

Item 1 EVALUATION PLAN BUDGET DISCUSSION ITEMS - FOR SEPT 2021 MEETING

2019-2021 Three Year Evaluation Plan Budget Reallocations

Rationale: Discuss enough before end of year that the changes can be contracted...

Thousands

Projects Not Yet Underway - Discuss Committee interest

\$280.0 <== X1940 Emerging issues project; not to be contracted.

\$75.0 R1963c Lighting Study - Sales or Shelf Stocking Analysis as needed for \$75K - **Discuss**

Other possibly unspent items to confirm

21K? Possibly 21K from the multi-state gas project if that was not paid from evaluation funds...

3K R2023 RASS Database Additions - may not have additional work (HES?, SFWx?, other?);
Recommend leaving this available for updates

Claims to Date on these Funds

-\$10.0 <== R2015 ZNE Project addition March 2021.
(contingency; \$65K increased to \$75K, March RFP/memo decision to attract bidders)

VOTE

Recommended Draws on funds 8/9/21 meeting (discussed July)

-\$180.0 <== R1982 - Res HVAC / DHW Perf & Potential Assessment - Metering
WILL HOLD UNTIL Discussion: Orig budget =790K. Plan added \$200K in 2020; removed -150K in 2021 (Plan dollars).
OCTOBER MTG. New Request: Replace the \$200K metering Year 2
+\$30K (on-hold management, stops/starts Covid; revised Covid methods)
Net impact in Plan dollars is 230-50 or 180
Note: Could be allocated in 2022 if other important demands for 2021 projects.

-\$55.4 <== R1983 - HES / HES-IE Process, Impact, Profiling Analysis - data efforts and Spanish survey translation
data request efforts beyond expectations & Spanish survey translation
RECOMMENDED Discussion: Double the data prep in one task, and 50% over in another much larger task.
FOR VOTE NMR has long-time familiarity with CT data and least likely to underestimate. Nearly daily data
SEPT 2021 MTG communications (see Data Tracking sheet). 80% UI.

<== Working on HP study / HPWH (NMR 1965, 2027, 1983) Examine several issues. Are there claimable fossil fuel savings?
Should programs target delivered fuels? Can this be identified for downstream, but also maybe midstream
or other programs? <Would it offset some of the load-building issues?> When could they be claimed?
PENDING / IN Also maybe fuel switching impact of current program(s).
DEVELOPMENT Would review existing interviews, data, and impacts; as well as program designs elsewhere; plus 1617,
Plus possibly additional participant surveys, depending on robustness / appropriateness of survey and other
data already available from 2 other projects. <Note for future, there is also interest in similar C&I issues>

\$0.0 <== C1901 - data overruns; prepared / merged data, provided data to other projects (saving them money). Discussed.
Unlikely to recommend strongly as provided budget augmentation for very closely related issue last year.

\$109.6 BALANCE WITH THESE AMENDMENTS - (WE ARE STILL WITHIN 3 YEAR EVALUATION PLAN BUDGET)

NOTE ALSO FOR UTILITIES: All existing contracts that do not complete by December 2021 will carry over to 2022.

Have confirmed no problems for both utilities via email.

Item 2 **EA TEAM BUDGET CALCULATIONS FOR 2022-24 C&LM PLAN**
FOR DISCUSSION / AGREEMENT AUG 2021 MEETING & DELIVERY TO C&LM PLANNING GROUP

In the July 2021 meeting, the EA Team discussed calculations that the Evaluation Project budget increase from \$3M/year to \$4.5 million in 2022 and then to \$6 million in 2023 and 2024 would need to have an associated increase in the EA Team's oversight budget.

The EA team noted the increases were not quite proportional.

Increases: More projects, more project documents (development, QC, surveys, sampling plans, reports)

Not proportional: Sample size increases don't add oversight work; not a proportional increase in meetings with contractors with the new plan for 3-year Research Area contractors, and potentially less training / retraining in data, procedures, expectations, programs.

Our assessment is that the 50% Evaluation Project Budget increase would lead to a 35% increase in the EA team budget needs.

\$328,970 2021 EA Team budget - original

SCENARIO 1 - 1/2, FULL, FULL.

\$444,110 2022 EA Team budget - 35% increase associated with 50% increase in annual project budgets in Plan (to \$4.5 M)

\$559,249 2023 EA Team budget - 70% increase associated with doubling of 2021 Evaluation Projects budget (\$3M to \$6M)

\$559,249 2024 EA Team budget - same as 2023.

\$1,562,608 Total EA Team budget for 2022-24 C&LM Plan

SCENARIO 2: 1/2, 3/4, FULL INCREASE TO \$6m IN 2022-2024

\$444,110 2022 EA Team budget - 35% increase associated with 50% increase in annual project budgets in Plan (to \$4.5 M)

\$501,679 2023 EA Team budget - midpoint between 2022 and 2024. Associated with \$5.25 Million in Evaluation projects.

\$559,249 2024 budget - 70% increase associated with doubling of 2021 Evaluation Budget (\$3M to \$6M)

\$1,505,038

For discussion / vote, for delivery to C&LM Plan for vote by CTEEB.