**Response to Request for Proposals:**

**24-09 Seeking EM&V Contractor**

Prepared for:

Louisiana Public Service Commission

Delivered on:

November 20, 2024

Prepared by:

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ADM 
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November 20, 2024

Attention: Kimberly N. O’Brian & Kathryn H. Bowman

Subject: ADM Proposal in Response to Request for Proposals, 24-09 Seeking EM&V Contractor, November 20, 2024

Dear Rex Kimberly N. O’Brian & Kathryn H. Bowman:

ADM Associates, Inc. is pleased to submit its proposal to perform Evaluation, Measurement and Verification tasks of the Louisiana Public Service Commission’s statewide energy efficiency program. The ADM Team and our subcontractors offer numerous capabilities and benefits that are relevant to the scope of the requested services, including:

* A highly skilled and experienced team with decades of combined experience designing, planning, and executing complex energy-related evaluations including technical reference manual development and a variety of market potential studies;
* Expert staff with extensive experience evaluating energy efficiency programs for Louisiana utilities and coordinating with statewide evaluators across the United States.
* Three Louisiana-based ADM staff as well as Louisiana-based subcontractor MDRG
* A team of engineers and analysts with expertise in on-site data collection, deemed savings analyses, regression billing analyses, and other industry-standard engineering methodologies;
* Process evaluation professionals and an in-house call center with extensive experience producing sampling plans, developing and running surveys, and interviewing key stakeholders;
* A demonstrated track record of consistently delivering complete, high-quality evaluation reports and recommendations within required timeframes.

ADM Associates, Inc. is ready and willing to enter a contract to provide the desired services. Our offer is valid for 180 days.

Contractual or technical questions pertaining to this proposal may be addressed directly to Sasha Baroiant or myself, as we are ADM staff authorized to negotiate terms. I may be reached at taghi@admenergy.com or (916) 761-7249 and Sasha may be reached at sasha@admenergy.com or (916) 216-7939.

We appreciate the opportunity to submit this proposal and to work with LPSC on this project.

Very truly yours,

Taghi Alereza, D.Sc.



CEO, ADM Associates, Inc.

Table of Contents

1. Overall Approach to the Transition of a New Statewide EE Program 1

1.1 Program Plan and Goals (Questions A1-A2) 1

1.2 Proposed Schedule and Required Data (Questions A3-A5) 3

1.3 Proposed Team Competencies and Organization (Questions A6-A10) 7

2. Demonstration of Qualifications 12

2.1 Organizational and Planning Expertise (Questions B1-B3 and B9) 12

2.2 Confidentiality Procedures (Question B4) 14

2.3 Impact Analysis Expertise (Question B10) 15

2.4 Process Analysis Expertise (Questions B6 and B10) 18

2.5 Quality Review and Reporting Expertise (Questions B5 and B10) 19

2.6 Specialized Task Expertise (Questions B7, B8, and B11) 20

3. Approach to EM&V Functions 20

3.1 Data and Software (Questions C1-C2) 20

3.2 Analytical Approaches (Questions C3-C5) 22

3.3 Staffing, Coordination, and Management (Questions C6-C8) 23

4. Cost Proposal 24

4.1 Attachment B and Rate Sheet (Question D1) 24

4.2 Budgeting for Uncertainty (Question D2) 24

4.3 Sample Contract and Detailed Budget (Question D3) 25

5. Appendices 26

5.1 Insurance Qualifications 26

5.2 Financial Qualifications 26

5.3 EM&V Planning Samples 26

5.4 Annual Reporting Samples 26

5.5 Market Potential Study Samples 26

5.6 Other Market Research Samples 27

5.7 Additional Cost Proposal Details 27

5.8 Contract Sample 27

5.9 Additional Appendices 27

List of Tables

[Table 1‑1. Data Requirements by Task 4](#_Toc182671475)

[Table 1‑2. Estimated Interaction and Availability by Year 6](#_Toc182671476)

[Table 2‑1. ADM Experience with Facility-Level Regression Analyses **Error! Bookmark not defined.**](#_Toc182671477)

[Table 4‑1. Hourly Rate Sheet 24](#_Toc182671478)

[Table 4‑2. Current Louisiana Utility Programs 28](#_Toc182671479)

[Table 4‑3. Proposed Schedule, Data Requirements, Deliverables, and Effort Estimates 29](#_Toc182671480)

List of Figures

[Figure 1‑1. Proposed Task Gantt Chart 5](#_Toc182671481)

[Figure 1‑2. Proposed Team Organization 11](#_Toc182671482)

# Overall Approach to the Transition of a New Statewide EE Program

## Program Plan and Goals (Questions A1-A2)

ADM Associates, Inc. (“ADM”) and our subcontractors, BrightLine Group (“BrightLine”), Demand Side Analytics (“DSA”), the Johnson Consulting Group (“JCG”), MDRG Inc. (“MDRG”), and Tierra Resource Consultants (“Tierra”), collectively “the ADM Team”, relish the opportunity to serve as the Evaluation, Measurement, and Verification (EM&V) Contractor for the Louisiana Public Service Commission’s (“LPSC”) statewide energy efficiency (EE) program. Per the Request for Qualifications (RFP), the ADM Team understands the scope of work will entail a one-year transition (2025) from the current Quick Start program to the statewide program as well as four years of statewide program evaluation (2026-2029). The following paragraphs detail our vision for the one-year transition period and the next four years of the first statewide budget cycle.

During the one-year transition period in 2025, the ADM Team plans to coordinate with existing utilities, the program administrator APTIM, LPSC, and other key players in the Louisiana energy efficiency market to ensure a smooth transition to a statewide program. This coordination will occur on a few different fronts. First, the ADM Team will review key utility program materials and publications such as integrated resource plans. Second, the ADM Team will hold meetings with APTIM and key Louisiana utilities such as Cleco Power (“Cleco”), Southwestern Electric Power Company Louisiana (“SWEPCO LA”), and Entergy Louisiana LLC (“ELL”) to verify existing programs and streamline the transition to a statewide framework. During these meetings the ADM Team will coordinate both program organization (i.e., how existing programs will be grouped and organized moving forward) and data management (i.e., how disparate utility billing and tracking datasets will be merged into a single comprehensive system). As a part of this data management coordination, the ADM Team will investigate smart meter coverage in Louisiana, conducting surveys and interviews as necessary to glean this important information. In addition to coordination meetings, the ADM Team plans to actively participate in the Energy Efficiency Working Group (“EEWG”). The ADM Team will provide critical insights to the working group based on decades of experience in the energy efficiency space and will report key findings and recommendations to LPSC.

After collecting necessary background information via program material review, coordination meetings and EEWG participation, the ADM Team will develop a comprehensive EM&V plan. The EM&V plan will provide details on all activities to be conducted in the first four-year budget cycle and at a minimum will include:

* The evaluation budget for the four-year budget cycle, broken down by task
* A schedule of key dates for EM&V activities and sharing deliverables
* Impact evaluation guidelines and detailed techniques for verifying savings (both gross and net)
* Process evaluation researchable issues, survey, and interview methods
* The proposed methodology for cost effectiveness calculations
* EEWG participation expectations and goals
* Louisiana Technical Reference Manual (“TRM”) development details, including how we plan to evaluate the costs and benefits of a LA-specific TRM and how such a LA-specific TRM would be produced
* Our approach to conducting market potential studies including details on EE, demand response, and other topics such as electrification or emerging technologies
* Our approach to reporting, quality assurance (QA) and quality control (QC) practices, and developing recommendations for future program improvement
* Key logistics such as preferred avenues for data delivery and data security protocols

We will share a preliminary version of the EM&V plan with LPSC for review and comment in 2025 and will produce a final version of the plan well in advance of January 1, 2026.

The first four-year statewide program evaluation will involve a variety of activities including impact and process evaluation of gas and electric programs across Louisiana, cost effectiveness analyses, a baseline study to inform other analyses, TRM assessment and development, market potential studies, annual reporting, and as necessary, ad hoc analyses, studies, and commission support. Louisiana utilities currently offer numerous programs across a variety of sectors, many of which may transfer to the statewide initiative. The ADM Team plans to conduct in-depth impact and process evaluations of the Residential (“Res EE”) and Commercial Energy Efficiency (“Com EE”) programs in 2026 and 2028 and the Demand Response (“DR”) and Electrification programs in 2027 and 2029. Bi-annual evaluations should help address any budgetary concerns and will provide substantial data for billing analyses. Should LPSC require annual evaluations for each program, we will gladly accommodate that request in a budget-neutral manner.

We plan to conduct a baseline study in 2026 to inform both TRM development and market potential studies. We will assess the DR and Electrification programs in this baseline study; so, while the full-fledged DR and Electrification evaluation will not be conducted until 2027, LPSC will still have access to high-level, preliminary findings regarding these programs in 2026. For each bi-annual evaluation cycle, we will assess gross and net impacts, conduct process evaluation activities, calculate program-level cost effectiveness, and develop an annual report with recommendations for future improvement. We will conduct net-to-gross research to determine free ridership and spillover rates and thereby calculate measure-specific net-to-gross ratios and net savings. As outlined in the RFP, the Total Resource Cost (“TRC”) test is the primary test, but we can also assess cost-effectiveness from other perspectives. We will report our findings in comprehensive annual reports and will provide LPSC with ample time to review and comment before sharing finalized deliverables.

In addition to program evaluation and associated activities, we will assess the need for a LA-specific TRM, as necessary create that TRM, produce a variety of market potential studies, and provide LPSC with ad hoc analytical support. We will assess the costs and benefits of producing a LA-specific TRM in 2025 and present LPSC with several options for TRM development. For example, depending on LPSC’s needs the ADM Team could model the LA TRM based on the Arkansas TRM[[1]](#footnote-2) and update it with Louisiana-specific inputs (e.g., equivalent full-load hours [“EFLH”], business hours, water temperatures, etc.). Alternatively, we could develop the LA TRM using a bottom-up approach based on the measures currently offered by Louisiana utilities. We will highlight the strengths and weaknesses of different approaches to TRM development and aim to provide LPSC with a final recommendation in late 2025. After LPSC determines whether they want to develop a LA TRM and their preferred approach, as necessary, we will develop the LA TRM in 2026. In addition to producing the TRM, we will conduct market potential studies focused on EE, DR, and electrification[[2]](#footnote-3) by Q3 of 2028 to allow time for planning and orders for the second statewide budget cycle (starting in 2030). Lastly, we will maintain availability to provide LPSC with ad hoc analytical support across the first budget cycle.

The ADM Team will track and assess our performance by referencing the following key performance indicators (“KPIs”). The following KPIs will help to keep the entire team on track, and specific parties responsible and accountable for their respective work. In addition to KPIs we develop monthly project status reports for our internal management and accountability and to share with LPSC staff.

* Forward looking KPIs for the entire evaluation team in transition period
  + Do the evaluation and implementation teams have a full understanding of key fields to be included in tracking data and on required documentation at the project level?
  + Is the draft evaluation plan issued by October 1, 2024?
  + Has the evaluation team developed a data transfer and storage process that satisfies stakeholders’ concerns regarding data security and privacy?
  + Does the Evaluation Team have at least five staff with significant availability residing in Louisiana by the end of 2024?
* Forward looking KPIs for years 2026-2029
  + Are preliminary evaluation samples pulled and associated data requests made by 60 days following each of Q1:Q3 and 40 days following Q4?
  + Are draft report templates issued to LPSC and stakeholders by August, and final templates locked down by October?
  + Are initial process evaluation interviews completed by Q1 of the year?
* Ongoing KPIs for 2026-2029
  + For the entire team: Are at least 70% of sampled projects evaluated by the end of Q4?
  + For Tierra: Is the EE potential study complete by March 2027?
  + For DSA: Is the DR potential study complete by March 2027?
  + For all subs other than MDRG – Is the initial draft TRM ready by September 2026?
  + For the entire team: A brief satisfaction survey will be distributed to EEWG constituents fielded after the third meeting, and then annually to solicit feedback.

Ultimately, our aim is to provide LPSC with timely guidance and evaluation services that will ensure a smooth transition to the new statewide EE program. We look forward to the opportunity to leverage our expertise in statewide program implementation, Louisiana program evaluation, TRM development, and market potential studies to provide LPSC with valuable analytical findings and actionable recommendations for program improvement.

## Proposed Schedule and Required Data (Questions A3-A5)

The ADM Team has developed a proposed schedule that lists task deadlines, key deliverables, data requirements, and expected interaction from LPSC, Louisiana Utilities, and the program Administrator APTIM. A full version of that schedule is presented in Table 5‑2 in the Appendices section, while an outline of data requirements by task and a Gantt chart of scheduled activities are presented in Table 1‑1 and Figure 1‑1, respectively.

Table ‑. Data Requirements by Task

|  |  |
| --- | --- |
| **Task** | **Data Requirements** |
| EEWG participation and reporting | Contact information for participants |
| Project kickoff meeting | Feedback on meeting agenda |
| Request existing program materials | List of existing Quick Start programs, key portfolio documents such as integrated resource plans, previous annual savings reports, etc. |
| Utility coordination meetings | Documents outlining current program organization, existing billing/tracking datasets, and any data on smart meter coverage. |
| Investigate costs and benefits of LA TRM | Any existing information on LA-specific measure parameters. |
| Statewide data management | Necessary data will have already been delivered. |
| EM&V plan development | Necessary data will have already been delivered. |
| Develop LA TRM (pending results of 2025 investigation) | Outside of existing information on measure parameters, potentially updated billing data to back calculate key measure parameters. |
| 2026 Residential EE impact/process evaluation | 2026 Residential Energy Efficiency billing and tracking data, as well as any other program materials for review. |
| 2026 Commercial EE impact/process evaluation | 2026 Commercial Energy Efficiency billing and tracking data, as well as any other program materials for review. |
| Calculate 2026 cost effectiveness | Outside of tracking data cost info, potentially data on arrearages. |
| Produce 2026 (PY1) report | Necessary data has already been delivered. |
| 2027 DR/Electrification impact/process evaluation | 2026 and 2027 tracking and AMI billing data DR and electrification customers. |
| Energy efficiency market potential study | Outside of 2026 billing and tracking data for Res EE and Com EE customers, potentially non-participant contact info for surveys. |
| Demand response market potential study | Outside of 2026 DR tracking and billing data, potentially non-participant contact information for surveys. |
| Calculate 2027 cost effectiveness | Outside of tracking data cost info, potentially data on arrearages. |
| Produce 2027 (PY2) report | Necessary data will have already been delivered. |
| Electrification market potential study | 2026/2027 electrification tracking and billing data and potentially non-participant contact information for surveys. |
| Additional market potential studies | TBD, contact information for surveys will likely be necessary. |
| 2028 Residential EE impact/process evaluation | 2027 and 2028 tracking and billing data for customers participating in Res EE programs. |
| 2028 Commercial EE impact/process evaluation | 2027 and 2028 tracking and billing data for customers participating in Com EE programs. |
| Calculate 2028 cost effectiveness | Outside of tracking data cost info, potentially data on arrearages. |
| Produce 2028 (PY3) report | Necessary data will have already been delivered. |
| 2029 DR impact/process evaluation | 2028 and 2029 tracking and AMI billing data for customers participating in DR programs. |
| 2029 Electrification impact/process evaluation | 2028 and 2029 tracking and AMI billing data for customers participating in electrification programs. |
| Calculate 2029 cost effectiveness | Outside of tracking data cost info, potentially data on arrearages. |
| Produce 2029 (PY4) report | Necessary data will have already been delivered. |

Figure ‑. Proposed Task Gantt Chart

A graph of a project

Description automatically generated with medium confidence

The ADM Team will request the following from the Louisiana utilities and the program Administrator:

* A list of existing Quick Start programs and key associated documents
* Existing Quick Start billing/tracking datasets and any available data on smart meter coverage
* 2026-2029 program plans and documents, as well as tracking and billing data (including AMI data as available and necessary) for LPSC Res EE, Com EE, DR, and Electrification programs
* Existing information on Louisiana measure parameters such as but not limited to EFLH, current practice equipment efficiency and water temperature
  + We can collect additional data to aid the development of a LA-specific TRM
* Data on customer arrearages if avoided arrearages will be used in cost effectiveness testing
* Evaluation reports on pre-2025 programs, as available
* Non-participant customer contact information for market potential surveys etc.

The ADM Team will request program tracking and billing data in a few different rounds each program year. Taking 2026 (PY1) as an example, we would hope to receive intermediate data at three points in 2026 (for example, March 2026, July 2026 and November 2026) followed by full 2026 data in January 2027. This staged data delivery will allow the ADM Team to develop frameworks for data cleaning and analyses using incomplete data and then quickly finalize savings results soon after the end of each program year. Furthermore, staged billing and tracking data delivery will allow for faster feedback regarding program implementation. The ADM Team will coordinate a statewide data management system with the program Administrator during the transition year, which should streamline data delivery in subsequent years.

In addition to presenting information on task timelines, Table 5‑2 also includes information on the interaction and availability (in person-hours) expected from LPSC, LA utilities, and the Administrator for each task. A breakdown of hours by year is presented below in Table 1‑2. The most time-intensive tasks for LPSC are developing providing guidance on data and evaluation findings to be reported and reviewing plans and final editions of the TRM and potential studies. The most time-intensive tasks for the program Administrator (APTIM) will be collaborating on the development of the statewide data management system and participating in utility coordination meetings. The total person-hours are highest for the utilities because there are multiple utilities involved.

Table ‑. Estimated Interaction and Availability by Year

|  |  |  |  |
| --- | --- | --- | --- |
| **Year** | **LPSC Person-hours** | **LA Utility Person-hours** | **Administrator Person-hours** |
| 2024-2025 (Transition) | 55 | 348 | 166 |
| 2026 (PY1) | 83 | 281 | 263 |
| 2027 (PY2) | 67 | 287 | 145 |
| 2028 (PY3) | 63 | 217 | 215 |
| 2029 (PY4) | 27 | 137 | 125 |

In addition to data requirements and expected person-hours, the ADM Team also included a detailed list of deliverables by task in Table 5‑2 of the appendix. At a high level, we expect to share the following deliverables with LPSC:

* Writeups of key findings based on EEWG participation
* Meeting minutes from the kickoff call
* Formal data requests for existing LA utility program data and portfolio documents such as integrated resource plans
* A report detailing the costs and benefits of developing an LA TRM
  + Depending on LPSC’s decision regarding LA TRM development, a Louisiana-specific TRM
* A statewide data management system based on collaboration with the Administrator
* A formal EM&V plan for the four-year budget cycle
* A writeup based on the baseline study the ADM Team plans to conduct in 2026
* Savings calculation workbooks (and other analysis materials) including details on the impact and process assessment of LPSC programs, upon request
* Cost effectiveness calculation workbooks for each annual evaluation
* Annual reports for each program year (2026-2029) including program evaluation findings, conclusions, and recommendations for future improvement
* Reports based on the assessment of market potential in the following practice areas:
  + Energy efficiency
  + Demand response
  + Electrification
  + Other market potential studies requested by LPSC

The ADM Team plans to share each of these deliverables per the schedule outlined in Table 5‑2 and Figure 1‑1. We will share each annual report in June of the following year so that we can conduct analyses and develop recommendations based on a full year of billing and tracking data. For example, we will finalize the impact and process evaluations of the 2026 programs in March 2027 and then finalize the report in June 2027. While the ADM Team has outlined a comprehensive list of tasks and deadlines we are certainly open to modifying timelines and deliverables based on conversations with the Administrator, LA utilities, and LPSC.

## Proposed Team Competencies and Organization (Questions A6-A10)

The ADM Team brings decades of expertise across the EE space. The following subsections outline the unique competencies that differentiate us from other firms, our proposed team organization, references from prior work, and additional team information.

### Team Competencies

#### Louisiana Program Evaluation

The ADM Teams have extensive experience working with and evaluating programs for Louisiana utilities. More specifically, ADM has conducted impact and process evaluation activities for Cleco for seven years and for SWEPCO LA since 2015. Over the past few years ADM has assessed the savings associated with a variety of Cleco and SWEPCO LA programs including residential equipment rebates and weatherization, income-qualified projects, and both small and large commercial and industrial (“C&I”) programs. In evaluating these programs, ADM has calculated net and gross savings using varied methodologies (e.g., deemed savings, billing analyses, engineering equations), conducted process analyses including interviews (with utilities and trade allies) and surveys (with participants and non-participants), completed site visits to verify equipment working conditions, and run cost-benefit analyses. These evaluation efforts have culminated in a variety of deliverables including client-facing desk reviews and annual reports. Through this work we have developed expertise that makes us comfortable and confident collaborating with and evaluating programs for utilities across Louisiana.

MDRG also has experience conducting market research in Louisiana for ELL. As a part of Entergy’s 2016 Safety Campaign, MDRG conducted consumer research and tested various concepts to creatively inform consumers of the danger of power lines. The ADM Team is well-versed in Louisiana-specific EM&V protocols and has the necessary business connections and analytical acumen to effectively assist LPSC. Collectively, we have run program EM&V efforts across the United States, from Idaho to Pennsylvania to Arkansas. We look forward to the opportunity to leverage our state-specific and country-wide evaluation expertise to provide LPSC with insightful findings and actionable recommendations.

#### Statewide Program Implementation and Evaluation

The ADM Team also assisted with the implementation and evaluation of several statewide or near-statewide efficiency programs. One example of this is Tierra and JCG’s support of the Maryland Public Service Commission’s (PSC) oversight of statewide evaluations.[[3]](#footnote-4) In this role, they advised the Commission on impact evaluation and cost effectiveness analysis policies and practices and presented impact evaluation results and key findings in Commission hearings. The team ensured compliance with annual evaluation plans, conducted stakeholder group meetings, provided independent savings verification, and also participated in the Mid-Atlantic TRM review subcommittee and on behalf of the Commission.

In addition to Maryland PSC, Tierra also collaborated with the California Public Utilities Commission (“CPUC”) from 2018-2024 to evaluate a set of State-funded efficiency programs. These programs primarily focused on workforce education/training and market transformation/support. Tierra conducted interviews, surveys, and engineering analyses to assess program influence, calculate claimed and unclaimed savings and identify deficiencies in program data tracking. The team’s findings and associated recommendations for better tracking contributed to a 2021 CPUC decision to reapportion the State’s portfolio of demand side management (“DSM”) programs by splitting programs into equity, market support, and resource acquisition categories. ADM has also assisted with several statewide programs, having conducted similar evaluation activities and coordinated with Commissions and multiple utilities in New Mexico, Nevada, and Pennsylvania alike. The ADM Team fully appreciates the broad scope of statewide evaluation work and boasts the experience and organizational prowess necessary to effectively assist LPSC with its transition from Quick Start programs to the statewide initiative.

#### EEWG Participation

The ADM Team has participated in a number of EEWGs and are confident in our abilities to make pivotal contributions to the group and share key insights with LPSC and other collaborators. We have participated in and presented at various working groups and forums across the United States, and we pride ourselves on our strategic consulting acumen. In particular, JCG has an established presence in the South-Central states and beyond having played a key role in the development of the Arkansas TRM and published a number of impactful studies. Katherine Johnson of JCG is a key member of the Parties Working Collaboratively (“PWC”) effort in Arkansas, which has played an integral role in future program planned based on a highly collaborative EM&V feedback loop.[[4]](#footnote-5) The PWC model for a collaborative approach to EM&V planning would likely be a great fit for LPSC and key Louisiana stakeholders.

Recently, JCG ran interviews and conducted a deep dive into existing literature to publish a white paper reviewing EM&V frameworks in North America.[[5]](#footnote-6) This white paper identified eight different regulatory models, summarized key trends as well as pros and cons of each approach, and identified best practices to incorporate into EM&V regulatory frameworks going forward. JCG’s understanding of existing program frameworks and the essential elements of a successful regulator model would be invaluable to both LPSC and the EEWG. In addition to this review, JCG also collaborated with ADM to produce a market progress evaluation report for the Northwest Energy Efficiency Alliance’s code influence work.[[6]](#footnote-7) As such, both teams are highly familiar with developing progress indicators, soliciting feedback from key stakeholders, and streamlining updates to EE code and frameworks. The ADM Team looks forward to sharing our expertise to help develop the next generation of EE in Louisiana.

#### TRM Assessment and Development

The ADM Team has also contributed to the development of several TRMs, and as such would be well positioned to evaluate the costs and benefits of producing one and create the manual itself. As detailed above, JCG was directly involved in developing and maintaining the Arkansas (“AR”) TRM, which is currently in its 9th edition[[7]](#footnote-8) and has a 10th edition near publication. Not only does the AR TRM include engineering equations and savings calculation methodologies for residential and non-residential measures, but Volume 1 of the document provides a detailed description of EM&V protocols including goals, definitions, and best practices. Utilities across Louisiana currently rely on the AR TRM for a variety of EM&V needs. Our insider knowledge of the economic costs, timeline, and pitfalls of TRM development in a neighboring state will be critical resource for LPSC.

ADM is also well-versed in the AR TRM having utilized various iterations of the document for Cleco and SWEPCO LA evaluations. Furthermore, ADM has led the development and upkeep of several other TRMs including the Entergy New Orleans (“ENO”) TRM (2015 – Present), the Idaho TRM (2018 – 2021), and the New Mexico TRM (2008 – 2017). The New Orleans TRM contains 36 residential measures covering appliances, domestic hot water, HVAC, envelope, and lighting, and contains 32 commercial measures covering motors, water heating, HVAC, refrigeration, food service, lighting, and miscellaneous measures. ADM continues to update, add measures to, and revise ENO’s TRM based on changes in New Orleans’ EE landscape. Based on our familiarity with TRM development and maintenance paired with expertise in regionally relevant measures, we are confident in our ability to pragmatically assess TRM costs and benefits and efficiently produce a Louisiana-specific TRM that meets LPSC’s needs.

#### Market Potential and Other Studies

The ADM Team also has extensive experience conducting a variety of market potential studies that have culminated in actionable plans and recommendations. DSA has conducted a number of market potential studies including DR potential studies for Pacific Gas and Electric[[8]](#footnote-9), Pennsylvania PUC[[9]](#footnote-10), the Northern Indiana Public Service[[10]](#footnote-11), and the Lawrence Berkely National Laboratory.[[11]](#footnote-12) In addition to DR market potential studies, DSA also completed non-residential EE baseline studies in 2018[[12]](#footnote-13) and 2023[[13]](#footnote-14) for Pennsylvania PUC. As a part of each of these studies, DSA conducted extensive research to develop a clear understanding of current market conditions and segments and produced data-driven recommendations and estimates of technical, economic, and achievable potential.

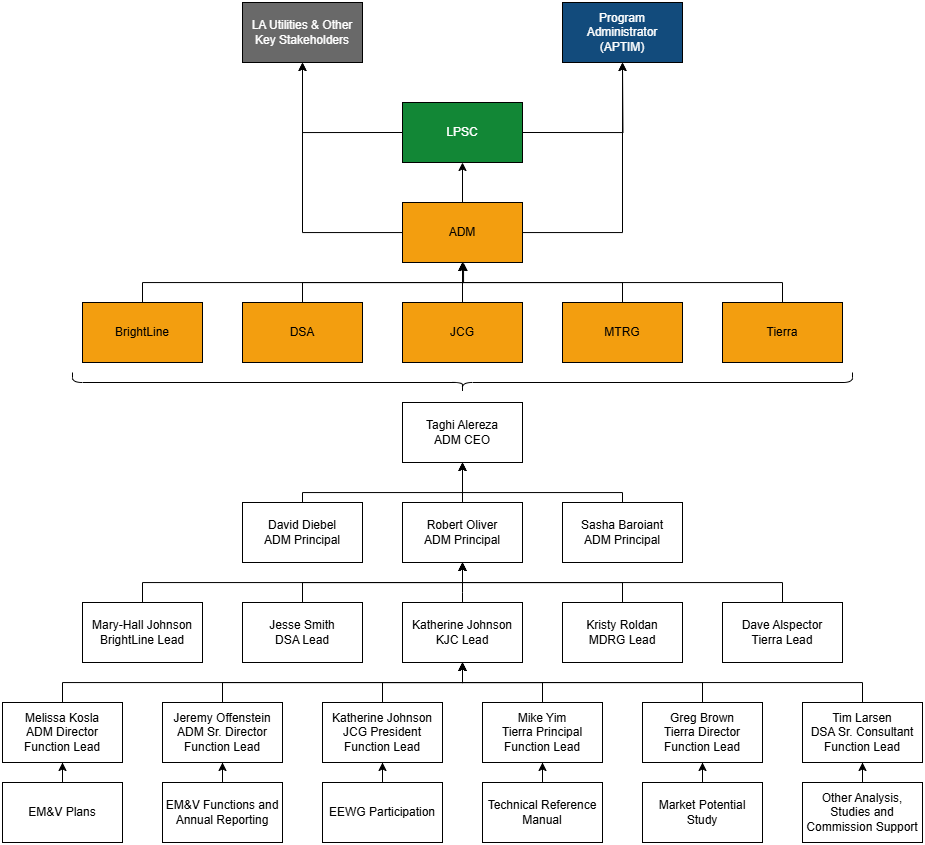
BrightLine has also conducted market potential analyses for a variety of clients, including the state of Arkansas. In 2023, BrightLine began an assessment of the DR potential for eligible residential, commercial, and industrial customers in Arkansas. DR technologies being investigated include active management of thermostats and water heaters, rate designs to shift customer loads, and battery storage dispatch. Not only do BrightLine have a background in market research, but they also have experience applying data-driven findings into a novel EE portfolio, as evidenced by their portfolio planning work for the Mississippi Power Company.

In addition to DSA and BrightLine, Tierra also has a strong background in market research. One prime example of this is Tierra’s current collaboration with ADM and others to conduct a comprehensive Distributed Energy Resource (“DER”) market potential study for NV Energy. The goal of this DER study is to evaluate the potential for EE, building electrification, transportation electrification, behind-the-meter solar and storage, and DR adoption from 2024 to 2054 across NV Energy territories. So far, Tierra has produced detailed models of a variety of DER adoption scenarios and calculated associated impacts. Based on this modelling, Tierra has developed three different portfolio design options for NV Energy to consider moving forward. ADM’s market research experience includes both the original and the recent California Commercial End-Use (CEUS) surveys.

### Team Organization

The following figure outlines the high-level team organization that we propose for the evaluation of LPSC’s statewide EE program. While Figure 1‑2 presents subcontractors as responsible for various tasks, as the primary contractor for this proposal, ADM is ultimately accountable and responsible for producing and sharing deliverables with LPSC. Our founder and CEO, Taghi Alereza, will personally oversee the success of this engagement. For additional information on the ADM Team’s task assignment by firm and proposed team members, please reference the Cost Proposal section and the Resumes PDF attachment.

Figure ‑. Proposed Team Organization



### Team References

The following three points of contact will provide meaningful insight into our collective EM&V expertise. The three references and details regarding each are presented below.

#### Reference 1 – Darren Gill, Pennsylvania Public Utility Commission

Darren Gill has collaborated with DSA and Brightline in their evaluation of statewide programs for Pennsylvania PUC. DSA has conducted a variety of research tasks ranging from baseline studies and DR potential analyses to a home energy report persistence study. Brightline supports the Pennsylvania TRM and conducts technical audits of utility evaluators’ work.

* Darren Gill, Deputy Director of the Bureau of Technical Utility Services (Pennsylvania PUC)
* [dgill@pa.gov](mailto:dgill@pa.gov) | (717) 783-5244

#### Reference 2 – Wally Nixon, Arkansas Public Service Commission

Wally Nixon has worked with Katherine Johnson and JCG in Arkansas for many years and can speak to Katherine Johnson’s expertise in TRM development and EEWG leadership and participation. Not only has JCG created and maintained the AR TRM, but they have played an integral role in shaping and developing Arkansas’ EE portfolio. Not only has JCG engendered substantial energy savings across the state, but they have done so in a manner that prioritizes collaboration and input from all stakeholders.

* Wally Nixon, Legal Advisor for Arkansas Public Service Commission
* Wally.Nixon@arkansas.gov

#### Reference 3 – Mohsen Abrishami, California Energy Commission

ADM Associates in their work as a prime contractor for the California Commercial End-Use Survey. In this effort, ADM was responsible for sampling, surveying, data analysis, and reporting. ADM developed custom software to facilitate sample control, customer recruitment, surveying (including dynamic quality control algorithms), and safe uploading of survey data and photos to a database in Sacramento. The ADM Team conducted over 23,000 surveys of commercial buildings in California between 2018 and 2021, including over 15,000 on-site visits in the year 2019 and over 3,000 surveys conducted virtually during the COVID pandemic. The project report is on the Energy Commission’s website.[[14]](#footnote-15) ADM CEO Taghi Alereza and Principal Sasha Baroiant were heavily involved in this project.

* Mohsen Abrishami, Senior Mechanical Engineer at the California Energy Commission
* [mohsen.abrishami@energy.ca.gov](mailto:mohsen.abrishami@energy.ca.gov) | (916) 397-0790

### Additional Team Information

As the primary contractor for this proposal, ADM has included information regarding our Insurance Qualifications and Financial Qualifications in the Appendices section below.

# Demonstration of Qualifications

## Organizational and Planning Expertise (Questions B1-B3 and B9)

As demonstrated by this proposal and our previous evaluation work, the ADM Team has developed the organizational skills, financial acumen, and managerial expertise necessary to effectively support LPSC’s statewide EM&V needs. The ADM Team has a track record of excellence spanning the continent, that is reinforced by our consistent delivery of work on time and within budget. Not only does the ADM Team have exceptional written organization as evidenced by prior publications (referenced below in the

Appendices section) but we also offer deft managerial oversight for all casework. We believe detailed planning and regular check-ins are hallmarks of effective management and we plan to stick to those agile organizational principles when working with LPSC, the Administrator, and other key Louisiana stakeholders. As detailed in the KPI portion of the Program Plan and Goals (Questions A1-A2) section, we plan to share monthly progress updates with LPSC which will ensure evaluation efforts stay on-track and well-organized throughout the five-year contract. Regular status updates and check-ins will also help us to quickly identify any budgetary concerns and address them upfront. Across dozens of engagements, ADM effectively manages budgets while producing high-quality deliverables. Moreover, as detailed in the Statewide Program Implementation and Evaluation section, we have extensive experience managing multi-faceted evaluation efforts involving complex statewide data. We plan to collaborate with the Administrator to develop streamlined statewide data management that effectively integrates with existing data frameworks and software. Efficient data management system design, paired with highly organized staff will help the ADM Team to successfully manage both individual projects and overall programs.

The ADM Team also have experience utilizing client data to develop analytics of success and failure. While much attention is paid to realization rates or overall impacts, a broad set of KPI as well as qualitative data are needed to fully characterize performance. We plan to assess our own evaluation success via two main methods. First, we will regularly review our progress on the key performance indicators outlined in the Program Plan and Goals (Questions A1-A2). Second, we will maintain an open dialogue with LPSC, the Administrator, and other key stakeholders, and ask for formal feedback on an annual basis. These steps will help to quickly identify any weaknesses or failures in program evaluation practices and quickly address them. We also plan to assess the success of LPSC programs through impact and process evaluation. From an impact standpoint, the ADM Team will verify measure/program energy (and as appropriate non-energy) savings to calculate realization rates and assess measure, program, and portfolio cost-effectiveness. From a process standpoint, we will review program materials, conduct surveys, and complete in-depth interviews to determine the effectiveness of program processes and procedures. In this manner, we will leverage analytics to assess the strengths and weaknesses of both the evaluation effort and LPSC programs.

At a minimum, we plan to provide monthly status updates, regular check-in meetings (frequency to be determined during the kickoff meeting), opportunities for review and comment on all deliverables, annual reports, and availability to meet and participate with advisory groups, subcommittees, and others, as needed. In addition to these standard procedures, we also expect to discuss additional client needs with LPSC during the project kickoff call. We are committed to providing transparent, all-encompassing evaluation and consulting services that will culminate in effective statewide program rollout and meaningful program improvements.

A final key aspect of the ADM Team’s skillset is our experience developing, reviewing and utilizing EM&V plans. We have produced and employed EM&V plans across a variety of contracts and have provided sample EM&V plans and frameworks in the EM&V Planning Samples section below. We will develop an EM&V plan that meets LPSC’s requirements and will specify our evaluation procedures described in this proposal. As such, it will detail our strategy for allocating evaluation resources strategically and cost-effectively among the various programs, based on the evaluation objectives described in the RFP, as clarified through discussions with LPSC staff during project initiation. This will include:

* A comprehensive schedule of activities including task descriptions and data requirements. We have developed a preliminary version of this schedule (see Proposed Schedule and Required Data (Questions A3-A5) above and Detailed Schedule below) and plan to coordinate with LPSC to adjust and finalize it as necessary;
* A detailed description of all program activities, including data collection and a variety of analysis methods, with final sample plans for both impact and process evaluation data collection. This description will address how we will deal with programs with small population sizes and other potential drawbacks;
* Staffing plans;
* Schedules and budgets for each deliverable.
* A list of deliverables;
* An outline of our QA/QC process for the identified evaluation activities;

The EM&V plan will detail procedures related to customer contact, data needs at the rebate application and tracking and reporting system level, data requests, and reporting procedures. We will track all comments from LPSC and provide a written summary of edits and actions toward their resolution. We will submit our EM&V plan to LPSC as early as possible to expedite feedback. At this stage, we anticipate delivering an EM&V plan to LPSC by December 16, 2025.

The ADM Team will also outline strategies in the EM&V plan to minimize the transfer of the personal identifying information of LPSC customers. For example, we may only request customer contact information for the customers selected for survey contact in 90/10 sample estimates and will use anonymized customer identifiers in all other evaluation activities, as necessary. These steps will be taken to further protect LPSC customer information at all stages of evaluation. ADM will work with LPSC to refine the strategies possible for each program and data type.

## Confidentiality Procedures (Question B4)

The ADM Team is well-versed in confidentiality rules/restrictions and are committed to responsibly storing and protecting all LPSC data. As the primary contractor for this proposal, ADM has provided an outline of our standard confidentiality procedures below.

Sensitive client data such as personally identifiable information is electronically protected during and after being transmitted to ADM facilities. All ADM email is secured using SSL encryption through the web browser. ADM’s IT team can set up a Secure File Transfer Protocols (SFTP) site for transferring data between LPSC and ADM. Alternatively, ADM has extensive experience using secure data sharing portals like SharePoint, which benefits from Microsoft Azure’s encryption at rest capabilities. Data uploaded to our survey platform is limited to that required to complete each survey. Survey datasets are scrubbed before use and will not include utility account numbers (which are needed for the billing data analysis but not for survey efforts).

KirkpatrickPrice recently completed a Type II System and Organization Controls (SOC 2) report for ADM. The report states that the controls were suitably designed to provide service commitments and system requirements. ADM will be happy to provide a copy of the report upon request. ADM conducts regular audits of our data security practices to ensure continuous compliance and improvement. Upon the conclusion of the project or otherwise at the direction of LPSC, ADM will destroy all confidential utility customer data used during the project. ADM uses Microsoft SDelete (Secure Delete) to overwrite the contents of free disk space to prevent deleted or encrypted files from being recovered.

ADM presently stores program tracking and project-specific data, much like the data needed for this engagement, for over 50 distinct utility companies across the country. We adhere to data security best practices such as least privilege, data masking, access controls, regular audits, and regular internal and external penetration testing.

## Impact Analysis Expertise (Question B10)

As described in the Team Competencies section above, we have conducted evaluation activities for numerous clients including several in Louisiana (e.g., SWEPCO LA, Cleco, and ELL) and several with a statewide project scope (e.g., Pennsylvania PUC and CPUC). A full list of our relevant experience including examples of evaluation activities can be found below in the Firm Qualifications subsection.

Prior to verifying savings, costs and cost-effectiveness, we will conduct a thorough review of LPSC and LA utility tracking and billing data. In this review, we plan to verify reported household information via a Redfin API, identify any errors (e.g., duplicates, missing information) or outliers, and as necessary complete document verification to validate key measure parameters like equipment efficiency. We plan to tailor our impact evaluation approach to LPSC’s specific needs, but generally we define five major approaches to determining net savings for LPSC’s programs:

* Deemed Savings
* Partially/Fully Measured Retrofit Isolation (IPMVP Options A & B)
* Billing Analysis (IPMVP Option C)
* Simulation Model Analysis (IPMVP Option D)
* DR AMI Approaches

A deemed savings approach involves referencing unit energy savings values and standardized engineering equations to determine measure savings. Should LPSC approve the development of a LA-specific TRM, we will reference it once it is finalized, but until that point, we plan to refer to the AR TRM for deemed savings calculations.

For custom or otherwise non-deemed measures, we may rely on a partially/fully measured retrofit isolation calculation. This involves a careful review of the analyses and calculations that were used to develop stipulated savings values for rebated measures. We evaluate the analysis for each measure according to the degree to which the savings calculations are supported and defensible and documentation is adequate. To facilitate our review of savings calculations, we use a checklist to record whether (1) the methodology used for the calculation was appropriate, (2) assumptions used were reasonable and appropriate, and (3) savings calculations were completed correctly. The accuracy of a savings estimate developed through engineering calculations depends on the extent to which the analysis is based on correct assumptions regarding such factors as usage patterns and operating hours. We assess assumed and actual baseline conditions by reviewing program baseline assumptions, verifying adequate supporting documentation, and testing the validity of those assumptions via interviews with participants and the findings from primary verification efforts. We have local field staff residing in Louisiana who can conduct site visits to verify installed equipment and working conditions.

For measures with sufficient participation and available billing data, we will likely rely on billing analysis to calculate savings. At its core, a billing analysis involves comparing energy usage prior to and after a measure install date via a regression (while controlling for key variables like weather) to determine the savings attributable to measure installation. We have conducted a variety of regression billing analyses, but the gold standard is a regression comparing a treatment group (i.e., customers who installed a particular measure) against a randomized control trial (“RCT”) selected control group. For programs where RCT design is not available, we will request billing data for non-participant customers and employ quasi-experimental methods such as propensity score matching (“PSM”) to develop a comparable control group. PSM allows evaluators to find the most similar household based on the customers’ billed consumption trends in the period prior to measure installation. Using the constructed control group or the RCT assigned control group, we will fit a regression model to estimate energy consumption differences between treatment group households and control group households. We will include independent variables such as Heating Degree Days (HDD) and Cooling Degree Days (CDD) for weather controls, square footage, and other household or measure characteristics where applicable to improve model confidence. We will tailor our regression model specifications to each program and measure. At a minimum, we will explore the following regression models:

* Fixed effect Difference-in-Difference (D-n-D) regression model (recommended in the Uniform Methods Project [“UMP”] protocols)
* Random effects post-program regression model (recommended in the UMP protocols)

Facility-level regression analyses are a subset of the broader category of billing analyses and are primarily employed to calculate savings for commercial/industrial projects that may involve the installation of multiple measures in a single facility. We plan to use consumption data in the baseline period (the 12 months immediately prior to project participation) and in the performance period (program intervention) in a linear regression model with specifications tailored to each building to assess (or with forecast models predict) monthly energy usage. Given that facility-level regression analyses often focus on non-residential customers, we plan to include production schedules in these regressions and control for any non-routine events such as, changes in space use type, changes in operating hours, fuel switching, on-site energy generation, and occupancy changes. In a typical year, ADM alone conducts regression analysis on hundreds of nonresidential facilities as well as millions of homes across the country.

Simulation model analysis corresponds to IPMVP Option D, and it involves using building simulation technology such as REM/Rate to calculate savings based on the comparison of participating facilities with a User Defined Reference Facility (UDRF). Each UDRF will be designed as an exact replica of each sampled participating facility in terms of size, structure, and climate zone. However, instead of using the actual facility efficiency values, we use baseline (e.g., Regional or Federal energy code) efficiency data. The ADM Team will gather energy characteristics for the efficient technology via tracking data review and on-site data collection, as necessary. From there, we will compare simulated consumption in the UDRF to the LPSC efficient facility to verify energy savings.

The ADM Team has conducted a variety of different analytical approaches to evaluate the energy savings and peak load reduction associated with DR programs. Each of these approaches rely on hourly, or sub-hourly, AMI data to estimate savings impacts. In general, the following impact evaluation steps are followed for most DR programs:

1. Select one or more baseline approaches suitable for the program and subject to data availability and programs goals (e.g. regression, day matching, control-group estimation, or other methods).
2. Determine days that will serve as proxy days for testing the suitability of baseline approaches. Proxy days represent days like DR event days in terms of load shape and temperature profiles.
3. Estimate bias (uncertainty) and error on proxy days to assess baseline performance. Bias is assessed by examining the average percent error (among other metrics) of the baseline predictions relative to the actual usage on proxy days. In a similar manner, error is assessed through various metrics such as Root Mean Squared Error (“RRMSE”) using baseline predictions and actual usage on proxy days.
4. Determine model selection for the DR program cohort on an individual customer basis, for a subgroup of customers, or for the entire program population, with the goal of minimizing bias and error for the program. Models can be fit on a customer-specific basis for residential and commercial programs, and this significantly reduces the uncertainty and error of savings estimates. For example, some customers could be assigned regression-based baselines, while other customers are assigned baselines from day matching (i.e. prior-day averaging).

Once we receive more information on the availability of AMI data and existing Louisiana DR programs, we plan to determine specifically which baseline approaches are most appropriate for DR savings analyses. For large residential DR programs, ADM will identify non-responding devices and assess their impact on demand savings. Prior to the calculation of demand factors, non-responding devices are identified using a combination of 2 algorithms: a cumulative sum (CSUM) change in slope analysis and a straight 10% decrease in load detection. At LPSC’s request we can share additional information on any of these impact analysis methodologies.

In addition to calculating gross savings using the aforementioned methods, we also plan to conduct net-to-gross analyses to determine net savings. The ADM Team has calculated net-to-gross ratios and determined net energy savings for clients across the United States and are prepared to develop a sampling plan and interview key stakeholders to assess free ridership and spillover.

After calculating energy savings, we also plan to conduct cost-effectiveness analyses. ADM regularly conducts cost-effectiveness testing for SWEPCO LA and Cleco and as such are familiar with employing the Total Resource Cost (“TRC”) Test in a Louisiana context. While the RFP outlines that the TRC is likely to be the primary cost-effectiveness test for this evaluation effort, we have the tools necessary to run other tests (e.g., the Utility Cost Test, Participant Cost Test, Ratepayer Impact Measure, or Societal Cost Test) at LPSC’s request.

## Process Analysis Expertise (Questions B6 and B10)

In addition to impact evaluation, we also have conducted process evaluation of EE programs and portfolios across the United States. As with impact evaluation, ADM has extensive experience conducting process evaluation activities, such as staff interviews and participant surveys, in Louisiana for SWEPCO AR and Cleco. Louisiana-based MDRG has also conducted process evaluation work with ADM for Entergy New Orleans, spearheading consumer research and testing concepts for Entergy’s 2016 Safety Campaign. For a full list of our process evaluation activities by firm, please reference the Firm Qualifications subsection below. Our process evaluation will, at a minimum, address all the objectives identified in the RFP and cover all elements of a successful program, including design, staffing, marketing, implementation, delivery, and customer response.

Our approach to process evaluation will assess the effectiveness of program activities and provide strategic guidance to assist program improvement. Data collection activities will provide information on the effectiveness of program processes and procedures, including how well the program works with key stakeholders to optimize program operations. To this end, we plan to:

* Review program documentation and interview program and implementer staff to understand program goals, rules, and processes to reveal any issues or concerns to be investigated through other process evaluation data collection;
* Interview applicable market actors about their experiences with the program to shed light on the effectiveness of program processes, the communication between LPSC and its implementers, marketing activities, customer decision-making, and participation barriers;
* Survey program participants about their experiences, including satisfaction with the program, and their decision-making process; and
* Survey nonparticipants to reveal the level of program awareness and identify barriers to participation.

From the information obtained from the process evaluation, we will identify what programs are doing well and what factors may be preventing the programs from achieving their goals or doing so more cost-effectively. As we have with other clients, we plan to employ the following process evaluation best practices:

* Allocating process evaluation resources based on each program’s contribution to overall energy savings; evidence of evaluation need (e.g., failure to meet savings goals or unsolicited feedback from customers or trade allies); changes in program design or implementation; and the recency with which programs had a detailed process evaluation.
* Designing all data collection instruments to address specific research questions, ensuring that all needed information is collected, and none is collected that will not or cannot be used.
* Presenting the process evaluations results clearly and efficiently, identifying how each interview or survey finding addresses a specific research question. LPSC will not have to sort through lengthy descriptions of every survey response trying to figure out the meaning of the results.
* Providing meaningful high-level conclusions, which will form the basis for clear, actionable recommendations for process improvements where identified.

Where possible, we will seek to achieve the standard level of 90% confidence at 10% precision (90/10) for participant surveys. We note, however, that such a level of confidence and precision is not always feasible, particularly in programs with relatively small participant populations. In the case of market actors, such as contractors, retailers, and distributors, the choice of data collection approach will be driven by the size of the relevant market actor population and the nature of the data to be collected.

The ADM Team has developed and implemented both participant and non-participant surveys in Louisiana. We conduct all interviews and surveys using in-house resources and Louisiana-based MDRG. Our senior staff have broad and deep experience interviewing program and implementer staff, and ADM by itself carries out dozens of phone, web, and mail surveys each year. ADM’s in-house dedicated call center is staffed with a full-time manager and both English- and Spanish-speaking professionals. As-needed, ADM has completed surveys in additional languages including Mandarin and Vietnamese. Since 2015, our call center has handled an average of about 180 surveys a year with market actors, program participants, and nonparticipants, with about 12,000 survey completions overall.

We will develop all interview guides and survey instruments to address research questions identified in the RFP, during project initiation, or in staff and implementer interviews and with a mind to the analyses to be performed. The evaluation plan will document the research questions specific to each data source, which will guide the process for developing each instrument. This will ensure that the research questions for each instrument will already have been vetted and discussed with LPSC. After developing survey instruments, we will program and test surveys internally before sharing with LPSC for approval and finally sharing with sampled participants.

Our process evaluation will culminate in clear and actionable recommendations for program improvement, such as improvements to program design and customer outreach plans, and modifications to program measure offerings. Over the past five years, ADM alone has conducted process evaluation activities for well over 25 utilities, many of which offer similar programs to those we expect to evaluate in Louisiana. We will leverage our experience evaluating other utilities program implementation to identify key strengths and weaknesses in LPSC’s programs.

## Quality Review and Reporting Expertise (Questions B5 and B10)

The ADM Team will work with the Administrator to establish ongoing QA/QC procedures that provide fast feedback while promoting program evaluability and customer satisfaction. Many of ADM’s clients bear significant financial risks related to EE programs. For this reason, ADM has embraced the following QA/QC practices to mitigate risks related to underperforming trade allies or high-risk projects:

* Establishing open communication channels to deliver prompt feedback
* Developing resource-efficient sampling schemes for QA/QC inspections and reviews
* Conducting ex-ante engineering reviews for large or complex projects
* Developing gross realization rates by trade allies
* Performing “ride-along” visits with the implementor’s QA/QC team
* Working with the tracking and reporting vendor to develop automated review algorithms
* Monthly tracking data reviews and quarterly evaluation sampling

Any urgent findings will be related verbally, with memoranda issued as needed to document any issues as well as remediation actions taken and any resulting changes in policies or procedures. The ADM Team will also provide quarterly evaluation results updates. These updates provide forward-looking indicators of the year-end realization rates and serve to solicit feedback on our own activities.

We will present impact and process evaluations in comprehensive annual reports. In addition, should LPSC request it, we will also share select evaluation materials such as code used for billing analyses or savings calculation workbooks.

Evaluation reports will include specific recommendations for program improvement based on both the impact and process analysis. Impact recommendations will likely include proposed updates to LPSC tracking and/or billing data, potential changes to data (e.g., key household characteristics) collected from customers, and suggested modifications to savings calculation methodologies. Throughout the impact evaluation process, the ADM Team will keep a running list of recommendations for improvement that we will share with LPSC during regular check-in calls and in the final evaluation report. We will leverage both the kickoff call and interviews with key stakeholders to identify LPSC’s priorities and will organize and present recommendations accordingly. Furthermore, recommendations for program improvement will be reported in a pragmatic manner, with high-impact, low-effort recommendations prioritized, and lower-impact and/or more complex improvements presented subsequently. Prime examples of annual reports that members of the ADM Team have produced can be found in the Annual Reporting Samples section below.

## Specialized Task Expertise (Questions B7, B8, and B11)

We present examples of our expertise in drafting a TRM, participating in EEWG, and developing market potential studies in the TRM Assessment and Development, EEWG Participation, Market Potential and Other Studies subsections above. For additional information on firm-specific expertise in these specialized task areas, please reference the Firm Qualifications subsection. Furthermore, examples of market potential studies the ADM Team members have developed are included in the Market Potential Study Samples section below. We are confident in our ability to conduct these specialized tasks for LPSC and to leverage our findings to develop actionable recommendations for program improvement and future development.

# Approach to EM&V Functions

## Data and Software (Questions C1-C2)

The ADM Team plans to utilize the data systems developed by the Administrator to source tracking and billing data for each of LPSC’s programs and then plan to use that data to calculate savings, determine cost-effectiveness, and run various market potential studies. We provided a high-level outline of data needs in Proposed Schedule and Required Data (Questions A3-A5), but please find a more detailed breakdown of data needs below:

* Program materials such as logic models, guides, and brochures that we can review to familiarize ourselves with existing program offerings.
* Customer contact information (for at least a sample of customers) to facilitate surveys, such as names, email addresses, and phone numbers.
* Household or facility information such as square footage, onsite generation (e.g., solar), occupancy, schedule of operations, facility shutdowns or closures, moveouts, and details on facility type.
* A comprehensive list of efficiency measures installed and other program participation, including measure details and parameters such as efficiency, measure life, costs, associated rebates, and ex-ante estimated savings.
* Customer billing data, electric and/or gas depending on the measure or program being assessed. The required granularity of billing data will vary depending on the analysis, for example monthly billing data should be sufficient for a regression billing analysis of home energy reports while 15-minute or hourly advanced metering infrastructure (“AMI”) data will be necessary for DR program evaluation.
* Potentially control group or non-participant billing data that we can use to compare to treatment customers.
* Customer electric and/or gas rate information and potentially arrearages data to inform cost effectiveness calculations.
* Available data on Louisiana utility emissions factors to inform a precise assessment of greenhouse gas emissions.
* Available data on customer free-ridership and spillover to inform net-to-gross calculations.

In addition to the data listed above, we also plan to collect information on Louisiana weather from the NOAA such that we can control for HDD and CDD impacts in our analyses. The ADM Team will conduct analyses in Excel, R Programming software, and as necessary other programs like REM/Rate and Python. We have an “open books” policy – all our work products are available for technical review and critique. Additionally, all analysis code and workbooks that we share with LPSC can be used for ongoing monitoring purposes at the conclusion of the contract period. Should the ADM Team develop hosted user-facing tools such as an R Shiny app, we plan to host the app for the duration of the contract and then can coordinate with LPSC’s IT team to pass along hosting responsibilities in 2030 if necessary.

As detailed in previous sections, we plan to collaborate with LPSC and the Administrator to help coordinate the development of an efficient data management system. ADM Team members have extensive experience developing coding frameworks to clean, preprocess, and stress-test utility billing and tracking data. For example, prior to running regression billing analyses, ADM staff run billing data through a standardized framework to:

* Identify and address instances of missing data
  + Should key household information like square footage be missing, ADM has tools developed to scrape real estate platforms for data by address
* Identify and remove duplicates and near-duplicates
* Run a true-up process on estimated bills
* Conduct calendarization on monthly billing data, as necessary
* Flag outliers and as necessary remove them from the analysis
* Verify customers have sufficient pre-period and post-period billing data for inclusion

We have developed and maintained such software and have the coding skillset and organizational prowess necessary to assist LPSC and the Administrator in data system development. Data management system specifics will depend on the needs of LPSC, the Administrator, and LA utilities, but one option is an intermediary program or app that processes and formats billing and tracking data to produce clean datasets for analyses. We plan to initiate data management system planning soon after project kickoff and aim to have a framework finalized by the end of 2025. We will strictly adhere to the confidentiality and security procedures outlined in the Confidentiality Procedures (Question B4) section above. Our IT teams are well equipped to assist in the secure sharing and storage of sensitive customer information.

## Analytical Approaches (Questions C3-C5)

We outline our approach to EM&V plans and annual reporting in the Demonstration of Qualifications section above. We also provide examples of both deliverables in the EM&V Planning Samples and Annual Reporting Samples appendices below. While the Market Potential and Other Studies subsection above does include some details on the ADM Teams’ experience developing market potential studies, this section will provide additional information on our approach to the task.

We plan to conduct at least three market potential studies focusing on EE, DR, and electrification/other measures potential. While each market potential study is unique, we will generally follow similar steps to assess the amount of energy savings that exist, are cost-effective, or could be realized through the implementation of EE programs in Louisiana territory. The steps we plan to take to assess LPSC savings potential are as follows:

* Meet with LPSC and key stakeholders to determine the scope and audience of each analysis, currently available data, and project goals.
  + Common goals include setting attainable energy savings targets, determining funding for novel EE efforts, and reassessing EE opportunities as conditions change.
* Define a clear analysis methodology and share a request for key data relevant to the analysis.
* Conduct research and if necessary complete a baseline study or other original research (e.g., customer surveys) to characterize baseline conditions and energy consumption.
* Characterize the key efficiency measures for the analysis and identify the savings and costs associated with each and how those parameters are likely to change over time.
* Develop a potential program design by grouping key efficiency measures to target specific customers and/or end-uses.
* Define economic, regulatory, and market scenarios of varying likelihoods (e.g. mid, high, low)
* For each scenario evaluate the technical, economic, achievable, and program potential.
  + Technical potential is the theoretical maximum energy usage that could be displaced by efficiency measures disregarding any non-engineering constraints.
  + Economic potential refers to the subset of technical potential that is cost-effective as compared to conventional supply-side energy resources.
  + Achievable potential refers to the subset of economic potential that is achievable in practice when we take into consideration real-world barriers like end-user measure adoption and Administrators’ ability to ramp up program activity.
  + Program potential refers to the subset of achievable potential that is possible within specific program designs given budgetary and/or staffing constraints.
* Present market potential study results to LPSC as a formal report with expert recommendations for future program adjustments or updates.
* As necessary, present findings to key stakeholders and participate in discussions to advise LPSC on appropriate next steps.

In addition to these steps, throughout the market potential study, we also plan to regularly provide status updates and as necessary hold check-in meetings with LPSC. To the extent possible, we will develop a flexible potential study analysis framework that we can leverage for multiple studies, thereby maximizing the efficiency of our analyses. Having conducted EE, DR, and electrification studies in the past, the ADM Team is confident in our ability to produce a robust final analysis that helps LPSC make important policy decisions. For examples of market potential studies and additional information on our extensive experience conducting them, please reference the Market Potential Study Samples and the Firm Qualifications subsections, respectively.

## Staffing, Coordination, and Management (Questions C6-C8)

ADM Team members have collaborated with a variety of clients, consultants, and administrators in our management and evaluation of programs and measures across the country. Specific details on this collaboration can be found in the Team Competencies subsection above and the Firm Qualifications subsection below. Collectively, we have assisted in the development of several TRMs. Most notably, ADM has developed the New Orleans TRM. Katherine Johnson of JCG is directly involved in the development and maintenance of the AR TRM. As part of the statewide evaluator team in Pennsylvania, both DSA and Brightline maintain and add to the PA TRM, and ADM has also added over 50 measure protocols to the PA TRM since 2010.

Details on this process can be found in the TRM Assessment and Development subsection above. At its core, TRM development is an iterative process that builds on existing frameworks and adjusts them based on state-specific data to produce increasingly precise EM&V practices and savings calculations. We plan to approach TRM development pragmatically by focusing on popular, high savings measures first and then gradually incorporating other measures into the TRM. Ultimately, we recognize the importance of approaching TRM development collaboratively and look forward leveraging in-depth discussions with LPSC and key stakeholders to inform specifically how the LA TRM is developed.

While much of the evaluation work and analyses included in this proposal can be conducted remotely, local staffing will be vital for EEWG participation and other collaboration with key stakeholders. The ADM Team have staff residing in Louisiana and the surrounding states (i.e., Arkansas and Mississippi) that will be available for meetings or other in-person tasks such as site visits. Evaluation staff residing in other parts of the country are also willing to fly to Louisiana for key meetings, and we have budgeted for seven in-person meetings over the course of the contract. We plan to discuss LPSC’s needs regarding in-person communication during the project kickoff meeting and will develop the schedule included in the EM&V plan based on those needs. We look forward to the opportunity to collaborate with LPSC both online and in-person over the next five years.

# Cost Proposal

## Attachment B and Rate Sheet (Question D1)

We have attached an Excel document entitled “ADM Associates Attachment B.xlsx” which provides our proposed budget split by year and EM&V function as requested in the RFP.

We have also developed an hourly rate sheet for management personnel and expected functional roles presented below in Table 4‑1. We plan to apply a 3% rate increase each project year.

Table ‑. Hourly Rate Sheet

|  |  |  |
| --- | --- | --- |
| **Firm** | **Role** | **2024-2025 (Transition) Rate** |
| ADM | Principal | $280 |
| ADM | Senior Director | $230 |
| ADM | Director | $200 |
| ADM | Senior Project Manager / Analyst / Engineer | $170 |
| BrightLine | Director | $245 |
| BrightLine | Principal Consultant | $230 |
| BrightLine | Managing Consultant | $215 |
| BrightLine | Senior Consultant | $200 |
| BrightLine | Consultant | $185 |
| DSA | Partner | $240 |
| DSA | Senior Consultant | $220 |
| DSA | Consultant | $200 |
| DSA | Senior Quantitative Analyst | $180 |
| KJC | President | $200 |
| MDRG | Director | $300 |
| MDRG | Senior Manager | $275 |
| MDRG | Manager | $225 |
| Tierra | Principal | $250 |
| Tierra | Director | $235 |
| Tierra | Associate Director | $225 |
| Tierra | Managing Consultant | $215 |
| Tierra | Sr. Consultant | $185 |

## Budgeting for Uncertainty (Question D2)

In addition to the budget document and rate sheet LPSC requested in the RFP, please find a figure detailing our proposed budget by EM&V task and firm below. The figure highlights how most of the proposed budget will be assigned to EM&V functions and annual reporting, but substantial portions of the budget will also be assigned to other EM&V functions like market potential studies. To account for uncertainty in task timelines and ad hoc requests from LPSC, we have budgeted ~$600,000 for additional analysis, studies, and ad-hoc commission support.

## Sample Contract and Detailed Budget (Question D3)

In addition to the key budget details presented above, we have also attached a more detailed budget workbook and a sample contract which are referenced in the Additional Cost Proposal Details and Contract Sample subsections, respectively. The ADM Team aims for full budgetary transparency and will readily provide any additional cost information LPSC might request.

# Appendices

## Insurance Qualifications

ADM’s November 2024 insurance coverage is presented in an attached file entitled “ADM Current Insurance Coverage Nov 2024.pdf”.

## Financial Qualifications

ADM’s financial qualifications, including 3 years of audited financial statements are presented in an attached file entitled “ADM Associates Financial Information.pdf”.

## EM&V Planning Samples

We have included three EM&V plans for LPSC to review. The first entitled “ADM EM&V Plan for 2024-2025 Avista Portfolio Impact & Process Evaluation.pdf” provides details on ADM’s plans for the evaluation of Avista Utilities Gas and Electric EE portfolio. The second entitled “AR TRM 9.1 Volume 1.pdf” is the EM&V protocols developed by JCG for evaluation efforts in Arkansas.[[15]](#footnote-16) The third entitled “Pennsylvania PUC Phase IV Evaluation Framework.pdf” is a detailed framework that DSA and BrightLine (among other collaborators) produced to guide evaluation processes for the seven largest Pennsylvania electric distribution companies.[[16]](#footnote-17)

## Annual Reporting Samples

We have included two examples of annual reporting for LPSC to review. The first entitled “FirstEnergy Annual Report to the Pennsylvania PUC Program Year 15.pdf” highlights ADM’s recent evaluation of four different portfolios for Pennsylvania PUC.[[17]](#footnote-18) The second entitled “PSO 2023 Annual EMV Report.pdf” includes full impact, process, and cost-effectiveness evaluation results for our client Public Service Company of Oklahoma.

## Market Potential Study Samples

We have included two examples of market potential studies for LPSC to review. The first is a study conducted by Tierra entitled “Duke Energy Winter Peak Analysis.pdf” that presents innovative demand side management solutions capable of addressing winter peak load challenges for Duke Energy.[[18]](#footnote-19) The second, entitled “Pennsylvania PUC Phase IV DR Potential.pdf” is a DR potential study led by DSA in collaboration with BrightLine that assesses DR potential for the seven largest Pennsylvania electric distribution companies and examines costs and benefits of statewide policies to encourage the development of DR resources.[[19]](#footnote-20)

## Other Market Research Samples

The ADM Team has provided two examples of market research used to develop region-specific building characteristics. The first, entitled “Pennsylvania PUC Non-Residential Baseline.pdf” is a 2023 non-residential baseline study conducted by DSA which involved the inspection and analysis of 516 facilities to characterize the baseline energy efficiency level of the small and large C&I sectors in Pennsylvania.[[20]](#footnote-21) The second, entitled “2022 CEUS Final Report”, describes ADM’s approach and results in the largest commercial building survey conducted to date[[21]](#footnote-22).

## Additional Cost Proposal Details

We have included a more detailed budget presenting costs by task and firm in the attached file entitled “ADM Associates Detailed Budget.xlsx”. The tasks presented in this attachment reflect those detailed in the Proposed Schedule and Required Data section above and should provide additional insight into how tasks will be split between ADM Team members.

## Contract Sample

We have included a sample contract in the attached file entitled “Sample Agreement.docx”. LPSC can reference this file to develop a final contract or request additional information from the ADM Team, as necessary. The ADM Team is also open to alternative or additional terms suggested by LPSC. We are currently contracted with over 50 distinct utilities, agencies, regulatory bodies, and private firms, and we have been agreeable to the various terms and conditions in those contracts.

## Additional Appendices

### Resume Attachment

In addition to the details presented on team organization above, we have also shared a PDF attachment entitled “ADM Associates and Subcontractor Resumes.pdf” including key team member resumes organized alphabetically by firm.

### Firm Qualifications

We have included additional information on each firm and their relevant qualifications in the attachment entitled “ADM Associates and Subcontractor Qualifications.zip”. We will gladly share additional qualifications should LPSC request them.

### Current Quick Start Louisiana Utility Programs

Current Quick Start Louisiana utility programs are outlined in the table below. While some of these programs might not be included in the statewide initiative, we expect to evaluate many of them.

Table ‑. Current Louisiana Utility Programs

|  |  |  |
| --- | --- | --- |
| **Sector/Type** | **Program** | **Utilities Offering the Program** |
| Residential Energy Efficiency | Weatherization | Cleco, SWEPCO LA, Entergy Louisiana |
| Residential Energy Efficiency | Home energy audit | Cleco, NELPCO, DEMCO, SLECA |
| Residential Energy Efficiency | Equipment rebates | Cleco, SWEPCO LA, Entergy Louisiana |
| Residential Energy Efficiency | New homes | SWEPCO LA |
| Residential Energy Efficiency | HVAC program | Cleco, SWEPCO LA, Entergy Louisiana |
| Residential Energy Efficiency | Online marketplace | Cleco, Entergy Louisiana |
| Residential Energy Efficiency | Education program(s) (e.g., Elementary Education) | Cleco, Entergy Louisiana |
| Residential Energy Efficiency | Multifamily solutions | Entergy Louisiana |
| Residential Energy Efficiency | Income-Qualified programs | Cleco, SWEPCO LA |
| Commercial Energy Efficiency | LED lighting assessments & upgrades | Cleco |
| Commercial Energy Efficiency | HVAC change-outs/tune-ups | Cleco |
| Commercial Energy Efficiency | Energy management systems | SWEPCO LA |
| Commercial Energy Efficiency | Agricultural solutions | Entergy Louisiana |
| Commercial Energy Efficiency | Commercial new construction | Entergy Louisiana |
| Commercial Energy Efficiency | Commercial equipment rebates | Cleco |
| Commercial Energy Efficiency | Custom programs | Cleco |
| Demand Response | Residential DR | Entergy Louisiana |
| Demand Response | Commercial DR | Entergy Louisiana |
| Electrification | Residential heat pumps | Cleco |
| Electrification | Residential EVs and EVSE | Cleco, SWEPCO LA |
| Electrification | Commercial EVs and public charging stations | Cleco |
| Electrification | Industrial electrification | Cleco |
| Electrification | Green tariffs | Cleco |

### Detailed Schedule

Table ‑. Proposed Schedule, Data Requirements, Deliverables, and Effort Estimates

| **Task** | **Start Date** | **End Date** | **Task Details** | **Data Requirements** | **Task Deliverable** | **Effort from LPSC** | **Effort from LA Utilities** | **Effort from Administrator** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| EEWG participation and reporting | 5/1/2025 | 6/4/2030 | Evaluators to participate in regular EEWG meetings throughout the five-year contract and share key findings with LPSC via memos and other writeups. | N/A | Short-term findings to be outlined in memos and longer term findings to be included in annual reports. | ~55 person-hours (11 person-hours per year) to discuss key findings and review memos etc. | ~165 person-hours (33 person-hours per year) to discuss key findings and review memos etc. | ~55 person-hours (11 person-hours per year) to discuss key findings and review memos etc. |
| Project kickoff meeting | 5/1/2025 | 5/1/2025 | Evaluators to hold a kickoff meeting with LPSC and other key parties like the program Administrator to discuss evaluation plans, deliverables, and next steps. | N/A | Meeting minutes. | ~5 person-hour meeting | ~5 person-hour meeting | ~5 person-hour meeting |
| Request existing program materials | 5/8/2025 | 6/4/2025 | Evaluators to request existing program materials from LPSC and key Louisiana utilities such as Cleco, SWEPCO LA, and ELL. | List of existing Quick Start programs, key portfolio documents such as integrated resource plans, previous annual savings reports, etc. | A formal data request. | N/A | ~40 person-hours to collate and share program materials | ~10 person-hours as needed to support administrator |
| Utility coordination meetings | 5/8/2025 | 8/7/2025 | Evaluators to meet with the program Administrator and key Louisiana utilities to collect data on program organization and data management. | Documents outlining current program organization, existing billing/tracking datasets, and any data on smart meter coverage. | A memo of key findings based on utility materials review. | ~4 person-hours if LPSC staff choose to attend meetings | ~50 person-hours to discuss existing program organization and data management practices | ~40 person-hours to discuss existing program organization and data management practices |
| Investigate costs and benefits of LA TRM | 8/7/2025 | 10/29/2025 | Evaluators to investigate the costs and benefits of developing a LA-specific TRM and present LPSC with options for TRM development. | Any existing information on LA-specific measure parameters. | A report detailing the costs and benefits developing an LA TRM and the Evaluators' recommendation. | ~16 person-hours to provide guidance, review recommendation, and to decide TRM development approach. | ~40 person-hours availability for discussions of LA-specific parameters | ~20 person-hours availability for discussions of LA-specific parameters |
| Statewide data system coordination | 8/7/2025 | 11/18/2025 | Based on tracking/billing data received from utilities and conversations with key parties, Evaluators to develop a framework for statewide data management. The Administrator to collaborate with the Evaluators on this effort and utilities and LPSC to provide approval. | Necessary data will have already been delivered. | A statewide data management system that streamlines tracking and billing data delivery and analyses. | ~4 person-hours if LPSC staff choose to attend meetings | ~100 person-hours to discuss data management, transfer, security, destruction | ~40 person-hours to discuss plans for data management and coordinate updates/modifications |
| EM&V plan development | 8/7/2025 | 12/16/2025 | Based on discussions with LPSC and data received from the Administrator and key utilities, Evaluators to develop a comprehensive EM&V plan. LPSC will have at least three weeks to review and comment on an EM&V draft prior to final submission. | Necessary data will have already been delivered. | A formal EM&V plan for the four-year budget cycle (2026-2029). | ~15 person-hours to review EM&V plan and provide comments | ~80 person-hours to review EM&V plan and provide comments | ~40 person-hours to review EM&V plan and provide comments |
| Baseline study | 1/20/2026 | 8/27/2026 | Evaluators to conduct a baseline study of existing programs to determine the current energy efficiency landscape in Louisiana and to prepare for TRM development and market potential studies. Results to be shared with LPSC. | 2025 (and any 2026) billing and tracking data from LA utilities/LPSC. | A formal writeup of baseline study findings. | ~8 person-hours to review initial plans and results of the baseline study | ~60 person-hours to share billing data, review results of the baseline study, notify call centers in case baseline study will require customer contacts | ~20 person-hours to help coordinate data sharing with new management system |
| Develop LA TRM (pending results of 2025 investigation) | 1/20/2026 | 11/4/2026 | Depending on LPSC's response to the investigation of LA TRM costs and benefits, develop a LA TRM. This may involve updating parameters in an existing TRM or building one via a bottom-up approach. | Outside of existing information on measure parameters, potentially updated billing data to back calculate key measure parameters. | A Louisiana-specific TRM. | ~32 person-hours to review and ratify TRM | ~40 person-hours to share any data on TRM parameters and to test TRM functionality | ~40 person-hours of availability to review TRM development |
| 2026 Residential EE impact/process evaluation | 3/10/2026 | 3/3/2027 | Use 2026 billing and tracking data from Louisiana utilities to calculate kWh and Therms savings (gross and net), assess costs and develop recommendations for improvement to the Res EE programs. | 2026 Residential Energy Efficiency billing and tracking data, as well as any other program materials for review. | Savings calculation workbooks available at LPSC's request. | ~4 hours in attending selected meetings and being updated on interim findings and emerging issues | ~40 person-hours to compile and share billing/tracking data and interview | ~80 person-hours to compile and share billing/tracking data and interview |
| 2026 Commercial EE impact/process evaluation | 3/10/2026 | 3/3/2027 | Use 2026 billing and tracking data from Louisiana utilities to calculate kWh and Therms savings (gross and net), assess costs and develop recommendations for improvement to the Com EE programs. | 2026 Commercial Energy Efficiency billing and tracking data, as well as any other program materials for review. | Savings calculation workbooks available at LPSC's request. | ~4 hours in attending selected meetings and being updated on interim findings and emerging issues | ~40 person-hours to compile and share billing/tracking data and interview | ~80 person-hours to compile and share billing/tracking data and interview |
| Calculate 2026 cost effectiveness | 3/3/2027 | 4/8/2027 | Conduct cost effectiveness analysis for Res EE and Com EE programs and develop conclusions and recommendations. | Outside of tracking data cost info, potentially data on arrearages. | Cost calculation workbook available at LPSC's request. | N/A | ~24 person-hours availability for any additional cost data requests | ~8 person-hours availability for any additional cost data requests |
| Produce 2026 (PY1) report | 3/3/2027 | 6/1/2027 | Compile results from impact, process, and cost analyses and produce a comprehensive report. Evaluators to share a preliminary version with LPSC for review and comment at least three weeks prior to deliverable deadline. | Necessary data has already been delivered. | A formal annual report on the Res EE and Com EE programs with recommendations for program improvement. | ~24 person-hours availability for review both report template and draft report, comment, and report finalization | ~60 person-hours availability for review both report template and draft report, comment, and report finalization | ~24 person-hours availability for review both report template and draft report, comment, and report finalization |
| 2027 Demand Response impact/process evaluation | 2/16/2027 | 3/2/2028 | Use 2026/2027 billing and tracking data to calculate kW, kWh (net and gross), and cost impacts of DR programs and develop recommendations for program improvement. | 2026 and 2027 tracking and AMI billing data DR customers. | Savings calculation workbooks available at LPSC's request. | ~2 hours in being updated on interim findings and emerging issues | ~40 person-hours to compile and share billing/tracking data and interview | ~80 person-hours to compile and share billing/tracking data and interview |
| 2027 Electrification impact/process evaluation | 2/16/2027 | 3/2/2028 | Use 2026/2027 billing and tracking data to calculate kW, kWh/Therms (net and gross), and cost impacts of electrification programs and develop recommendations for program improvement. | 2026 and 2027 tracking and AMI billing data for customers participating in electrification programs. | Savings calculation workbooks available at LPSC's request. | ~2 hours in being updated on interim findings and emerging issues | ~20 person-hours to compile and share billing/tracking data and interview | ~10 person-hours to compile and share billing/tracking data and interview |
| Energy efficiency market potential study | 3/10/2027 | 9/30/2027 | Conduct a study to assess the potential avenues for energy efficiency growth and expansion in Louisiana. | Outside of 2026 billing and tracking data for Res EE and Com EE customers, potentially non-participant contact info for surveys. | A report on the energy efficiency market potential in Louisiana as of 2027. | ~24 person-hours review plans and findings, and to set targets for the next phase | ~90 person-hours availability to assist with data sharing, alert call centers in case there are specific surveys related to the study | ~10 person-hours availability to assist with data sharing |
| Demand response market potential study | 3/10/2027 | 9/30/2027 | Conduct a study to assess the potential avenues for demand response growth and expansion in Louisiana. | Outside of 2026 DR tracking and billing data, potentially non-participant contact information for surveys. | A report on the demand response market potential in Louisiana as of 2027. | ~16 person-hours review plans and findings, and to set targets for the next phase | ~60 person-hours availability to assist with data sharing, alert call centers in case there are specific surveys related to the study | ~10 person-hours availability to assist with data sharing |
| Calculate 2027 cost effectiveness | 3/2/2028 | 4/13/2028 | Conduct cost effectiveness analysis for DR and Electrification programs and develop conclusions and recommendations. | Outside of tracking data cost info, potentially data on arrearages. | Cost calculation workbook available at LPSC's request. | N/A | ~4 person-hours to review results | ~4 person-hours to review results |
| Produce 2027 (PY2) report | 3/2/2028 | 6/1/2028 | Compile results from impact, process, and cost analyses and produce a comprehensive report. Evaluators to share a preliminary version with LPSC for review and comment at least three weeks prior to deliverable deadline. | Necessary data will have already been delivered. | A formal annual report on the DR and Electrification programs with recommendations for program improvement. | ~12 person-hours availability for review draft report, comment, and report finalization | ~40 person-hours availability for review draft report, comment, and report finalization | ~20 person-hours availability for review draft report, comment, and report finalization |
| Electrification market potential study | 2/24/2028 | 8/30/2028 | Conduct a study to assess the potential avenues for electrification growth and expansion in Louisiana. | 2026/2027 electrification tracking and billing data and potentially non-participant contact information for surveys. | A report on the electrification market potential in Louisiana as of 2028. | ~16 person-hours review plans and findings, and to set targets for the next phase, if any | ~30 person-hours availability to assist with data sharing | ~10 person-hours availability to assist with data sharing |
| Additional market potential studies | 2/24/2028 | 8/30/2028 | Conduct any additional market potential studies requested by LPSC or deemed necessary for the second four-year budget cycle (starting in 2030). | TBD, contact information for surveys will likely be necessary. | A report based on any additional market potential studies conducted by the Evaluators. | ~16 person-hours review plans and findings, and to set targets for the next phase, if any | ~30 person-hours availability to assist with data sharing | ~10 person-hours availability to assist with data sharing |
| 2028 Residential EE impact/process evaluation | 3/1/2028 | 3/1/2029 | Use 2027/2028 billing and tracking data to calculate kWh/Therms (net and gross) and cost impacts of Res EE programs and develop recommendations for program improvement. | 2027 and 2028 tracking and billing data for customers participating in Res EE programs. | Savings calculation workbooks available at LPSC's request. | ~4 hours in attending selected meetings and being updated on interim findings and emerging issues | ~40 person-hours to compile and share billing/tracking data and interview | ~80 person-hours to compile and share billing/tracking data and interview |
| 2028 Commercial EE impact/process evaluation | 3/1/2028 | 3/1/2029 | Use 2027/2028 billing and tracking data from LPSC to calculate kWh/Therms (net and gross) and cost impacts of Com EE programs and develop recommendations for program improvement. | 2027 and 2028 tracking and billing data for customers participating in Com EE programs. | Savings calculation workbooks available at LPSC's request. | ~4 hours in attending selected meetings and being updated on interim findings and emerging issues | ~40 person-hours to compile and share billing/tracking data and interview | ~80 person-hours to compile and share billing/tracking data and interview |
| Calculate 2028 cost effectiveness | 3/1/2029 | 4/12/2029 | Conduct cost effectiveness analysis for Res EE and Com EE programs and develop conclusions and recommendations. | Outside of tracking data cost info, potentially data on arrearages. | Cost calculation workbook available at LPSC's request. | N/A | ~4 person-hours to review results | ~4 person-hours to review results |
| Produce 2028 (PY3) report | 3/1/2029 | 6/1/2029 | Compile results from impact, process, and cost analyses and produce a comprehensive report. Evaluators to share a preliminary version with LPSC for review and comment at least three weeks prior to deliverable deadline. | Necessary data will have already been delivered. | A formal annual report on the Res EE and Com EE programs with recommendations for program improvement. | ~12 person-hours availability for review draft report, comment, and report finalization | ~40 person-hours availability for review draft report, comment, and report finalization | ~20 person-hours availability for review draft report, comment, and report finalization |
| 2029 Demand Response impact/process evaluation | 3/1/2029 | 3/1/2030 | Use 2028/2029 billing and tracking data to calculate kW, kWh (net and gross), and cost impacts of DR programs and develop recommendations for program improvement. | 2028 and 2029 tracking and AMI billing data for customers participating in DR programs. | Savings calculation workbooks available at LPSC's request. | ~2 hours in being updated on interim findings and emerging issues | ~40 person-hours to compile and share billing/tracking data and interview | ~80 person-hours to compile and share billing/tracking data and interview |
| 2029 Electrification impact/process evaluation | 3/1/2029 | 3/1/2030 | Use 2028/2029 billing and tracking data to calculate kW, kWh/Therms (net and gross), and cost impacts of electrification programs and develop recommendations for program improvement. | 2028 and 2029 tracking and AMI billing data for customers participating in electrification programs. | Savings calculation workbooks available at LPSC's request. | ~2 hours in being updated on interim findings and emerging issues | ~20 person-hours to compile and share billing/tracking data and interview | ~10 person-hours to compile and share billing/tracking data and interview |
| Calculate 2029 cost effectiveness | 3/1/2030 | 4/11/2030 | Conduct cost effectiveness analysis for DR and Electrification programs and develop conclusions and recommendations. | Outside of tracking data cost info, potentially data on arrearages. | Cost calculation workbook available at LPSC's request. | N/A | ~4 person-hours to review results | ~4 person-hours to review results |
| Produce 2029 (PY4) report | 3/1/2030 | 6/4/2030 | Compile results from impact, process, and cost analyses and produce a comprehensive report. Evaluators to share a preliminary version with LPSC for review and comment at least three weeks prior to deliverable deadline. | Necessary data will have already been delivered. | A formal annual report on the DR and Electrification programs with recommendations for program improvement. | ~12 person-hours availability for review draft report, comment, and report finalization | ~40 person-hours availability for review draft report, comment, and report finalization | ~20 person-hours availability for review draft report, comment, and report finalization |

1. https://apsc.arkansas.gov/wp-content/uploads/AR\_TRM\_V9.1\_Volume\_1\_2\_and\_3\_on\_8-31-22.pdf [↑](#footnote-ref-2)
2. While electrification with a natural gas baseline is disallowed, opportunities for gasoline, diesel, propane, or other fuels exist. [↑](#footnote-ref-3)
3. https://tierrarc.com/empower-maryland-independent-evaluator/ [↑](#footnote-ref-4)
4. https://energy-evaluation.org/wp-content/uploads/2019/06/2014-berlin-katherine-johnson.pdf [↑](#footnote-ref-5)
5. https://johnsonconsults.com/wp-content/uploads/2024/05/Johnson-EMV-Framework-ACEEE-Paper-FINAL.docx [↑](#footnote-ref-6)
6. https://neea.org/img/documents/codes-mper-5.pdf [↑](#footnote-ref-7)
7. https://apsc.arkansas.gov/wp-content/uploads/AR\_TRM\_V9.1\_Volume\_1\_2\_and\_3\_on\_8-31-22.pdf [↑](#footnote-ref-8)
8. https://www.dret-ca.com/wp-content/uploads/2023/07/PGE-Agricultural-Demand-Response-Study.pdf [↑](#footnote-ref-9)
9. http://www.puc.state.pa.us/pcdocs/1656475.pdf [↑](#footnote-ref-10)
10. https://www.nipsco.com/docs/librariesprovider11/rates-and-tariffs/irp/2021-nipsco-irp-appendix-b.pdf?sfvrsn=6 [↑](#footnote-ref-11)
11. https://buildings.lbl.gov/publications/2025-california-demand-response [↑](#footnote-ref-12)
12. https://www.puc.pa.gov/Electric/pdf/Act129/SWE-Phase3\_NonRes\_Baseline\_Study\_Rpt021219.pdf [↑](#footnote-ref-13)
13. https://www.puc.pa.gov/Electric/pdf/Act129/SWE\_Res\_Behavioral\_Program-Persistence\_Study\_Addendum2018.pdf [↑](#footnote-ref-14)
14. https://www.energy.ca.gov/publications/2023/2022-california-commercial-end-use-survey-ceus-final-report [↑](#footnote-ref-15)
15. https://apsc.arkansas.gov/wp-content/uploads/AR\_TRM\_V9.1\_Volume\_1\_2\_and\_3\_on\_8-31-22.pdf [↑](#footnote-ref-16)
16. https://www.puc.pa.gov/media/1584/swe-phaseiv\_evaluation\_framework071621.pdf [↑](#footnote-ref-17)
17. https://www.puc.pa.gov/pcdocs/1851541.pdf [↑](#footnote-ref-18)
18. https://cleanenergy.org/wp-content/uploads/Duke-Winter-Peak-Analysis-Solution-Set-Final-Report.pdf [↑](#footnote-ref-19)
19. https://www.puc.pa.gov/pcdocs/1656475.pdf [↑](#footnote-ref-20)
20. https://www.puc.pa.gov/media/2884/2023\_pa\_non-residential\_baseline\_study.pdf [↑](#footnote-ref-21)
21. https://www.energy.ca.gov/publications/2023/2022-california-commercial-end-use-survey-ceus-final-report [↑](#footnote-ref-22)