

**Quarterly Reports on
the Three-Year Plans,
Recommendations
to the EEAC**

EEAC Consultants

February 9, 2010

PA Initial Proposal (45 days after quarter)

<p>Year to Date Program and pilot savings and spending info</p>	<ul style="list-style-type: none"> • See quarterly report templates of YTD budget and savings (kWh, kW, therms) summaries by program (data in Excel) • Carbon reductions to date – using a formula to be developed by PAs and DEP and presented on portfolio basis
<p>Quarterly Program and pilot highlights</p>	<ul style="list-style-type: none"> • CHP update • <i>Are there any other MAJOR program or pilot issues for which the EEAC would want <u>regular</u> quarterly highlights?</i>
<p>Performance Metrics Status Update</p>	<ul style="list-style-type: none"> • Table with each metric and update
<p>Marketing, education, outreach highlights</p>	
<p>Evaluation / RFP process and progress highlights</p>	
<p>Financing and funding updates and highlights</p>	<ul style="list-style-type: none"> • On-bill Financing • Funding and financing options explored
<p><i>SPECIAL EEAC requested info for the relevant quarter (need to know at least a month before the end of the quarter)</i></p>	<ul style="list-style-type: none"> • First quarter: training/jobs update

Consultant Recommendations

- PA proposal good start, appreciated
- Consultants recommend two-part approach to quarterly reporting:
 - Key issues and progress on key building blocks (first Council meeting after quarter)
 - Quarterly report data and tables (within 30-35 days, available at Council meeting ~40 days)
- Very important for Council to identify focused list of key issues to report

Additional Needs

- Report benefits, not just electric kWh and kW, and gas therms
 - Multi-fuel and multi-resource benefits, including oil and water, etc (MassSAVE)
 - Benefits expressed in \$ is common unit
- Projects in progress/commitments
 - Important to track and report on commitments and major projects in the queue in addition to completions (look forward)