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Energy Efficiency EM&V and Filing & Reporting Stakeholder Meetings

Wednesday, December 18, 2019

10:00 a.m. – 1:00 p.m.

2:00 – 4:00 p.m.

Mercer County Community College
Conference Center Auditorium
1200 Old Trenton Road
West Windsor, NJ

AGENDA

Evaluation, Measurement, and Verification

10:00 a.m. – 1:00 p.m.

- I. Welcome & Overview (5 min.)
- II. Timeline Overview (15 min.)
- III. Panel Discussion (Moderator: Jennifer Senick, PhD, Executive Director, Rutgers Center for Green Building) (1 hr.)
 - ❖ Rachel Gold, Senior Manager, Utilities, ACEEE
 - Best Practices for EM&V to Support NJ's Energy Efficiency Policy
 - ❖ Chris Neme, Principal, Energy Futures Group
 - The National Standard Practice Manual (NSPM): Industry Best Practices for Assessing Cost-Effectiveness of EE and other DERs
 - ❖ Diane Rapp, Manager, Energy Efficiency EM&V, FirstEnergy
 - EM&V Best Practices and Lessons Learned – Utility Perspective
 - ❖ Kurt S. Lewandowski, Esq., Asst. Deputy Rate Counsel, NJ Division of Rate Counsel
 - Ratepayer Perspective in the Context of the Clean Energy Act
- IV. Discussion (1 hr. 30 min)
- V. Wrap Up & Next Steps (10 min.)

EM&V Discussion Questions:

❖ Question Set 1:

- What types of evaluations and studies (BCA, baseline, process, impact) are necessary, in what cadence and frequency?
- What models do we see for who conducts, reviews, and approves each of those?
- How can stakeholders provide technical or on-the-ground expertise into the process?
- What model(s) for program evaluators should New Jersey consider?

❖ Question Set 2:

- How should the EM&V process intersect with filing requirements? What types of information are needed when, and from whom?
- What is needed in this transition period (through launch of new programs) and the long term (~5-year goal and beyond)?
- Should New Jersey evolve towards a unified framework for all distributed energy resources?

❖ Question Set 3:

- Should New Jersey develop a primary cost test associated with key policy initiatives, e.g., following the Resource Value Framework (National Standard Practice Manual), designate one of the five standard tests as the primary test, or employ another approach? What approach is recommended?
- What are the costs and benefits that you would recommend for consideration in a single benefit-cost test?
 - Are there indirect or non-energy related costs or benefits that should be considered?
 - If so, how can they be estimated?

❖ Question Set 4:

- What are the most important factors to address in measurement and verification of energy savings?
 - Should programs be evaluated based on gross or net savings?
 - For which measures are the use of deemed (assumed) savings appropriate, and which measures should be tested to verify actual savings?
- How should advanced M&V (automated data processing/increased data granulation) be integrated into EM&V?
 - When should it be incorporated?
 - What are best practices related to accuracy/confidence/reporting?

AGENDA
Filing and Reporting
2:00 – 4:00 p.m.

- I. Welcome & Introductions (5 min.)
- II. Scope of Meeting, Definitions, Objectives, Clean Energy Act Requirements, Timeline (10 min.)
- III. Minimum Filing Requirements (30 min.)
 - a. Current minimum filing requirements for proposed new or modified programs
 - i. Examples: market segment/efficiency targeted, delivery method, estimated participants, total project energy savings, marketing, market barriers, impact on employment and competition in the marketplace
 - b. Discussion
 - i. How are the current filing requirements working, including regarding required information and process?
 - ii. What are best practices for filing requirements?
- IV. Reporting Requirements (30 min.)
 - a. Current reporting requirements
 - b. Data quality control / verification
 - c. Potential new data requirements
 - i. Examples: committed and actual dollars spent per program by sector and category, projected and actual participants by program, projects in progress and completed, projected and actual energy saved per program by fuel source and sector, projected and actual cost of measures, projected and actual benefit-cost analysis of programs, actual energy sales by sector, rate and bill impacts, greenhouse gas emission reductions, jobs created and retained, payment times for contractors
 - d. Frequency, formats, and types of reporting
 - e. Discussion
 - i. Feedback about current reporting requirements regarding data and process
 - ii. What is needed from a reporting system to meet Clean Energy Act goals?
 - iii. What is a successful reporting program?
 - iv. Access: What data from the utilities and State should be tracked?
 - v. Use: How should data be used?
 - vi. What are barriers to a successful reporting program?
 - vii. What are best practices and lessons learned?
- V. Tracking System (30 min.)
 - a. Current practices by utilities and the State – features and utilization
 - b. Discussion
 - i. Advantages and disadvantages of current tracking systems
 - 1. What are utilities using in New Jersey (legacy systems) and other states to track information about energy efficiency programs?
 - ii. Desired outcomes of the next tracking system
 - 1. What is needed from a tracking system to meet Clean Energy Act goals?

2. What is a successful tracking system?
3. What are best practices and lessons learned?
4. Ideal features / capabilities / utilization?
 - a. How and when should advanced M&V (automated data processing / increased data granulation) be integrated?
 - b. Is a dynamic / automated platform needed for it to be useful? For example, could there be a monthly data dashboard?
 - c. Should it be a statewide system?
 - d. What level of detail should it hold? For example, should it be able to hold demographic and tax data?
 - e. Should it be able to hold downloaded utility records and data provided by contractors?
 - f. Should it be able to work / connect / cross-reference with other (e.g., utility, State) systems?
5. Ownership and transparency of data
 - a. Who should own the system and data?
 - b. How accessible to the public vs. the utilities and State should it be?
6. What are barriers to a successful tracking system?

VI. Summary & Next Steps (15 min.)