



# Retail Sales Allocation Tool (RSAT) FAQ

## 1. What is the RSAT

The Retail Sales Allocation Tool (RSAT) is a dynamic interface tool for creating transparent and accurate allocations of sales of energy efficiency products to the utility service territory in which they were installed, without requiring end user documentation. The tool uses detailed data sources that combine:

- Retailer profiles
- Information about products and stocking practices
- 72 consumer profiles from Experian's Mosaic© customer segmentation data
- GIS to map drive times and overlay the multiple data sources with all 142 public and investor-owned utility service territories in the Pacific Northwest.

The current output of the tool is in the form of an Excel spreadsheet (with a choice of Macros or Filters) to allow for the tool to be used by all parties without the need for additional software or Web access.

## 2. Why was it developed?

BPA initiated this project to address utility requests for more accurate and transparent allocation percentages for the Simple Step, Smart Savings regional program and to identify a methodology to move appliance programs upstream and relieve utilities from the laborious practice of Appliance Incentive forms.

In November 2011, BPA contracted with Portland Energy Conservation Inc. (PECI) to build the RSAT. The goal of the project was to provide public and investor-owned utilities in BPA's region with a tool that provides percentage allocation by utility service territory, of sales of energy efficient retail products from a variety of retail outlets. Initial product categories were: lighting products (CFLs, LED, fixtures, lighting controls), showerheads, and appliances (refrigerators, freezers, clothes washers).



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### **3. How did BPA get input from utilities on this project?**

To gather input for the project, BPA began with stakeholder interviews. PECI completed 19 phone interviews with regional utility stakeholders at the beginning of the project (December '11 - January '12) to gather perspectives on program design, retailers to include, product categories and potential areas for concern. The DRAFT Retail Sales Allocation tool was distributed to all BPA utilities during FY13 and an updated version was distributed in March 2014 for FY14. A current copy is available by contacting your Energy Efficiency Representative.

### **4. What can the RSAT do?**

The RSAT can provide percentage allocations of sales of promoted (or non-promoted) energy efficiency products in the product classes that have been researched (i.e. CFLs, LEDs, lighting fixtures, showerheads, refrigerators, freezers and clothes washers).

### **5. What can it not do?**

The RSAT cannot predict the volume or quantity of sales of products.

### **6. How does BPA intend to use the RSAT?**

Based on utility request and support, BPA will be updating the Simple Steps allocations using the RSAT effective October 2014. We also intend to use this tool to make upstream appliance measures available as an optional measure in 2015. To learn more about how the RSAT is currently being used, visit the [RSAT Usage Document](#).

### **7. Where do I get more information?**

Please contact your Energy Efficiency Representative for more information.