

PTCS Evaluation Billing Data Request

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Economics



Overview of Topics

- Purpose of this evaluation
- Overall study timeline and design
- Data Request process
- Questions

Why Evaluate?

- Evaluation and research is essential to ensure operational excellence, including:
 - Our collective investment is spent effectively
 - Savings achievements are accurate and reliable – benefit to BPA and utility power planning
 - Continuous improvement in program design and implementation
- EE Implementation Manual Section 3.4
 - As a part of the oversight review process, BPA shall (1) perform end-user site and record reviews and (2) make program evaluations. (Details of 3.4.2 on final slide)

Why evaluate PTCS?

- PTCS is a high-cost set of measures for the region (cents/kWh)
- Uncertainty around the savings associated with PTCS
 - The RTF Provider Review of PTCS and the BPA-funded process evaluation of PTCS both recommended an impact evaluation
- New RTF protocols require measure research for measures to remain “active”

Evaluation Timeline

- Billing Request Sent: March 1st
- Begin processing data returned: March 21st
- Finish processing data returned: May 15th
- Draft Results: August/September
- Brownbag presentation of final results: November
- RTF presentation of final results: December

Evaluation Details

- Billing Analysis
 - Uses regression techniques to estimate the change in electric consumption between the pre- and post-installation periods
 - Requires a very large sample size for accuracy
 - Follows standard data cleaning and evaluation methodology

Savings Estimates

- Segmentation
 - Will attempt to estimate savings for PTCS Measures (Duct Sealing, Heat Pumps, etc.) by different baseline heating types, building type and heating zone
 - Sample sizes may not be robust enough to support this level of segmentation and may be measure category by climate zone estimates
 - Analysis will provide a total realization rate for the program

Evergreen Economics

- Contact person is Jenny Yailen
- Evergreen Economics has staff with deep regional knowledge as well as strong analytical capabilities
- Secure data handling processes
- Jenny can provide support for additional questions you may have

Data Request Files

- *PTCS Data Request Memo.docx*
 - Details on the requested data, timeline, data security
- *PTCS Data Request Template.xlsx*
 - Example of data formatting, addresses of participants, data template, PTR extract
- *Evergreen SFTP instructions.docx*
 - Instructions for using our secure file transfer site
- *Evergreen SFTP login.docx*
 - Login credentials for our secure file transfer site

Requested Data

- All monthly records since January 1, 2008
- Required data fields:
 - Address (provided by Evergreen Economics)
 - Utility account number (or proxy)
 - Utility meter number (or proxy)
 - Meter read date
 - Read code (actual/estimate/etc.)
 - Number of days in read cycle
 - Monthly kWh usage

Requested Data

- Optional data fields:
 - County
 - Home type (single family detached, multi-family, mobile home, etc.)
 - Square feet of home
 - Age of home
 - Indicator of participant move (if applicable)

Data Template

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	PROVIDED BY EVERGREEN				REQUIRED BY EVERGREEN FOR THE EVALUATION						USEFUL IF UTILITY CAN PROVIDE			IF NECESSARY		
2	Address	City	State	Zipcode	Account #	Meter #	Meter Read Date	Read Code (Actual, Est.)	Days in Read Cycle	kWh Usage	County	Home Type	Square Feet	Home Age	Participant Move	
3	12345 Cherry Lane	Philomath	OR	97370	121212	11111	2/23/06	Actual	34	1588	Benton	Single family detac	1300	10	0	
4	12345 Cherry Lane	Philomath	OR	97370	121212	11111	3/20/06	Actual	25	890	Benton	Single family detac	1300	10	0	
5	12345 Cherry Lane	Philomath	OR	97370	121212	11111	4/20/06	Actual	31	996	Benton	Single family detac	1300	10	0	
6	12345 Cherry Lane	Philomath	OR	97370	121212	11111	5/20/06	Actual	30	621	Benton	Single family detac	1300	10	0	
7	12345 Cherry Lane	Philomath	OR	97370	121212	11111	6/19/06	Actual	30	520	Benton	Single family detac	1300	10	0	
8	12345 Cherry Lane	Philomath	OR	97370	121212	11111	7/20/06	Actual	31	434	Benton	Single family detac	1300	10	0	
9	12345 Cherry Lane	Philomath	OR	97370	121212	11111	8/20/06	Actual	31	525	Benton	Single family detac	1300	10	0	
10	12345 Cherry Lane	Philomath	OR	97370	121212	11111	9/20/06	Actual	31	412	Benton	Single family detac	1300	10	0	
11	12345 Cherry Lane	Philomath	OR	97370	121212	11111	10/20/06	Actual	30	784	Benton	Single family detac	1300	10	0	
12	12345 Cherry Lane	Philomath	OR	97370	121212	11111	11/19/06	Actual	30	1291	Benton	Single family detac	1300	10	0	
13	12345 Cherry Lane	Philomath	OR	97370	121212	11111	12/19/06	Actual	30	1715	Benton	Single family detac	1300	10	0	
14	12345 Cherry Lane	Philomath	OR	97370	121212	11111	1/20/07	Actual	32	1953	Benton	Single family detac	1300	10	0	
15	12345 Cherry Lane	Philomath	OR	97370	121212	11111	2/20/07	Actual	31	2147	Benton	Single family detac	1300	10	0	
16	12345 Cherry Lane	Philomath	OR	97370	121212	11111	3/20/07	Actual	29	1850	Benton	Single family detac	1300	10	0	
17	12345 Cherry Lane	Philomath	OR	97370	121212	11111	4/20/07	Estimated	31	1470	Benton	Single family detac	1300	10	0	
18	12345 Cherry Lane	Philomath	OR	97370	121212	11111	5/16/07	Actual	26	1153	Benton	Single family detac	1300	10	0	
19	12345 Cherry Lane	Philomath	OR	97370	121212	11111	6/20/07	Actual	35	816	Benton	Single family detac	1300	10	0	
20	12345 Cherry Lane	Philomath	OR	97370	121212	11111	7/19/07	Actual	29	525	Benton	Single family detac	1300	10	1	
21	12345 Cherry Lane	Philomath	OR	97370	121212	11111	8/20/07	Actual	32	633	Benton	Single family detac	1300	10	1	
22	12345 Cherry Lane	Philomath	OR	97370	121212	11111	9/19/07	Actual	30	528	Benton	Single family detac	1300	10	1	
23	12345 Cherry Lane	Philomath	OR	97370	121212	11111	10/20/07	Actual	31	945	Benton	Single family detac	1300	10	1	
24	12345 Cherry Lane	Philomath	OR	97370	121212	11111	11/20/07	Actual	31	1107	Benton	Single family detac	1300	10	1	
25	12345 Cherry Lane	Philomath	OR	97370	121212	11111	12/20/07	Actual	30	1545	Benton	Single family detac	1300	10	1	
26	12345 Cherry Lane	Philomath	OR	97370	121212	11111	1/20/08	Actual	31	1709	Benton	Single family detac	1300	10	1	
27	12345 Cherry Lane	Philomath	OR	97370	121212	11111	2/20/08	Actual	31	1365	Benton	Single family detac	1300	10	1	
28	12345 Cherry Lane	Philomath	OR	97370	121212	11111	3/20/08	Actual	29	807	Benton	Single family detac	1300	10	1	
29	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	2/23/06	Actual	34	1588	Ada	Multi-family	2000	15	0	
30	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	3/20/06	Actual	25	890	Ada	Multi-family	2000	15	0	
31	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	4/20/06	Actual	31	996	Ada	Multi-family	2000	15	0	
32	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	5/20/06	Actual	30	621	Ada	Multi-family	2000	15	0	
33	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	6/19/06	Actual	30	520	Ada	Multi-family	2000	15	0	
34	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	7/20/06	Actual	31	434	Ada	Multi-family	2000	15	0	
35	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	8/20/06	Actual	31	525	Ada	Multi-family	2000	15	0	
36	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	9/20/06	Actual	31	412	Ada	Multi-family	2000	15	0	
37	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	10/20/06	Actual	30	784	Ada	Multi-family	2000	15	0	
38	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	11/19/06	Actual	30	1291	Ada	Multi-family	2000	15	0	
39	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	22222	12/19/06	Actual	30	1715	Ada	Multi-family	2000	15	0	
40	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	33333	2/23/06	Actual	34	1953	Ada	Multi-family	2000	15	0	
41	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	33333	3/20/06	Actual	25	2147	Ada	Multi-family	2000	15	0	
42	23456 SW Viewpoint Terrace	Boise	ID	83725	3030303	33333	4/20/06	Actual	31	1850	Ada	Multi-family	2000	15	0	

One row per meter read

Secure File Transfer

- Go to files.evergreenecon.com
 - Enter your login and password provided with the data request
- At this screen, click “Upload file(s)” on right side

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Logged in: Utility Test <UtilityName> | Logout

MANAGE FILES CONTACT SUPPORT

BROWSER

MANAGE FILES

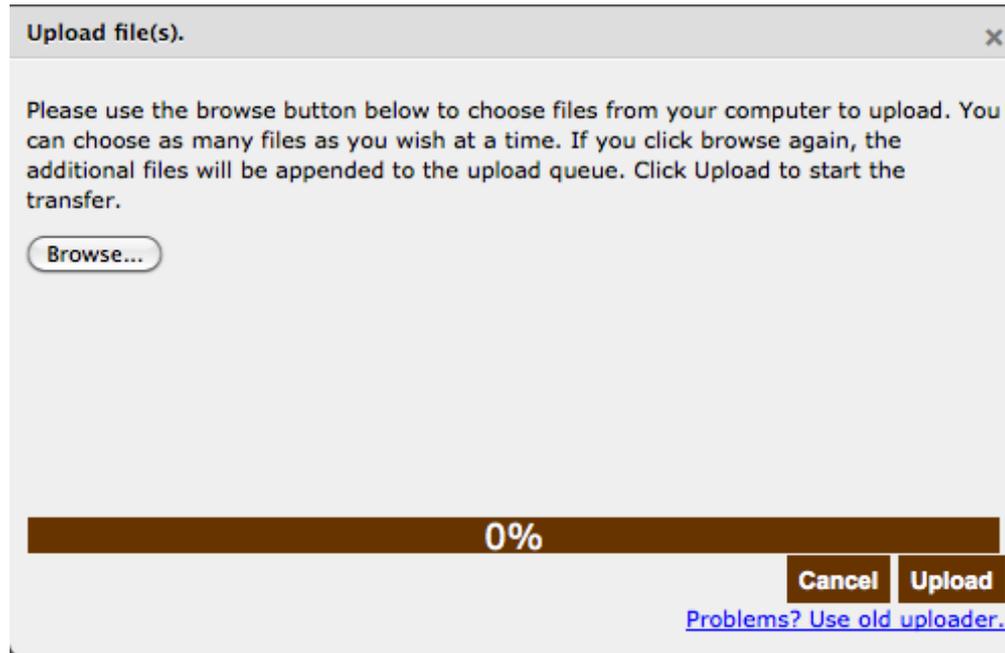
File Manager

Edit columns | Import file(s) | Upload file(s)

name	size	percent	owner
Home	4.0KB	100%	Utility Test <UtilityName>

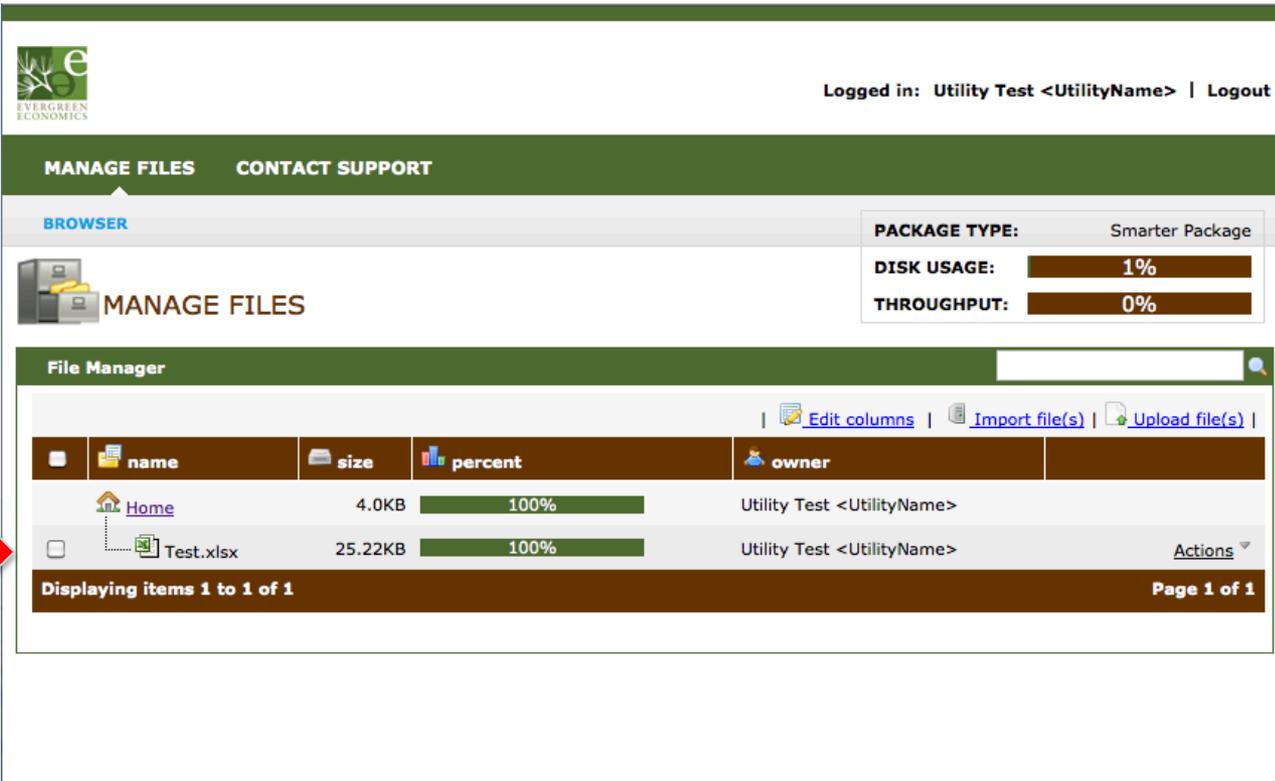
Secure File Transfer

- Follow the directions on the upload wizard, and click “Upload” when you have selected your file to upload



Secure File Transfer

- The page will refresh automatically and your upload should appear under the Home folder, as shown here:



The screenshot displays the Evergreen Economics file manager interface. At the top left is the logo for Evergreen Economics. The user is logged in as "Utility Test <UtilityName>" with a "Logout" link. The main navigation bar includes "MANAGE FILES" and "CONTACT SUPPORT". Below this, there is a "BROWSER" section with a "MANAGE FILES" icon and a "PACKAGE TYPE: Smarter Package" indicator. A summary box shows "DISK USAGE: 1%" and "THROUGHPUT: 0%". The "File Manager" section features a search bar and a table of files. The table has columns for "name", "size", "percent", and "owner". The "Home" folder is listed with a size of 4.0KB and 100% completion. A file named "Test.xlsx" is listed with a size of 25.22KB and 100% completion. A red arrow points to the "Test.xlsx" row. The interface also includes links for "Edit columns", "Import file(s)", and "Upload file(s)". The footer of the table indicates "Displaying items 1 to 1 of 1" and "Page 1 of 1".

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Logged in: Utility Test <UtilityName> | Logout

MANAGE FILES CONTACT SUPPORT

BROWSER

MANAGE FILES

PACKAGE TYPE: Smarter Package

DISK USAGE: 1%

THROUGHPUT: 0%

File Manager

	name	size	percent	owner
	Home	4.0KB	100%	Utility Test <UtilityName>
	Test.xlsx	25.22KB	100%	Utility Test <UtilityName>

Displaying items 1 to 1 of 1 Page 1 of 1

Questions?

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