



Energy Efficiency Post-2011 Phase 2

Workgroup 3 Meeting 4

Wednesday, September 1, 2010

9:00am to 12:00pm

Conference Call Only

Overview

- Workgroup members provided their feedback on the Utility Potential Calculator demonstration.
- Co-Chair Jill Steiner gave workgroup 3 an overview of the Data Collection Subgroup meeting and the consensus for drafting recommendations on a standardized regional data collection process.
- Workgroup 3 reviewed the Issues List for consensus on issues that have been removed or need further discussion. It was determined that many issues would be incorporated into the formal recommendations that Workgroup 3 will submit to BPA at the conclusion of this process.

Decision/Action Items

- Workgroup 3 Co-Chairs will create a draft recommendations outline for the larger workgroup to review and discuss at the next meeting.

Meeting Notes¹

Facilitators:

Jill Steiner, Snohomish PUD

Andrew Miller, BPA

BPA Participants:

Josh Warner

Matt Tidwell

Carrie Cobb

1. AM: brief overview of last meeting and subgroup meeting as well as goals for today's meeting.
2. JS: one thing in the meeting minutes from last session is the calculator presentation that was given during the previous meeting
3. AM: what are thoughts/impressions with the current calculator tool? Where can BPA add value?
4. Person A: it was a good practical tool to dial in and get a good estimate of your service territory potential; there are some short cuts that you have to take to come

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

- up with the estimate. If you're constrained with budgets or time, it's certainly going to be better than the Council's calculator and quicker/less expensive than a full on CPA. A great tool.
5. AM: did people get the sense that by a utility using the tool, it would get the idea of whether it could avoid a more in-depth CPA?
 6. JS: as a beta-tester of the pool, we're comfortable with the granularity going into it, but it would be nicer to get more granularity coming out of it. Being able to look more closely at the output and get a sense of what the magnitude is of the programmatic efforts would need to be to capture the potential. An understanding of some of the key variables that drive the results is needed. Some of this will be dependent on which measures have the most conservation potential. Maybe we might see BPA in terms of facilitation, identify a few resources (e.g. consultants), standardize the approaches; it may not be completely "plug-and-play." Having a standardized survey isn't everything, you still have to use it in your service territory, so just having the tool isn't enough.
 7. Person B: I like the concept; would be good for a smaller utility, but doesn't account for conservation that has been done historically. So somehow this has to be taken into consideration.
 8. JS: that's important if you think you've deviated significantly from the rest of the region. The tool takes the average condition. There are several things it doesn't account for, but if there was a way to make those post-modeling adjustments that would be beneficial and perhaps a role for BPA. Making it more actionable for a utility.
 9. Person B: Since we have an interesting ag load and most ag folks are very educated, it wouldn't match the model of many places in the region that have to compete in the world's market and are already competitive. So I wouldn't want to do things just based on this tool; we'd need to do an ag survey.
 10. JS: a good point.
 11. Person B: we have an odd ag sector and others have an odd industrial sector, so it's important that the tool takes into consideration those differences are post-model tweaks are made.
 12. JS: any thoughts on how BPA could help facilitate a more hybrid approach?
 13. Person C: wondering if there's a way to work with the Industrial Savings program just getting started taking a look at the industrial sites; is there a way to get into the system the kinds of things they are finding?
 14. JS: a great question. One of the things the tool clarifies is where we have some data gaps and we can fill those data gaps via research efforts, but we should be looking...
 15. Person C: I'm wondering how many custom project proposals are not being done but have the potential to happen in the future.
 16. Person A: could you clarify.
 17. Person C: the custom project proposals that are put together for the ag/commercial/industrial sectors, a project is identified and we determine this is what the savings are, but the end-user determines not to go through with it and we just say project not completed and deleted, but there is value in this assessment.

18. Person A: yes, especially if it was determined that all c/e measures were reviewed, the document would be better than a tool based on regional assumptions. We've done studies, but a scattershot of studies hasn't been very useful.
19. Person C: how many commercial accounts are doing their own assessments outside of the BPA program; we have one industrial customer that hired an out-of-state entity to do an entire energy survey. Wondering how many studies are out there and how we would get that information. The customer has shared the study with us, but I don't have a sense how much assessment is being done by commercial enterprises on their own, outside of BPA programs.
20. JS: I think over the long term there may be more and more activity in this area. I was talking to somebody last week, a third party program administrator is a subsidiary of a big bill management firm and they have national clients and they do send reports around about energy performance along several types of buildings. We're probably going to see more of this type of assessment and comparisons. Our first step would be to engage with those folks programmatically. If a national data firm has the billing information for all the Starbucks, for example, they would also know the energy managers and this might be a way to leverage the vast amount of data they have to inform our potential assessments.
21. Person A: my recollection is that SnoPud worked with Avista to consolidate all bills?
22. JS: I don't actually know about that or if we're working on that now.
23. AM: when you submit a custom project proposal and it's not pursued for any reason, how do you handle now with your end-use customer? In terms of getting information from various entities doing assessments on their own, the problem seems to be that the data that comes in isn't aligned?
24. JS: at our utility, they never die on a list of authorized projects. We have some that have been authorized since 2006. Our regional reporting of accomplishments is uneven at best. A simple example: CFLs and having an understanding what we actually accomplished over the past years, what our overall delivery capacity was...we spent a lot of time trying to determine, "how much of this simple measure have we already done?"
25. AM: we've captured a few themes: a roster of consultants; being comfortable with the data that goes in and comes out; depends on measures in particular territories; and the current calculator is a good concept for a small utility, but it comes up a bit short for not being able to take into consideration past conservation.
26. JS: the calculator was a good calibration tool for us.
27. Person B: would be good to see where you may deviate. With ag, it would be interesting to see what the calculator spits out compared to a more substantive survey of the ag sector on our end.
28. JS: we found in beta testing that it only had one input for fuel share, but we have different saturation of gas heat, so newer homes are almost exclusively natural gas homes, but those built before 1980 are mainly electric. We've been able to impact the development of the tool to take into consideration some of the nuances of

- individual service territories. So the hybrid approach is maybe something we want to give more thought to.
29. AM: what exactly does the group envision when the group says “BPA could facilitate a more hybrid approach.”
 30. JS: there are different levels of granularity for the tool and if one did its own CPA. So we would ask BPA what we would need to know on a utility level, e.g. a utility would use the tool to do the commercial and residential sector, but they have a unique industrial sector, so they would use BPA to give them guidance on what data would be needed on the industrial sector in order to do a full blown CPA for their industrial sector. I want to be careful about using the word “guidance” from BPA; Cowlitz perhaps knows more about this than anyone, so BPA could be the repository for this information that exist either within BPA or within the utility organization.
 31. Person B: at this point, I don’t even know what questions to ask, so where do I go to get the questions.
 32. JS: where we would see BPA value is that a utility shouldn’t have to pay a consultant to come up with all the questions; don’t need to reinvent the wheel. We have this library of survey instruments that we could pick from depending on how we’re going to use the information.
 33. Person B: I see the value in having these instruments available, then a utility could do it either by mail, or when the auditor is out at a site...we need to do this going forward. This isn’t just a two to four year time frame, I’m looking at this for 10 years.
 34. AM: remember David Cohen from NEEA mentioning data collection protocols and stock surveys. It’s surely within the realm of possibility that BPA could serve as a library.
 35. JS: BPA could act as an intermediary between utilities and NEEA, so utilities are made aware of regional efforts and what tools are available to help individual utility data collection efforts.
 36. Person B: when a utility does a survey and they compile it at the utility level, is BPA going to be interested in all of this data that the utility has? I’m thinking of taking it from one step to the next.
 37. JS: we’re getting close to putting down specific bullets on paper on “this is the role we think BPA should play.” We need to figure out how we can get this written down to start passing it around for comment.
 38. JW: from what I’ve heard, BPA is in a position to play the kind of roles that have been discussed in this subgroup. We want to provide value where we can.
 39. JS: (Highlights from subgroup meeting.) We had two sessions, one focused on residential and the other focused on commercial. One of the things discussed was some of the regional data collection efforts going on, e.g., NEEA’s Residential Building Stock Assessment. They are looking for broad regional involvement. It’s early on in that process, so we do have some opportunities to influence that process. We also talked about SnoPud’s residential home inventory process. This process feed the calculator as well as our own CPA very well. We want to make sure regional data collection efforts are done in such a way that they feed our downstream analytical means. There is a need to make sure there is broad

- awareness among public power customers that these efforts are going on. We'd like BPA to look at the potential calculator and see if this regional building stock assessment will result in the data that utilities could use.
40. Person B: It concerns me that its spending a million dollars of the utility money and I would hope that the data collecting that the utilities will be able to use and if they can't use it, what's the point.
 41. Carrie Cobb: our main objective is to make sure that the data is available and transparent and lines up the calculator with the 6th power plan and how we view efficiency. Now that NEEA has had its kick off, we're going to be having webinar so public power customers can provide input.
 42. JS: there are going to be plenty of opportunities to weigh in on this process. Glad to hear that BPA is making sure these opportunities will be available and making sure everyone has access to the information. We just did a residential home inventory and we were ahead of the process; we did ask NEEA to take a look at our survey instrument. Our hope is to use what becomes a "standardized" survey the next time we do this. The outcome of our discussion last week was that consistent and standardized data collection is a benefit to all. We want alignment and consistency, e.g., across the different housing types.
 43. CC: hoping to have a date soon for the first webinar for the RBSA.
 44. JS: this is a two year process so some utilities may want to move forward on their own, so they may be ahead of this process but they can still benefit from the process and make sure their efforts will align with the regional effort as much as possible.
 45. CC: there's a lot of interest now with having NEEA be in line with the 6th power plan.
 46. JS: it's amazing how much disparity there is in the 6th plan (e.g. number of building types), so it's important that we get some consistency. We need to get some consensus on what is the significant break down across building types.
 47. JS: so we could use a telescoping approach, i.e., Seattle may want to look at small, medium, and large office buildings, where in other territories it may just be rolled up to "office" buildings.
 48. JS: we're trying to pull together a comprehensive look at our customers and come up with a proposed protocol about how you would map your accounts by different building types. The council said it would do this so any utility could do the mapping.
 49. Person B: how does what we're talking about line up with SIC codes?
 50. JS: yes, along the lines of saying these SIC codes go to these building types and these codes go to this different type, but it can get complicated (e.g., Boeing "office" building). In this combined database we're hoping to get square footage for most of our accounts, going to map this according to county assessor data.
 51. Person A: this is like prying an onion, e.g. what to do about mixed-use buildings. It depends on how deep you want to dive into the rabbit hole. It does help to understand your customers and helps with programmatic planning.
 52. JS: there's a role for BPA to be a conduit between utilities and these regional bodies in terms of keeping utilities aware of regional efforts; to gather input from utilities to make sure our interests are represented; help communicate and deploy

the results of the research efforts as well as being a repository to help with methodologies (data collection tools). We have consensus on this philosophically, but the question is how deep we want to go into the rabbit hole.

Break

1. AM: time to revisit the issues list.
2. AM: 1. I see this issue as being incorporated into the recommendations. The latter part of a size threshold was tabled at the first meeting.
3. JS: from a mandate standpoint, we tabled it, but I do think there's room for not necessarily around "size" but "needs" of a utility. If a utility has load growth or doesn't or has done more or less conservation than an average point, we could identify if several utility characteristics would lead to a "recommended" action or approach for utilities.
4. AM: seems like this should be specifically called out in the recommendations.
5. JS: not necessarily a policy issue, but more of a practical issue. It would be nice to have a place to get advice about CPAs.
6. AM: 2. what role for BPA; this is mainly what we've been discussing. We're moving forward with putting together recommendations to address that.
7. AM: 3. should BPA help develop tools. I think it's a resounding yes and feeds into BPA's role. So the issue is alive.
8. AM: 4. BPA's role in collecting data inputs. Another big topic of discussion.
9. AM: It seems like earlier on we decided that BPA should not actually be the one going into service territories to collect data, but rather to provide the tools to utilities to allow them to collect the data.
10. JS: it will show up in our recommendations, some specific things BPA could do that could help individual utilities. We need to get what we've heard down on paper and make sure it represents the consensus view of the group.
11. AM: A resounding yes. There's the tool. This issue will be folded into the recommendations.
12. AM: 5. role of BPA in developing methodologies and standards.
13. JS: like the first set of questions, there is some openness to have BPA be a repository for best practices, surveys, etc. Anything along the lines of "you must do it this way" doesn't resonate with the group.
14. AM: agreed.
15. AM: 6. what are some of the key timelines. This was tabled.
16. JS: however, there is some value to utilities having a place to go to know where what things might influence an individual utility in its efforts to do an estimate or CPA, which might influence the utility's timeline. For example, knowing when BPA is making budgets, regional undertakings, etc.
17. Person B: I really think there's going to be more a drive for most utilities to determine what their potential is. I think it's going to be up to the utility to when and if they are going to do a CPA.
18. AM: changing the way we interpret this issue is helpful.
19. AM: 7. Who should pay for CPAs and/or services?

20. JW: this will fall out of where we come down on other pieces. If it's a tool that BPA will provide and a data warehouse that could be BPA, but who's going to pay for things beyond that is more complicated.
21. Person B: If it's not required by BPA, there wouldn't be funding, right?
22. JW: that's a question.
23. AM: we have enough to put together a draft recommendation. My thought would be to have a LiveMeeting during the Sept. 15 meeting and use that meeting to flush out a more defined set of recommendations and then have an in-person meeting on the 29th.
24. AM: action item: in-person meeting on Sept 29 in Portland, but other suggestions for location are welcome.
25. AM: MT to send out a separate email to the WG list about the 29th meeting.