



## Energy Efficiency Post-2011 Phase 2

### Workgroup 3 Meeting 2

**August 4, 21010**  
9:00am to 12:00pm  
Conference Call Only

#### Overview

- **Role of BPA:** Where can BPA add value? BPA can provide resources to build a potential calculator tool; provide regional updates - get everybody on the same page - economies of scale question.
- **Standardized Data Collection:** NEEA residential building stock assessment - how are they conducting the assessment...? Commercial Characterizing types - 17 types are used by the Council / NEEA uses a different set of building types. It would better serve the region if everybody used an agreed upon set of commercial types, residential measures, etc. For progress sake, it is more efficient to start with residential accounts when collecting data for CPAs. The region needs to identify what utilities/groups need to have and what they may already have - data inputs/collection.
- **Informing Council on assumptions, terms and conditions of contracts**  
Data usage - alignment with Council deemed saving assumptions  
Use them to inform specific action plans - inputs / data usage as and output.

#### Decision/Action Items

- The workgroup decided by consensus to “table” two issues. The two issues are:
  1. What are some of the key timelines that must be met to make the CPAs most useful?
  2. What should be BPA’s role, if any, in developing standards and methodologies?
- The workgroup agreed to have a Potential Calculator Tool demonstration for next meeting on August 18<sup>th</sup>.
- A suggestion was made with strong workgroup support to form an additional subgroup that meets in off weeks to discuss standardized data collection methods with the goal of creating a proposal to present to the larger workgroup.

#### Meeting Notes<sup>1</sup>

*Facilitators:*

Andrew Miller (BPA)

Jill Steiner (Snohomish PUD)

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<sup>1</sup> Due to privacy concerns, only BPA staff and workgroup co-chairs are listed in these meeting notes.

*BPA Participants:*

Josh Warner

Matt Tidwell

Matt Hayes

1. AM: was there anything that jumped out at you from the meeting notes of last week?
  - a. At end of the last meeting it came out there was a pretty strong consensus that we need to have a discussion on what the role of BPA is in CPAs and what of value it can add.
  - b. What the role is for gathering data, how that data would be used and the nature relationship in informing the council on potential conservation
  - c. What we have tried to do is discuss the role of BPA and what we can do.
  - d. Is there anything looking at the agenda that people would like to add?
2. AM: what is the role of BPA for CPAs?
  - a. We could start with the first bullet point, the tool. What are your impressions of it and how can we develop a tool for everybody?
3. For the bullet you just mentioned it is ok for what it is. Looking forward it would need to be more flexible. I think right now the tool is fine, but my major concern with it is that it is really linked to the council's plan, so I don't know how helpful that is on an individual utility basis
4. JS: what we need to see is a tool that makes the council's assumptions more visible
5. I haven't seen the tool.
6. JS: demonstration of the tool would be good for next meeting (webcast)
7. JW: important to note that this is a beta tool and not ready for prime time
8. Important to note that the tool does require you to come up with some amount of information.
  - a. For the smaller utilities, how much of that information do they have? Can they get?
9. One of the things we did internally is sent out a survey that offered a complimentary gift if they responded, got almost 20% response rate. Asked age, type of home, ect.
  - a. This might be one way for utilities to gather the kind of info ER is talking about.
10. AM: just targeted Res customers?
11. In first go around, we do have surveys for industry, agriculture, and commercial. Have not yet moved forward with other sectors
  - a. For other utilities that are smaller, this might be one way for utilities to gather data for tool
12. Participated in a touchtone survey
13. AM: anyone on the call that has been a beta tester for the tool? If so give a quick explanation of tool, how easy it is or challenges in collecting data
14. JS: one thing we did note is that the tool does require some specific inputs. Need to be cognizant of what tool requires when going out collecting data.

- a. Overview of tool for I937 utilities. Pretty high level overview of tool. BPA said they were going to be doing some ongoing development
  - b. On residential side it asks for data on fuel shares and equipment types and saturations
  - c. Want to be asking questions to customers using similar equipment questions (electric baseboard vs., electric duct)
  - d. There is a use for the tool, but another area that has opportunity for discussion is standardized data. Kathy mentioned they did a survey. I would be frustrated if I did a survey and found that the tool did not accommodate our data.
15. JS: if we had had information about the tool we could have standardized our information
16. We coordinated with NEEA to see what they were doing for home stock so that our findings would line up with NEEA's data. There are opportunities for standardized data collection that transcends CPA
- a. The council uses 17 building types for the commercial customer base. NEEA last commercial building stock assessment, they used different types. This is an area we can start making progress toward using standard commercial building types.
  - b. We need a mechanism for comparing and contrasting commercial building types to the regional makeup.
  - c. NEEA says this is what commercial looks like across region, but we really struggled with what *our* commercial looks like
  - d. The tool development really depends on how granular our data is
17. Tool will be meaningless if we don't spend time defining the accounts.
18. JS: if we were to take a look at the demonstration of the tool, a lot of our discussion would be around what kind of data the tool takes. A discussion about data needs to include council and NEEA staff.
- a. We should be able to leverage some of that data collection to understand our own territory.
19. JW: trying to figure out what level of detail, if anything,
20. JS: I did hear X say the tool needs to be flexible; it does need to scale. Depending on what level of data a utility might have. NEEA has 17 types of commercial buildings; some are nuanced. If you can expand or contract those characterizations depending on the data you have, that would be a benefit.
- a. That's the type of flexibility that would be nice to see in the tool; whatever investments the utility has made in characterizing his service territory should be able to be used.
21. We could potentially phase in the tool; we all have residential so maybe that would be the best start. Industrial probably the last, if ever, and commercial might be the most difficult. We might get caught up on so many areas that we might not come up with something useful.
22. The residential might also be the easiest, whereas commercial and industrial gets more difficult, particularly with commercial and with smaller utilities...that group is so diverse. It's also important, as JS said, that we have some consistency in being able to leverage data with what NEEA, the Council and BPA are collecting.

23. The biggest challenge for us has been getting info on the size of housing, how they're heating, so to me one of the tools is identifying what we need to have and it has to be flexible so it fits all the different types of utilities and it has to fit the NW's planning practices. I'm not familiar with NEEA's or Council's wants. We need to identify so we can start focusing on what type of data by utility needs to be collected. Any CPA that we would do should be able to identify missed opportunities.
24. AM: recap of what people have offered: on tool development, it's a draft, still be testing, easier to critique than create. We've started but we need to tighten it up. The 18<sup>th</sup> meeting, we'll try to have a demonstration of the calculator/draft tool. This might lend some insight into what data inputs are needed and how data collection is going to happen.
25. JW: we'll work to make this happen by the 18<sup>th</sup>, depending on the
26. AM: it needs to be flexible. There may not be a consensus across the board on delinking the tool from the Council's plan.
27. JS: at least making sure the tool leads to better understanding to what's in the Council's plan. So that it's not feeding more into the black box of the council's assumptions.
28. AM: data collection standardization, so customers are collecting and inputting similar data inputs.
29. JS: across the region we need to consistently characterize building types with still leaving some flexibility.
30. AM: within standard collection also have flexibility, but it still needs to be able to leverage preexisting work stakeholders have done on this front, so those investments are not lost. Start with residential then move into commercial so progress can be made
31. Agriculture can't be forgotten.
32. Distribution efficiencies is another area.
33. AM: it seems like there is a lot of headway that needs to be made. We can have the demo and then have a robust discussion about what stakeholders need to have and to build within the tool the functionality of being able to identify missed opportunities. Seems like a tool is a good idea to have but we have to be cognizant of how data is collected and the different types of building types.
34. Important to keep in mind that developing a CPA is just a snap shot of what the potential of conservation is at a certain period of time. Whereas a tool, is something that utilities could update their data at a reduced costs to update their conservation plan. So a tool is valuable particularly for smaller utilities.
35. JS: and if the tool guides some of the data collection.
36. AM: we have a much clearer way forward. Based on the meeting of the 18<sup>th</sup>, we might need to schedule a meeting off the current schedule to start shaping recommendations on how we want to structure best practices on data collection, the types of building types that could incorporated, etc. Where does BPA add value in this?
37. Providing the resources for the tool development, coordinating updates with utilities that are affected.
38. Doing a survey for the region.

39. Get everyone on the same page.
40. There is a sort of economies of scale question. For one utility to develop a comprehensive tool and maintain it would be difficult. If that were to reside centrally with BPA, that would be beneficial. Utilities could tap into it as they need to. A good fit for BPA.
41. AM: ER, last week somebody mentioned that BPA could convene a regional workgroup of some sort? What did you mean?
42. If there was an on-going workgroup to talk about these ideas and to work on some of these things. I wouldn't think it would need to be restricted to just one role.
43. Someone said BPA's role could be imbedding major assumptions for the region, e.g. cost of measures, admin costs for the regional cost tests, there are changes that could be looked at, e.g. 20% assumption for residential. Digging deeper into assumptions to make sure they are valid and remain valid.
44. JS: most of the discussion of this morning has focused on BPA working with individual utilities, but another role is aggregating across the region for public power and assessing if that aligns with the Council's assumptions. Give us an idea of if we need to provide feedback to the Council about what we know.
45. The Council would agree that any type of input or shedding light on assumptions would be helpful and the Council may also provide input during the process might also be helpful. Not sure if this workgroup is the forum for this or if some regional group separate and apart from this that could meet on a regular basis might be good.
46. ER: the council does have the Conservation advisory committee that it could use, but those people might not be the right people to be involved on something like this.
47. JS: in the development of the 6<sup>th</sup> plan the council was really engaged and took a lot from the advisory committee, but there were some things that we learned along away...the need for digging deep is apparent to all of us. I'm thinking BPA could help us all come to the advisory review during the midterm review process with a wealth of information and the better understanding of how we're going to move forward to capture the conservation resources. As we set more aggressive goals, we have had more internal review because we've realized this is going to be a challenge to capture the savings. So BPA could help bring this information to the Council's discussion of the power plan.
48. JW: JS is right that we could help inform with a lot of data.
49. JS: we appreciate the council participating in this process.
50. I think we're on the same page and any additional data is only going to help the region.
51. AM: do people feel it's appropriate to have a conversation on the BPA's role in helping to gather data and on standards and guidelines, or should this conversation be moved to the 18<sup>th</sup>?
52. I think we need to use a shared vocabulary re: CPAs and PTR reporting, whenever we discuss conservation I want to make sure we use the same language.
53. I'd like to have a look at what data the region and the Council uses. JS talked about surveys and if we could look at those different collection processes we

- could get a better idea of how to bring it together into one type of gathering opportunity.
54. AM: X had mentioned that you use a survey and get about a 25% response rate. Could you share that?
  55. It's just one page and I could email it to the group. Keep in mind that these were just questions we needed internally. We thought they could incorporate into our CPA, but we're not sure that is going to work at this point. But it has proven valuable outside of a CPA for our Umatilla's planning.
  56. JW: I think that would help inform the conversation.
  57. AM: I could do some research on my part to outreach to some organizations to request some of the info that they have used.
  58. JS: I think it would make sense to touch base with NEEA and their "residential stack assessment." Making sure what they are doing aligns with our needs.
  59. Working with Fluid on a direct install and those kinds of contracts with subcontractors might also be of benefit.
  60. JS: I think we asked that question last round re: how their tools align.
  61. Process question: it seems that we do have consensus on what we think one of the recommendations should be of this group re: a role for BPA. Seems that we should write that down, that BPA should develop some data collection consistency. But now we're talking about doing the work and trying to get everyone to talk about the different types of data collection. Could be putting the cart before the horse. If we feel like we have consensus we should move onto the other issues that we have. If we get done with those issues we could get into the more specifics.
  62. JS: we talked about the possibility of a subgroup doing some additional work, is this something a smaller, few interested folks to spend some time on this and flesh something out. Bring back a few more pages including more detail...the beginning of our recommendation, which could be taken to other stakeholders, e.g. NEEA.
  63. JW: having some sort idea of what the consensus, having more detail, would be helpful. Having a clear picture in our minds.
  64. AM: do we also want to lump into that sub-group the inputs and data collection bullet point?
  65. JW: I don't know if it does fall in the same bucket. I think about standards and guidelines as to whether people think BPA working on standards and guidelines for CPAs is a good idea. It's worth having a conversation whether we want BPA to create standards for utilities who want to do CPAs. Part of Phase 1 was the desire to use CPAs for a range of reasons, e.g. to replace the TOCA billing method.
  66. Could you explain how the CPAs and the billing determinants would work?
  67. JW: today with the EEI we are collecting in rates and redistributing based on the TOCA. So if a utility is 1% of the tier one, they will pay 1% of the costs and have access to 1% of the EEI. Some people thought this wasn't fair because conservation is not equal across the board. So we heard a better way to allocate cost would be CPAs. But to go down that path, everyone would probably have to

- have a CPA and they would be standardized. This was the background to this workgroup.
68. JW: if people aren't interested in this, we can drop it, but I did want to bring it up. We don't have to push it any further. Should we just drop this?
69. Yes.
70. JW: we should reflect that we aren't going to take this any further, but for the moment, we'll cross it off the list.
71. What are you dropping from the list?
72. JW: the idea that BPA would help provide standards and guidelines for CPAs as a billing determinant. If people don't understand this issue, feel free to call me and I can fill you in. I don't want people to feel like they have to be silent if they don't fully understand.
73. JS: I would feel better if we tabled this and said it's not a high priority issue.
74. I agree, let's not totally dump it, but move it down the priority list.
75. AM: I can move "gathering and inputs for individual utility CPAs" to the discussion after the demo. The conversation this morning shed light on the direction of this workgroup. Some of the remaining bullet points could be scrubbed and moved to the later meeting.
76. We should just keep going.
77. AM: JS, how do you see data being used as an output?
78. JS: One of the things would be to get a big picture view of what "public power looks like." This would help "inform" rather than "challenge" the Council's assumptions. We've also talked about how data does not just go into the CPA, but comes out of the CPA and how this data is used to develop individual program plans, how BPA would use that data to develop program initiatives. Is there always alignment between the Council's supply curve assumptions and deemed measure assumptions. We used to call CPAs "self-studies" but now they need to be used to really inform specific action plans.
79. AM: I believe during our first meeting there was a lot of discussion on the multiple uses for the CPA outputs. I put this on there because it didn't seem to be a clear consensus on this issue during the last meeting.
80. JS: we did just talk about the billing determinant, which is one of the things that was on the laundry list. We're talking about how to do CPAs, what the implications are BPA and individual utilities and so is this a discussion of all the ways a CPA could be used?
81. AM: yes, but I'm not sure if this is appropriate for the workgroup, but I wanted to raise it.
82. JS: maybe we could talk about this once we have a little more common understanding of the tool, then once we have that understanding, we could have a discussion about "what are all the ways these CPA results could be used"? e.g., plan BPA activities, plan individual activities, what works best locally vs. regionally, the implications for CPA results and the relationship to BPA's efforts to ensure public power's share of the regional targets are met. We could just start keeping a laundry list and once we get a better understanding of what CPAs will look like, we could go back to the laundry list.
83. AM: a great idea. Recap:

- a. Action item: start working on a draft sheet of common language
  - b. Action item: start creating a laundry list of what types of data collection has been used in the past.
84. JS: between the 18<sup>th</sup> and the following meeting, we talked about a workgroup that would get together on data collection guidelines. Anticipating that after the tool we would want to have a discussion, would we want to schedule something and invite the NEEA folks to have a meeting between the two meetings, a subgroup who wants to work on fleshing recommendations on how to go about doing data collection.
85. I would like the subgroup to keep it simple. The ones who are going to benefit the most are those that can't pay for contractors: we need to be comprehensive and simple.
86. JS: Anyone who is interested on being on the subgroup, please email the workgroup email: [workgroupthree@bpa.gov](mailto:workgroupthree@bpa.gov).