BONNEVILLE POWER ADMINISTRATION

2024 Non-Industrial Custom and Energy Smart Reserve Power Impact Evaluation Research Plan

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1 INTRODUCTION

This document provides a research plan to conduct an impact evaluation of Bonneville Power Administration's (BPA's) non-industrial custom portfolio and Energy Smart Reserved Power (ESRP) program. A team led by Evergreen Economics (which includes SBW Consulting and Apex Analytics and) is conducting this research.

1.1 BACKGROUND

Consistent with the Regional Technical Forum (RTF) guidelines, BPA aims to achieve 90 percent coverage of the energy efficiency portfolio through impact evaluation in a four-year period.[44] When selecting which programs to evaluate in a given year, BPA balances the objectives of portfolio coverage, strategic research needs, timely feedback, annual budgets, and the cost and effort required.

BPA conducted impact evaluation planning in 2019-2020 to determine what evaluation activities had occurred previously and what evaluation needed to occur in the next four years to satisfy BPA's policy of evaluating measure savings equivalent to 90% of the energy efficiency portfolio every four years. The outcome of this effort was the 2020-2021 evaluation plan[1], which categorized the portfolio into unique domains grouped by similar delivery approaches (utility type, measure type, and sector). The evaluation plan proposed conducting evaluation on a consistent rolling basis, with one domain-specific study approximately every six months across the four-year period. Aligned with the priorities identified in the 2020-2021 evaluation plan, since 2020 BPA has completed an evaluation of its custom industrial portfolio for both Option 1 and Option 2 utilities and is currently in the process of evaluating its non-residential lighting portfolio (for both Option 1 and 2 utilities).

1.1.1 REFINED ROLLING EVALUATION APPROACH

In 2022, BPA revisited its evaluation strategy and 2020-2021 evaluation plan, and refined the rolling evaluation approach that was recommended in the prior evaluation plan. BPA condensed and streamlined the domains into four major measure categories, with an updated plan to begin one study per year on a rolling basis across the four-year period. Table 1 on the next page shows the major measure categories and the planned cadence of these evaluations, as identified in the revised evaluation strategy[2].

[1] https://www.bpa.gov/-/media/Aep/energy-efficiency/evaluation-projects-studies/bpa-2020-21-impact-evaluation-plan.pdf.
[2] https://www.bpa.gov/-/media/Aep/energy-efficiency/evaluation-projects-studies/2023-2024-bpa-ee-evaluation-strategy-presentation.pdf.

Table 1. Planned Evaluation Cadence by Measure Category

Measure Category	Fiscal Year			
	2023	2024	2025	2026
Nonresidential Lighting	X			
Custom – Nonindustrial		X		
UES Delivery Verification			X	
Custom – Industrial				**X**

In developing this updated evaluation strategy, BPA determined that completing an evaluation of the non-industrial[3] custom portfolio was still a high priority for evaluation, given that it represents a large share of BPA's energy efficiency portfolio and has not been evaluated since FY2012-2013.

1.2 STUDY OVERVIEW

The primary objectives of this evaluation are to:

- Estimate first-year kWh savings and cost-effectiveness for the non-industrial custom portfolio, including the Energy Smart Reserved Power (ESRP) Program, to understand the savings performance.
- Develop recommendations on M&V procedures, including when savings can be reliably estimated, for custom measures, using the BPA M&V Protocol Selection Guide, including the protocol called Engineering Calculations with Verification (ECwV).

This evaluation will cover both Option 1 and Option 2 utilities, as well as ESRP projects outside of utility service territories.

The Evergreen team will conduct impact evaluation activities and analysis in a representative sample of sites for the non-industrial custom program portfolio. The evaluation site sampling strategy will be consistent with BPA evaluation policy, which targets a 90/10 confidence level and precision.

The evaluation will rely on an engineering modeling approach, with the collection and reviewing of project files and where needed, customer surveys and/or site visits. The Evergreen Team shall seek to leverage any and all data that are already collected from existing BPA and utility staff's data collection efforts. Customer data will be collected whenever the data provided does not support a reliable estimate of savings or additional information is required for evaluation that is not provided on project documentation. The study will include the development of end user and utility customer contact protocols that the Evergreen team will adhere to.

[3] All sectors besides industrial, which includes commercial, agricultural and residential customers.

1.3 DEFINITIONS

- **Option 1 Utilities:** Utilities that have opted to have BPA engineers manage and estimate the savings for custom projects at sites where site specific characteristics will determine energy savings estimates.
- **Option 2 Utilities:** Utilities that have opted to have their own engineers do the site-specific savings estimates and otherwise manage the implementation of custom projects with a BPA approved measurement and verification plan.
- **Energy Smart Reserved Power (ESRP) Program:** Includes projects at Federally Chartered Irrigation Districts served by BPA Reserved Power, and BPA and other federal agency infrastructure projects served by Station Service. Projects are programmatically managed by BPA, and BPA engineers estimate the savings for custom projects at sites where site-specific characteristics will determine energy savings estimates.

2 NON-INDUSTRIAL CUSTOM PORTFOLIO AND ESRP PROGRAM IMPACT EVALUATION RESEARCH PLAN

This section provides the Evergreen Team's detailed approach to conducting this impact evaluation, including the schedule.

2.1 SAMPLE DESIGN

BPA's evaluation policies have established a target for impact evaluation, striving for evaluations that attain a relative error of 10 percent at the 90 percent confidence level, with a minimum acceptable level of 80/20. The proposed sampling strategy targets a 90/10 confidence level and precision for the Non-Industrial Custom and ESRP evaluation.

The Evergreen team prepared a detailed sample design for both Option 1 and Option 2 utilities as well as facilities with no utility that are served directly by the Federal Columbia River Power System (FCRP). The sample is based on the custom projects in IS2.0 data, pulled in mid-January 2024 and comprises of projects that completed invoicing in the most recent and complete year (fiscal year 2023).[4] The evaluation team excluded industrial sites and Option 1 and Option 2 utility lighting projects, as they were recently evaluated. The sampling unit of this study is a measure, defined as a unique Technology/Activity/Practice (TAP) for a single site.[5] Each item is defined below:

- **Measure:** A unique TAP installed at a site (i.e., 3 VFD upgrades at the same location invoiced at the same time would be one measure)
- **Project:** All TAPs invoiced at the same time at the same site, regardless of measure type (i.e., A VFD upgrade and new pump installed at the same site and invoiced for at the same time, would be one project, but two measures)
    - While not used for sampling, BPA enters data into IS2.0 as projects, therefore the file review will request project files as part of the evaluation.
- **Site**: a distinct location where a measure is installed
    - Even if the locations are within the same address/facility, if transit time is required between the two locations, they are two sites (i.e., 2 buildings at one college campus may have the same address, but are not walking distance. These are 2 sites)

The evaluation team developed a sample design that utilizes Dalenius-Hodges stratified random sampling based on utility type and reported kWh savings for the measure. This method is designed to produce a sample that will result in the greatest precision across strata that are defined by measure size, given a fixed sample size. [6] The evaluation team selected a savings stratified random sample designed to achieve at least an expected precision of +/- 20% at an 80% level of confidence. This method reduces the variability in the sampling universe by segmenting the measures into more homogenous groups. The evaluation team defined an excluded stratum (i.e., stratum 0) that contains very small measures; this is the group of

[4] Going back more than a year is more difficult for utilities and end use customers due to staff turnover, program changes, and misplaced documentation.

[5] For uniformity of the evaluation approach, evaluation and project resource management, and cost control, sampling is based on measure.

[6] Dalenius-Hodges is preferred to Neyman allocation when stratifying on ex ante savings as opposed to end use (e.g., HVAC, refrigeration). Sample points are allocated evenly across strata, when possible. If a stratum is filled, any remaining points are allocated to the next largest stratum.

measures that collectively account for less than 1 percent of the savings within each utility type. Measures that represent a significant portion (more than 10% of the domain) of total reported energy savings are assigned to a priority "certainty" stratum. The evaluation team considers these measures necessary for the evaluation; thus, they are not subject to random selection. Moderately sized measures were then allocated to probabilistic strata. Between the probabilistic strata and the certainty strata, there is a guaranteed a mix of measure sizes.

Another variable that could be considered for sampling, M&V protocol, is not listed in the IS2.0, therefore not available to easily design a sample off of. However, because the M&V protocol is inherently linked to measure size, the evaluation team will be able to analyze evaluation results by protocol, even without explicit sampling on that variable. Residential custom measures are some of the smallest measures in our sampling universe, with most falling into the excluded stratum (stratum 0) or the smallest probabilistic strata (stratum 1), which have a low probability of being drawn into the sample. New construction and agricultural measures are larger, so the evaluation team expects to see around two new construction and two agricultural measures in this sample, even without explicitly stratifying on baseline scenario or sector.

Table 2 shows the number of non-industrial custom measures and custom ESRP Program measures with their associated savings in the sample frame by utility type and size strata. The sample sizes shown in the table should yield a relative precision of +/- 10 percent at a 90 percent confidence level for the evaluation over the 12-month period. At the utility type level, the evaluation team expects that the samples for Option 1, Option 2, and Federal should yield at least a relative precision of +/- 20 percent at an 80 percent confidence level.[7]

This sample of 32 measures include four certainty measures and a stratified random sample of 28 additional measures.[8] The certainty sample points will guarantee that the evaluation sample will cover at least 46 percent of the total non-industrial custom and ESRP Program savings. Based on the average savings by strata, the evaluation team estimate that the full sample will cover approximately 66 percent of non-industrial custom and custom ESRP Program savings.

Our sample extract using this design contains 32 measures from at least 29 unique sites with 26 unique TAPs (i.e., distinct measure types). Note that because the sample frame was developed based on the IS2.0 database that has aggregated information on measures, the evaluation team will determine the actual number of unique sites once they request and review the sample measure project files.[9]

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[7] The Evergreen team estimates that the overall sample precision will be +/- 7% at 90% confidence, +/- 11% at 80% confidence for the Option 1 utility sample at 80% confidence, +/- 9% for the Option 2 utility sample at 80% confidence, and +/- 10% for the Federal sample at 80% confidence.

[8] It would be feasible to meet the relative precision target with a smaller sample if stratified by measure size alone (i.e., not also by utility type). The benefit of utility type stratification is that it ensures that a wider range of measures and utilities are included in the evaluation, which will be a better representation of the domain as a whole.

[9] At this time, the evaluation team does not have the detailed project files for ESRP sites to determine what TAP they serve or specific address. To estimate unique TAP, program data do have the Measure Number variable which indicates the type of measure installed. There are 3 distinct measure types amongst the 5 sampled measures. IS 2.0 data also do not have specific addresses for ESRP measures, but have assumed estimated the number of sites associated with the ESRP measure sample based on a variable "Installation Site."

Table 2: Non-Industrial Custom and ESRP Sample Design

Utility Type	Strata*	Reported Savings (kWh)		Number of Reported Measures	Sample Size (Measures)
		Average	Total		
Option 1	0	7,029	168,688	24	0
	1	85,392	5,635,899	66	7
	2	343,866	5,845,718	17	7
	Certainty	2,021,533	2,021,533	1	1
	Subtotal	**126,591**	**13,671,838**	**108**	**15**
Option 2	0	10,646	212,920	20	0
	1	114,326	4,344,379	38	6
	2	511,820	4,606,383	9	6
	Subtotal	**136,771**	**9,163,681**	**67**	**12**
Federal/ESRP Program	1	681,272	1,362,544	2	2
	Certainty	5,543,566	16,630,698	3	3
	Subtotal	**3,598,648**	**17,993,242**	**5**	**5**
Total		**226,826**	**40,828,761**	**180**	**32**

*Stratum *0* denotes the excluded projects (based on very small *ex ante* savings). The *certainty* projects represent a significant portion of total reported energy savings within the domain and are considered as necessary for the evaluation and therefore are not subject to random selection.

2.2 DATA COLLECTION

The Evergreen team will develop procedures for data collection, adapting the procedures already developed for the recently completed evaluation of BPA's 2019-2021 custom industrial portfolio.

The evaluation team will closely coordinate with BPA to notify utilities that have projects selected for the study sample and provide them with the necessary information consistent with the communication protocols developed for this study (see Appendix A). The team will develop materials for and host a data collection webinar to introduce sampled utilities to the study, notify them of upcoming data collection activities (including end-user contact protocols), and clarify roles and expectations.

The study includes collecting data from at least 29 sites. The Evergreen team will track and record dispositions for completed sites in an excel-based project tracker. The tracker will be updated and shared with BPA on a weekly basis and record the status of each site and relevant information about the site (e.g., utility, assigned engineer, number of contacts made, level of complexity). The tracker will support any follow-up required by BPA to ensure response by end users and utilities.

In accordance with the research plan and approved communication protocols, the team will collect data with the following methods:

- **File review.** The file review will involve extracting all project information relevant to savings estimation including measure descriptions, baseline or efficient condition inputs, reported savings values, and the final version of the M&V model.
- **Telephone/email discussion with technical staff who had involvement with the project.** Technical staff at the utility (for Option 1 utility customers) or BPA and/or vendors (for Option 2 utility and federal infrastructure / ESRP customers), are another possible source of data. As needed, the team will contact them by telephone or email to obtain information needed for the evaluation that was not found in the project files.
- **Telephone/email discussion with end users.** In some cases, it may be necessary to obtain information from the end user via telephone or email contacts.
- **Site visits.** Based on the file review and discussions with project staff, the contractor may conduct in-person interviews with operation staff, review of electrical plans, inspection of control settings, review of manufacturers' specifications, one-time measurements and short-term metering to gather more information from inspection of affected systems and equipment.
- **Affected system trend metering.** Our team may collect additional metering data, such as billing or interval premise electric, if the initial metering data are not sufficient.

The data collection for project sites will be a mix of low, medium and high effort, based on project size and complexity. Final determination of sample size and quantity of each type will be determined once the project files are gathered and reviewed. Assumptions regarding level of effort are as follows:

- **Low Effort:** Typically, does not require a new model or data logging. Onsite visits may only require nameplate verification and one-time reading, or an output of data from a control system.

- **Medium Effort:** May require some trend logging for key equipment and or a simple new model.
- **High Effort:** Requires logging or trend data for multiple parameters.

Current assumptions for level of effort within the initial sample err on the side of more complex sites (higher effort).

2.3 SITE LEVEL MEASURE ANALYSIS

The Evergreen team will first estimate savings for the sample of custom and ESRP measures as described below.

- **Review Project Energy Models**: The Evergreen team will base the evaluation model on what the team deem a reasonable and reliable energy model. The Evergreen team will start by reviewing the existing energy model, to confirm the model conforms to BPA's M&V protocols and assess savings calculations to determine reliability of savings estimates. If necessary, the team will create a new energy model. As necessary, the team will develop an updated evaluation version of the energy models in order to accurately represent the conditions observed during evaluation data collection.

- **Assess Determinant Reliability and Collect Supplemental Data**: The Evergreen team will develop a list of critical determinants for each project, where critical is defined as having a significant (possibly 10 percent or more) impact on the calculated savings. The Evergreen team will then find the corresponding values used in the evaluation model, assess the data and/or documentation underlying those values, and determine whether the team consider those values reliable. For unreliable critical determinants, the team will assess what level of data collection involving the end user would be necessary to obtain reliability for that determinant (telephone/email interview, site visit, or metering) and will gather supplemental data as needed to support sufficiently reliable savings estimates.

- **Run the Model and Estimate Evaluated Savings:** After reliable determinant values are confirmed or obtained through data collection, the Evergreen team will run the evaluation model for each site and estimate site-level energy savings.

- **Treatment of Interactive Measures.** Savings achieved by one measure can affect the savings of another measure— for example, a lighting upgrade that coincides with an HVAC upgrade that affect the same spaces within a building. If the two improvements occur part of separate projects that were completed at different times, this should not be an issue for this evaluation. However, an issue may arise if one or more projects are completed at the same time. Using information collected from the reporting system, project engineers and end-users, the Evergreen team will determine whether this occurs for any of the measures in the sample. If it does, the team will obtain documentation for all the interactive measures at the end user site to determine how the M&V models accounted for the interactions. The Evergreen team will identify the measure order that was assumed in estimating each measure's savings and use the same measure order to account for measure interaction in estimating the evaluation savings.

- **Time-Based Value of Savings and Cost Effectiveness.** The Evergreen team will assign load shapes to individual measures using ProCost via BPA technology/activity/practice (TAP) reporting code and calculate cost effectiveness and

peak savings based on the generic calculator and project specific ProCost analyses and report on any differences.

The Evergreen team will coordinate with BPA throughout the data collection and analysis process to ensure the data and information used to develop independent estimates of savings are accurate and complete.

2.4 STUDY ANALYSIS

Once analysis is completed for the sample, the Evergreen team will compile site-level results to estimate the electric savings and cost-effectiveness for the portfolio using a ratio analysis. The team will estimate first-year savings for Option 1, Option 2, and ESRP subdomains, using the evaluation model results for the sample, weighted to reflect the probabilities of selection.

Prior to portfolio analysis, the evaluation team will develop an analysis template workbook for BPA review. This workbook will serve as template for conducting the subdomain and portfolio-level rollup calculations. The subdomain-level rollup analysis will take the evaluation results for the sample of sites, extrapolate them to the stratum and subdomain level, and ultimately calculate stratum and subdomain-level results.

After completing the analysis, the Evergreen team will deliver a results workbook, including aggregated electricity savings and cost-effectiveness results for each subdomain.

2.5 REPORTING

The Evergreen team will prepare a report that documents the methodology, findings and recommendations of this evaluation. The report will not contain any information that could be used to identify the end users that participate in the evaluation. Further, the reports will not contain any utility-specific findings or recommendations.

The reports will be consistent with the content, transparency, and comparability guidance found in the RTF Guidelines and BPA's internal guidance on reporting and recommendations. The evaluation team expects that the report will have the following structure:

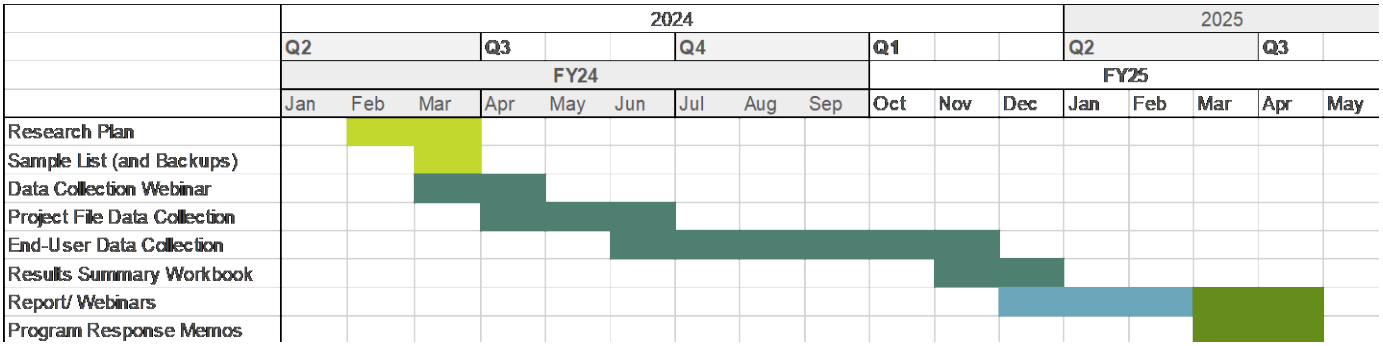
1. Executive Summary
    a. Findings
    b. Recommendations
2. Introduction and Background
3. Objectives
4. Methodology
    a. Data Collection
    b. Savings Estimation
5. Findings
    a. First-Year kWh Savings
    b. Cost-effectiveness Results
6. Recommendations

Technical Appendices and Data Products

2.6 SCHEDULE

The following schedule (Table 3) outlines key steps in the project and expected timelines. The Evergreen team and BPA developed a stakeholder plan that identifies which stakeholder groups will be involved at the various stages of the evaluation, which will guide the stakeholder reviews.

Table 3: Key project steps



Throughout the project, BPA will communicate with stakeholders through multiple approaches including ad hoc meetings, email communication, webinars, weekly announcements, and evaluation and website updates. The Evergreen team also developed stakeholder communication protocols (see Appendix A) that outline procedures for engaging with utilities, BPA Program staff and their end use customers throughout the evaluation.

APPENDIX A: UTILITY AND END USE CUSTOMER COMMUNICATION PROTOCOLS

A.1 OVERVIEW

The evaluation team will follow general protocols for each evaluation that requires the team to contact end users, utility (Option 1 and Option 2) representatives and non-utility representatives working on Energy Smart Reserve Power (ESRP) Program Projects. In situations when utilities must provide data to BPA or end user customer contact is required, the following communication principles will be followed:

- Utilities and non-utility stakeholders with projects included in the evaluation will be notified prior to the start of evaluation activities and provided with information on samples, timelines, and requirements. At that time, stakeholders may reach out to their customers notifying them of potential future contact by the evaluation team.
- BPA will provide opportunities for utilities and non-utility stakeholders to understand the details of the evaluation plan and data request.
- BPA will give utilities and non-utility stakeholders a reasonable timeline to collect project data, and will use escalation protocols if deadlines are missed, which may involve the BPA contracting officer's technical representative (COTR), energy efficiency representative (EER), ESRP liaison, and/or account executive (AE).
- The evaluation team will provide utilities and non-utility stakeholders at least one week notice before initiating any end user contact, including phone surveys and site visits.

A.2 UTILITY NOTIFICATION AND WEBINAR

Once the research plan and sample have been reviewed by the BPA evaluation team and the non-industrial custom program team, the BPA evaluation EER will notify utilities via email (copying their assigned EER) that at least one project in their territory has been selected in the primary or secondary evaluation sample). For ESRP contact, BPA Evaluation Lead will notify the BPA project contacts if their projects are selected. This initial email will request the primary contact (at the utility, or for the project if ESRP) for the evaluation and include an invitation to a BPA-hosted webinar presenting data collection information and evaluation plan details. BPA will host a separate webinar for BPA ESRP contacts to explain the data collection protocols and answer questions about the evaluation

The evaluation team will provide BPA with a stakeholder notification package with a schedule for utility and non-utility notification and sample text for BPA to provide to the stakeholders for notification.

The evaluation team will also provide detailed information to each utility about their sampled sites through a secured file transfer protocol or other mechanism, based on utility preference.

- For **Option 1** utilities, this detail will likely include unique site ID, address, measure/project name, completion date, sampled measure (specific measure, technology), and whether the site is a primary or secondary sample site.

- For **Option 2** utilities, this detail will include measure/project name, approval date, sampled measure (TAP), energy savings and BPA incentive (to aid in identification of a site and measure), and whether the site is a primary or secondary sample site.
- For **ESRP Program** measures, this detail will likely include measure/project name, energy savings and BPA incentive (to aid in identification of a site and measure), and whether the site is a primary or secondary sample site.

A.3 UTILITY PROJECT CONTACT

For Option 1 utilities, the evaluation team will contact the BPA program team to request project documentation and files directly.

For Option 2 utility sampled measures, the evaluation team will request project documentation from the utilities since BPA does not hold the complete records. Following the utility notification/webinar, the Evergreen evaluation team will email the Option 2 utility project contacts to request documentation for their sampled sites. All contacts to utilities will copy the assigned EER and the evaluation EER. The documentation review may lead to ad-hoc discussions about the project or files. The discussion with the project contact will:

- Answer questions regarding the project or files.
- Obtain information needed for the evaluation that was not found in the project files.
- If end user contact is required, discussion with the utility contact will inform the evaluation team on the history of the project and circumstances at the site and will identify the least intrusive approach for obtaining data needed by the evaluation.

The evaluation team will strive to combine these requests for utilities. Any utility providing staff for interviews to the evaluation team may negotiate and execute with the evaluation team a nondisclosure agreement that meets the utility's requirements for protecting end user information. BPA's contract protects data under the language of BPA's existing contract with the evaluation firm. The evaluation team will provide a timeline for interviews (typically two weeks). The evaluation team will work with utilities individually to support its request as much as is feasible.

A.4 PHONE SURVEYS OR SITE VISITS OF END USERS

If utilizing phone surveys or site visits, the evaluation team lead engineer will email the utilities (copying the BPA evaluation lead, evaluation EER and assigned EER) at least one week prior to any end user contact, providing them with a general description of information to be collected from the site. The phone survey will collect relevant information and determine if a site visit is necessary. The feasibility of on-site visits will be at the discretion of the customer and the evaluation team. If a visit is determined not to be feasible, the end user is expected to provide data necessary for 3rd party savings verification. BPA will provide materials to support any advance contact the utilities would like to make with end users, such as advance letters, email or a phone call script. BPA will also provide an FAQ of frequently asked questions to minimize any potential concerns by the end users.

Evaluation engineers will follow reasonable safety and privacy requirements set by end users. This includes safety training, personal protective equipment and health screenings. Nondisclosure agreements will be executed between the evaluation team and the end user as

needed. The site visit will not proceed until all reasonable end-user requirements for an on-site visit have been met.

If end-use customers do not respond to the evaluation team lead engineer's attempts to collect additional data or schedule a phone survey or site visit, or they refuse to participate in the evaluation, the evaluation team will take the following escalation steps:

i. If customer is nonresponsive (i.e., after more than five attempts over a four-week period), evaluator to notify the utility customer EER, copying the BPA evaluation lead and evaluation EER.

ii. Utility customer EER contacts the utility project representative (and possibly others at the utility, at their discretion) to request that they encourage the end-use customer to participate in the evaluation study.

iii. If still no response from the end-use customer, evaluation team discusses options of using a backup site, or further escalation.

iv. Final escalation step, at BPA's discretion, is for the EER to request the BPA account executive contact the utility.

v. If after the above escalation steps are taken, there is no resolution, the evaluation team will pull a backup site sample to replace the unresponsive end-use customer.

A.5 SITE SPECIFIC RESULTS

If requested by a utility or utilities (such as for their own uses or in response to a request from an end user), BPA may provide site-specific results for their respective sample. The findings will be contained in an Excel workbook for each measure studied. A secure download link to the site workbooks will be emailed to utilities if they request to see the results. In the event an end user requests site-specific results from BPA or BPA's contractor(s), BPA will refer them to their utility.