

	B	C	D	E	F	G	H	I	J	K	L
2	CT-EEB EVALUATION PROJECTS UPDATE -								PART I - MONTHLY STATUS SUMMARY		
3	1/10/22									Reports on tasks completed by Project Contractors	
4	Project (and last initial of consultant)	Description/Outcomes	Budget	Invoiced	% Spent	% Done	Are there Current Challenges / Concerns / Issues	Last Task Completed	Current task, status, expected finish date	Next step and its deadline	
62	C1901 - C&I Sector-Wide Process Evaluation (non-SBEA)	<i>This process evaluation will cover the portfolio of CT's C&I programs, largely focusing on non-SBEA programs. The study will explore key questions that cut across the C&I programs and provide actionable information that will increase program cost effectiveness, market penetration, depth and comprehensiveness of savings, customer equity, and optimization of program expenditures.</i>	\$668,355	\$785,000	117%	100%	None - project complete.	Final Report completed and submitted to EA Team on 12/7/21.	None - project complete.	None.	
63	C1906 SEM Design and Evaluation	<i>The C1906 project will focus on evaluating the Strategic Energy Management (SEM), a specific initiative of the Business and Energy Sustainability (BES) program to achieve energy and non-energy benefits. The Connecticut utilities currently do not claim savings from the SEM program; this project will primarily identify methods to estimate energy savings from the program from an evaluation perspective. Over the course of this study, the evaluation team will gather information about the current state of the SEM program and barriers to claiming savings, identify effective and cost-efficient methods for collecting the data for claiming defensible savings from SEM, research and advise on program processes to support the utilities in documenting and claiming savings from the initiative, and enable an eventual impact evaluation of the SEM initiative after methods to claim savings have been established.</i>	\$264,880	\$166,100	63%	55%	No	4/15/2021 - Present SEM Evaluation Methods Webinar	Process evaluation instrument development; January 7, 2021	Process evaluation instrument development; January 7, 2021	
64	C2014 C&I Lighting Saturation and Remaining Potential	<i>The primary objective of this study is to characterize the current status of the Connecticut C&I lighting market and then forecast the remaining potential for lighting programs. Phase 2 of this study is designed to better understand remaining potential in specific areas.</i>	\$400,000	\$145,000	36%	40%	Data request for lighting measure tracking data submitted on 12/7. Requested for 1/7	Phase 2 Kick off on 11/19/21	Survey guide development: draft on 1/10	Survey implementation (2/1/22-2/25/22)	
81	C1902 ECB NTG and Baseline	<i>This study integrates NTG and market baseline research and analysis components to support improved accuracy of gross and net savings estimates for the ECB program. The study also includes non-residential new construction code compliance and estimation of NTG values for the Upstream non-lighting program. The outcomes can then be used to inform future program changes to increase program attribution.</i>	\$680,000	\$548,830	81%	73%	None	Upstream NTG results presented to EA Team	Fielding cross-cutting market actor IDIs (Aug-Jan), fielding web-surveys for baseline component in Nov-Jan	Wrap up baseline surveys by end of Jan, code compliance analyses by end of mid-Jan, Reporting for upstream NTG (Jan)	
82	X1931-1 ISP Comm Boiler & Furnace Study	<i>Establish an Industry Standard Practice (ISP) baseline for boilers and furnaces in commercial buildings in CT.</i>	\$59,900	\$50,352	84%	95%	No	Resonse to comments 9/15/2021	Finalize report based on review draft comments	Finalize report based on review draft comments	

	B	C	D	E	F	G	H	I	J	K	L
2	CT-EEB EVALUATION PROJECTS UPDATE -								PART 1 - MONTHLY STATUS SUMMARY		
3	1/10/22									Reports on tasks completed by Project Contractors	
4	Project (and last initial of consultant)	Description/Outcomes	Budget	Invoiced	% Spent	% Done	Are there Current Challenges / Concerns / Issues	Last Task Completed	Current task, status, expected finish date	Next step and its deadline	
84	X1931-5 Comm Refrigeration Efficiency Update Study	<i>Update aggregate commercial refrigeration efficiency values through primary and secondary research (COP and ACOP). Recommend an approach to quantify HVAC interactive savings for measures with refrigeration savings.</i>	\$29,600	\$32,000	108%	85%	No	Data analysis on individual systems complete and discussed with the EA Team.	Aggregate analysis of data for final ACOP values.	Draft presentation of results to EA Team 10/11/21	
86	R1959 Single-Family Renovations & Additions Potential Analysis	<i>Market characterization, savings potential study, and program pilot process evaluation for single-family renovations and additions</i>	\$170,000	\$170,000	100%	100%	No, final study complete - distributed 11/22	Final report, Oct 2021.	N/A, complete.	N/A, complete.	
89	R1965 HP/HPWH Baseline and Potential Assessment	<i>The study will incorporate multiple primary and secondary data sources to estimate the size of the market in CT, including previous baseline studies, purchased sales data, as well as shipment data. The team will also solicit feedback from manufacturers, distributors, and installers through interviews and surveys to better understand the future of the market for heat pumps, as well as system configurations that are dominating the market. Finally, the team will perform cost effectiveness testing at the measure level, focusing on particular system configurations of interest.</i>	\$325,000	\$273,304	84%	90%	None	Presented recs and results PPT to stakeholders on 12/17.	Review draft in progress, to EA Team by end of January.	Review draft to EA Team by end of January	
91	R1982.HVAC/DHW Performance and Potential Evaluation	<i>R1982.Circuit-level monitoring of electric HVAC and DHW loads in single family homes. Data analysis to inform fuel use, seasonal efficiencies, and peak demand for HVAC and DHW equipment in single family Connecticut residences.</i>	\$1,015,000	\$526,000	52%	60%	Evergreen and Eversource have been emailing about additional emails and a second email blast (status TBD).	Initiated recruitment and the installation of monitoring equipment.	Recruitment and equipment installations; ongoing QC	Recruitment of sites, installation of equipment. Deadline is as soon as possible	
93	R2027 HP/HPWH Reliability	<i>A study looking at the reliability, satisfaction, and repair costs of HP/HPWH</i>	\$75,000	\$67,522	90%	95%	None	With R1965: Presented recs and results to Eval Committee and stakeholders 12/17.	With R1965: Submit review draft (with revisions to initial internal draft) to EA Team, Jan 2022	With R1965: Submit review draft (with revisions to initial internal draft) to EA Team, Jan 2022	
94	R1983 HES/HES-IE Impact and Process Evaluation	<i>The study will utilize multiple primary and secondary data sources to determine the gross and net energy savings associated with HES/HES-IE measures, as well as the effectiveness of the programs' delivery to residential customers in Connecticut. In addition to core impact (e.g., billing and engineering analysis) and process (e.g., interviews and survey) tasks, the study also includes a customer profiling effort that will combine program tracking, Census, and third-party data sources (where available) to identify geographic areas within the state that participate at higher- or lower-than-expected levels.</i>	\$890,000	\$711,321	80%	75%	Yes, we are awaiting one element from Eversource (in process and expected soon) and several from UI. We sent the EA Team an updated summary of our requests on 12/17; please see for more details.	Launched participant survey; completed ~90% completes as of 1/3	Surveys (finishing by late January), second wave of customer profiling insights (mid-January), as well as the billing analysis (elements we have data for in early January, rest as data are available).	Beside those in #15, the NTG results, which we've started analyzing using the survey completions to date	

	B	C	D	E	F	G	H	I	J	K	L
2	CT-EEB EVALUATION PROJECTS UPDATE -							Summ All SERA 21-010822from10-27	PART I - MONTHLY STATUS SUMMARY		
3	1/10/22									Reports on tasks completed by Project Contractors	
4	Project (and last initial of consultant)	Description/Outcomes	Budget	Invoiced	% Spent	% Done	Are there Current Challenges / Concerns / Issues	Last Task Completed	Current task, status, expected finish date	Next step and its deadline	
95	R2029 SF Weatherization Assessment and Update	<i>This study will provide an updated assessment of the state's progress toward its weatherization targets and will assess opportunities to revise the current draft weatherization standard.</i>	\$110,000	\$49,086	45%	8%	Developing project design. Also waiting on R1983 and additional program data from Eversource that includes pre/post weatherization R-value data, which was not provided as a part of R1983. Study did not include budget for a data request beyond what was requested through R1983 process, and data coming from that study has been delayed and is incomplete for R2029 purposes, which affects program design. Waiting for new additional data from utilities that can help address issues. Coordinating with DEEP process triggered change in project design which is not final; new study design will coordinate more with DEEP's weatherization standard update process. The study will assess weatherization progress, but one of the metrics is WAP data. WAP data from CRT were valuable, but they did not include address info, which is necessary. Tried negotiating with them to get unredacted version of database, but this is unlikely, and study will have to find new ways to move forward without complete database.	Additional data call with Eversource (9/2/2021) to figure out how HES data handles overlap with WAP program. Previously provided interim memo (2/17/2021) providing feedback on the DEEP draft weatherization metric memo, noting what metrics are reasonable and how they can be assessed as part of this study. Also responded to EA Team comments on that memo (3/27/2021). No further movement on CRT database.	Drafting project design, Jan 2022	Project design document, Jan 2022.	
96	R2120. Appliance Recycling Impact	<i>R2120. Study will 1) estimate gross and net savings from 2019 and 2020 recycling program; 2) explore optimal incentive levels; 3) estimate program impact on reclaimed materials (CFCs, plastics, etc.)</i>	\$35,000	\$35,000	100%	100%	None	Revised draft final incentives memo per public review on Dec. 27.	Finalize after receiving approval from EA Team	Finalize after receiving approval from EA Team	
98	X1939 Early Retirement	<i>This is an evaluation of early retirement programs in CT. In addition to evaluating the CT programs directly, it also includes secondary research and interviews on other programs throughout the country to provide program design and process guidance.</i>	\$284,543	\$172,012	60%	50%	N/A	Phase 1 final report	Phase 2 Impact Evaluation of ER programs	Updated data request to UI, January 2022	
100	CT X2022 - Education and Engagement Evaluation	<i>We are conducting an evaluation of the Workforce Development, Education, and Community Outreach initiatives of Energize CT. The evaluation will include cataloging the education, training, and engagement activities; conducting secondary research around best practices and lessons learned in education, workforce development, and community engagement efforts elsewhere; and primary evaluation research with program participants across selected program efforts and activities to understand potential behavior changes and identify potential energy savings related to behavior changes.</i>	\$457,000	\$372,132	81%	82%	0	Presented findings, conclusions, and recommendations to utilities on 12/10/2021	Reporting across all efforts, expected by 3/2022; planning for primary research on community partnerships initiative.	Continue drafting report; for delivery in spring 2022.	
101	X2001 - EUL	<i>Study to provide statistically-defensible, upated, CT-appropriate EULs for several major residential and C&I measures.</i>	\$275,000	\$234,276	85%	80%	We have received all data and materials requested to date.	Follow up interviews with Measure Group 1 and 2 respondents	Measure Group 3 survey launch preparation - planned launch in mid-late January	Measure Group 3 survey fielding - Feb 2022	
102	X1932 DR EM&V Support	<i>The project will assess if UI DR pilots and projects are delivered in a way that allows evaluation of results in consistent and valid manner. This effort will also involve developing defensible estimates of kW savings from UI DR programs/pilots.</i>	\$225,000	\$139,001	62%	90%	None	Data request #2 issued (10/20)	Developing results PowerPoint	Draft report (end of Jan/early Feb 2022)	

	B	C	D	E	F	G	H	I	J	K	L
2	CT-EEB EVALUATION PROJECTS UPDATE -							Summ All SERA 21-010822from10-277	PART 1 - MONTHLY STATUS SUMMARY		
3	1/10/22									Reports on tasks completed by Project Contractors	
4	Project (and last initial of consultant)	Description/Outcomes	Budget	Invoiced	% Spent	% Done	Are there Current Challenges / Concerns / Issues	Last Task Completed	Current task, status, expected finish date	Next step and its deadline	
103	X1942 NEIs	<i>This study will provide data and information to support expected revisions to Connecticut's cost-effectiveness tests. The research will address the high priority gaps in NEIs in the Connecticut PSD: (1) utility NEIs associated with low-income programs, such as HES-IE and EAP discounts; (2) health and safety NEIs associated with low-income programs such as HES-IE; (3) residential HP/HPWH NEIs; and (4) commercial participant NEIs.</i>	\$325,000	\$203,395	63%	48%	Still waiting on arrearage-related data from Eversource	Submitted SBEA data request (November 2021)	Complete draft of HES/HES IE Surveys; completed follow-up with utilities for analysis of arrearage data; developed HES and HES IE samples for surveys; review SBEA data (Dec 2021 through Jan 2022)	Field HES / HES IE and SBEA surveys (Q1 2022 to Q2 2022)	
106	X1931-4 New Measure Advanced Lighting Controls	<i>This study will incorporate a new measure in the PSD for Advanced Lighting Controls. Additional Primary research to be conducted starting in July 2021 for completion in fall 2021.</i>	\$50,000	\$35,850	72%	55%	No	Phase 2 primary research kickoff scheduled 12/13/2021	Developing interview guides and data requests	Expert interviews and data analysis	
107	X1931-8 New Measure Advanced Commercial Thermostats	<i>This study will incorporate a new measure in the PSD for Advanced Commercial Thermostats. Additional Primary research to be conducted starting in July 2021 for completion in fall 2021.</i>	\$30,000	\$18,000	60%	45%	No	Final Phase 1 report and measure submitted 10/19/2021.	Phase 2 of study cancelled due to lack of data. Remaining funds will be used for the Advanced Lighting Controls study X1931-4	Phase 2 of study cancelled due to lack of data. Remaining funds will be used for the Advanced Lighting Controls study X1931-4	
108	R2015. Low Load and All-Electric Residential New Construction	<i>R2015. Secondary research study on various issues related to next generation residential new construction programs and approaches. Exploring strategies, approaches, outcomes, market factors, and benefits and costs concerning advanced approaches to residential new construction that inform programs in their effort to stay ahead of industry practices.</i>	\$75,000	\$41,000	55%	50%	Need to get stakeholder briefing scheduled	Initial research - October 31, 2021	Mid-project stakeholder engagement interim memo - timing currently in discussion - iterating with EA team	Mid-project stakeholder engagement - meeting and slides of interim findings - timing currently in discussion - iterating with EA team	
109	C2117 - RCx Persistence Study	Study to develop better estimates of retro-commissioning savings persistence.	\$50,000	\$8,085	16%	10%	Eversource is working with the RCx vendors to provide a sample of project files. We have received files for 8/40 projects on 12/1. Eversource expects the others to be ready in early Jan, but is trying to push the vendor to deliver earlier.	Met with utilities on 11/4 to discuss project files.	Finalization of work plan, review of utility data - 1/28/22	Project kickoff - early Jan	
110	R1968 RNC Baseline and Code Compliance	<i>RNC Baseline study involving on-site inspections of homes built under the current building code.</i>	\$350,000	\$0	0%	0%	No	None	Refined Project Design/kickoff development by Feb 2022	Complete planning: February	