NTAG Meeting Notes
3/28/2013

Attendance list:

- Dan Violette
- Pam Rathbun
- Dick Spellman
- Tom Eckman
- Mike Rufo
- Terry Fry
- Steve Schiller
- Mary Sutter
- Elizabeth Titus
- Chuck Kurnik
- Mike Li
- Tina Jayaweera
- Hossein Haeri
- Alex Rekkas

- Chapter will probably be around 30 pages
- Defining problem is baseline
- Dick Spellman (?) – Lot of previous sources on NTG, are they all considered equivalent sources?
- Dan Violette – One key objective of the chapter is to provide guidance for people who are looking for other studies to examine. Chapter cannot include all literature, but will be more of a cross-section. We will try to include detailed examples with actual questions asked (like in persistence chapter).
- Steve Schiller – Agree on this approach. Providing more guidance to practitioners on common methodologies would be helpful. UMP started with the objective of having a recommended methodology for a particular measure for more consistency. In existing protocols, said that this is a common approach that people can start with. This is more difficult with net savings. General agreement about what gross savings are. What net savings are depends on factors included, timeframe, etc. With that long intro, is the document going to be recommending certain approaches to net savings?
- Dan – Try to break it up into program type (depends on available data), talk about pros and cons of approach. Try to set out something that should be considered by the people doing the research. May opt in going into another direction, but we're trying to do a little bit more than just putting out all the options, saying that they're equal.
- Mike Li – The end goal would be akin to what we have for Phase I. What is feasible? How close to that can we get? We are leaving it up to working group to decide. It also depends on existing literature (don't want to repeat what's already out there). What are the different use cases?
- Dan – Will be humble in recommendations, emphasize that they are voluntary. We can make contribution that isn't really out there right now.
- Elizabeth Titus – Met with NEEP subcommittee on NTG, backed up her comments on outline.
- Dan – We should begin with definitions. We want to come up with definitions that have been used by the industry. We should talk about different usages of NTG. Don't plan on doing inventory about what is used in different states, might get that from NEEP.

- Estimating an appropriate baseline. Putting that section at the beginning simplifies the problem. Freeriders is a biased baseline. Spillover is similar issue. Market effects are a little more nuanced.
- Steve – One thing I've seen is the definition of the common practice baseline, which has found overlap with determining freeridership. If you have a common practice baseline, there's a degree of net savings you're calculating.
- Dan – If you do have the right baseline, those people would be included. I would appreciate getting references for us to include.
- Mike Rufo – We deal with that in custom impact work in CA. I'm not sure you can get to the right baseline. You will also end up with a probabilistic baseline. Might be helpful to parse out different baselines as you move across the continuum of market share. When you talk about technology baseline, you need to grapple with market share issues. Another comment: the point about time and maturity is important. Must think about long-term market effects (bullet a under Time).
- Tom Eckman – Agree it's important to begin with definitions.
- Dan – This will blend in nicely with Steve's chapter.
- Strategies for NTG Measurement. We will change the term measurement. Some of the issues will be defined by generic category. Will have a table with confounding factors.
- Hossein Haeri – Another cross-cutting chapter that discusses biases associated with self-report by Bob Baumgartner.
- Pam Rathbun – We had planned on looking at that and making sure we reference it.
- Tom – The difficulty of having people report on actions they would have took, but the measures wouldn't have been there without historical investments. For example, CFLs wouldn't be possible without previous buy-in.
- Dan – That's an important issue.
- Controlled experiments and quasi-experimental design. Could be two sections.
- Mary Sutter – Positivist viewpoint. Needs to have regular data and a lot of data. Works for certain types of programs and not with others. Realist perspective, real causal mechanism. Deemed savings is political issue.
- Dan – We'll keep that in mind. We do have all these things in there.
- Mary – Just suggested rearrangement of what you already have. Have you considered triangulation approach? Move away from NTG to evaluate programs? Value of program not simply net?
- Pam – Attributes meaning other benefits?
- Steve – NTG is a 2010 issue. What's the 2015 issue? NTG associated with attribution and utility run. Looking at resource planning and climate-based concern, is net savings the right metric?
- Dan – If you're looking at carbon issues or resource planning, one of those attributes has to be what has been accomplished by the program. If not, you don't have one of the first building blocks to go into multiple attribute approach. I think it is necessary, but not necessarily sufficient.

- Mike Li – What is the future paradigm? But is this the right venue to address that? Or more appropriate for a white paper? This is supposed to be a little more specific or technical in nature.
- Steve – In the CEE-Action guide, I was putting together a snapshot, which I didn't think was sufficient. I'm a little sensitive to it because I thought it was a shortcoming of the document.
- Dan – Survey-based approaches. We can triangulation from surveys and also from surveys and other methods.
- Regression/econometric analysis. Subset of very important choices.
- Mary – Does regression underestimate slightly nonparticipant spillover?
- Dan – Yes, one of the issues.
- We aren't sure that NTG with dynamic baseline should be a section. Need to keep in mind that the baseline we're using might need to be moving.
- Market sales data. Look at states without program and states with data.
- Hossein – It would be nice to have a matrix that lists metrics for practitioners to decide among them. We will also send you the section on whole-house measurement of gross savings. We need to make sure the sections cross-reference each other.
- Dan – We were planning on that.
- Top-down approach. For other studies, we replicated the models. Still lots of choices to make. Far from silver bullet. More work done on this in Canada vs. the U.S.
- Mike Rufo – Piloted in CA.
- Dan – New approaches go through euphoric phase, but as you apply it, you become more realistic on the pros and cons of approach. Examples of where we got the data and replicated the model.
- Hossein – Surveys of trade allies and participant surveys and take average of results. Something we need to address.
- Dan – I think we should list a couple of ways of doing that.
- Structuring the approach. I was giving this a high priority. What do you think?
- Mike Rufo – I do see it coming up more, so I think it's worthwhile to have discussion about it.
- Mary – I agree
- Mike Rufo – I have some concerns, so I'll have an opportunity to express what I think.
- Dan – Some good examples that we can draw on.
- Deemed or stipulated NTG ratios. Value of information.
- Tom –Setting baselines with common practice as base, used in a few TRMs, stipulates NTG up front.
- Dan – Other methods. Stems from other industries and disciplines.
- Pam – Historical tracing, one paper from IEPEC.
- Dan – Even if it's in another discipline, I would be interested.
- Mary – Historical tracing in emerging technologies and R&D projects. I'll get that to you. I would also add the multiple case study approach. Using case studies to show causation. Doesn't get at causation in the exact same way used here.
- Dan – We can mention it and provide references to it.

- Dick – Are you going to discuss how the regulatory framework impacts how you use NTG ratios? If there are no repercussions, you might select one method.
- Mike Rufo – Good framing point to put in the beginning somewhere. The context of what purpose is something being measured for is often missed.
- Hossein – The NTG issue is really about attribution. The closest parallel is additionality in the context of carbon offsets.
- Dan – Europe refers to additionality in much the same way that we define net savings.
- Hossein – Some jurisdictions have not achieved their EEPS based on attribution. Important to identify good, sound practices.
- Dan – Steve wrote about this in CEE-Action chapter. Some of these portfolio goals are set in gross savings.
- Dick – Except when they have goals as gross and what you must report as net.
- Mary – Discussion on when to do NTG analysis? First or second year, for example?
- Dan – Some discussion in each of the methods. Issues in survey analysis that suggests you do certain surveys at certain points in time. Maybe this should be in the conclusion. Maybe up front we should put some of the discussion in, and say we'll discuss it further in the conclusion.
- Mary – It would fit in 2b.
- Tom – I think planning, design, and tracking all are good.
- Dan – Should we be doing this in real time as an ongoing part of data collection of the program? Just do this as part of the tracking system?
- Hossein – Similar to what is being done in Pennsylvania.