

**Utility Sounding Board (USB) Face-to-Face Summary  
August 8, 2007**

**USB members in attendance:**

- Larry Blaufus – Clark Public Utilities
- Bruce Etzel – Benton REA
- Kevin Howerton – Grays Harbor PUD
- Joe Savage – Emerald PUD
- Randy Thorn – Idaho Power

**USB members in attendance via phone:**

- Van Ashton – Idaho Falls Power/IDEA

*Absent:* Dawn Senger – Richland Energy Services

Jim Wellcome – Cowlitz County PUD

Kathy Moore - Umatilla Electric/PNGC

**BPA staff in attendance at various times:**

- |                 |                  |               |
|-----------------|------------------|---------------|
| • Karen Meadows | • Margaret Lewis | • Lloyd Meyer |
| • Tim Scanlon   | • Mark Ralston   | • Chris Tash  |
| • Mira Vowles   | • Rosalie Nourse | • Lisa Perigo |
| • Bruce Cody    | • Jim Kenna      |               |

**Action Items:**

USB members are interested in discussing the Green Motors initiative.

TIM - Give me your top 3-4 that you wish you had that you don't now.

Karen - 1 pager of what we are going to roll out and when

Karen - Send the link to NEEA's residential characterization study (Update: Karen will send the link as soon as NEEA posts the final). The multifamily characterization study is available @ <http://www.nwalliance.org/research/reports/168.pdf>.

**Marketing Strategy Priorities**

**Introduction to the Marketing Scoping Paper/Background:**

- Summit Blue recommendations
- Summaries EERs determined benefits from their perspective
- Primarily an EER project, Sector Leads have had some input which is reflected in the front of the document.
- Marketing Scoping Matrix – Bold implies we can accomplish within FY, short period of time.

**Review of the Matrix of Recommendations**

USB comments on each recommendation are listed below.

**Large Utilities #1:**

Future niche markets to get into? Hotel/motel, grocery store, roof top, etc.

Have we done any testing/inquiring on golf courses (water-pumping)? Brad is doing some research on pumping loads in that area.

**USB** Hard to reach market – Larger office buildings that have several tenants on different floors, do we have that addressed? Commercial? Could that be a niche market?

**USB** Do we have enough resources for our aggressive targets?

USB If you have a number of 3<sup>rd</sup> parties running the programs for utilities (PECI) would that be helpful? It doesn't hurt us to have contractors but it comes down to willingness to pay from BPA to utilities. The more you pay the more you will get.

Do you think the niche markets are harder to reach because of the willingness to pay has been so low or? Both, we had one go forward with the grocery store initiative

**Mira** CNC – sustainability, greenness, would we help recognize buildings as being more green? Try to facilitate media alerts or PR for awareness.

Green motors – rewind process

Premium motor rebates – PacifiCorp has a successful one

Until we have simple deemed measures it's just going to be a hard to market

The big boys are easy.

Having regional consistency is very important

Standardized deemed numbers is key

Marketing for the Green Motors – worth more discussion

*Keep list of lettermen top ten that need attention*

If BPA is going to do anything we'd like to see it

### Large Utilities #2

Seattle coalition of utilities: has been very successful

Everyone is offering the same incentives it moves the market more simplistically

Should we continue to do this on other areas? In rural areas...

Puget area utilities felt having consistency is critical for them since they overlap.

Suggested one central website for standardized information...

Is it hard to know who is doing what where? More information on the web...

In the irrigation sector, the vendors are pushing the program

Better agreement of what program specifications are.

### Large Utilities #3

Example included Lighting workshops/training sessions. Is it helpful?

**USB** Hard time to get large industries into meetings, best thing is to take tech expertise to walk through the plant. Go to them and identify what needs to be corrected and make list of top 3 items to be changed. As you expand you are going to need more "Tom's" (engineers).

That would be the key for any large customer as well, just not smaller ones. When you get down to the small ones you need to have deemed savings. They need to know what the incentives are right away, not after a year of M&V

Reinforce that there are programs out there.

All new construction done by Platt is done out of Portland. Shift to also target regional offices for this effort.

Hand holding is great. Vendors have a hard time getting through the customers front door. Utilities want/need to be the first line of contact.

Who would that one person be? Vendors, Utilities – Utilities in my case, we have easier access to the customers. Flyers are great for walk-through (leaving marketing materials).

### Small/Med Utilities #1

Keep this group and add "special groups;" ad-hoc committees if need be. Staffing issues to expand it beyond that...

We've been sending notes out after the meetings to all customers as an FYI

### Small/Med Utilities #2 & #3

Mostly a delivery question... Need program flexibility

Example, HTR for CFLs – if we mail them can we get the \$4.00 cause we have to mail them...?? Just what are the requirements to claim higher rated bulb.

Only negative comments we got were from the post office. 4 /home – hard to reach, customers liked it. Some of these should be able to be claimed as hard to reach.

USB We measure everything out right now, nothing is deemed. It's hard to market when you have to go out and put up meters etc. Stop having to meter everything.

**Mira** More transparencies across sectors

Looking for more creative ways to get out there and better tools.

**Mark R.** Engineers should take more of a marketing role since they are so well known in the field.

**Mira** Has anyone used part of the roadmap? Use it as reference.

**USB** We use it right now and we're starting to have a little bit of an affect. Seems to be helping us get into the door and get more projects through to completion. We had it printed up with our logo.

Sometimes the vendor brings their own materials on their products. Utilities should come in unbiased.

If we had access to the electronic materials we could customize the information. Information is in Adobe. Need a more user friendly software tool.

**Margaret** Rubberstamp of a program process, Grocery Store etc., would that help?

Case studies are on of the best marketing tools.

**USB** Is there are way regionally that BPA could get information out about their program through the media?

How much deeper do we go on branching out or do we come back in a focus on what we currently have. Is there any technology that we're missing?

Engineers (especially BPA) should not be salesman. They are successful because they are not – they are solely technical experts. No pressure on customers.

### Small/Med Utilities #4

Solar water heaters, hard to get builders to put them in. Same with GFX Heat Exchanges. More program education/awareness for industry folks.

Energy is a small line item on customer bill; need more customer awareness opportunities.

Consider BPA ads directing customers to contact local utility.

Macro marketing approach.

Is there going to be a problem when utilities do/don't want to offer programs when marketed regionally. Utilities will just have to deal with the phone calls, but it's not worth holding off on a regional campaign just because we don't have regional consensus.

Best supporting roles, we're pushing NEEA.

Should we be coordinating more – think of a one-stop shopping site on the web for information and resources.

### Regional Implementation Groups #1-3

TRAINING – additional training needed. Who (organizations) does what training, and for what? Maybe have one calendar for all “other” parties – Regional Calendar

Coordinating would be very helpful. Is there a need for clarity of roles?

BPA Brown Bag sessions on what those organizations do.

Consider a cheat sheet posted to the web – Entities, What the Do, Acronyms, etc.

IEA role, training, I'm comfortable with it. But do others know what it is?  
Tie into State Directives, such as Carbon Reductions – is it helpful to market that if you do this measure then your carbon reduction is this? If they know what their measures are working on then that might be more helpful in the marketing materials and getting customer buy in.

Work with the Climate Trust on a Conversion sheet...

Program – Carbon Footprint (CA Bay Area)

Also have Cross marketing/promotion for programs. We do that now in commercial (Tim). Example – Grocery Store. Working with ETO to make sure they know our programs and vice versa.

### Trade Allies #1-3

Developing trade ally program, use vendors in a marketing role. ETO has a large TA group. (just in Oregon service territory) Would there be interest if it were available in WA or other states?

Companies are pushing conservation from their National Offices (Energy Industries, Grainger). Target some regional offices as opposed to the local levels.

### BPA Internal Personnel #3-5

Take advantage of existing meetings/conferences with architects & engineers.

Consider Regional Design CNC workshop. Traveling road show, NEEA would be involved. Maybe have a speaker at one of their shows/meetings.

Web based tool, generic web interface, customers could customize, web-based auto generated forms

Do more work on the design of the Web site. Consider outside personnel.

### Market Research #1-4

Do we need more focus on market intelligence?

Folks are working now to come up with information on utility loads by type. Is it useful? Council does some... Really starting to roll into getting ready for 6<sup>th</sup> Power Plan. We're trying not to duplicate. We fund some of what NEEA does to be useful.

Need to create a better linkage between what they have and what utilities want and need.

Next year NEEA will do their commercial assessment, what are people doing, residential – appliances?

For a small utility it won't make too much of a difference. Some basic numbers would be good. For example, # of CFLs in a home? How many new appliances have been installed? Would data market research be good? Blend the two.

We need some of the basic facts and figures. What works in Seattle won't work in a small town.

We need to have something in areas where there is not data.

**USB** When we have data, have some information to validate the source of the numbers and/or the methodology on the determination of the numbers.

**USB** Maybe do a survey in a few years on our customers of what they did when their CFLs burned out. Did they replace them with CFLs?

### Marketing Strategies #1-4

**USB** Historically – you save money doing conservation. Now it's more of a social, being green, externalities that don't get factored into prices but do factor into the decisions of purchasing conservation as a low cost resource.

SCL – Building a Better Environment campaign, countertop plaque for customers participating in the program.

Being green typically associated with implying higher costs, but not necessarily true.

Campaign – Saving Monday and Saving the Environment

Look for business opportunities – consider the Burgerville strategy!!!!

### **USB Top Ten:**

- Carbon Footprint
- Challenge environmental effectiveness of renewables
- Mass marketing on conservation – TV, radio etc
- Case studies for End Users (consider other messages, such as reduced load, safety, employee safety, etc.)
- Key accounts are taken care of. Ones below the key accounts (medium and small accounts) for opportunities. Use market intelligence in this effort.
- Broad based regional marketing effort vs. everyone doing their own thing. Consistent messages, e.g., national campaign based on the basis of energy efficiency

### **Commercial Sector Discussion**

#### **Review/Discuss USB feedback on draft FY08 Commercial Sector Strategy**

(Refer to handout included with 8/8/07 USB agenda) Tim thanked USB for providing written comments and suggestions. Focus of discussion was how he intended to respond to USB suggestions.

Next step is to solicit feedback from USB members on:

- Which activities should be given highest priority in the FY 2008 strategy?
- Are there any major missing elements that should be added to this strategy?
- In terms of relative priorities should the focus be on adding more deemed measures? Developing more “calculators” for Commercial measures? Is there any need to refine the Custom Project Proposal procedures?

*{Received handwritten feedback from one USB member on relative priorities at the end of the discussion. In order to finalize the Sector Strategy, we hope to get written feedback (on the items listed above) from other USB members in advance of next USB meeting}*

#### **HVAC program development options**

- BPA intends to develop HVAC programs that are applicable to both retrofit and new HVAC systems.
- Rooftop HVAC is a major source of remaining Commercial conservation potential.
- Development of a rooftop HVAC program will be a long term undertaking. An RTF subcommittee has spent 2.5 years addressing the technical issues. We do not expect to have a program design in place in FY 2008.

#### **Commissioning**

- In terms of energy savings, commissioning (retro commissioning, continuous commissioning, etc.) and repair of rooftop HVAC may be just as important as the installation of new energy efficient HVAC systems.

- There appears to be no single, unified vision as to what “commissioning” can entail (e.g., could include a mix of equipment tune ups, repairs and hardware upgrades).
- There are also significant policy issues regarding development of a “stand alone” commissioning program. Biggest issue is how to credit energy savings from retro-commissioning. Current program assumption is that equipment is commissioned at time of installation and measure savings do not degrade over measure life. That said, there is substantial evidence that HVAC systems are often not operating within the design specs and are not properly maintained (especially economizers).
- EE is doing a limited field study to learn more about the feasibility of different types of commissioning options for rooftop HVAC. Tim Steele is working with Clark PUD to identify candidate sites. The idea here is to develop a set of commissioning protocols. Suggestion from one USB member was that there could be a potentially viable commissioning program where commercial end users are trained and incentivized to check their equipment every 1-3 years.
- BPA will keep USB posted on further developments and solicit feedback on commissioning field study.

### **Use of Calculators**

- Feedback from a USB member, requested use of calculators (in lieu of custom proposals), so utilities can quickly determine what the BPA incentive will be. This is preferable to custom proposals, where the utility must submit the project proposal then wait to hear back on acceptability of M & V before they can give the end user the go ahead to order the equipment.
- One USB member provided hard copy of a Premium Efficiency Motors program (small motors >200 hp) spreadsheet and suggested having BPA design something similar for our utilities. Karen noted that the new higher minimum efficiency standards for motors would have to be taken into consideration.

### **“Provisional” Deeming Concept**

- USB member feedback stressed the importance of adding more deemed measures to the commercial sector program portfolio. Tim briefly discussed the challenges of getting deemed savings values through the RTF process. Proposal under development to expedite the addition of new deemed measures. The idea is to work with the Power Council on a provisional deeming approach wherein initial estimated savings values can be established (and credited toward the Council’s A&W target) and refined over time based on actual program experience.

### **Advanced Field Training**

- Briefly discussed the current plans to offer advanced field training for C&I Lighting (as a follow on to the utility field training, which in FY07 50+ utilities have participated in). The focus of the advanced field training is hands on instruction on performing the lighting audits, uploading the audit results into PTR and marketing to commercial end users. One USB member asked if commercial end users could attend training, Tim said all are welcome to attend if utility thinks there is interest and benefit.

### **C&I Lighting Trade Ally Network**

- Lisa Perigo (C&I Lighting Program Coordinator) briefed USB on current efforts to get the C&I Lighting TAN up and running.
- E-mail will be sent out later this week informing utilities about the selecting of Evergreen as the C&I Lighting TAN Administrator.

- Lisa and Rosalie will be working on a communication plan.
- Work plan with Evergreen will address:
  - Communication/Coordination – BPA, Utilities and Trade Allies
  - Geographic Target Markets – define markets for the TAN
- Intention is to broadly interpret the term “Trade Allies”. Anyone involved in the C&I Lighting delivery chain, except BPA, utilities and the commercial end user, (would include lighting suppliers, installers, electricians, etc.).
- We will solicit feedback from USB members on the Draft C&I work plan at the next USB meeting.
- This effort will also include potential refinements in C&I Lighting Program design from the Trade Ally perspective
- There are many vendors who don’t know the program that need training. Let us know who you thinking should be in those training.

***Please provide any feedback to Lisa Perigo.***

Trade ally groups – Anyone who is not BPA or the Utilities who can help with Lighting Installers/Suppliers

Living Doc on the Web, work with EERs

There are many vendors who don’t know the program that need training. Let us know who you thinking should be in those training.

Not everyone has those same incentives.

Stages we can do this. We have very similar specs, maybe there are areas where we can have consistency.

#### ***CNC EIDP***

Trial Period – new buildings before development

Develop Web site where information can be input

Outreach – they enter basic project info ASAP, we determine send info to serving utility  
We’ll send all info to utilities and bones of an email of what they’ll send to end users.

Track in PTR system.

What’s the incentive. They get \$100-\$500, six since March have been approved.

Getting money reward is hard on our part and theirs. SCL get their TA into a room and tell them they will be rewarded, they get some kind of cool flashy prize

Aug 20<sup>th</sup> – CNC group, brainstorm on non-monetary awards.

LEED building – They build to code, we’ll work with Lead, it would be a custom proposal. Especially if they want the energy credits.

#### **Energy Smart Design™ New Office Prescriptive Package**

Working with the college, NSOP, piggy back on Energy Smart Office, too generic  
This is the first piece, 1 year, meetings with the RTF, waiting to get real green light. Next packages will be schools, warehouses, retail (NEXT), Public assembly. Schools would be great, huge lost opportunity! Would additional measures for offices be better? Do we have to add more measures? It might be better to add more because they would be more cost-effective in other areas. We can stretch measures...

For small office there are items that exceed codes through out the region 10-16%.  
Eligibility under current utilities, new building, must use one of the simple HVAC systems, Window wall >30spf. Less then or = 100k conditioned square feet.

EE teir 2  
Windows .4%  
HCSG  
Lighting controls beyond what's required  
Economizers – Commissioned  
Letter from certified professionals  
Just deemed cost effective by the RTF last week

Oct 3 – Utility BB to explain how this program will work. Will be in the PTR.  
First BB i  
Other outreach to owners  
Aug 20 we'll be talking to others on the package  
Utility – Funding mechanism, if additional is required go to the MSO  
IN the sample will be a place to enter the PTR ref number. Only good for a period of time. Things could change.  
Stretch measures on top of  
Region Wide – Working with several groups to be consistent on measures. \$/sqf might be different for every utility. .50/sqf – not approved  
In the PTR, one reference number per combination. In 2009 we'll have another reference number

Connected per sqf. There could be a tech trade-off, daylight.

1.1/sqf in WA. .75 isn't unattainable.  
No site inspections  
Required Docs – Letter cert from reg design professional (gen contractor, architect, engineer)  
Once you have doc then you can enter into PTR  
Going through evaluation plan  
Do these qualify for any other energy measures? As of Jan if you were to abide by the whole package that would get you 2 energy credits in Lead. **Mira will check...**  
They are now required to get 1 energy credit

Who is responsible for verification of installment? Mike Rose - Clarification

We can help with Photo-op  
Case studies  
Delivering check

OCTOBER 1<sup>st</sup> kick off  
These buildings have an EUI of 39-40, they qualify under ENERGY STAR®  
Attach it to LEED, too many names with ENERGY STAR etc. Some people might not want to be involved in LEED because it's spendy. ENERGY STAR brand has a lot of awareness.

ETO has an ENERGY STAR incentive. Standard incentive they pay for upfront. After one yr they pay \$1500 incentive.

To get ENERGY STAR label, enter 1 year of data etc., and they let you know if you can get the label. Can we say ENERGY STAR qualified? "ENERGY STAR Northwest Office"

## **RTF Update**

July 17, Next meeting is Aug 30, agenda day before.

1<sup>st</sup> – Hotel/Motel lighting technologies preprogram, lighting sensor for bathroom light \$59 for a retrofit and \$21 for equip and new installation.

2.2 – 4.4 less hours of use a day, incandescent, good for new construction.

More data on connected load.

2<sup>nd</sup> – Green motors management program, motor rewinding program, fair amount of QC in the system, savings analysis, we are now using

Doing the rewinding at the higher level will require much more of everything all the way around but it is good for the rewinder for savings.

Our recommendation was unanimous on adopting it.

CNC – Cost in savings, pre information plenty of cost effective savings to bas a program on. Easy vehicle and enough juicy measures to go forward.

Development contract to review ductless heat pumps, mini splits

SOW for what would be the impact for the installation in existing/new energy star residences. Possibly hire contractor.

Good measure for no homes that have heat still.

Is this already acceptable for Energy Star homes, moves you from BOP 2 to BOP 1?

Will we provide an incentive?

Building simulations

PTCS training requirements, want to expand and get more trainers

Revisions to the cost model

Council drop box and check for bugs, workshop and web-based demo.

RNC – Grading system for insulation installment, 1-2-3, for new construction, ECOTOP

Technical, ETO will do the other. To determine what the real baseline is for insulation.

## **Long-Term Regional Dialogue**

Final policy release July 19, 60-day window, you can switch USF to BPA funded or vice versa in this FY, Sept 17. Only applies to measures/projects already in the PTR. This will not happen every year. Retroactive decision.

Oct 1 of 2006 you could go back and change. HWM conservation adjustment, any conservation that has had M&V, BPA funded and USF will be the same. FY 07-FY 10 will count towards HWM adjustment.

Last step in determining a Utilities HWM, adjustments according on the FBS

Load you have in 2010 is when the HWM will be set

Any self funded will be counted 100%

Any BPA 75% every MW from towards your conservation adjustment. CAA, CRC,

Donation to NEEA

Should we do a Brown Bag?

At some point CFLs will go away next year. 2 out of 3 purchases are being done without market incentives. Only 8% of sockets have CFLs in them.

NEEA, this is their last year with Savings With A Twist.

10 out of 14 mw were CFLs in Puget area.

## **Accelerated conservation business plan**

Can we do more to augment tier 1 and if so where would we get it. Consultants, Quantec; are we missing technologies? Summit Blue is looking at talking to some of the

leading utilities around the country to see what they have done and/are doing. Summit Blue says it's a pretty common theme that we have to do more. Two of the big keys are internal and they aren't a lot of magic bullets, what comes after CFLs? What we have to do is get more penetration with our current measure. How do we get the rest the industry to move in that direction? NYSERDA, CA

Community Based approaches, neighborhood groups (CA). Proving to show that word of mouth is better marketing.

What do you tell them the benefit is? Is the price going down?

The more we can do, the more it'll keep the rates down. The environmental benefit.

We give to ESource, CEE for R&D

Some utilities are doing bidding programs, we'll pay you this much if you bring us this much conservation.

### **Implementation Manual-**

More user friendly, reorganizing it.

Mike Rose will have a list of changes that will go out

Sept conf call, we'll cover

### **USB Business**

October transition of USB members

Oct. 1<sup>st</sup> Bruce, Van and Kathy's last day

One of the criteria was that they had to have some exp in the EE industry

E/W balance

Leaving USB members will contact new USB people and will give them a break down of what the USB is about.

Pre letter to people and appreciation letter afterwards...

Invite new people to Sept conf call

We might do a tour at next f2f.

USB conf call on New Office Prescr Pkg.

Tent Sept 17 to discuss the Energy Smart Design Office

Availability for 9/12 conf call?