



The Commonwealth of Massachusetts

DEPARTMENT OF PUBLIC UTILITIES

MEMORANDUM

TO: Service List for Energy Efficiency Guidelines, D.P.U. 11-120, Phase II

FROM: Jeffrey Leupold, Hearing Officer

RE: Meeting of the D.P.U. 11-120, Phase II (“Streamlining”) Working Group

DATE: June 12, 2013

CC: Mark D. Marini, Secretary

In Energy Efficiency Guidelines, D.P.U. 11-120-A, Phase II (2013), the Department of Public Utilities (“Department”) stated that it would develop, through a working group process, reporting-related implementation details associated with: (1) the content and format of the information to be included in the Program Administrators’ respective three-year term and annual performance reports (“Three-Year Term Report” and “Plan-Year Report,” respectively); and (2) the schedules on which the Program Administrators will submit these reports to the Department. D.P.U. 11-120-A, Phase II, at 12-13. On May 7, 2013, the Department held the initial meeting of the Streamlining Working Group, which focused on energy efficiency performance reporting requirements.

As discussed during the May 7th meeting, the first step in developing reporting-related implementation details is to establish a common understanding of the purposes of the Three-Year Term and Plan-Year Reports. The Department will use these reports to fulfill its regulatory oversight responsibilities. Specifically, each Program Administrator’s Three-Year Term Report is intended to allow the Department, after investigation, to determine whether the Program Administrator: (1) reported its savings, benefits, and costs accurately and reliably; and (2) implemented its energy efficiency programs in a manner that was consistent with its approved three-year plan. D.P.U. 11-120-A, Phase II, at 6-7, 11-13. Each Program Administrator’s Plan-Year Report is intended to allow the Department and stakeholders to monitor the status of the Program Administrator’s performance in implementing its plan and determine whether an investigation into such performance is necessary during the course of a three-year term. D.P.U. 11-120-A, Phase II, at 6-7, 11-13. The Department seeks input from the working group as to the content and format of the information to be included in the Three-Year

Term and Plan-Year Reports for the purpose of efficiently and effectively fulfilling the Department's regulatory oversight responsibilities.

Keeping in mind the Department's stated policy objectives regarding streamlining,¹ the Department will also consider how the Three-Year Term and Plan-Year Reports may be leveraged to serve additional purposes that stakeholders may identify. In particular, the Department notes that the Energy Efficiency Advisory Council ("Council") has its own reporting requirements and that coordinating Council requirements with those of the Department may enhance the efficiency of the regulatory process. Accordingly, the Department seeks input from stakeholders on the purposes they ascribe to the Council-required reports. Additionally, the Department recognizes that stakeholders may identify purposes for the Three-Year Term and Plan-Year Reports in addition to those required by the Department or the Council. We seek stakeholder-input regarding any such additional purposes.

As noted at the May 7th meeting, the Department will convene a sub-committee of working group participants to discuss the purposes of the Three-Year Term and Plan-Year Reports. Stakeholders that wish to participate in the sub-committee should notify the Hearing Officer by the close of business on **June 19, 2013** (jeffrey.leupold@state.ma.us). The Department will convene the first meeting of this sub-committee on **July 2, 2013, at 10:00 am**, in the Department's offices. Participants should be prepared to discuss their identified purposes of the Three-Year Term and Plan-Year Reports at this meeting.

¹ The Department's objectives in establishing the streamlined processes are to allow: (1) Program Administrators and stakeholders to focus on the successful implementation of the three-year plans, while maintaining accountability in the delivery of programs; and (2) the Department to fulfill our oversight responsibilities more efficiently and effectively. D.P.U. 11-120-A, Phase II, at 2.