Open Q Pilot - bHER Program

September 25, 2025

AGENDA

- **Introductions**

- **Open Q Overview**

- **Open Q Pilot – Behavioral Home Energy Report Program**

- **Questions**
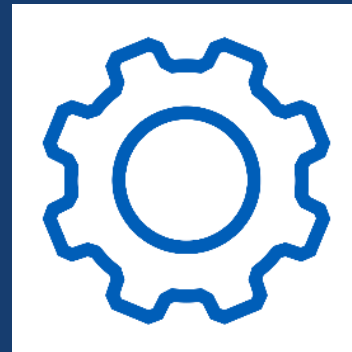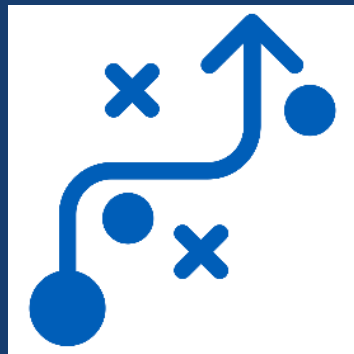
Energy Efficiency Program Constraints

- BPA's Energy Efficiency programs offer **proven and reliable measures.**

- This requires investment in **research and evaluation.**

- There are lots of other measures and program types that could produce **savings.**

- BPA staff have **limited capacity** to develop and evaluate new measures.

- BPA customer **utilities might run innovative energy conservation programs** but could not report them to BPA because they did not fit within existing processes for custom projects or other program measures.

- **Open Q offers another pathway** to leverage customer pilot efforts to acquire energy savings and evaluate savings for potential future regional offerings.

A Path for Creative Solutions – Open Q

- **Lower up-front barriers:** Delays evaluation requirements for technically sound program proposals.

- **Provide technical support:** Support program design and savings assumptions to ensure proposals are implementable and measurable.

- **Provide validation support:** Support utilities by providing guidance and support for the program evaluation process.

Open Q Overview

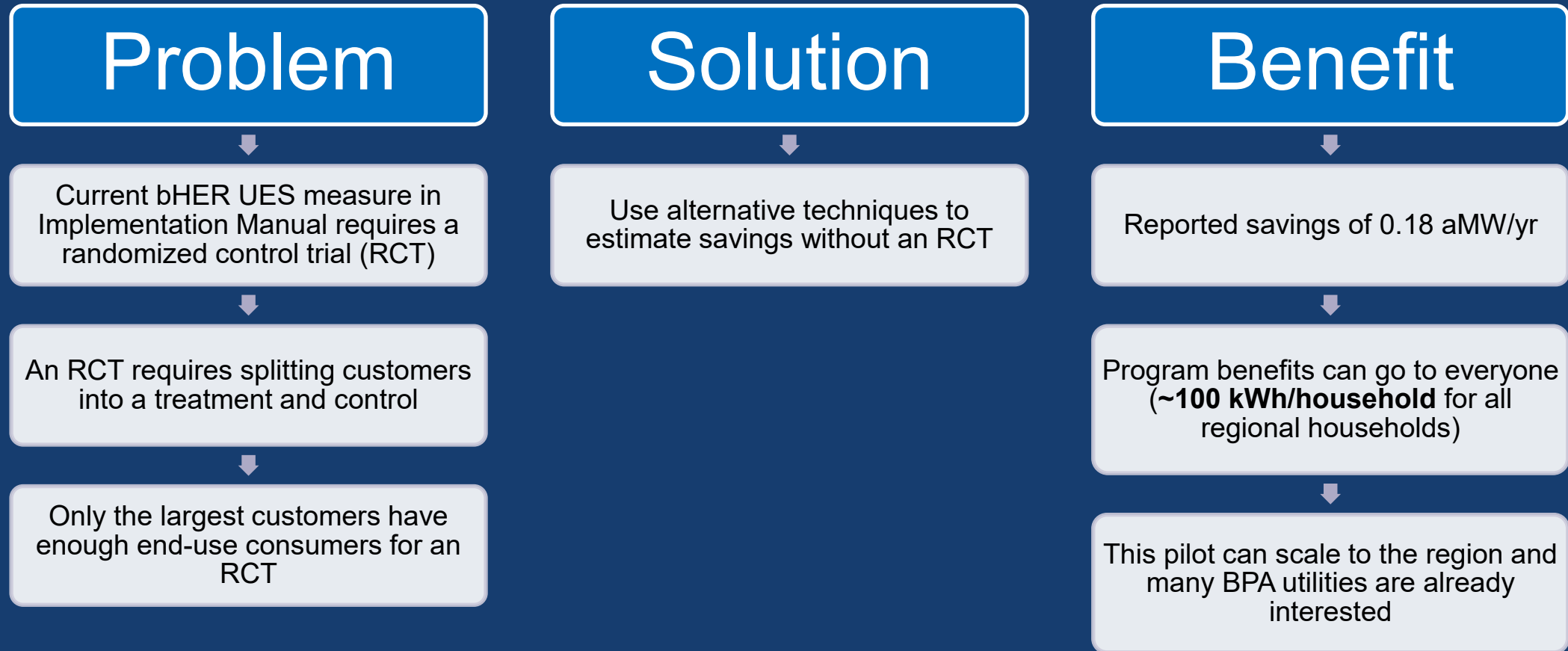- Open Q is designed to be **simple and flexible:**

| Submit a program proposal | Develop the idea with BPA | Implement the program | Evaluate and update |

Behavioral Home Energy Report (bHER) Open Q Pilot

Problem

Current bHER UES measure in Implementation Manual requires a randomized control trial (RCT)

An RCT requires splitting customers into a treatment and control

Only the largest customers have enough end-use consumers for an RCT

Solution

Use alternative techniques to estimate savings without an RCT

Benefit

Reported savings of 0.18 aMW/yr

Program benefits can go to everyone (~**100 kWh/household** for all regional households)

This pilot can scale to the region and many BPA utilities are already interested

Open Q bHER Pilot Summary of Requirements

- **To participate in the Open Q bHER Pilot, utilities must:**

  - Distribute* bHER reports to all of your customers

  - Have one year of pre- and one year of post-hourly AMI data or finer for all residential customers

  - Participate in BPA's evaluation (including answering data requests and helping with a survey)

  *Exceptions apply – discussed in next slide

Open Q bHER Pilot Requirements

- **bHER Reports must be:**

  - Distributed to all customers that have an email address **<u>or</u>** have not opted out

  - Delivered to end-use residential customers on a quarterly basis at a minimum.

    - Programs that provide reports more frequently are allowed.

Open Q bHER Pilot Requirements (continued)

- **bHER Reports must include:**

  - Seasonal household energy consumption information

  - A normative comparison of household energy consumption to similar households

  - Tips and strategies to reduce home energy consumption.

Open Q bHER Pilot Requirements (continued)

- **Utilities must**
  - Have one-year of pre- and one-year of post-Advanced Metering Infrastructure (AMI) data at one hour level or finer (e.g., 15-minute) for all (or at least the vast majority [~>95%] of) residential customers
  - Be able to store the AMI data and transfer the data to BPA's evaluator

Open Q bHER Pilot Requirements (continued)

- **BPA's evaluator can provide guidance and limited support with tips for storing data and will facilitate the transfer of data**
  - Will send a secure file transfer request for utilities to upload the data
  - Can provide guidance in helping utilities set up a database, but ultimately the utility needs to have access to a database to store and pull the amount of data required

Open Q bHER Pilot Requirements (continued)

- **Utilities must be willing and able to**
  - Answer BPA's evaluator questions on AMI data quality and solve any potential issues (including pulling additional AMI data from additional months)
  - Give BPA's evaluator end-user customer information so that they can conduct a survey
  - Help BPA's evaluator conduct a survey if needed by giving end-users a heads up that a survey is coming and to please fill it out