

Overview Subcommittee Process



AYAD AL-SHAIKH & ANNETTE BEITEL
APRIL 2017

Agenda

2

- Measure Consolidation Strategic Plan - Update
- Measure Consolidation - Flow Chart
- Measures and Measure Data
 - Statewide Measure List
- Data Used to Understand the Measures
 - Workpapers
 - EESat / CEDARs
 - Ex Ante Tables
 - What else are we missing...
- Power of the Data
- Subcommittee Expectation

Questions / Comments?

Measure Consolidation Strategic Plan

3

- Create updated Statewide Measure List (2017)
 - Gather all active (2017) IOU workpapers
 - Review POU TRM
 - Identify DEER Measures being used that do not have IOU workpapers (13)
 - Identify overlapping workpapers
- Prioritize measures for 2017
 - Cal TF meeting (Dec 2017)
- Identify measures that will still be offered in 2018
 - IOU / POU multiple rounds of input
- Result
 - List of Measures for 2017 eTRM review/placement
 - List of Measures for 2018 eTRM review/placement
 - Statewide Measure List that will be updated on a monthly basis
- Big Caveat
 - How will existing conditions baseline policy change the list of retired measures?
 - Changes to code?
 - New dispositions?

Measure Consolidation Strategic Plan

4

- Consolidation Process

- Phase 1

- ✦ Use Workpapers to identify differences between Measure Offerings (ie, Measure Application Type, Delivery Type, Offerings).

- Phase 2

- ✦ Use Ex Ante Measure tables to create Pivot Tables that can compare Measure Permutation differences (ie, savings, cost).

- Phase 3

- ✦ Reconvene subcommittee if additional discrepancies arise once Measures are in the eTRM template.

Result: Category Groups for eTRM

5

- 2017 Categories (61 of 75)
 1. Refrigeration
 2. Food Service
 3. Agriculture / Pumps
 4. Water Heating
 5. Appliance or Plug Load
- 2018 Categories (9 of 75)
 - ❑ HVAC / Motors
 - ❑ Lighting
 - ❑ Building Envelope
 - ❑ Miscellaneous
 - ❑ Pools
 - ❑ Process

Category Groups for eTRM

(Number of Measures – 2017 / 2018)

6

1. Commercial Refrigeration (12 / 9)
2. Food Service (14 / 1)
3. Agriculture / Pumps (5 / 1)
4. Water Heating (17 / 9)
5. Appliance or Plug Load (13 / 15)
6. Lighting (3 / 28)
7. HVAC / Motors (2 / 65)
8. Building Envelope (0 / 4)
9. Miscellaneous (1 / 6)
10. Pools (1 / 5)
11. Process (2 / 12)

70 Measures in 2017 (so far); **155** Measures in 2018

This list does not take into account measures that are being developed.

Measure Consolidation Process

7

Cal TF Staff

1. Identify Measures
3. Identify WP & POU TRM
4. Identify Sources

- Statewide Measure List

Cal TF Staff

8. Identify WP Differences & Issues
7. Complete Overlapping WP Template

- Workpapers
- CEDARS Data
- Ex Ante Tables

- Excel Summaries
- Pivot Tables
- Decks Summarizing Measures & Tables

IOU/POU Tech Staff

11. Identify Other Potential Issues
12. Challenges to Developing Statewide Measure

- IOU/POU Pre-Subcommittee Meeting

Subcommittee

2. Subcommittee Formation
9. Address Issues Identified
6. Assess If Data is Sufficient
17. Subcommittee Measure Recommendations
16. Assess Measure Future

Cal TF Staff

5. Gather / Analyze Sources
10. Compare to Values in Other TRMs (if needed)

Full TF

19. CalTF Peer Review / Affirmation

Cal TF Staff

- 14,20. Populate Draft & Final eTRM Template and Upload into Repository

CPUC Staff

21. CPUC Approval of Measures and Repository

13. CPUC Consultation
18. Obtain CPUC Staff Feedback

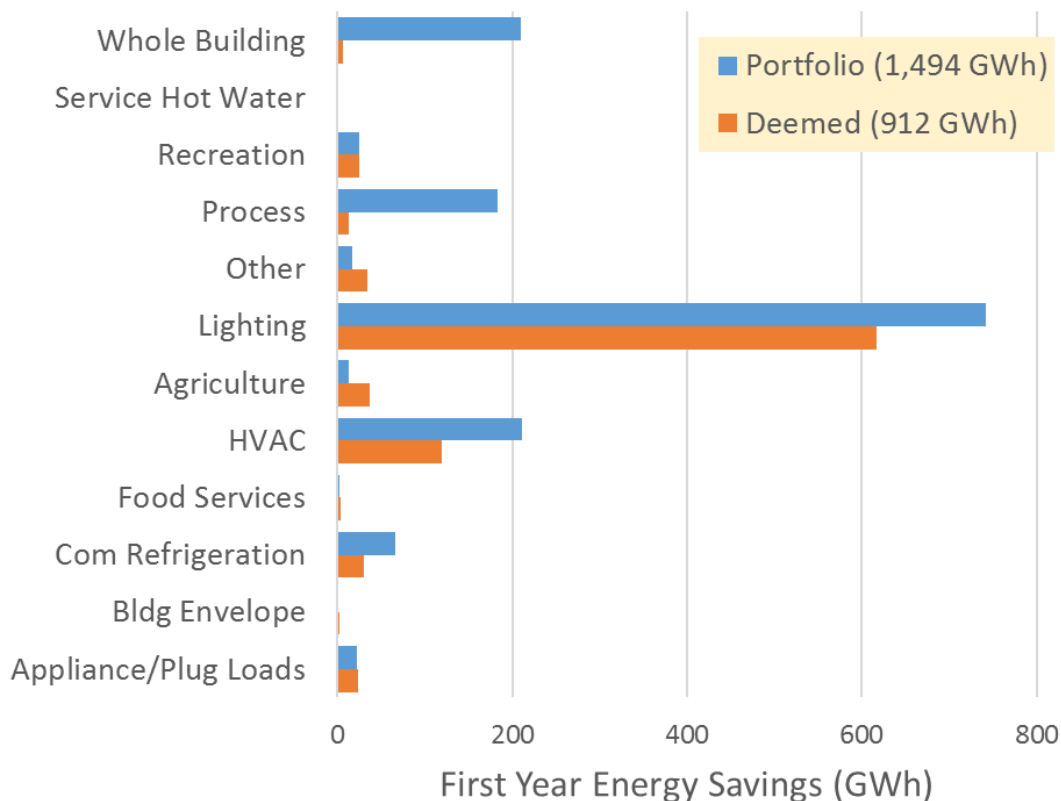
Back for additional consultation, if needed

General Observations

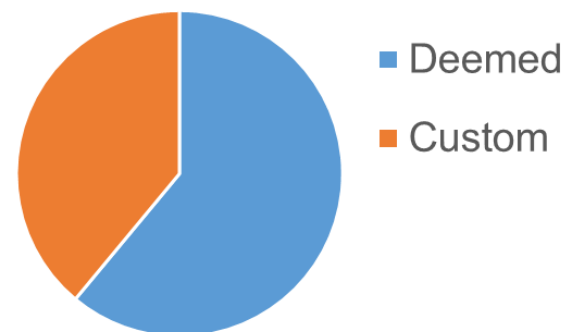
Portfolio vs Deemed Savings - Electric

8

Deemed Portion of Portfolio Savings - 2016
(EESStats to Claims Data)



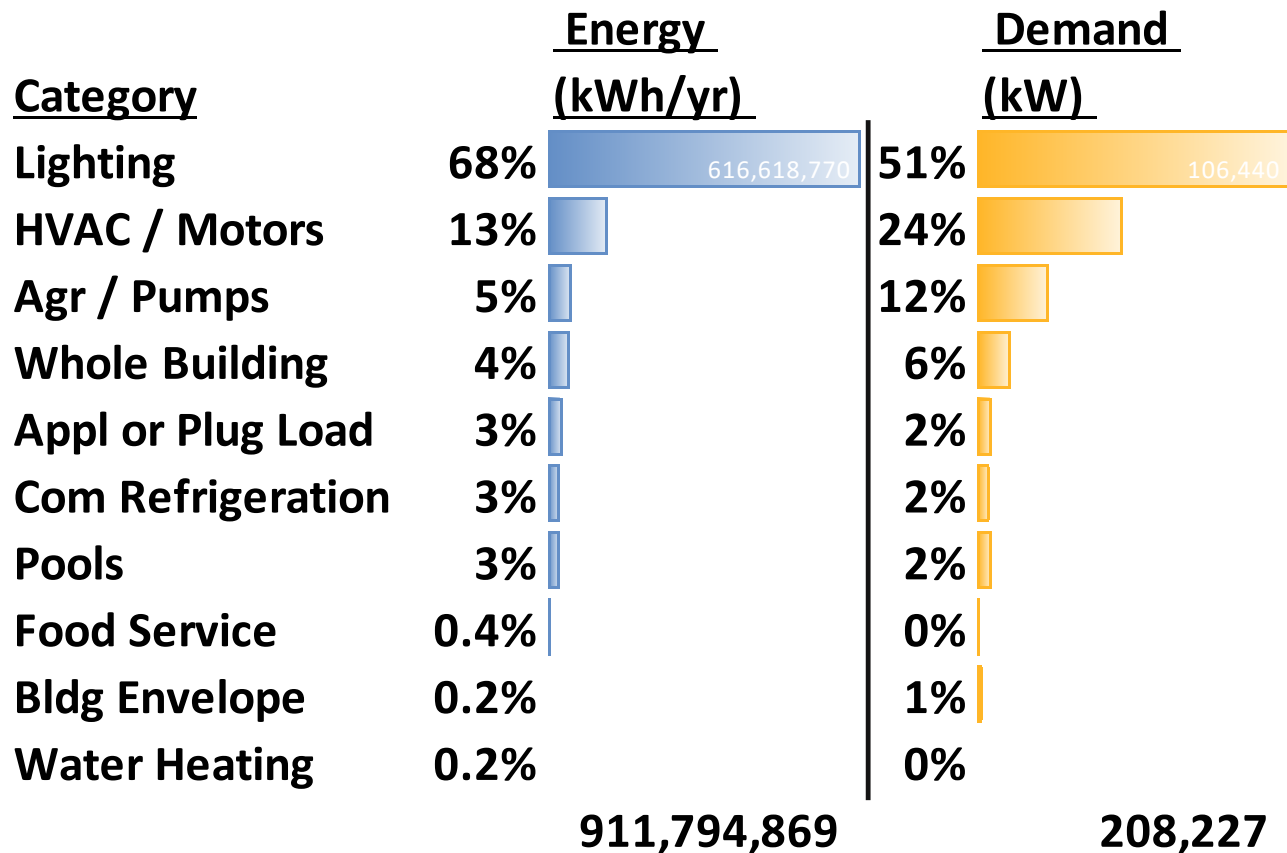
2016 CA IOU Electric Savings



Note: Categories do not align between EESStats and Claims data. (Portfolio should always be greater than Deemed.)

Deemed Portfolio Savings - 2016

9

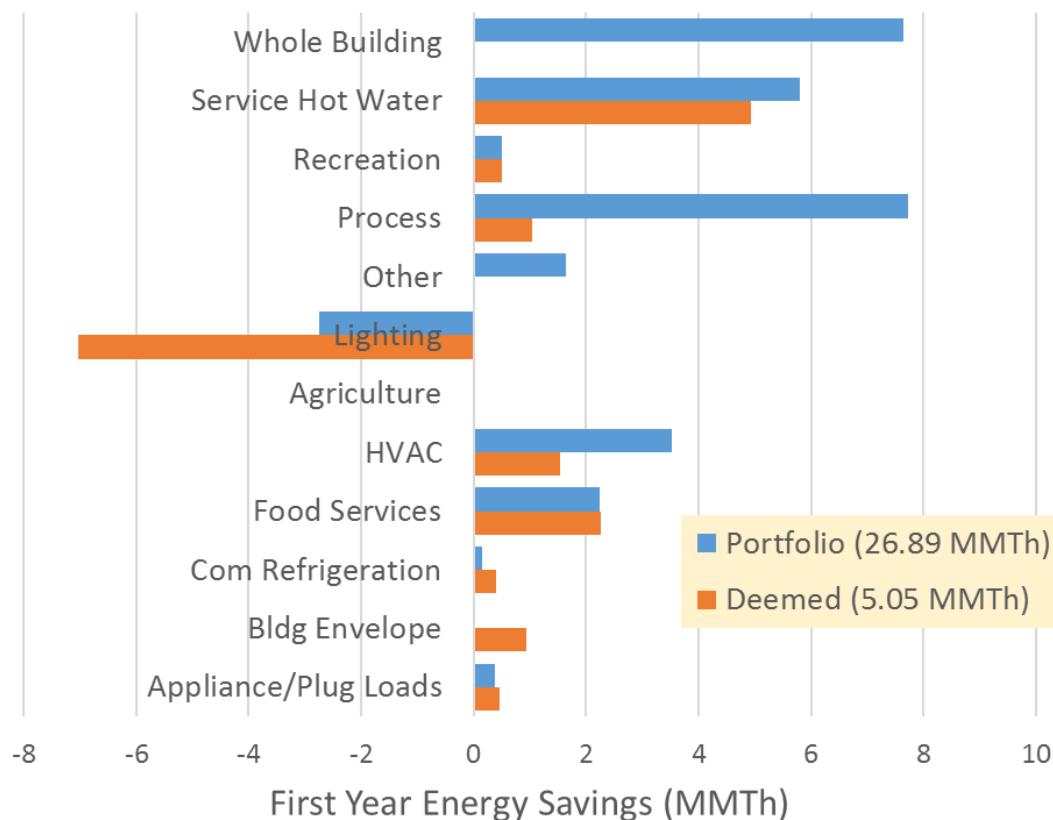


General Observations

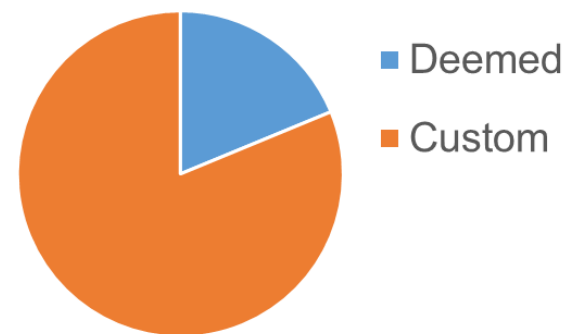
Portfolio vs Deemed Savings - Gas

10

Deemed Portion of Portfolio Savings - 2016
(EESStats to Claims Data)



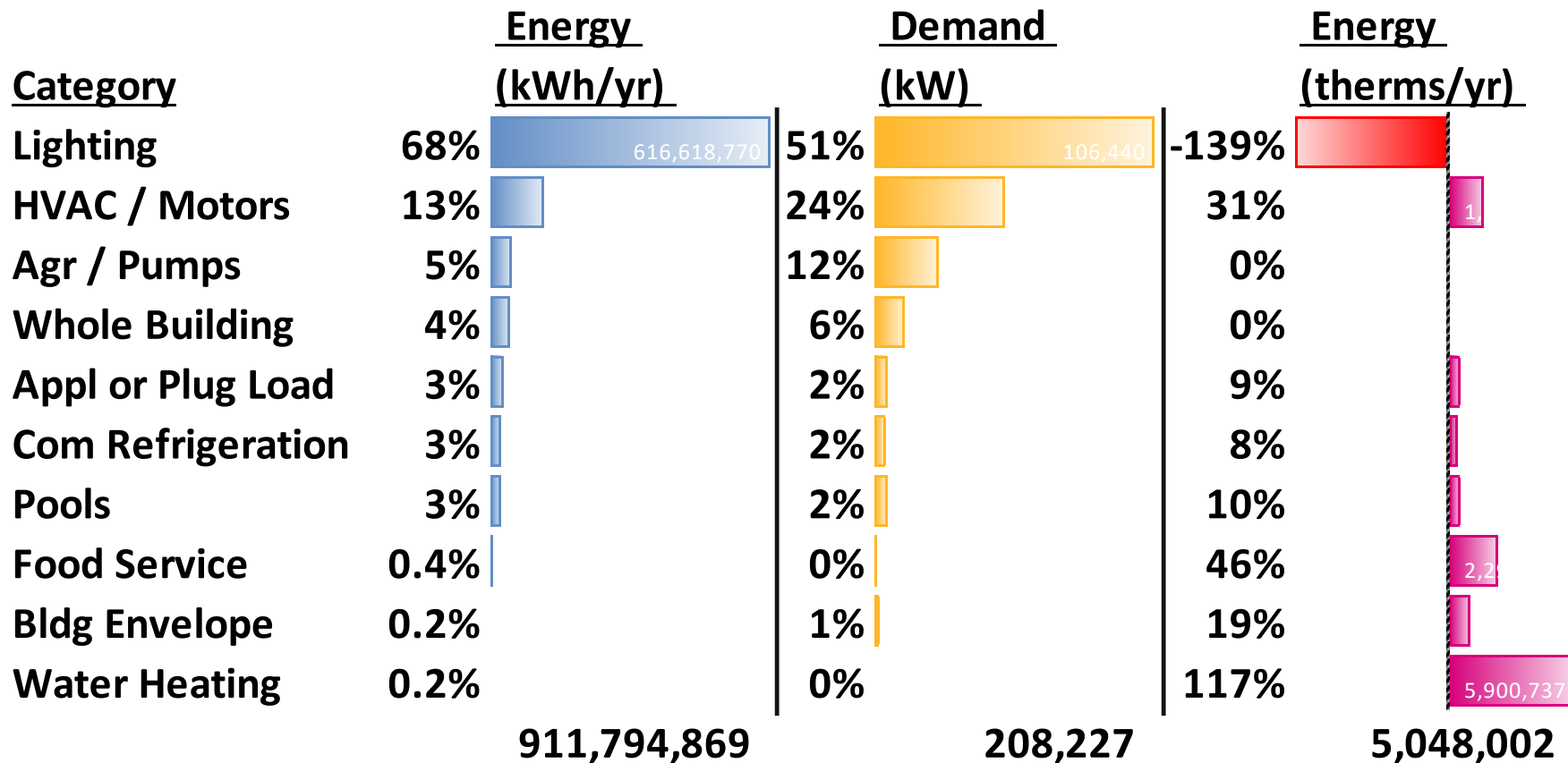
2016 CA IOU Gas Savings



Note: Categories do not align between EESStats and Claims data. (Portfolio should always be greater than Deemed.)

Deemed Portfolio Savings - 2016

11



Data Used to Understand the Measures

12

1. Workpaper Library (development in progress)



CALIFORNIA
ENERGY EFFICIENCY
STATISTICS



2. EE Stats: 2016 Portfolio Savings

- PA, Program
- End-Use, Sub-End-Use
- Climate Zone, Zip Code

3. CEDARS: 2016 Deemed Savings

- Workpaper
- Offering



4. Ex Ante Measure Tables:

- Impact -> Permutations
- Measure
- Implementation
- Measure Cost

Power of Data

13

- Reviewed data sources to identify values and differences for measure consolidation process.

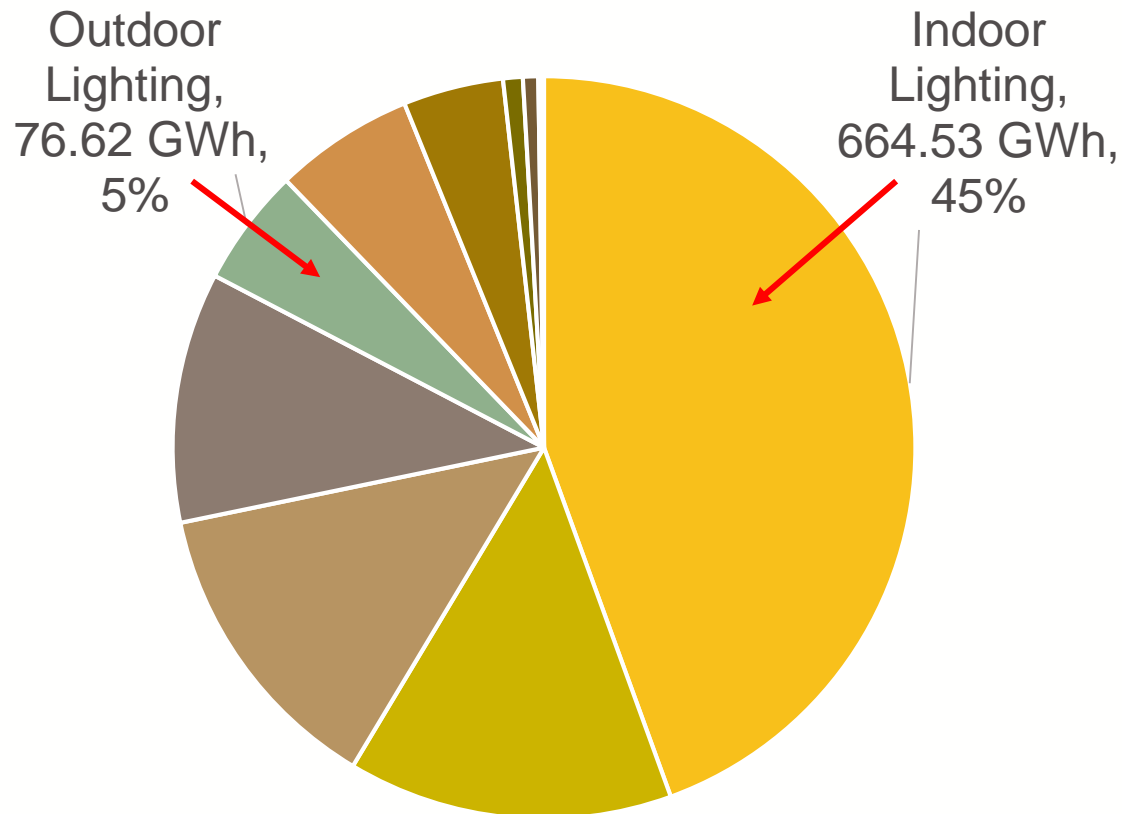
BUT...

- In reviewing data, found that it had value in measure consolidation process beyond identifying similarities and differences across measures AND beyond measure consolidation process
 - ❑ Identifying HIMs (high impact measures) for greater focus
 - ❑ Use data to maintain savings accuracy
 - ❑ Shows opportunities for a statewide approach

Example: “Power of Data” for Lighting

14

2016 Q1-Q4 - EESat Data
Total: 1,494.88 GWh



2016 Q1-Q4 IOU data just posted this month.

Outdoor Lighting - HIMs

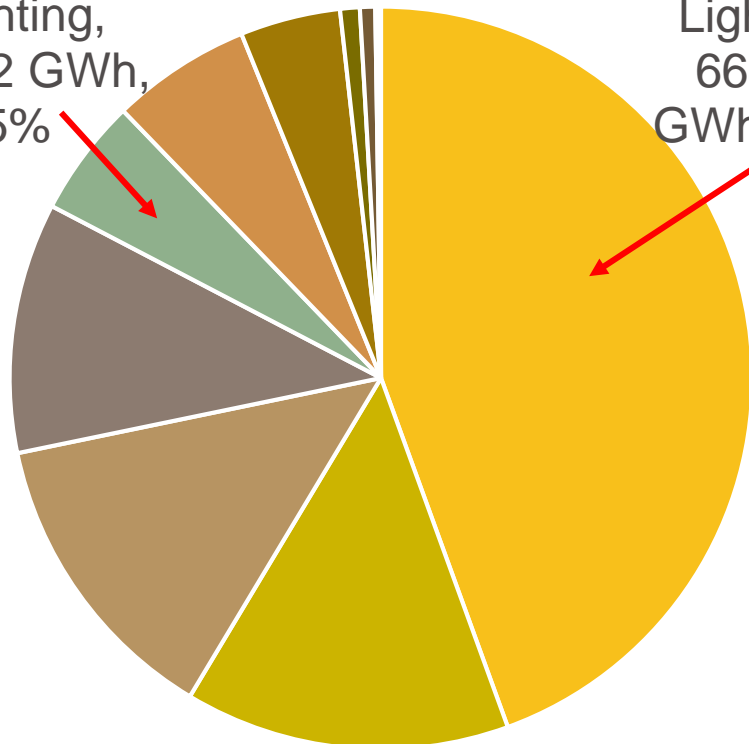
15

Outdoor Lighting		
Codes And Standards Title 24		1.14
Lighting Outdoor CFL Basic		0.03
Lighting Outdoor CFL Fixture		2.98
Lighting Outdoor CFL Other		0.00
Lighting Outdoor CFL Reflector		0.04
Lighting Outdoor Controls Other		0.36
Lighting Outdoor HID		0.08
Lighting Outdoor Induction		0.33
Lighting Outdoor LED Fixture		51.04
Lighting Outdoor LED Lamp		0.24
Lighting Outdoor LED Other		11.37
Lighting Outdoor LED Streetlight		7.47
Lighting Outdoor Linear Fluorescent		0.03
Lighting Outdoor Other		1.50
Whole Building Retrofit		0.00
Outdoor Lighting Total		76.62

Outdoor
Lighting,
76.62 GWh,
5%

2016 - EESat Data
Total: 1,494.88 GWh

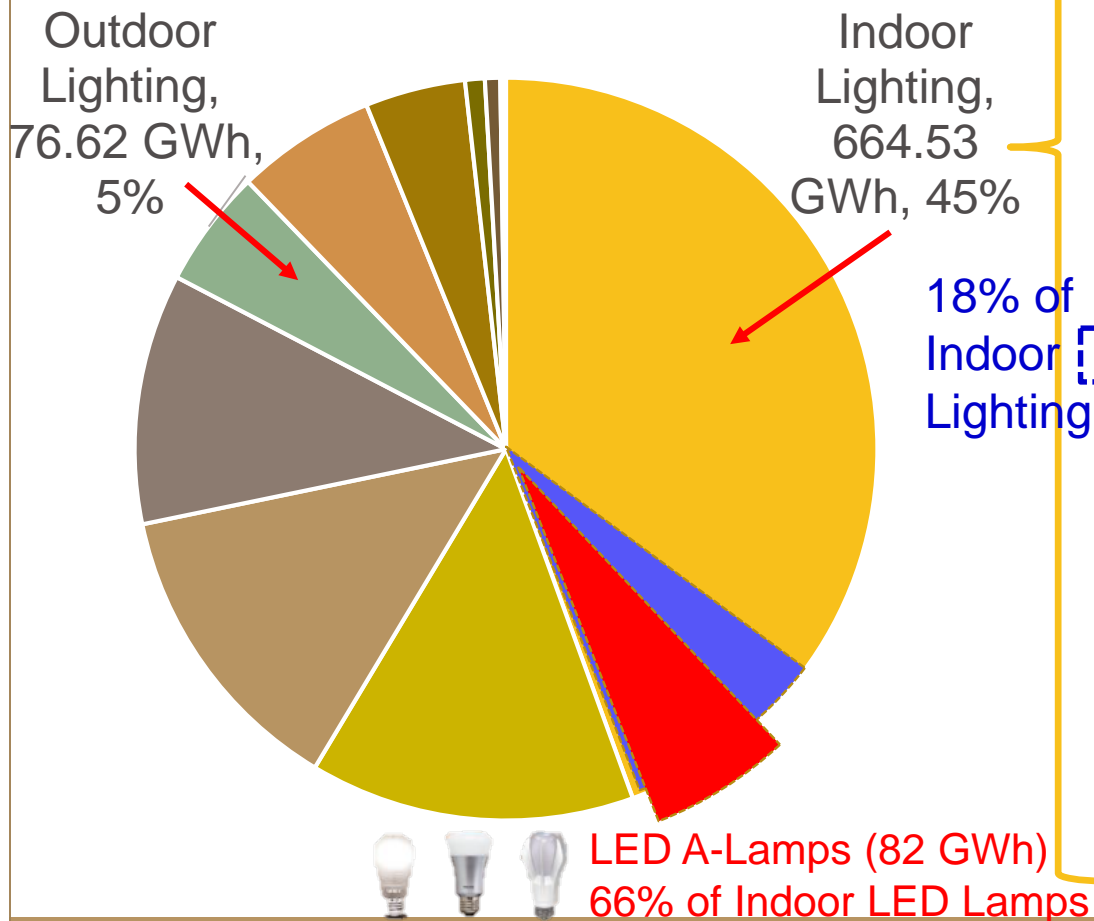
Indoor
Lighting,
664.53
GWh, 45%



Indoor Lighting - HIMs

16

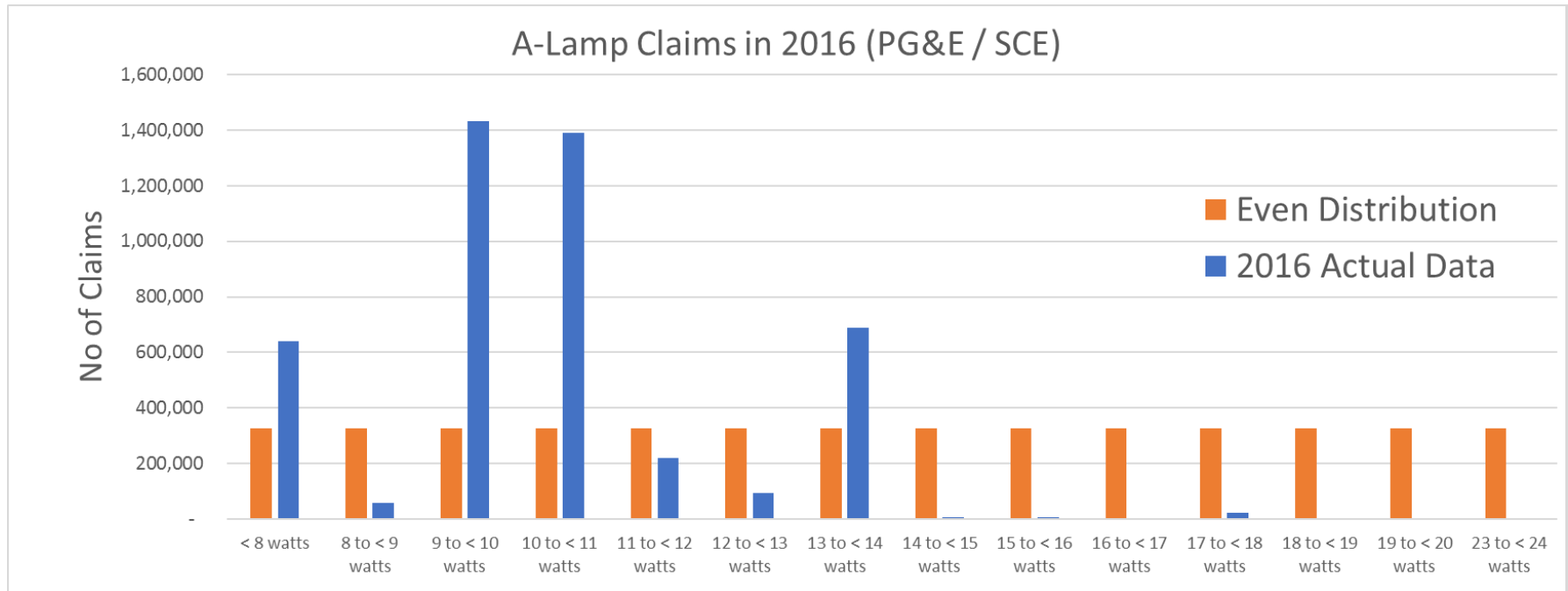
2016 - EESat Data
Total: 1,494.88 GWh



Indoor Lighting	
Lighting Indoor CFL > 30 Watts	2.58
Lighting Indoor CFL 3 Way	13.54
Lighting Indoor CFL A Lamp	31.46
Lighting Indoor CFL Basic	138.87
Lighting Indoor CFL Fixture	1.76
Lighting Indoor CFL Globe	0.00
Lighting Indoor CFL Other	0.00
Lighting Indoor CFL Reflector	4.65
Lighting Indoor Controls Daylighting	0.17
Lighting Indoor Controls Other	1.40
Lighting Indoor Controls Wall Or Ceiling	1.30
Lighting Indoor Fixture Integrated Occu	0.17
Lighting Indoor HID	0.18
Lighting Indoor High Bay Fluorescent	2.21
Lighting Indoor Induction	0.02
Lighting Indoor LED Fixture	125.80
Lighting Indoor LED Lamp	123.43
Lighting Indoor LED Night Light	0.20
Lighting Indoor LED Other	19.97
Lighting Indoor LED Reflector Lamp	124.17
Lighting Indoor LED Signage	0.13
Lighting Indoor Linear Fluorescent	42.10
Lighting Indoor Linear Fluorescent Dela	3.96
Lighting Indoor Other	26.09
Lighting Outdoor LED Fixture	0.03
Lighting Outdoor LED Streetlight	0.28
Other	-
Retrocommissioning Lighting	0.06
Indoor Lighting Total	664.53

CEDARs / Claims Data Helps Maintain Savings Accuracy

17

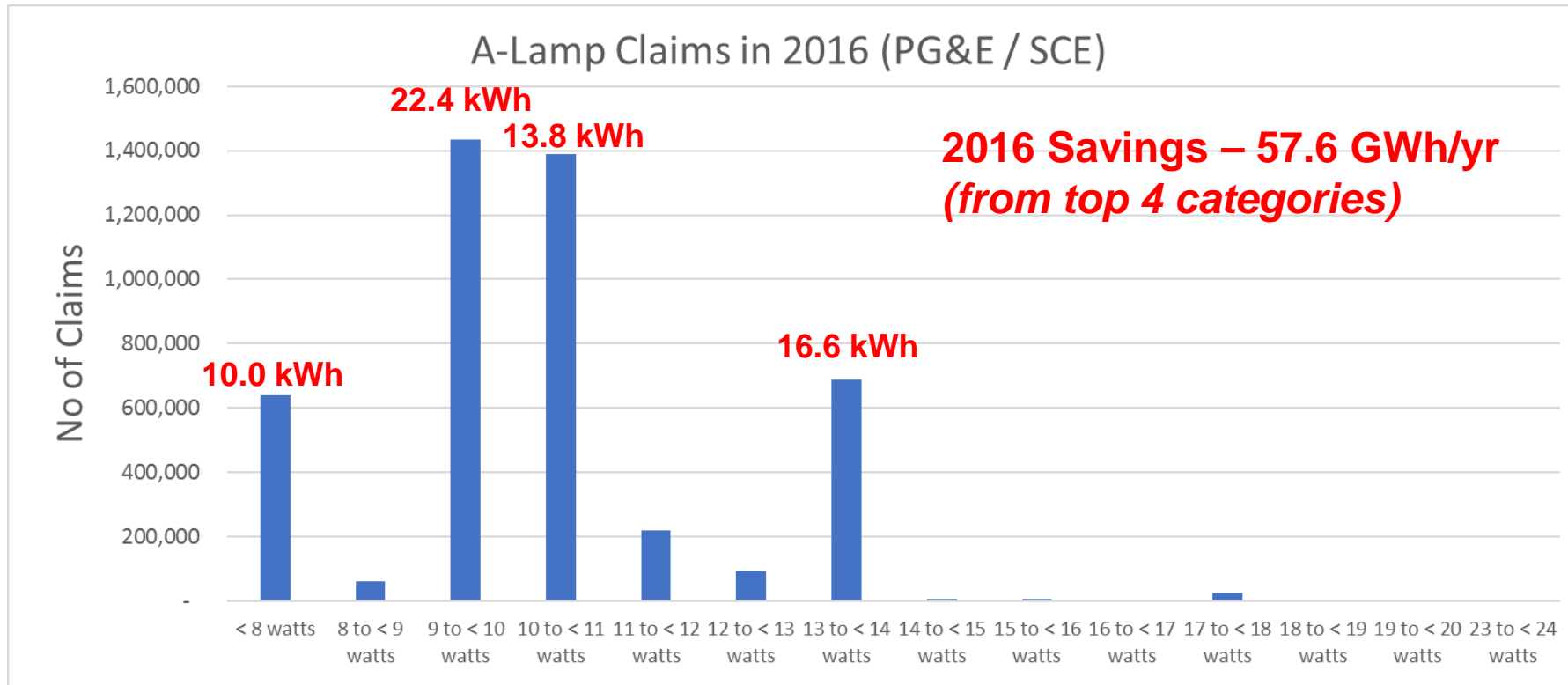


2016 Savings – 82.4 GWh/yr (all A-Lamps)

**Confirm that the distribution is not even;
1-Watt bins provide great value to keep savings accurate.**

CEDARs / Claims Data Helps Maintain Savings Accuracy

18

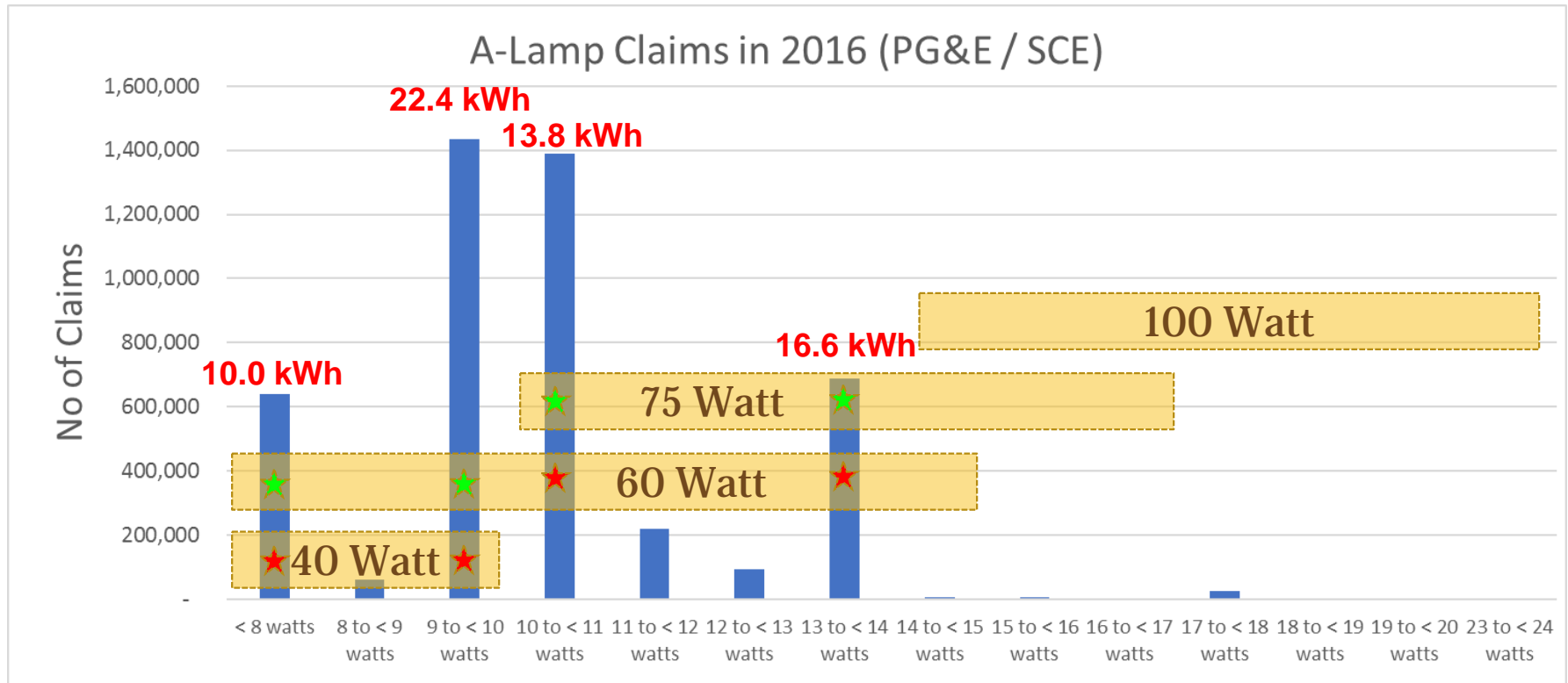


2016 Savings – 82.4 GWh/yr (all A-Lamps)

2016 Savings – 57.6 GWh/yr (top 4 categories)

CEDARs / Claims Data Helps Maintain Savings Accuracy

19



2016 Savings – 82.4 GWh/yr (all A-Lamps) / 57.6 GWh/yr (top 4 categories)

Unapproved 2017 Range in Top 4 Categories (same quantities)

- ★ - From ~70 GWh/yr
- ★ - To ~125 GWh/yr

**Values are not so important; Range is critical.
Potentially, twice the savings from correct baseline.**

Power of Data

20

- What about:
 - How to characterize a measure?
 - ✦ Based upon variables that show sensitivity.
 - ✦ Example of EC Motor offerings: Application (Freezer/Cooler) vs Rated Motor HP
 - How many permutation are needed?
 - ✦ All permutations within 10% of each other.
 - ✦ Example of insignificant variation by climate zone from the EC Motor

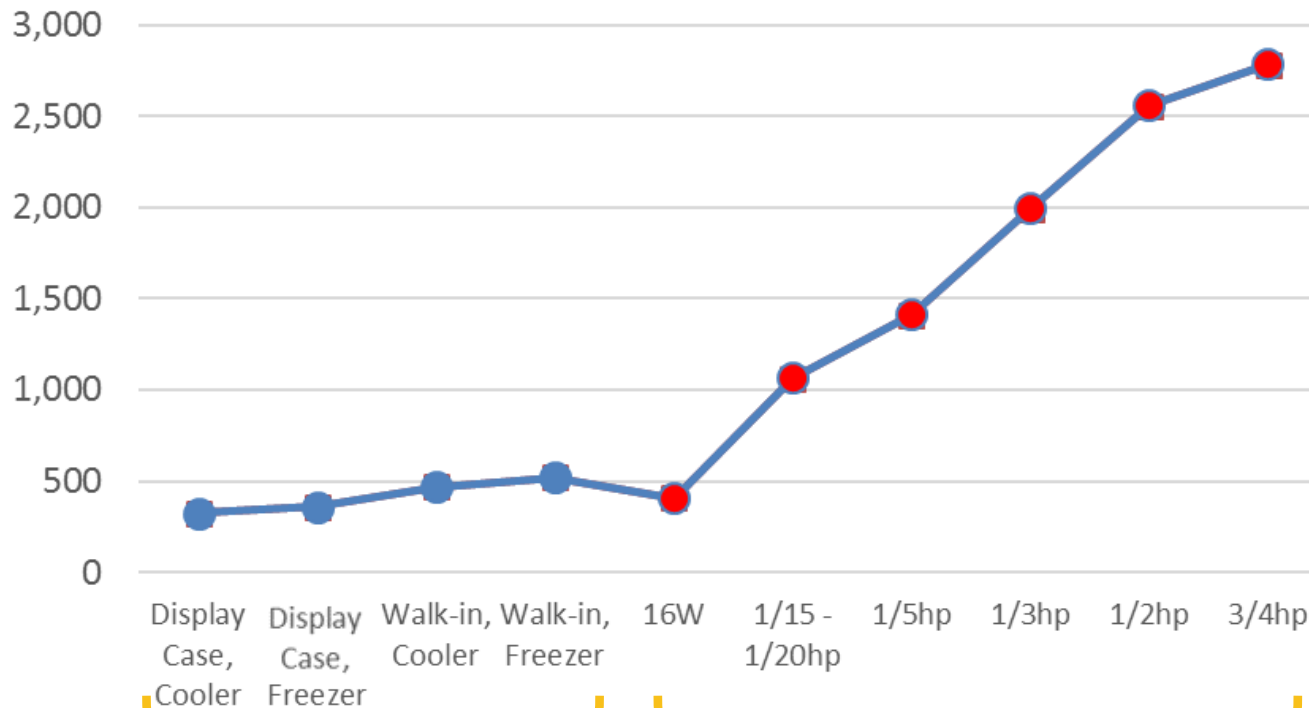
How Data Can Influence Offerings

21

Ref No	Name	Total No of Units	Energy (kWh/yr)
1.01	Anti-Sweat Heater (ASH) Controls	21,570	5,022,366
1.02	Anti-Sweat Heater Display Doors	2,424	1,539,951
1.03	Evaporator Fan Motors	1,397	524,845
1.04	Refrigerated Storage Auto Closer	1,760	3,731,458
1.05	Walk-in Cooler Evaporative Fan Cycling and	1,854	1,285,285
1.06	Refrigeration Head Pressure Controls	3,330	2,429,104
1.07	Refrigeration Night Covers	4,134	153,634
1.08	Bare Refrigeration Line Insulation	1,028	42,398
1.09	Add Doors to Walk-in Cooler	433	304,913
	etrofit: Multiplex	54	191,502
	1 Motor Retrofit	1,023	722,109
	er: Multiplex	350	197,666
	essure - Single Compressor	214	101,384
	to Reach-In	269	850,046
	pen Case Retrofit	1,771	215,188
	h Doors	4,012	4,896,771
	ase Doors	5,433	2,575,884

24,784,503

Refrigeration - Evaporator EC Motor



IOU Approach

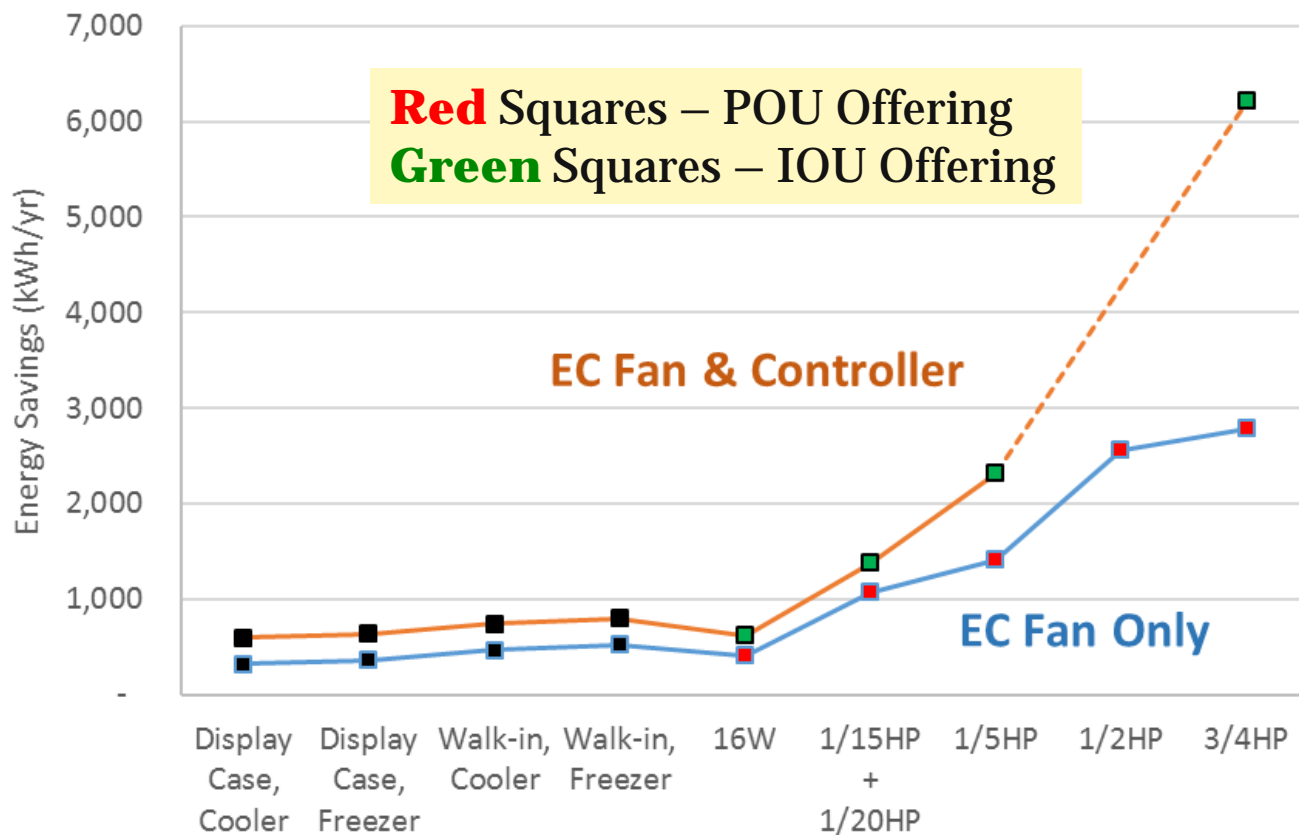
POU Approach

How Data Can Influence Offerings

22

Ref No	Name	No of Units	Energy (kWh/yr)
1.01	Anti-Sweat Heater (ASH) Controls	21,570	5,022,366
1.02	Anti-Sweat Heater Display Doors	2,424	1,539,951
1.03	Evaporator Fan Motors	1,397	524,845
1.04	Refrigerated Storage Auto Closer	1,760	3,731,458
1.05	Walk-in Cooler Evaporative Fan Cycling and	1,854	1,285,285
1.06	Refrigeration Head Pressure Controls	3,330	2,429,104
1.07	Refrigeration Night Covers	4,134	153,634
1.08	Base Refrigeration Line Insulation	1,028	42,398
	in Cooler	433	304,913
	: Multiplex	54	191,502
	Motor Retrofit	1,023	722,109
	: Multiplex	350	197,666
	ure - Single Compressor	214	101,384
	Reach-In	269	850,046
	n Case Retrofit	1,771	215,188
	Doors	4,012	4,896,771
	e Doors	5,433	2,575,884
			24,784,503

Evap EC Motor Measures

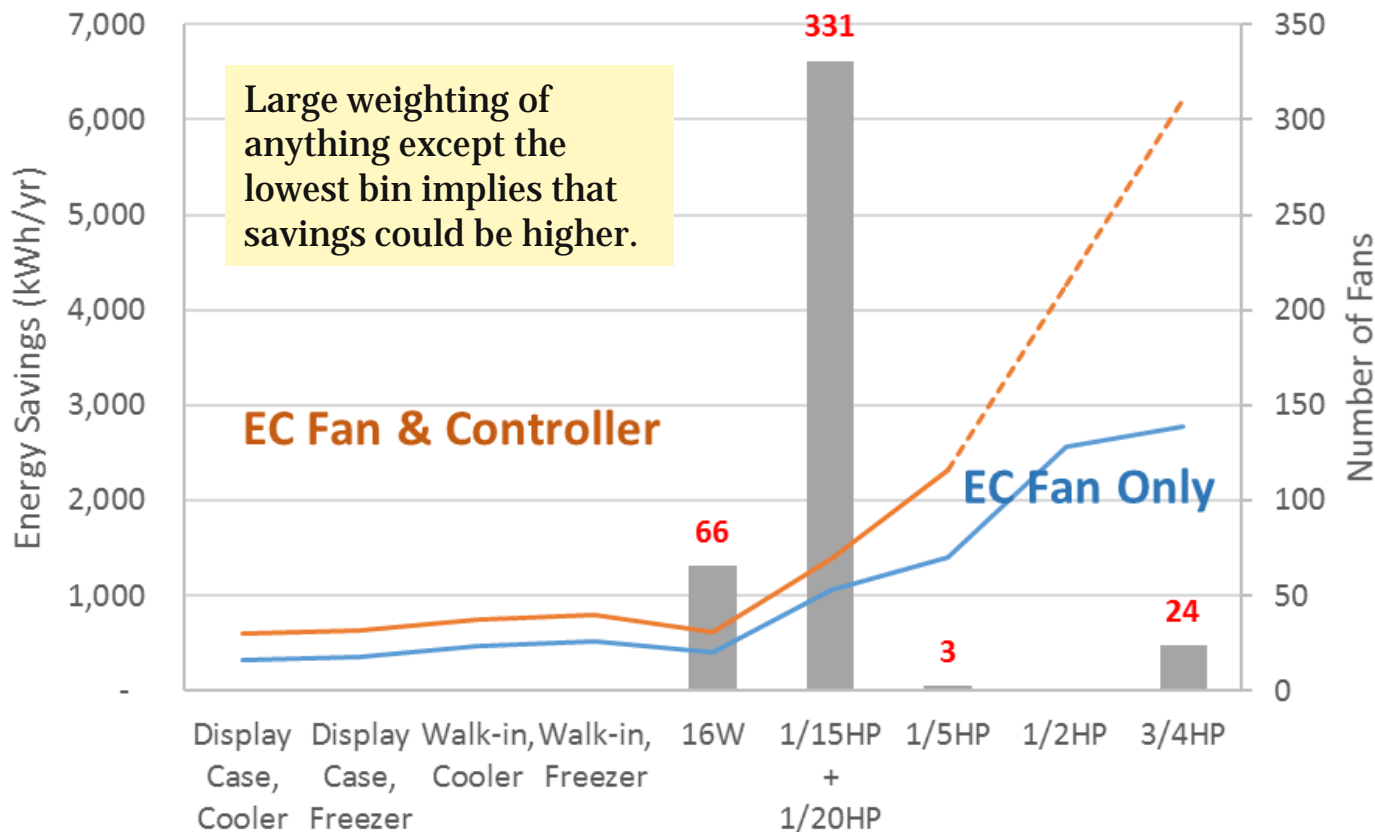


How Data Can Influence Offerings

23

Ref No	Name	No of Units	Energy (kWh/yr)
1.01	Anti-Sweat Heater (ASH) Controls	21,570	5,022,366
1.02	Anti-Sweat Heater Display Doors	2,424	1,539,951
1.03	Evaporator Fan Motors	1,397	524,845
1.04	Refrigerated Storage Auto Closer	1,760	3,731,458
1.05	Walk-in Cooler Evaporative Fan Cycling and	1,854	1,285,285
1.06	Refrigeration Head Pressure Controls	3,330	2,429,104
1.07	Refrigeration Night Covers	4,134	153,634
1.08	Rare Refrigeration Line Insulation	1,028	42,398
		433	304,913
	ex	54	191,502
	profit	1,023	722,109
	ex	350	197,666
	le Compressor	214	101,384
		269	850,046
	etrofit	1,771	215,188
		4,012	4,896,771
		5,433	2,575,884
			24,784,503

Evap EC Motor Measures



Limit Permutations

24

1st Baseline															2nd Baseline					
Energy (kWh)															Energy (kWh)					
Std Dev (kWh)															Std Dev (kWh)					
Type	REF																			
UseSubCategory	TechGroup	TechType	WP_No	WP name	WP_Rq	Code	Measure	Offer Description	Unit	MeasAp	NTG	EUL	RUL	GSIA	Delivery	No of Permutations	Average of APreWB kWh	StdDev of APreWB kWh	Average of AStdWB kWh	StdDev of AStdWB kWh
Equipment	Ref_Storage	HorDisp	PGECOREF109	Evap Fan Motor	R6	R145		Display Case Cooler Evaporator	Each	ROB	0.6	15	5	1	Any	9	-	-	324.6	3.4
								Display Case Freezer Evaporator	Each	ROB	0.6	15	5	1	Any	9	-	-	357.5	3.5
								Walk-in Cooler Evaporator	Each	ROB	0.6	15	5	1	Any	9	-	-	465.9	4.9
								Walk-in Freezer Evaporator	Each	ROB	0.6	15	5	1	Any	9	-	-	519.1	14.3
																	-	-	416.8	80.4

2nd Baseline

Energy (kWh)Std Dev (kWh)

Offer Description	No of Permutations	Average of AStdWB kWh	StdDev of AStdWB kWh
Display Case Cooler Evaporator	9	324.6	3.4
Display Case Freezer Evaporator	9	357.5	3.5
Walk-in Cooler Evaporator	9	465.9	4.9
Walk-in Freezer Evaporator	9	519.1	14.3

In this case, Permutation are due to Climate Zone. However, variation between CZ's is only 1-3

If other parameters (like motor HP or hours of use vary savings more

In this case, Permutation are due to Climate Zone. However, variation between CZ's is only 1-3%.

If other parameters (like motor HP or hours of use) vary savings more significantly, consolidation is valuable.

Subcommittee Expectation

25

- Goals for this First Phase
 - Address Measures at a higher level (by category) to:
 - ✦ Identify and make recommendations on all **cross-cutting category issues** that are technical or policy related.
 - ✦ React to **Measure specific issues** that arise during the consolidation process.
 - ✦ Separate issues into 2017 / 2018 **issue solution path** to set expectations correctly
 - Create a **communication channel** for category stakeholders to stay informed or participate in a more focused manner.

Subcommittee Expectation

- Initial Expectations

- Cal TF Staff:

- ✦ Creates **summary documentation** prior to meeting.
 - ✦ Creates **measure comparison pivot tables** prior to meeting.
 - ✦ Provide **access to detailed documentation** if desired
 - ✦ Share **common results** between Subcommittees.

- Subcommittee Members:

- ✦ Read through **summary documentation** prior to meeting.
 - ✦ Formulate **opinions on issues** identified prior to the meeting.
 - ✦ Raise **other concerns** that should be looked at in further detail.

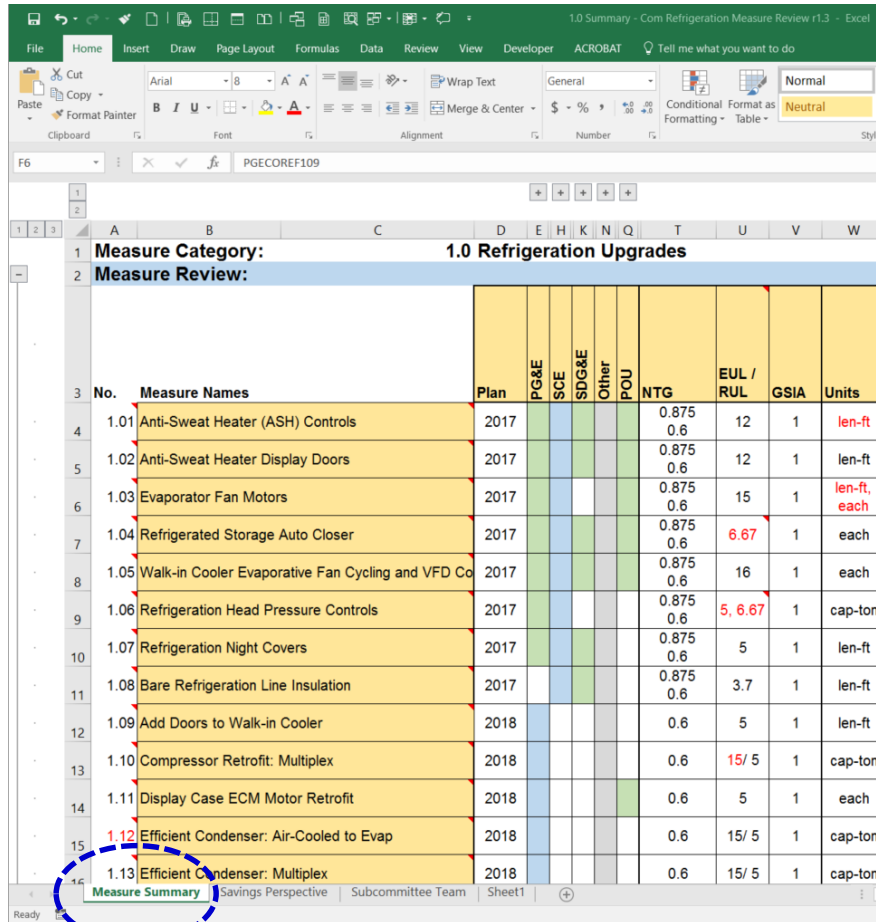
Subcommittee Materials

27

- Category Summary File
 - Measure Review
 - Cross-Cutting Issues
 - Measure-Specific Issues
- Category Savings Perspective
- Subcommittee Team List
- Library of Workpapers (*in progress*)
- Ex Ante Data Pivot Tables (*in progress*)

Category Summary File

28



No.	Measure Names	Plan	PG&E	SCE	SDG&E	Other	POU	NTG	EUL / RUL	GSIA	Units
1.01	Anti-Sweat Heater (ASH) Controls	2017						0.875 0.6	12	1	len-ft
1.02	Anti-Sweat Heater Display Doors	2017						0.875 0.6	12	1	len-ft
1.03	Evaporator Fan Motors	2017						0.875 0.6	15	1	len-ft, each
1.04	Refrigerated Storage Auto Closer	2017						0.875 0.6	6.67	1	each
1.05	Walk-in Cooler Evaporative Fan Cycling and VFD Co	2017						0.875 0.6	16	1	each
1.06	Refrigeration Head Pressure Controls	2017						0.875 0.6	5, 6.67	1	cap-ton
1.07	Refrigeration Night Covers	2017						0.875 0.6	5	1	len-ft
1.08	Bare Refrigeration Line Insulation	2017						0.875 0.6	3.7	1	len-ft
1.09	Add Doors to Walk-in Cooler	2018						0.6	5	1	len-ft
1.10	Compressor Retrofit: Multiplex	2018						0.6	15/ 5	1	cap-ton
1.11	Display Case ECM Motor Retrofit	2018						0.6	5	1	each
1.12	Efficient Condenser: Air-Cooled to Evap	2018						0.6	15/ 5	1	cap-ton
1.13	Efficient Condenser: Multiplex	2018						0.6	15/ 5	1	cap-ton

- Category Summary File
 - Measure Review
 - Cross-Cutting Issues
 - ✦ **Intent:** Higher level concern that effects multiple Measures
 - Policy Issues
 - Technical Issues
 - Technical Questions
 - Etc...
 - Measure-Specific Issues
 - ✦ **Intent:** Detailed issue that needs resolution before consolidation.

Note: Some Cross-Cutting issues are turning out to be Global Issues.

Global Issue Discussion

29

- EUL definition for an REA Measure
- Cost methodology best practices
- Peak period will be changing
- Interactive Effects clarity

Question: What other “Global Issues” need to be addressed that cut across multiple Measure categories?

Category Presentations

30

1. Commercial Refrigeration

- Addressing offering or permutation differences and issues

2. Water Heating

- Address categorization, offerings/tiers, and baseline efficiencies
- Measure application type agreement

3. Agriculture / Pumps

- Dispositions / evaluation adjustments

4. Food Service

- Assumption agreement

Questions

31

Back-up Slides

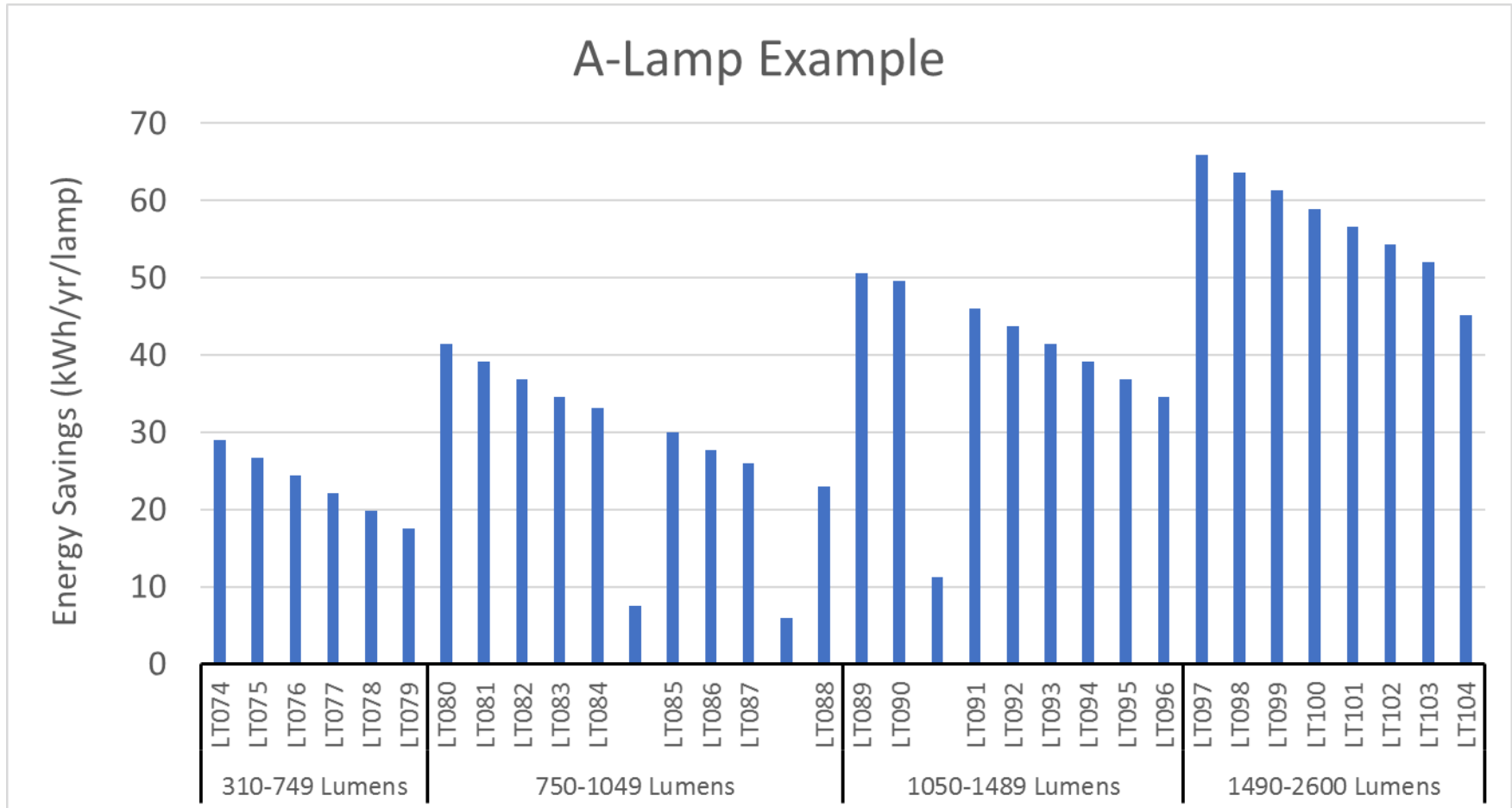
32

- A-Lamp Propose (savings and isolumen bins)
- EUL of REA detail
- Summary File review

Lighting Back-Up

33

A-Lamp Example



EUL Definition for an REA Measure

34

- Restated in Resolution E-4807.

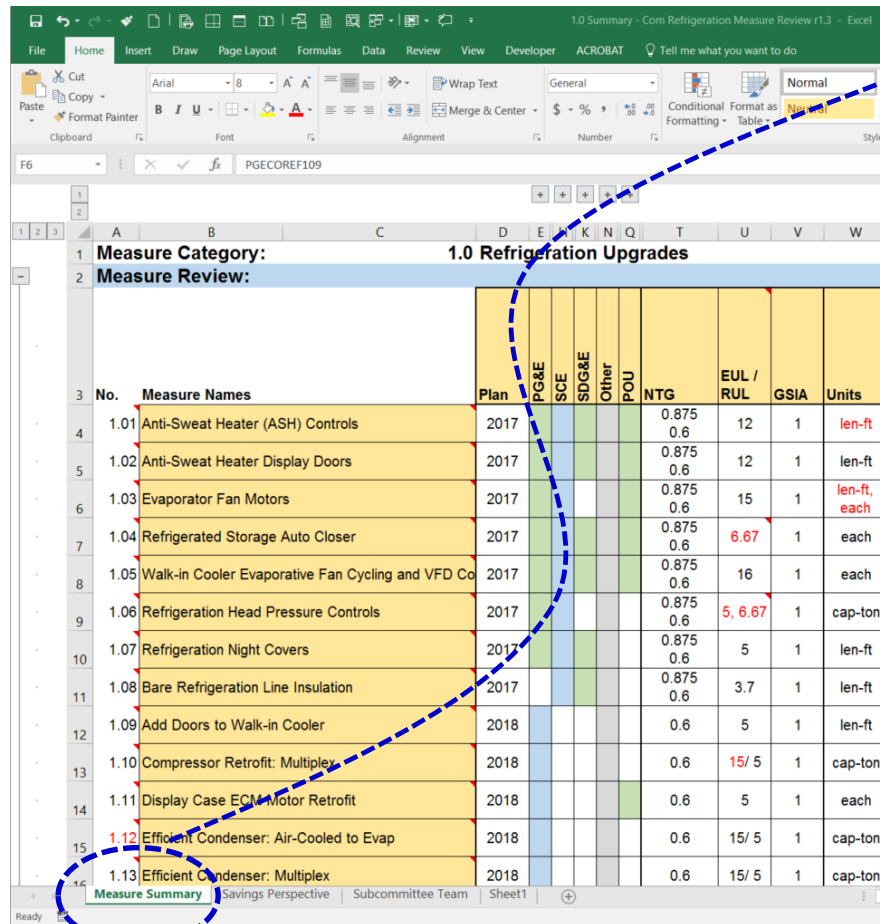
Effective Useful Life (EUL) adjustments:

In their comments SDG&E requests that the Commission reject the Commission staff proposed adjustments measure EUL values in their claims.⁷² Commission staff agrees with some of the SDG&E comments but disagrees with others. In general, Commission staff disagrees with SDG&E that there is a lack of clarity in the direction or timing relative to the EUL allowed to be claimed for REA measures. The guidance document covering REA measures was developed jointly by Commission staff and the IOUs and was first distributed in draft form to all IOUs in January of 2013 with the first final “living” document published for public distribution in July of 2014.⁷³ In that document the REA section provides that “The EUL of REA measures is capped at the RUL of the equipment being retrofitted. This means that REA measures utilize the RUL of the pre-existing equipment up to and not to exceed the EUL for the REA measure.” From

- Originally from the 2013 document, “Early Retirement Using Preponderance of Evidence”
 - Minimum of EUL of REA Measure OR RUL of retrofit equipment

Category Summary File

35

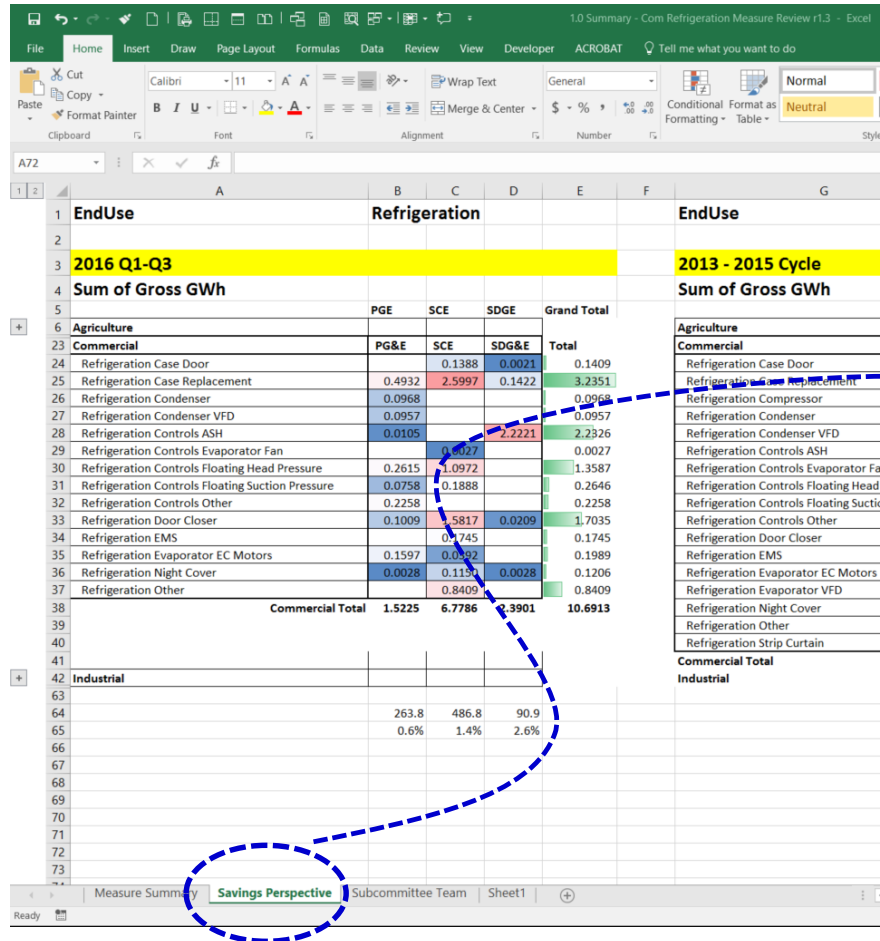


No.	Measure Names	Plan	P&E	SCE	SD&E	Other	POU	NTG	EUL / RUL	GSIA	Units
1.01	Anti-Sweat Heater (ASH) Controls	2017						0.875 0.6	12	1	len-ft
1.02	Anti-Sweat Heater Display Doors	2017						0.875 0.6	12	1	len-ft
1.03	Evaporator Fan Motors	2017						0.875 0.6	15	1	len-ft, each
1.04	Refrigerated Storage Auto Closer	2017						0.875 0.6	6.67	1	each
1.05	Walk-in Cooler Evaporative Fan Cycling and VFD Co	2017						0.875 0.6	16	1	each
1.06	Refrigeration Head Pressure Controls	2017						0.875 0.6	5, 6.67	1	cap-ton
1.07	Refrigeration Night Covers	2017						0.875 0.6	5	1	len-ft
1.08	Bare Refrigeration Line Insulation	2017						0.875 0.6	3.7	1	len-ft
1.09	Add Doors to Walk-in Cooler	2018						0.6	5	1	len-ft
1.10	Compressor Retrofit: Multiplex	2018						0.6	15/ 5	1	cap-ton
1.11	Display Case ECM Motor Retrofit	2018						0.6	5	1	each
1.12	Efficient Condenser: Air-Cooled to Evap	2018						0.6	15/ 5	1	cap-ton
1.13	Efficient Condenser: Multiplex	2018						0.6	15/ 5	1	cap-ton

- Category Summary File
 - Measure Review
 - Cross-Cutting Issues
 - Measure-Specific Issues
- Category Savings Perspective
- Subcommittee Team List

Category Summary File

36



EndUse	Refrigeration				EndUse
2016 Q1-Q3					2013 - 2015 Cycle
Sum of Gross GWh					Sum of Gross GWh
	PGE	SCE	SDGE	Grand Total	
Agriculture					Agriculture
Commercial	PG&E	SCE	SDG&E	Total	Commercial
Refrigeration Case Door		0.1388	0.0021	0.1409	Refrigeration Case Door
Refrigeration Case Replacement	0.4932	2.5997	0.1422	3.2351	Refrigeration Case Replacement
Refrigeration Condenser	0.0968			0.0968	Refrigeration Condenser
Refrigeration Condenser VFD	0.0957			0.0957	Refrigeration Condenser
Refrigeration Controls ASH	0.0105		2.2221	2.2326	Refrigeration Condenser VFD
Refrigeration Controls Evaporator Fan		0.0027		0.0027	Refrigeration Controls ASH
Refrigeration Controls Floating Head Pressure	0.2615	1.0972		1.3587	Refrigeration Controls Evaporator Fan
Refrigeration Controls Floating Suction Pressure	0.0758	0.1888		0.2646	Refrigeration Controls Floating Head P
Refrigeration Controls Other	0.2258			0.2258	Refrigeration Controls Floating Suction
Refrigeration Door Closer	0.1009	0.5817	0.0209	1.7035	Refrigeration Controls Other
Refrigeration EMS		0.1745		0.1745	Refrigeration Door Closer
Refrigeration Evaporator EC Motors	0.1597	0.0092		0.1989	Refrigeration EMS
Refrigeration Night Cover	0.0028	0.1150	0.0028	0.1206	Refrigeration Evaporator EC Motors
Refrigeration Other		0.8409		0.8409	Refrigeration Evaporator VFD
Commercial Total	1.5225	6.7786	2.3901	10.6913	Refrigeration Night Cover
					Refrigeration Other
Industrial					Refrigeration Strip Curtain
					Commercial Total
					Industrial
	263.8	486.8	90.9		
	0.6%	1.4%	2.6%		

- Category Summary File
 - Measure Review
 - Cross-Cutting Issues
 - Measure-Specific Issues
- Category Savings Perspective
- Subcommittee Team List

Overview

Category Summary File

38

1.0 Summary - Com Refrigeration Measure Review r1.3 - Excel

FileHomeInsertDrawPage LayoutFormulasDataReviewViewDeveloperACROBATTell me what you want to do

F6PGECOREF109

- Category Measure Number
 - Commercial Refrigeration
 - Food Service
 - Agriculture / Pumping
 - Water Heating
- Consolidation Plan Year (2017, 2018, n/a)
- Note: Comments available to give workpaper "Technical Description"

Category Summary File

40

1.0 Summary - Com Refrigeration Measure Review r1.3 - Excel

FileHomeInsertDrawPage LayoutFormulasDataReviewViewDeveloperACROBAT

Tell me what you want to do

F6PGECOREF109

Measure Characteristics Comparison

- Net to Gross (NTG)
- Effective Useful Life / Remaining Useful Life (EUL/RUL)
- Gross Savings and Installation Adjustment (GSIA...similar to IR)
- Units
- Measure Application Type (ER, NC, RC, REA, RET, ROB, or ROBNC)
- Delivery Type
- Calculation Type (1=simple calculation; 2=complex calculation; 3=modeled result)

- Note: Red values indicate some type of discrepancy between workpapers

