

## Retail Matrix Work Plan for NAESB EE/DSM Standards

#	Task	Description	Deliverable	Completion Date	Who
1	Finalize the retail matrix spreadsheet	The retail matrix spreadsheet will provide the basis for a utility survey to determine what types of M&V are currently underway for current or past DR programs and what is planned for new programs.	<ul style="list-style-type: none"> <li>▪ Decide if spreadsheet needs to be reformatted.</li> <li>▪ Add additional columns – past programs, current programs, proposed programs</li> <li>▪ Add examples from BGE and Alabama Power</li> </ul>		
2	Conference Call	See agenda	Come to consensus on the approach for retail matrix	1/17/08	Work group
3	Finalize cover letter for survey	Develop a cover letter to transmit the survey to target utilities	Provide cover letter draft for review Describe what is expected and how to respond.		
4	Identify survey targets	Identify who the survey will be sent to	List of survey participants		
5	Mail and distribute survey	Decide on date to send the survey	Individual utilities will be expected to list past, current and potential DR programs along with the requested information in the matrix based on the representative examples to be provided with the matrix		
6	Collect and summarize survey results	The survey instrument will request each participant to submit their responses. Responses will be reviewed and segregated into types of programs	A summary report will be produced which describe the quality of the responses and the general types of programs that were submitted. This will be a qualitative assessment to determine the next steps of evaluation and the level of effort required		
7	Report to NAESB	Report out on preliminary assessment of the responses with a proposed work plan to complete the analysis and recommend next steps	Discussion at March NEASB meeting		3/28/08
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