

2020 Production Efficiency Impact Evaluation

Questions and Answers

- Question:** There was a similar RFP issued roughly a year ago. Was that RFP for the 2018-2019 PE impact evaluation that is still in process (as referenced on page 2 of the RFP)?

Answer: Yes. An RFP was issued on 8/16/2019 for the 2018-2019 PE impact evaluation. As noted in the 2020 PE impact evaluation RFP, the final report for the 2018-2019 PE impact evaluation is not yet publicly available.
- Question:** The last two evaluations covered two years each. Is this one for 2020 only or is it for 2019 and 2020?

Answer: This RFP is for 2020 only. Energy Trust decided to evaluate 2020 only due to some significant differences between the 2020 and 2021 program years (namely, lighting projects will be evaluated separately starting with the 2021 program year) and anticipated challenges with how to evaluate 2020, which has been an anomalous year in terms of program operations as well as industrial facility operations in general.
- Question:** How much did the successful bidders bid on the last two evaluations?

Answer: Energy Trust cannot disclose information about bids. However, individual contract amounts (i.e., the not-to-exceed budget) are included in publicly available board packets. The contract amount for the 2016-2017 PE impact evaluation was \$546,200 and the contract amount for the 2018-2019 PE impact evaluation was \$550,000.
- Question:** I'm unable to reconcile some of the totals in Table 1 and Table 2 in Appendix D – see below.

Table	Column	Value in RFP	Note
Table 1	Sites	973	I get 1,088, not 973.
Table 1	Projects	1,312	I get 1,314, not 1,312.
Table 2	Sites	973	I get 1,262, not 973.
Table 2	Projects	1,312	I get 1,475, not 1,312.

Answer: The total (n=973) for the Sites column in both Table 1 and Table 2 represents the distinct number of sites that participated in 2020. The reason that the sum of the rows in the Sites column in these tables may exceed the total is that sites will appear in multiple rows if they participated in multiple tracks (Table 1) or if they are associated with multiple measure types (Table 2). Similarly, the total (n=1,312) for the Projects column in both Table 1 and Table 2 represents the distinct number of projects in 2020. The reason that the sum of the rows in the Projects column in these tables may exceed the total is that projects will appear in multiple rows if they are associated with multiple tracks (Table 1) or if they are associated with multiple measure types (Table 2).

5. **Question:** For the SEM projects for which a bottom-up approach was used to estimate savings (referenced on page 7 of the RFP): what percentage of the total savings did these projects represent?

Answer: It's not possible to answer this question in a timely manner given that Energy Trust does not store information about the approach used to estimate savings for SEM projects in its project tracking database. This information is only available in the project files.

6. **Question:** For the SEM projects for which a bottom-up approach was used to estimate savings (referenced on page 7 of the RFP): did Energy Trust have certain criteria when deciding to use and if so, what criteria were used?

Answer: Energy Trust always attempts to create an energy model for SEM participants that meets its modeling guidelines at the outset of the SEM engagement. If creating such a model is not possible, the program explores alternative approaches to estimating and claiming savings; a bottom-up approach is one alternative. In some cases, Energy Trust creates an energy model that meets its modeling guidelines at the outset of the SEM engagement and then there is some type of disruption (e.g., production changes due to COVID-19, etc.) that lead the program to shift to estimating and claiming savings using a bottom-up approach. Shifting to estimating and claiming savings using a bottom-up approach is always made on a case-by-case basis; some of the considerations include customer engagement with the energy model, time and resources needed to make changes to the energy model, and future facility changes and operations.

7. **Question:** Will utility billing data be available to the selected evaluator? If so, how far back? Would there be any challenges in obtaining it?

Answer: Utility billing data (i.e., monthly energy consumption data) will be available to the selected evaluator. This data goes back to 2013. Energy Trust staff can easily pull this data, assuming that the specific point-of-delivery or meter of interest has been consistently provided by the utilities to Energy Trust. There are provisions that by default "opt-out" large energy-using customers of data sharing and provisions for non-large energy-using customers to request "do not share" – i.e., to request that their utility not share data with Energy Trust. For prior PE impact evaluations, Energy Trust staff have been able to fulfill many, but not all, utility billing data requests.

8. **Question:** At what granularity (e.g., monthly, daily, hourly, sub-hourly) is the utility billing data (referenced on page 7 of the RFP) available?

Answer: The utility billing data referenced on page 7 of the RFP is monthly energy consumption data. Some custom and/or SEM projects may utilize more granular data, either utility data or metered data, to estimate energy savings, but this more granular data is obtained directly from the customer.

9. **Question:** For the evaluation of SEM projects, is it Energy Trust's preference that the selected evaluator review existing project documentation, bottom-up analyses, and energy models, and assign realization rates based on the guidance in Appendix E of the RFP, or would Energy Trust prefer the evaluation team to conduct regression modeling where possible? If modeling is preferred, what type of production, billing, and operational data should the selected evaluator expect to receive in the existing models (e.g., format, standardization, data granularity, etc.)?

Answer: In 2014, Energy Trust program designers, program implementers, and evaluators, as well as third-party consultants, participated in a series of workshops to

discuss how best to evaluate SEM; those workshops resulted in agreed-upon evaluation guidelines, which are detailed on pages 8-9 of [this PDF](#). In the 2020 PE impact evaluation, and in future impact evaluations, Energy Trust staff would like to employ methods that align with these guidelines, but are open to hearing about other protocols and methods, especially if they have been successfully employed elsewhere.

Note that for a variety of reasons, Energy Trust has experienced difficulties in obtaining the production and energy data needed to update the regression models used to estimate energy savings for SEM, so the main evaluation activities for SEM projects have included: reviewing regression models and opportunity registers, interviewing participants, and verifying that program SEM savings were adjusted for savings from other projects. If a bottom-up approach was used, then the evaluation activities include reviewing the engineering calculations associated with the SEM activities that were determined to result in savings. In the 2018-2019 PE impact evaluation, these activities are being used to qualitatively assess SEM savings and assign realization rates, as described in detail in Appendix E of the RFP.

10. **Question:** Do all custom track projects have existing M&V plans? If so, will those plans be available to the selected evaluator?

Answer: The basis of all custom track projects is a technical analysis study (TAS); there are several “flavors” of TAS that differ in terms of detail and complexity. The TAS is used by program delivery contractors (PDCs) to estimate energy savings and incentives. The TAS is reviewed by Energy Trust program staff, and is then provided to the customer. The customer then decides to move forward (or not) with the project(s) described in the TAS. If the customer decides to move forward, after equipment has been installed all custom track projects are verified by PDCs. The program requires the PDCs to provide a verification report detailing any updates to the savings estimates based on the verification. The TAS and the verification report (as well as the associated analysis files, typically Excel workbooks) will be available to the selected evaluator. It is up to the selected evaluator to come up with the M&V plans to be used for the 2020 PE impact evaluation.

11. **Question:** Page 2 of the RFP states that the 2020 PE impact evaluation will exclude mega and large/complex projects. However, Appendix D of the RFP states that Table 1 and Table 2 exclude savings achieved through NEEA and mega-projects and does not mention anything about the large/complex projects. Are the large/complex projects removed from Table 1 and table 2? If they are included and will be removed later, can you provide additional information on the typical number of sites/projects that will be treated as large/complex projects?

Answer: There was one mega-project and one large/complex project in 2020; both are excluded from Tables 1 and 2 in Appendix D of the RFP.

12. **Question:** Page 4 of the RFP describes the customer recruitment plan. Related to this, what is the nature of program contacts with participants after project completion? How common is it for program staff to have regular contact with participants after a project is completed? What share of participants in one year typically work on another project in the following year?

Answer: In prior PE impact evaluations, the PDCs have been extremely successful at recruiting customers to participate. Most of the sampled projects are associated with customers they regularly or semi-regularly contact; there are relatively few projects

associated with customers they haven't worked with previously (these tend to be customers that participated in the streamlined track).

13. **Question:** Have there been any meaningful changes in the details kept in project files (referenced on page 5 of the RFP) in recent years?

Answer: No.

14. **Question:** Page 6 of the RFP refers to both virtual and in-person site visits (as well as metering). Do Energy Trust and its program participants have preferences concerning virtual or in-person site visits?

Answer: Energy Trust does not have a preference. Due to the COVID-19 pandemic, for the 2018-2019 PE impact evaluation no in-person site visits were performed, but the evaluator worked with customers to install meters and collect data for a very small number of projects.

15. **Question:** Can respondents to the RFP see a copy of the 2018-2019 PE impact evaluation interview guides for SEM and non-SEM participants (referenced on page 6 of the RFP)?

Answer: The final report for the 2018-2019 PE impact evaluation is not yet publicly available. The interview guides for the 2013-2014 PE impact evaluation can be found on pages 55-70 of the [final report](#); these interview guides are similar to those used in the 2016-2017 PE impact evaluation and the 2018-2019 PE impact evaluation.