



Technical Advisory Group (TAG) Process

Background

The Technical Advisory Group or TAG includes the Vermont Department of Public Service, members of Vermont's Energy Efficiency Utilities, and other stakeholders and focuses on reviewing and approving the methodology and associated assumptions underlying measure-savings calculations that are included in the Technical Reference Manual (TRM). In addition TAG has functioned as a general forum for technical issues related to Energy Efficiency Utility savings claims and methodologies. TAG also resolves issues that arise from annual savings verification and serves as a proactive mechanism to develop energy characterization and savings calculations. Over the past fifteen years, the evolution of the TAG process has led to a very effective method of making improvements that increase the reliability of Energy Efficiency Utility savings claims.

Stakeholders

Key stakeholders in the TAG Process include:

- Department of Public Service
- 3rd Party Evaluator
- VEIC Evaluation, Measurement, and Verification (EM&V) Staff
- Efficiency Vermont Program and Implementation Staff
- Burlington Electric Department Staff
- Other Stakeholders, as appropriate

Process

TAG stakeholders work to resolve technical issues related to Energy Efficiency Utility savings claims. VEIC EM&V staff plays a coordination role for the TAG process scheduling monthly meetings, updating the TAG tracker, and coordinating communications around proposals and responses. TAG discussion topics and action items are maintained in the TAG Tracker document.

Items addressed via TAG include:

- TRM Measure Characterizations: VEIC EM&V submits proposals for new measure characterizations via TAG, bundling multiple characterizations into a Measure Portfolio. These characterization drafts are reviewed by the Department and other stakeholders and agreements are made on measure assumptions and savings estimates before incorporating new measure characterizations into the TRM.
 - Savings Verification Recommendations: issues that arise from annual savings verification including recommendations for process improvements and updates to savings characterization and calculations are tracked via TAG.
 - Program Implementation Procedures: for measures or programs that require a more comprehensive view of savings delivery methodology, Energy Efficiency Utility program staff develops a detailed memo that includes an explanation of inputs and methods used
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to calculate savings. These documents can be used by external evaluators and other stakeholders to understand how a program or measure works so they can evaluate the savings claim accordingly.

- General Technical Topics: issues related to Energy Efficiency Utility savings claims and methodologies.

Frequency

TAG has evolved into two separate meetings that occur on a monthly basis:

- TAG: A monthly TAG meeting takes place for two hours on the first Thursday of every month. The TAG meeting covers high level issues and ongoing conversations around TAG Tracker items.
- Mini-TAG: A monthly Mini-TAG meeting takes place for two hours every third Tuesday of the month. The Mini-TAG meeting serves the forum for deeper technical review and discussion of TRM Characterizations, savings methodologies, and other issues.

Agreements made between the Energy Efficiency Utilities and the Department can occur at either meeting.

Sub-Teams

A particularly effective mechanism that has evolved as part of the TAG process is the formation of cross-organizational teams (TAG sub-teams) to develop and resolve TAG issues to the best of their ability. These teams meet outside of the regular TAG meetings to explore specific issues in greater depth and bring recommendations back to the full TAG. Proposed resolutions are brought forward to the full TAG for review and adoption.