



**Vermont
Energy Investment
Corporation**

2015-2034

**Efficiency Vermont Demand Resources Plan
Non-Resource Acquisition Recommendation**

May 15, 2014

Non-Resource Acquisition Initiatives 2015-2034

- **Initiatives**

- Same seven categories
- Greater definition of individual initiatives
- Establishment of potential outcomes for each initiative
- Separation RA and NRA tasks

- **Budgets**

- Budgets forecasted from 2012-2014 actuals and future estimates
- Represents ~10% of combined RA and NRA recommended budgets
- Recommended method for NRA funding ratios is to base the ratio on Resource Acquisition funding ratio (EEC:TEPF)
- Joint proposal of VEIC and DPS

Non-Resource Acquisition Initiatives Budget 2015-2017

Non-Resource Acquisition Initiatives Budget (in Nominal \$)	2015	2016	2017	2015-2017 Total
Education & Training	\$838,000	\$854,700	\$871,800	\$2,564,500
Applied Research & Development	\$403,700	\$411,800	\$420,000	\$1,235,500
Planning and Reporting	\$415,000	\$614,300	\$626,600	\$1,655,900
Evaluation	\$880,000	\$897,600	\$915,600	\$2,693,200
Policy and Public Affairs	\$493,000	\$502,900	\$512,900	\$1,508,800
Information Technology	\$1,501,000	\$1,199,000	\$1,222,500	\$3,922,500
Administration	\$261,400	\$266,600	\$272,000	\$800,000
TOTAL NRA BUDGET	\$4,792,100	\$4,746,900	\$4,841,400	\$14,380,400

Non-Resource Acquisition Initiatives Budget 2015-2034

Non-Resource Acquisition Initiatives Budget (in Nominal \$)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Education & Training	\$838,000	\$854,700	\$871,800	\$889,200	\$907,000	\$925,200	\$943,700	\$962,500	\$981,800	\$1,001,400
Applied Research & Development	\$403,700	\$411,800	\$420,000	\$428,400	\$437,000	\$445,700	\$454,700	\$463,800	\$473,000	\$482,500
Planning and Reporting	\$415,000	\$614,300	\$626,600	\$437,500	\$641,100	\$653,900	\$461,400	\$669,300	\$682,700	\$486,600
Evaluation	\$880,000	\$897,600	\$915,600	\$933,900	\$952,500	\$971,600	\$991,000	\$1,010,800	\$1,031,100	\$1,051,700
Policy and Public Affairs	\$493,000	\$502,900	\$512,900	\$523,200	\$533,700	\$544,300	\$555,200	\$566,300	\$577,700	\$589,200
Information Technology	\$1,501,000	\$1,199,000	\$1,222,500	\$1,231,500	\$1,255,900	\$1,280,800	\$1,306,200	\$1,332,100	\$1,358,600	\$1,385,600
Administration	\$261,400	\$266,600	\$272,000	\$277,400	\$282,900	\$288,600	\$294,400	\$300,300	\$306,300	\$312,400
TOTAL NRA BUDGET	\$4,792,100	\$4,746,900	\$4,841,400	\$4,721,100	\$5,010,100	\$5,110,100	\$5,006,600	\$5,305,100	\$5,411,200	\$5,309,400
Non-Resource Acquisition Initiatives Budget (in Nominal \$)	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Education & Training	\$1,021,500	\$1,041,900	\$1,062,700	\$1,084,000	\$1,105,700	\$1,127,800	\$1,150,300	\$1,173,300	\$1,196,800	\$1,220,700
Applied Research & Development	\$492,100	\$502,000	\$512,000	\$522,300	\$532,700	\$543,400	\$554,200	\$565,300	\$576,600	\$588,200
Planning and Reporting	\$699,000	\$713,000	\$513,300	\$730,300	\$744,900	\$541,600	\$763,300	\$778,600	\$571,600	\$798,100
Evaluation	\$1,072,700	\$1,094,200	\$1,116,100	\$1,138,400	\$1,161,100	\$1,184,400	\$1,208,100	\$1,232,200	\$1,256,900	\$1,282,000
Policy and Public Affairs	\$601,000	\$613,000	\$625,300	\$637,800	\$650,500	\$663,500	\$676,800	\$690,400	\$704,200	\$718,200
Information Technology	\$1,413,100	\$1,441,100	\$1,469,700	\$1,498,900	\$1,528,700	\$1,559,100	\$1,590,100	\$1,621,700	\$1,653,900	\$1,686,800
Administration	\$318,600	\$325,000	\$331,500	\$338,100	\$344,900	\$351,800	\$358,800	\$366,000	\$373,300	\$380,800
TOTAL NRA BUDGET	\$5,618,000	\$5,730,200	\$5,630,600	\$5,949,800	\$6,068,500	\$5,971,600	\$6,301,600	\$6,427,500	\$6,333,300	\$6,674,800

Education and Training

\$2,564,500

- **Codes and Standards Support: Residential and Commercial / Industrial**
 - Code support and training;
 - Best practices in building operations and maintenance.
- **Energy Literacy Project**
 - Promote energy education in K-12 market;
 - Transform energy-related behaviors of students/staff at participating schools;
 - Encourage K-12 community to apply energy literacy beyond the classroom.
- **General Public Education**
 - Increase public awareness of benefits of energy efficiency and value and services of Efficiency Vermont;
 - Establish and leverage relationships with strategic partners whose missions align with the overall objectives of Efficiency Vermont.
- **Better Building by Design Conference**
 - EVT hosts *Better Buildings by Design* (BBD), premiere energy efficiency conference;
 - EVT welcomes more than 1,000 attendees, 40 workshops and 50 exhibitors.
- **Customer Support**
 - Respond to inquiries and requests for information;
 - Event staffing for home shows, energy fairs, farm shows;
 - Presentations to community groups;
 - Working with utility partners on training and communications.

Applied Research and Development

\$1,235,500

- **Emerging Data Services**

- Leverage the State's investment in smart grid infrastructure and other emerging data innovations ensuring optimal energy efficiency benefits;
- Manage collection of complex data and build systems that make it possible to use data to achieve energy savings goals.
- Explore new strategies, techniques, and technologies for increasing energy savings, decreasing delivery costs, and increases customer engagement and satisfaction.

- **Technology Demonstrations**

- R&D activities include applied research, development and demonstration designed to optimize the creation of cost-effective solutions to meet Efficiency Vermont's resource acquisition goals. Three principal areas of activity include:
 - field-testing new implementation strategies,
 - technology demonstrations,
 - research in emerging technologies and innovation of efficiency implementation strategies.

Planning and Reporting

\$1,655,900

- **Annual Plan:**
 - Plan and develop Annual Plan;
 - Coordinate with DPS,
 - Prepare and present plans to the Public Service Board.
- **Demand Resources Plan:**
 - On triennial basis, participate in the Board process to develop:
 - Resource acquisition budgets and savings for Electric (20 yrs) and Thermal Efficiency Process Fuels (10 yrs);
 - Quantifiable Performance Indicators (QPI's) and performance structure for three-year performance period;
 - Non-Resource Acquisition activities plans and budgets;
 - Compensation rates and structure;
 - Provide feedback on DPS efficiency evaluation plans and budgets
- **Participation in State and Regional Integrated Planning:**
 - Participate in Vermont System Planning Committee (VSPC) meetings;
 - Assist in fulfilling subcommittee charters;
 - Provide the Board, DPS, and Vermont's utilities with Forecast 20 data across 6 VSPC load zones.
- **ISO New England FCM Administration:**
 - Represent interests of Vermont ratepayers in the ISO New England (ISO-NE) Forward Capacity Market;
 - Prepare and submit bids to provide EVT's capacity savings in annual Forward Capacity Market auctions;
 - Track and report performance.
- **External Reporting:**
 - Fulfill all regulatory reporting requirements associated with EVT activity

- **Annual Savings Verification:**

- Participate with DPS on annual savings verification process to ensure savings are accurately reported. A consequence of the process is that EVT modifies tools for future custom projects where appropriate and updates and revises prescriptive screening tables to reflect savings verification outcomes.

- **Technical Advisory Group (TAG):**

- TAG resolves issues that arise from annual savings verification and serves as a proactive mechanism to develop energy characterization and savings calculations. The TAG ensures accurate savings claim methods are applied to the portfolio of measures.

- **Technical Reference Manual (TRM):**

- TRM management of portfolio submissions, update TRM tracker, re-characterizing measures and savings methods, research new technologies, annual updating of existing measure characterizations.

- **ISO-NE FCM Metering, and Monitoring and Evaluation:**

- Participate in ISO New England Forward Capacity Market, develop and review metering plans, analyze meter data, calculate realization rates and apply to the appropriate databases.

- **Quality Management Program:**

- Quality Management provides support for Service Quality and Reliability Plan (SQRP) and Administrative Efficiency Quantifiable Performance Indicator (Admin QPI)-related compliance and continuous improvement activities; supports, trains, and facilitates best-practice quality management tools.

Policy and Public Affairs

\$1,508,800

- **Public Affairs:**

- Support participation in energy discussions in Vermont, brief legislature on EEU and energy efficiency issues, assist legislators with review and development of policy proposals related to the EVT scope of work, produce EVT blog, develop media stories on experiences of EVT customers, present information about EVT at public forums and meetings.

- **Regulatory Affairs:**

- Write, revise, and maintain governing documents necessary for the EEU to operate as a regulated utility;
- Participate in Board proceedings that affect energy efficiency implementation in Vermont;
- Oversee VEIC interactions in ISO-NE Forward Capacity Market,
- Work with RGGI to inform Model Rule,
- Develop and support policy instruments for electricity and thermal energy savings,
- Participate in review of triennial distribution utilities' Integrated Resource Plans, updating of avoided costs and Board ordered proceedings that have potential to impact energy efficiency services.

- **Financial and Leveraged Product Development:**

- Develop and implement financial and leveraged policies and products relevant to EVT's scope of work;
- Manage relationships with lenders and other financial partners to develop programs to finance energy efficiency investments;
- Seek non-EVT funds to increase value of ratepayer funds in achieving higher levels of energy savings and ratepayer benefit.

- **Strategic Technology Services, Analytics, and Reporting:**
 - IT initiatives support collection, processing, and reporting of information critical to EVT;
 - IT maintains and enhances custom software applications used by EVT staff and develops custom software applications. Examples are:
 - **KITT.** project management and energy savings tracking tool
 - **RX Tool.** prescriptive energy efficiency measures calculation tool
 - **HERO: HVAC Upstream Tool.** Web-based data entry tool for HVAC vendors to report savings
 - **Products tools.** Efficient Products savings tracking tool
 - **Retail mobile application.** Retail account manager mobile devices used in field.
 - **TRM application.** Technical Reference Manual characterizations in database format.
 - During the 2015-2017 performance period, IT expects to take on the following development efforts:
 - Migrating KITT to Web application
 - Developing APIs for KITT and TRM applications for integration
 - Develop regulatory reporting tools by integrating financial and performance data
 - Develop existing suite of Efficient Products measure import and saving calculations tools
 - Develop efficiency forecasting and screening tool for demand resources planning.

General Administration

\$800,000

- **General Administration:**
 - Senior management team administration activities;
 - Prepare for and administer general staff meetings;
 - Coordinate program implementation;
 - Management, monitoring, and internal communication of overall performance and spending.

Questions