

**Proposed Technical Resource Manual (TRM) & Measure Classification List (MCL) Consultant Scope of Services\_DRAFT 5.14.2014**

**Task 1 TRM/MCL Maintenance**

- 1.1 Review current TRM and address any specific areas of concern identified by DPS Staff. This task may include a comparison of measure savings algorithms, assumptions and/or deemed savings with neighboring states in the northeast including those in New England and the Mid-Atlantic states, and those states with similar climates to New York who are actively pursuing energy efficiency through corresponding programs.
- 1.2 As directed by DPS Staff, review all requests for additions/modifications to the MCL and TRM from Program Administrators, including but not limited to verification of the appropriateness of inputs used for the Benefit Cost Analysis and sources used. Identify concerns and work with DPS Staff to resolve any issues with the Program Administrator request. Make recommendation to DPS Staff for approval or rejection of the proposed addition/modification.
- 1.3 Propose updates to TRM related to impending changes and updates in building & energy codes and product standards, as applicable.
- 1.4 Work with DPS Staff and the E<sup>2</sup> Working Group to develop criteria to be used to update TRM based on evaluation results. Review evaluation results for applicability to update or verify TRM inputs/formulas, as assigned. Conduct additional research/analysis that may be necessary based on findings of evaluation work, as assigned by DPS.
- 1.5 Manage the maintenance and annual revision of the TRM, including review of all proposed revisions. This task would include preparing all records of revisions and compilations into an annual published version. Work with DPS Staff and Program Administrators to revise revision process, as needed.
- 1.6 Perform research pertaining to the cost of specific energy efficient measures as compared to minimally-compliant models to assist DPS Staff in determining incremental costs, on an as-needed basis.
- 1.7 Participate on subcommittee calls or other meetings, as assigned by DPS Staff, to fulfill Task 1.

**Task 2 TRM/MCL Future Use & Planning**

- 2.1 Work with DPS Staff and the E2 Working Group to assess how the current TRM is being utilized by Program Administrators, including but not limited to, the use on a project-by-project basis as opposed to deemed values, the percentage of savings by Program Administrator and across Portfolio using the TRM versus custom modeling, etc.
- 2.2 Review and recommend to Staff Best Practices of other jurisdictions regarding the development, use, and management of a TRM/MCL.
- 2.3 Participate on subcommittee calls or other meetings, as assigned by DPS Staff, to fulfill Task 2.

**Task 3 Other**

- 3.1 Research as assigned by DPS Staff. This Task is expected to include, but not be limited to the research and proposal of new measures identified by DPS Staff or a Program Administrator; further analysis on characteristics such as hours of use, building stock, geographical considerations, etc.
- 3.2 Conduct/Review Benefit Cost Analysis, as assigned by DPS Staff.

**Contract Duration:** Through December 2015

**Cost Estimate:** TBD

**FTE Estimate:** TBD

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