



Goal 2: Residential Quality Installation Committee Meeting Minutes
Wednesday April 19, 2017

Call to Order

The meeting was called to order at 10:09 a.m. PDT by Chair Buck Taylor, Owner of Roltay Inc. Meetings are normally scheduled for 60 minutes.

Agenda

AGENDA TOPICS	DISCUSSION LEADER
Welcome, Roll Call, New Business	Bob Sundberg
Confirm Agenda	Bob Sundberg
SCE/PG&E RQI Data Gathering and Analysis Update	Atwater/Bullard/Fergadiotti (SCE) Nigalye (PG&E Consultant)
Update on 2017 RQI Program	Lori Atwater
2017 RQI Committee Goals Support the IOU RQI Claimed Energy Savings & Development of Claimed Savings Work Paper	Buck Taylor
WG – Adaptation of CI Performance Evaluation Data Specs to RI Application	Pete Jacobs
Next Meeting & Action Items	Bob Sundberg
Closing Comments/Adjournment	Bob Sundberg

Roll Call

Organization	First Name	Last Name	WHPA Category	P=Present
Voting Members				
ACCA (Air Conditioning Contractors of America)	Wes	Davis	Contractor Association	A
Benningfield Group	Russ	King	Energy Efficiency Program Consultant	A
Energy Analysis Technologies	Christ	Ganimian	Third Party Quality Assurance Provider	P
MSDC (Mechanical Systems Design & Consulting)	Jeff	Henning	Educator, Trainer	P
NCI (National Comfort Institute)	Scott	Johnson	Educator, Trainer	A
Redlands Plumbing & Heating (Henry Bush Plumbing)	Tyler	Miner	Contractor (Residential)	P



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Organization	First Name	Last Name	WHPA Category	P=Present
Roltay, Inc.	Buck	Taylor (Chair)	Other Stakeholder	P
SCE (Southern California Edison)	Scott	Higa	California IOU	A
Superior Air	Larry	Kapigian	Contractor (Residential)	A
Non-Voting Members				
SCE (Southern California Edison)	Lori	Atwater	California IOU	P
SCE (Southern California Edison)	Steve	Clinton	California IOU	P
SoCalGas (Southern California Gas Company)	Harvey	Bringas	California IOU	P
Guests				
ACCA (Air Conditioning Contractors of America)	Donald	Prather	Contractor Association	P
BMI (BuildingMetrics)	Pete	Jacobs	Energy Efficiency Program Consultant	P
CSC (Chandler von Schrader Consulting)	Chandler	von Schrader	Energy Efficiency Program Consultant	P
DNV-GL	Les	Owashi	Energy Efficiency Program Consultant	P
NCI (National Comfort Institute)	Rob	Falke	Educator, Trainer	A
JCI (Johnson Controls)	Bryan	Rocky	HVAC Manufacturer	P
Research Products Corporation (Aprilaire)	Eric	Brodsky	HVAC Manufacturer	P
SCE (Southern California Edison)	Andres	Fergadiotti	California IOU	P
SCE (Southern California Edison)	Ryan	Bullard	California IOU	P
SDG&E (San Diego Gas & Electric)	Paul	Thomas	California IOU	P
Tre'Laine Associates	Pepper	Hunziker	Energy Efficiency Program Consultant	P
Staff				
BNB Consulting (Staff Support)	Bob	Sundberg	Energy Efficiency Program Consultant	P
Galawish Consulting Associates (Staff Support)	Elsia	Galawish	Energy Efficiency Program Consultant	P

Welcome New Meeting Facilitator

Bob Sundberg (Staff) announced that Elsia Galawish (Staff) will be facilitating the RQI Committee meetings moving forward. Sundberg will continue with his CQM Committee activities.

SCE/PG&E RQI Data Gathering and Analysis Update

SCE's RQI Program Restart

Lori Atwater (SCE) – The RQI Program stopped accepting applications in November 2016 as part of SCE's proposal to ED to discontinue Residential HVAC programs and to shift toward a more education-based model. SCE's proposal was suspended for 2017. The program, with no changes in the 2016 format, will restart beginning in late April 2017 and end on September 30, 2017, pending feedback on the Business Plan. Comments from the CPUC 2018 Business

Plans are due in June-July 2017 but may be later. Contractors will see the same inspection and review processes; however, there have been delays relating to new contracts.

Chandler von Schrader (CSC) questioned investing time for jobs previously done and then wait a year to see actual savings?

Lori Atwater (SCE) noted that SCE is looking at billing data and moving forward with data gathering and data analytics.

Data Analytics

Ryan Bullard (SCE) – The data collection and analytics plans currently being undertaken for the RQI Program are looking at AB 802 and RQI as excellent candidates for data analytics. Will use previous RQI projects, evaluations, regulatory decisions, and bills. SCE hopes to have this work completed by end of 2017.

Evergreen Study: The random coefficient model used in the AMI Billing Analysis Study shows seasonal savings associated with a project – meter-based measurement.

Back Casting Study uses the High Opportunity Potential Programs (HOPPs) framework using 12 months of pre/post installation data. RQI is similar to Home Upgrade Program, but there are some challenges using it as a comparison group. Study with Home Upgrade vs. RQI – looking for the right test group/comparison group mix.

Jeff Henning (MSDC) – Possibly could mix Upgrade Program with RQI for test group.

Ryan Bullard (SCE) – SCE is looking at whether RQI is realizing planned savings relative to others and needs a reliable comparison group. We can do RQI or Home Upgrade or both. With Home Upgrade, we can perform an impact evaluation with clean data set. For the Back Casting Study, we can use this data set if sample is large enough.

Lori Atwater (SCE) – SCE may need to factor in vintage into the Upgrade Program if this is a factor in savings.

Chandler von Schrader (CSC) – There is some difficulty estimating baseline conditions—have 10k-12k installations but unable to quantify savings reliably. I recommend SCE not to be too complicated and use RQI data.

Ryan Bullard (SCE) – There is some leniency in establishing baseline in the pre/post assessment relative to the comparison group (attribution vs. savings). What is the best application? What are the risks/liabilities?

Rob Falke (NCI) – This is confusing. SCE continues to model savings based on average and measures as done in past—shows savings at the meter and uses metered data from past studies. There is no parallel between meters vs. programs being responsible for what appears at the meter.

Ryan Bullard (SCE) – SCE will use more granular AMI data – 12 months pre and 12 months post, and the difference between the two is savings. Normalization and a comparison group will account for most of the past challenges attributing savings to the program.

Lori Atwater (SCE) – In a regulatory environment, we cannot change the program without a proposal and it has to be based on data analytics – analysis results. Then we draft a proposal to achieve program savings within ACCA standards framework. We plan on developing the program with the RQI Committee (Industry) input towards a cost effective QI program in the future.

Pete Jacobs (BMI) – With regard to pre/post data and comparison group, how do you select the comparison group and what are the methods for analysis?

Ryan Bullard (SCE) – SCE needs to obtain more data for the model against residential usage base and avoid as much bias as possible. Itron just completed a billing analysis for the SCE RQI Program. It was a participant-only analysis and results varied. Accounting for bias is very challenging.

Pete Jacobs (BMI) – One has to explain how non-participants were selected and matched with the participant group. This is key.

RQI Statewide Work Paper Status

Andres Fergadiotti (SCE) – The IOUs worked with CalTF in developing the WP, and there is no resolution from the CPUC. The Energy Division (ED) has provided some guidance and requested that the IOUs use a methodology based on WO 32. The IOUs decided that due to the risk of waiting for a resolution, they would use WO 32 input, even though the Study is flawed. WP update is now finalized and will be submitted in a week to the ED. Included in the update are some manufacturer's data as inputs to the model and evaluated performance data.

Chris Ganimian (Energy Analysis) – Who made the decision to use WO 32?

Andres Fergadiotti (SCE) – SCE needed to do something, and its management made the decision to use WO 32 methodology especially since the ED pushed back on CalTF recommendations.

WG - Adaption of CI Performance Evaluation Data Specs to RI Application

Pete Jacobs (BMI), Chair of CQI SFDS WG presented the proposed draft RI Standard Field Data Specs to the Committee for review and consideration.

Buck Taylor (Roltay) – I am unsure what to do given that the proposed RI data specs consistent (in alignment) with what is currently being done in the field – similar to what ACCA requires. The specs have to fit within the AB 802 framework under which the IOUs have to implement programs.

Pete Jacobs (BMI) – The basic idea is ensure appropriate collection of data that will help improve ex ante savings customer savings calculations. The initial data specs were limited to CQI and then customized for RQI. These are pro forma specs for the group's review and to modify as it deems necessary.

Buck Taylor (Roltay) – I will see that the proposed RI Data Specs WP is distributed to members for their review and comments before the June 21, 2017, RQI Committee Meeting. I will call members and/or dialogue via email on whether to have a WG.

Bob Sundberg (Staff) – The data spec was not designed to be a stand-alone document.

- Step 1: Specify types of data to collect
- Step 2: Develop some type of criteria on performance scoring

Rob Falke (NCI) – The data specs parallel to the next generation move. However, the CPUC ED is not there yet.



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Next Meeting & Action Items

Next Meeting is planned for Wednesday, June 21, 2017, at 10:00 a.m. PDT.

ACTION ITEMS

1. Elsia Galawish (Staff) to distribute proposed RI Specs to members for review.
2. Committee Members to comment on the RI Specs and send to Buck Taylor at buck@roltay.com; or if members want to share their feedback with the entire group, send to Elsia Galawish at galawish1@gmail.com.

Closing Comments/Adjournment

The proposed specification is an important first step toward the development of a standardized approach for establishing field performance measurement protocols to score the level of performance achieved by an installed HVAC.

Buck Taylor (Roltay) adjourned the meeting at 11:14 a.m. PDT.

Submitted by Elsia Galawish, WHPA Staff
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