate thoughts on method.
- Hossein – Steve raised the question of why. Should we expand on "why" and "why now"?
- Bill Miller – I can get the slides that Mike used at ACEEE. It will have a section that explains the rationale.
- Hossein – The section on resource constraints, did it address issue adequately. I was wondering if the language we have added addressed NRECA concerns.
- SC Member – Yes, it addresses concerns. APPCA (?) submitted concerns.
- SC Member – So you will be compiling comments so we can glance through them?
- Steve – How about the introduction? I looked at the version you sent. One of the important points (3rd paragraph), emphasizes that this is a way to do it, not the way to do it. I think one of the greatest values of UMP is provide a resource for people to see examples. Discussion about resource constraints.
- SC Member – My impression of the introduction was that it ended without discussing how to use the protocols. It ended on a discussion of resource constraints, which is probably not the best place to end.
- Hossein – We talked about the issue of deemed savings. Lots of money required to develop deemed savings. For example, in California utilities use deemed savings values to design programs and also use for initial reporting. All the programs are evaluated. The methods that they need to verify savings are consistent with methods that are being described in these protocols. We need more guidance for how to present the idea of deemed savings. This gets to the context of what these protocols are for. To some extent, using protocols like this is a way many of these deemed savings have been developed.
- SC Member – Hossein brings up a fundamental point. A user of this report should understand up front how the report fits in the larger scheme of impact evaluation. Reiterate what are the ways that savings estimates are developed. What this document focuses on – guidance on M&V piece

of it. Maybe a schematic would be helpful. People sometimes don't realize how much goes into developing deemed savings.

- SC Member – On page 7 of the intro, the last paragraph, “deemed savings may be adjusted...” That sentence describes that changes may occur.