

Utility Sounding Board (USB) Meeting Summary August 13, 2008

USB members in attendance:

- Doris Abravanel – Snohomish Co. PUD
- Larry Blaufus – Clark Public Utilities
- Robert Kajfasz – City of Port Angeles
- Theresa Lackey – Midstate Electric Co-op
- Dawn Senger – Richland Energy Services
- Randy Thorn – Idaho Power Company
- Dan Villalobos – Inland Power & Light

Attending via phone: Todd Blackman – Franklin Co. PUD

BPA staff in attendance at various times:

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| <ul style="list-style-type: none">• Sarah Moore• Jean Oates• Lisa Perigo• Tim Scanlon• Grant Vincent• Mira Vowles• Josh Warner | <ul style="list-style-type: none">• Brent Barclay• Darby Collins• Jennifer Eskil• Abigail Howard• Mark Johnson |
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Ductless Heat Pump Pilot Launch (Sarah F. Moore and Mark Johnson)

Sarah F. Moore and Mark Johnson led a discussion of the Ductless Heat Pump Pilot.

Sarah updated everyone on the progress of the Ductless Heat Pump Pilot Program. Fluid Marketing Strategies and NEEA will be scheduling Pre-Launch Meetings around the region, during the last two weeks of August. Program launch is expected October 1st. One requirement of the pilot is 12 months of pre/post metering and quad metering for a sample of the pilot participants. Quad meters measure the indoor/outdoor temperature, electric loads in the house (data logger) and heating circuits, etc. There are some quad meters in the region now in Moses Lake, Grant County and the City of Monmouth. The resulting metering data will be used to adjust estimated program savings numbers. There will also be a housing characteristics survey, followed later with an end-user satisfaction survey. Households with wood heat can participate if wood is not the primary heat source.

USB/BPA Discussion (BPA response in [])

- Will multifamily be included? [Answer: We are considering that. Utilities could do Custom Project Proposals and claim the savings for MF.]
- How are things going with the development of equipment distribution? [There are about seven bigger manufactures of DHP. Three to four of the manufactures have distribution, networks in the region.]
- Are we looking at a year out for program launch? [No. We want utilities to start installing these as soon as they are available after the measure becomes available on October 1, 2008.]
- Will the occupant need to be the same person for both the pre and post metering and analysis? [Not necessarily but that would be preferable.]

AirCare Plus Research Project (Rosalie Nourse)

Rosalie Nourse opened a discussion of AirCare Plus with a brief description of the project.

AirCare Plus is a system for improving the efficiency of rooftop HVAC systems, using a hand-held device, e.g., a Palm Pilot. This project is an AirCare Plus rooftop unit retro-commissioning research project. The goal of the project is to determine unit savings. The goal is to get at least 30, and up to 50, rooftop HVAC units serviced this summer.

This fuel-blind pilot will be offered in the service territories of Cheney, Chewelah, Kootenai and Inland. Chewelah has started the pilot, and all types of commercial facilities are eligible, except for schools, as they are closed for the summer.

BPA hopes to have a complete regional program by spring 2010.

Key points include:

- The service is free to the end-user – they get a receipt that says “courtesy of {utility name}.
- The pilot is based on the protocol used by Avista, which has never evaluated the actual savings.
- PEI will provide quality control and monthly reports.
- No work will occur in a utility service territory without utility consent. An agreement with BPA will be required before work begins.
- The research project uses “Consent,” not “Consent Plus.”

CRC Loan Option (Mira Vowles)

The Energy Efficiency management team decided not to go ahead with the CRC loan option, so the August 14 Brown Bag session is canceled.

Performance Tested Comfort Systems™ Measures (Mark Johnson)

Mark Johnson asked for USB feedback about the PTCS unbundled measures and talked about the BPA’s documentation requirements for heat pumps.

USB/BPA Discussion (BPA response in [])

PTCS Unbundled Measures

- Is it correct that there’s no credit for just a change in efficiency, just for doing the controls and commissioning? [Correct]
- We like the unbundled measures, it gives us something to offer consumers and contractors that do not want to or cannot afford a premium quality heat pump. It also gives us more options to offer the consumer. There are lots of heat pumps being installed that are not installed to the PTCS standard. This will allow us to start a conversation with those contractors that install less expensive systems.
- We would rather have seen increase incentives than unbundled measures. We like the unbundling for manufactured homes, where we can do just duct sealing (they are primarily low-income), which is one of the best measures we could do.
- Our contractor charges \$50-\$100 to do the duct test. [If the measure does not save energy BPA can’t pay for it. Duct sealing saves energy, duct testing does not. BPA is considering ways to make its programs work better for utilities. However, utilities should remember they can provide incentives for test only and absorb the dry holes into the installed measures that are installed.]
- Is a stand-alone heat pump eligible for fuel switching, e.g., from oil to electric furnace or heat pump? [BPA does not pay for fuel switching, In the case of the PTCS measures the baseline from which the energy saving are calculated is a less efficient heat pump.]

PTCS Documentation Requirements

- Whatever BPA requires should be on the paperwork. Will I be able to get a waiver for the 30 or 40 that are already done? (Nancy does a good job with the oversight.) The market isn’t transformed; the incentive needs to be increased. [Mark Johnson will send “the form” to Mira Vowles, who will forward it to the USB.]

- Why are we paying a contractor if they don't do all of the paperwork? [Ecos qualifies and works with contractors who aren't meeting the specs.]
- So, Ecos isn't asking for the size? [Climate Crafters was self-funded; Ecos is directly funded by BPA and this was not required. The RTF decided what was required. A lot of people at Ecos who go out and do quality control are on the RTF and they know what they need.]

2) Ecos's proposed Data Collection Form

- Our biggest concern is that we made the assumption that the contractor would handle all paperwork. The vendors are filling out four pages, and we found out that we need more information. Vendors don't like it; if the flow test is okay, the rest should be. Why are we making these guys do more work than what is required for PTCS certification. One vendor said that he told an end-user that he would charge \$300 for certification and they may or may not get the \$650 incentive. If the end-user declines, the vendor can talk them into a less efficient unit. [There are the same documentation requirements. Ecos is trying to simplify the paperwork. We will still have to have their calculator, but some information is no longer required. One form has both the ducts and commissioning and controls.]
- Climate Crafters provided all of the documentation to the utility. Ecos should get that all on the form even if it needs to be six pages.

Trade Ally Network Update (Lisa Perigo)

Lisa Perigo presented an update on the TAN.

Phase 1 of the TAN is pretty much complete. The infrastructure is in place, and we have trained in every section of the region and raising trade ally awareness. We have the budget set for 2009, and will start Phase 2, in September.

For Phase 2, there are about six items we want to focus on:

1. Direct acquisition – We want a demo in 2009, with a full regional implementation in 2010.
2. We will identify the top performing allies to refine workshops. Evaluation forms for training asked for suggestions, which have been included.
3. We will develop a metric to measure savings attributable to the TAN, and hope to have a way to track in the PTR.
4. Build out TAN membership.
5. Design point of purchase materials and have them available at the retail level.
6. Continue training, advanced lighting controls, newsletter, Web site, review past training and continue to make rounds around the region.

USB/BPA Discussion (BPA response in [])

- How do you envision direct acquisition working out? Why a pilot? [We want to make sure end-users want more lighting. This assumes utility customers will participate. We won't pay 100 percent.]
- There are tremendous opportunities. [With small retail hard-to-reach, we think a higher incentive will make a difference.]
- The savings attributed to the TAN are something like industrial; seems like it's an intangible. [Would like to be able to attribute savings.]
- Maybe engagements. kWh savings. [It's one way; have to train staff and vendors.]
- Keep doing this, but quit trying to quantify savings.
- Every one of our vendors is a TAN member.
- We have had a couple of vendors who aren't TAN members. We have sent them the calculator. [Who checks the box that says the vendor is a trade ally? We're not sure that will happen . . . want the utility to see the value.]
- A lot of the value in the TAN is you can let them know what's coming in programs.
- We're seeing proposals from the TAN that aren't being implemented by the end-user. There's a lot of value in the TAN.

Both investor-owned utilities and public utilities are working on it. It leads to more regional consistency than a patchwork of programs.

Would the USB consider lighting through direct acquisition programs with the end-user getting the incentive from the contractor?

USB/BPA Discussion (BPA response in [])

- Leased warehouse lighting is huge for us. [Small customers might like it because they wouldn't have the resources to provide good customer service to their end-users. This should supplement, not redirect, what we're doing.]
- What about continued training. [We want more training in controls. There's a session planned in Portland on September 16. We have a grant arrangement with the Lighting Design Lab; the TAN training curriculum can be expanded to include that. Tim Scanlon/Lisa Perigo will provide more information to the USB about the new training curriculum.]
- Lisa mentioned designers; it seems like this is a real opportunity to change fixtures at the same time.
- The Home Depot CFL disposal is not readily apparent. There's no signage at the CFL display about the recycling. We're going to see if we can put utility signage up. [Mira will pose this to Craig Ciranny as a Brown Bag opportunity]
- We are planning to start a recycling program at our utility.

The Change a Light Web site will have choices for information on different products. It will list areas for recycling (based on the zip code the person enters). CAL is ongoing, year-round, but the Web site is new. We hope to have it up and running in a week. There will be an August 28 session with the EERs, and a September Brown Bag.

A few BPA staff will attend the ACEEE conference, and will compile materials for an internal meeting. Would utilities find that information useful?

- Yes

Update on Fiscal Year 2009 Commercial Sector Strategy (Tim Scanlon)

Tim Scanlon, BPA Commercial Sector Lead, presented what's new in the commercial sector for FY 2009. He began with an overview.

The commercial sector strategy pretty much started from scratch this rate period, other than for lighting. It's challenging to work with such a diverse sector across a lot of building types and end uses.

In FY 2007 we didn't meet our commercial targets (3 aMW low). We believe we are on track this year to make our 13 aMW target. Lighting may be under the target, but ESG and federal are performing well.

In addition to current program offerings we have been working externally in various regional forums, and internally working on policies, procedures and approaches to expand the portfolio of Commercial Program offerings.

The quarterly CNC forum has been a great place to design regional consistency. We will see benefits down the road and leveraging. Other regional collaborative provide utilities opportunities to participate in non-BPA programs, e.g., the Energy Trust of Oregon (ETO) hospitality program in Oregon.

BPA Qualified Measures: The Regional Technical Forum (RTF) process for approving measures can be daunting and takes too much time. BPA Qualified Measures provides a way for Energy Efficiency to go out and test a measure(s). BPA takes the risk and the process is expedited. There isn't a formal method for utilities to submit their ideas; work through the EERs.

Developing Direct Acquisition Approaches Public utilities Will Support:

What's new in the commercial sector (excerpted from briefing handout)?

1. Commercial & Industrial Lighting: Continue technical support for lighting audits. Offer hands-on, advanced field training to utility staff. Identify potential program refinements to increase lighting deliveries in FY 2010 and beyond.
2. Trade Ally Networks – C&I Lighting: Phase II implementation in FY 2009 to include: (1) development of direct acquisition program element; (2) targeted recruitment to increase number and types of TAN participants and fill gaps in regional network coverage; (3) point-of-purchase marketing materials for use in lighting supply outlets; (4) establish metrics for measuring incremental savings attributable to the TAN; and (5) offer second round of TAN workshop training with expanded curriculum (lighting controls and new lighting technologies). Scope options to promote other EE commercial program offerings (HVAC, CNC) through existing trade associations, and work with utilities to explore other commercial TAN opportunities.
3. 80+ for Desktops – We will double the amount of market transformation savings. Provide funding to NEEA for additional shipments of qualifying units in FY 2009 and FY 2010. Explore feasibility of providing incentives for 80+ office servers. NEEA contracts with Ecos Consulting to pay manufacturers for every office unit that comes into the region. Utility participation – we doubled the size of the program in FY 2008, and we will meet the 1 aMW target; would like to triple that over the next year. We're seeing more virtual services; VMware is the most popular. You have a monitor on your desk, but you go through a server rather than a desktop CPU.
4. Energy Smart Grocer - Continue full-scale regional implementation in FY 2009. Resolve issues regarding CRC funding commitments and future ESG funding mechanisms. Explore Grocer Benchmarking opportunity with NEEA. Complete lab testing to establish unit savings for direct install and potential new measures. Complete process and impact evaluations to inform decision on extending ESG beyond FY 2009.
5. CNC Early Project ID – WSU under contract to provide all regional utilities monthly contact information on new projects leads, utilizing Reed Construction Database. Evaluate effectiveness of CNC Early Project ID approach prior to end of FY 2009 and if appropriate, pursue IOU cost share.
6. ESD Retail – Puget Sound Energy CNC prescriptive package for retail to be vetted by the RTF sub-committee by September, for potential BPA roll-out in FY 2009. Minimum building size is 17,000 sq. ft. The BPA package is based on the Puget Sound Energy package, a whole building package with incentives similar to BPA's. These will be BPA Qualified Measures. Over 200 contractors and engineers participate in the PSE program. BPA can set up training for this.

Why isn't ESD Office getting much intake?

- The modeling, and the labor needed for modeling is a struggle.
 - The lack of available, eligible windows is a problem. It flies in the face of what architects and engineers want to do. [Mira will send the USB an e-mail regarding the A&E Brown Bags.]
 - The design of the program is down the right path.
 - Not much new construction; working with one firm and also have a couple of retrofit projects
 - A lot of the CNC process is trying to get people educated and to get going.
7. Hospitality Initiative - Contract with ETO to implement 1-year pilot turnkey Lodging and Food Service program, to extend ETO program into adjoining Oregon BPA utility service areas. Evaluate results to inform decision on potential region-wide program offering in FY 2010.

We want to offer package terminal heat pumps, which could be cost effective. Utilities can receive HWM credit. BPA will have a Memorandum of Understanding with ETO, and utilities will individually sign up with ETO.

- The ETO is talking to Clark about it at the request of NW Natural. [It might be implemented through Requests for Proposals in other states.]
- 8. Air Care Plus – As part of HVAC Market Research Plan, measure energy savings for this rooftop diagnostic/re-commissioning approach in select public utility applications in late FY 2009. Use results to inform decision on potential region-wide offering in FY 2010
 - Is a CRC reimbursement difficult with Consent +?
 - Would have to have it in place in advance of a program
 - I had one caveat in the agreement. I don't want anyone going out to customers without
 - My knowledge. I want to go out and talk to our customers before a contractor comes in
 - Other than that, we had no problems.
 - We don't care as long as we get HWM credit.

Other areas under development:

1. ENERGY STAR Vending Machines – Continue work with RTF subcommittee on field monitoring and identification of viable program designs to inform decision on potential region-wide offering in FY 2010. We are looking at bringing existing machines up to ENERGY STAR standards.
2. TSP and PTR Pipeline Management - Expand number of Commercial TSP Master Agreements to provide more complete geographic coverage. Develop capability to track and increase conversion rate of TSP project support to Custom Project submittals and completions in the PTR.
3. Expand Regional Collaborations- Continue work with NEEA and other regional stakeholders on Integrated Whole Building Approach (diagnostic tools/continuous commissioning, benchmarking, etc.).
4. New Programs/Initiatives under Consideration:
 - ESD CNC Rx packages (for retail, schools, multifamily, warehouses, etc.)
 - Rooftop HVAC (new/retrofit and retro commissioning)
 - Food service equipment measures
 - Office servers and plug load opportunities
 - ENERGY STAR vending machines

Are there any missing elements? What about ways to expedite or streamline the portfolio and increase uptake? Other comments?

- What kind of services does the commercial TSP offer? [Design review, custom project proposals, measurement and verification, preliminary and scoping (more in depth) audits. We learned in CNC to not waste a lot of time on design review.]
- We're seeing more virtual services; VMware is the most popular. You have a monitor on your desk, but you go through a server rather than a desktop CPU.
- Is anyone looking at bigger commercial space? [The TAN might help, and NEEA may be able to help with corporate design prospects.]
- Are you working with NEEA/BetterBricks, etc.? Yes. I serve on the NEEA/BetterBricks Regional Advisory Group. How does messaging get people engaged? [Not as much as we should; doing a Web site and cross-linking.]
- Are you looking at anything to do with the hospital/healthcare industry, i.e., benchmarking? [No. We would use benchmarking as an alternative to M&V. It might not be as useful in the NW.]
- Customers are going out and getting rating. What about over the next three years? [Benchmarking is an ongoing tool. There will be a paper presented on this at ACEEE.]
- Is anything being done for plug load management. [We have some stand alone measures in study phase; certainly a growing component and on BPA's horizon. There's a plug load pilot with Eugene Water and Electric Board.]
- Big construction is a lost opportunity and still a big issue. The rest looks good.
- Like the menu of choices. There's still trouble moving customers with the existing incentives.
- There's not a lot of commercial; Commercial & Industrial Lighting works.

- Everything is working for us.

We're concerned about the 2-year rate period. There's no early start on CRC. Commercial projects have a long lead time. One other aspect of 2-year rate periods going forward is the inability to carry CRC across rate periods. BPA is reviewing the way we fund our acquisition programs. Utilities will hear more about ways to fund and transition; BPA wants to ensure no utility stranded project investments.

Discussion of possible consideration of exemption for Commercial New Construction on custom projects - M&V wouldn't need to be reviewed and approved before purchase of equipment; just for items that have a code baseline.

Willingness to Pay Changes (Brent Barclay)

Brent Barclay briefed the USB on several proposed changes (increases) to the BPA willingness to pay levels, effective October 1. The changes are still under review and are not included here.

FY 2009 CRC/CAA Implementation Manual Schedule (Abigail Howard)

Abigail Howard, standing in for Mike Rose, provided the schedule for publication of the Implementation Manual (IM). The plan is to send the IM to print on August 28, and to post it online that same day. [This schedule has since slipped.]

Conservation Potential Assessment Workshop (Josh Warner)

Josh Warner led a discussion on the Conservation Potential Assessment (CPA) Workshop. The workshop will be held on September 8 at the Portland State Office building on NE Oregon St. A call-in number will be available for the workshop. The focus of the workshop is not necessarily on specific sectors, but there's Q&A time built into each session. Topics are broad enough to be general, or they can be specific. EE would like to include utility CPA experiences. Contact Josh with any questions at (503) 230-5857.

Planning, Tracking and Reporting (PTR) System (Grant Vincent)

Grant Vincent provided information to the USB on the PTR system and recent developments. The PTR system is owned and hosted by the Northwest Power and Conservation Council (Council). BPA provides most of the financial support for PTR system maintenance and technical support.

At the July 9th USB meeting, the group discussed a suggestion to consider forming a PTR users group. This idea was also discussed at a recent PTR Coordination Group meeting with BPA's EE staff & managers, Tom Eckman (Council), the Council's sub-contractor (Synergy). The PTR Coordination Group concluded that the needs identified by the USB could be met without forming a users group.

However, Lauren Gage is hiring an independent consultant to develop recommendations for a new tracking system for FY 2012 and beyond. The consultant is expected to solicit feedback and suggestions from PTR system users next Spring regarding the design of a new system to meet user needs. A users group may be formed for this purpose.

BPA's EE staff recently met with the Public Power Council (PPC) and are preparing a response to a PPC letter that identified several PTR system issues and problems. See BPA's response to the PPC for specific steps BPA is taking to improve the usability of the PTR system, including holding periodic brown bag sessions and providing users with our list of priorities for PTR system improvements. As suggested by the PPC, we will soon be providing additional tools (data queries) to utilities to help identify missing or duplicate measures before biannual/annual reports are submitted to BPA.

Beginning in October, 2008, BPA is planning to make additional funds available to the Council to train a new PTR technical support person to provide back-up support for Nora Miller and restore five-day-a-week support.

Also in October we are planning to improve the custom project features of the PTR system, including implementing a single-template design for all project proposals and an uploadable version of the generic credit calculator.

Customer Action Plan (CAP) reports were recently developed for the EERs to prepare customer action plans. These reports (since renamed as "EER Reports") include budgets, expenditures, and energy savings (aMW) for each funding source, as well as custom projects in the pipeline. These reports should be accessible to individual utilities in a couple of weeks. This will give utilities a good idea of progress to date during the rate period. Contact your EER if you have suggestions regarding these reports. Grant or Kevin will review the information in these reports at the September USB call.

Comments:

- The PTR is a great tool. You guys have done a great job.

Northwest Energy Efficiency Taskforce (Darby Collins)

Darby Collins is the BPA Northwest Energy Efficiency Taskforce Manager. She was present to update the USB on the status of NEET. There are more than 200 people in the six workgroups, and a lot of people are in more than one workgroup.

1. Workgroup 1 has met and is moving toward the deadline. This group was divided into subgroups and delivered reports on August 15.
2. Workgroup 2 conducted a survey of the entire taskforce, and received 84 responses. The next meeting is September 17.
3. Workgroup 3 – John Savage and Stan Price had their first meeting on August 1 and brought in a series of speakers. They put some things forward. Still working on a list that they may send out next week.
4. Workgroup 4 – They are setting up a Google Workroom, with materials there for everyone to see.
5. Workgroup 5 meets tomorrow. They are bringing in several speakers. About 22 will attend.
6. Workgroup 6 held its second meeting at the Portland State Office building.
7. The executive group is looking for actionable items. The co-chairs will report to the executive committee. January 9, 2009 is planned for the final meeting of the executive committee.
8. People can still join workgroups throughout the process.

USB Business (Mira Vowles)

- Bob K. will miss the September meeting
- Rotation

Next Meetings

• September 10	Conference call, 8:30 a.m. to 10:30 a.m.
• October 8	Face-to-face meeting, 8:30 a.m. to 3:30 p.m.