

Commercial Advisory Committee



DATE: October 18, 2018

LOCATION: NEEA – 421 SW 6th Ave, 6th Floor (Cedar Conference Room)

TIME: 10:00 am – 4:00 pm Pacific

WEBINAR: <http://neea.adobeconnect.com/cacoct2018/> (includes phone option)

DIAL-IN: **1-877-890-9502, Participant Code: 6262648262** (for those dialing in directly)

AGENDA			Packet Page#
10:00-10:30 am	Welcome, Introductions, Housekeeping, Packet Review <i><u>Desired Outcome:</u> CAC alignment on preparation materials and meeting objectives.</i>	Maria Alexandra Ramirez	1-3
10:30-11:15 am	Commercial Portfolio Update, and highlights from Business and Operations Planning <i><u>Desired Outcome:</u> Awareness of key updates on commercial programs, as well as current NEEA Business & Operations planning</i>	Emily Moore	4-7
11:15-11:30 am	C&I Lighting Regional Strategy Update: Network Lighting Controls <i><u>Desired Outcome:</u> Support for sharing and utilization of networked lighting control marketing and training materials</i>	Debbie Driscoll	8
11:30-12:15 pm	Luminaire Level Lighting Controls (LLLC) Update <i><u>Desired Outcome:</u></i> - Understanding of progress to date - Awareness of priorities for market development	Anne Curran	9
12:15-1:00 pm	Lunch (provided)	All	--
1:00 -2:15pm	CAC Member Share Out/Round Robin <i><u>Desired Outcome:</u> Awareness of current activities and issues within the region.</i>	All	--
2:15-2:30 pm	Break	All	--

Commercial Advisory Committee



2: 30-3:45 pm	<p>Expanding the Energy Efficiency Value Stream for Northwest Customers</p> <p><u><i>Desired Outcome:</i></u></p> <ul style="list-style-type: none">- <i>Understanding of three barriers to comprehensive energy efficiency</i>- <i>Collectively explore program and policy actions to address these barriers</i>	Debbie Driscoll Amy Cortese, NBI	10
3:45-4:00 pm	Opportunity for public comment and adjourn	Maria Alexandra Ramirez	--

Memorandum – *Agenda Item (Tier 1)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Maria Alexandra Ramirez, Stakeholder Relations Manager

SUBJECT: Meeting Packet, Informational Updates, Additional Details

MEETING PACKET APPROACH

This packet continues the “tiered” approach:

- Tier-1 memos for active agenda items;
- Tier-2 memos for informational updates on items not currently requiring agenda time;
- Tier-3 materials provided as additional detail for those interested, accessible via links in the Tier-1 and Tier-2 memos.

This approach helps keep packets concise and digestible. Any input for improvement is appreciated.

INFORMATIONAL UPDATES

Enclosed please find Tier-2 informational updates on the following:

- Page 11: Process Change on Notetaking for all ACs
- Page 12: Proposed CAC Meeting Dates for 2019
- Page 13: CAC Conference Coordination
- Page 14: MRE & CBSA Update

ADDITIONAL DETAILS (Tier 3)

Tier-3 materials related to the agenda items and informational updates listed above will be accessible through links in those memos. Additional Tier-3 details are available here:

- Q3 2018 [CAC Meeting Notes](#)
- Q3 2018 [Marketing Newsletter](#)
- Q4 2018 [Emerging Technology Newsletter](#)
- Q4 2018 [Market Research & Evaluation Newsletter](#)

Memorandum – *Agenda item (Tier 1)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Emily Moore, Senior Manager, Commercial/Industrial

SUBJECT: Commercial Portfolio Updates

Our Ask of You:

In the CAC meeting, NEEA staff will provide a brief review and update on the commercial program portfolio. Please review the program highlights from the last quarter and bring any questions or comments you may have to the meeting.

NEEA staff will also recap the highlights from the draft 2019 Operations Plan. If you missed the October 10th webinar, you can review the [webinar slides](#) and [detailed appendix](#) for the program-by-program operations plans. You can also access the [webinar recording](#) if you missed it or want a refresher. Please bring any questions or comments you may have about 2019 planning to the meeting.

PROGRAM HIGHLIGHTS:

Lighting

Reduced Wattage Lamp Replacement (RWLR)

- Program Touch: As of Q3, a total of 15 distributors are enrolled in RWLR Program touching 264 branches across the region. We estimate that this represents roughly 44% of all linear lamp sales in the region.
- LW Market penetration: 2018 has seen a steady increase in low wattage market penetration from 29% cumulative in 2017 to 53% in Q3 2018. This is market penetration relative to the linear fluorescent lighting category, and among the participating distributors. This increase is largely driven by the two largest partners, Platt and CED, exceeding their targets for the program and allowing branches to only stock LW lamps. Eight of the 15 participating distributors are above 50% LW market penetration in 2018.

Luminaire Level Lighting Controls (LLLC)

- To support market delivery capabilities for LLLC, the LLLC program collaborated with the Lighting Design Lab to finalize the curriculum for controls training for trade allies. This new one day class is now available for utilities to host for their trade allies in Q4 and in 2019.
- Seattle City Light and Idaho Power rolled out incentives in Q3. Snohomish PUD launched its Advanced Lighting Controls pilot. These new offerings complement those already in place at Puget Sound Energy, Pacific Power, Tacoma Power and many BPA member utilities.
- The program executed contracts with an additional 3 distributors to support the collection of sales data for LLLC. This brings the total to 6 participating distributors.

Top Tier Trade Ally (TTTA)

- In Q3, 11 individuals and 3 companies earned the NXT Level designation, for a total program to date of 151 individuals and 47 companies.
- The program received an additional 50 applications in Q3 for a total of 226 applications received in the last year. Conversion of applications to designations has been slower than expected, and in Q3

the program rolled out a marketing and outreach campaign to encourage successful completion of designation process. Additionally, the program upgraded its learning management platform and streamlined processes to provide a better learning and testing experience for NXT Level participants.

- Planning for the initial rollout for Level 2 has been completed, with the first workshop to take place in November in Seattle. The TTTA program has been coordinating with Seattle area utilities.

Lighting Resources

- No new updates to share.

C+I Lighting Regional Strategic Market Plan Implementation

- See C+I Lighting Quarterly Newsletter for updates [here](#).

Building Envelope

Window Attachments

- The Attachments Energy Rating Council (AERC) continues along its path to financial self-sufficiency. As their reliance on NEEA and DOE funding decreases over time, AERC expects to fill this gap through increases in membership and certification fees. As membership has more than doubled since 2015, AERC estimates it will make-up DOE and NEEA contributions by 2020.
- AERC is also building a commercial certification program with an expected launch date in early 2020. Currently, the priority for the Window Attachments team is to work alongside manufacturers to build regional awareness, identify early adopters, and continue to support AERC's commercial certification program.
- ENERGY STAR labeling, as planned, is currently underway for Larson's qualified low-e storm (LES) window products. With many of their products already labeled, Larson is set to finish certification and labeling this quarter. Larson is now certifying 36 products which will be available through big box stores at the end of 2018.

Pumps

Extended Motor Products

- Meeting #4 of the XMP Technical Workgroup will be held November 29th. Recordings and notes from past Technical Workgroup meetings are available—if you'd like those please email wfish@neea.org.
- The Pumps Research Project is going well, with a lot of existing and primary data gathered so far. The team is still in the data gathering phase, and we sincerely appreciate the data contributions and efforts of many NEEA funders already. If you are interested in learning more about how your library of past utility custom projects with pumps would be valuable for this research effort, please reach out for Warren directly or refer to our [XMP initiative Conduit page](#) for more information.
- Took part in CEE Industry Partners meetings on pumps and contributed to shaping the CEE Program Specification currently in development. Our focus remains on leveraging the PEI and Hydraulic Institute's Energy Rating Label Program to encourage procurement of energy efficient pumps.
- The XMP team is developing a project scope for the Market Characterization and Baseline study we anticipate launching in Q4.

HVAC

High-Performance HVAC

- In late August, an [online article](#) was published about very high efficiency DOAS, High-Performance HVAC's first technology. Zondits, a website dedicated to smart energy trends run by [ERS](#), featured the article, and the interview questions were a joint effort by PSE and ERS staff.
- Betterbricks partnered the Puget Sound utilities and NEEC to hold the first Northwest training on ventilation for high-performance commercial buildings on Sept. 17th in Seattle. The event was very well received with 52 attendees, almost half of which were utility engineers and staff.

- Phase 1 of the High-Performance HVAC program's market characterization is underway, with outreach to trade ally groups including specifiers, manufacturers, manufacturer's representatives, distributors and contractors, as well as some building owners, starting in mid-October. If you have any questions or concerns regarding outreach, please contact Maria Murphy. As a reminder, Phase 1 of the market characterization will allow NEEA to 1) better estimate the market opportunity, 2) assess market barriers and 3) begin mapping HVAC purchase and replacements decision-making processes within targeted building types (office, schools, retail).

Commercial New Construction

Commercial Code Enhancement (CCE)

- Completed scanning reports from each Integrated Design Lab that identifies measures to be considered in future code requirements. CCE presented the reports with the labs in Q3 Utility meetings in Washington, Oregon and Idaho. The scanning reports are the first step for CCE to help utilities align their commercial new construction programs with future code. CCE will meet with Montana in October to go over their state report. Each state report will be available to all utilities in Q4.
- Met participating CCE utilities from Washington (July 30), Oregon (August 9), and Idaho (September 5). Each meeting provided regional updates on CCE activities and opportunities in each state, and a state specific IDL scanning report presentation. NEEA will follow-up on measures utilities expressed interest in and will provide additional detail in Q4 2018 and into 2019.
- Presented the ACEEE accepted paper "Market Transformation Strategies for Commercial Code Enhancement" at the ACEEE Summer Study on August 15. The paper explains the concept of CCE and how NEEA is working with the market, Code, and utilities to create greater alignment and understanding of upcoming codes in the Northwest. The paper can be found [here](#).

Cross-cutting Infrastructure

Distributor Platform

- Supporting midstream pilots for the region that leverage the Distributor Platform components (relationships, data and program systems) and test market transformation interventions for LED replacement lamps. Phase 1 of Seattle City Light's "Lighting to Go" pilot launched August 1, 2018. Also continuing to help Snohomish PUD on acquiring data for their region as well develop a TLED pilot to be launched in their territory in Q1 2019. In addition to maintaining distributor engagement and access to full category product data, the pilots will help to inform future program strategy for commodity LED products: the learnings and data can directly benefit utilities in the region as they wrestle with the cost-effectiveness of LEDs, and inform whether there is a regional market transformation opportunity to accelerate the removal of inefficient products while capturing the entire market, and more cost-effectively transform the LED replacement lamp market over the long-term.

Commercial Real Estate (CRE)

- The CRE team continues to support the City of Seattle's Building Tune-up Accelerator (TUA) Program. With nine months remaining in the TUA, Spark reports have been created for 20 participating buildings; it is estimated that 50 Spark reports in total will be completed by the end of 2018, six months before the conclusion of the TUA.
- In Washington, the CRE team is working with the City of Bellevue to deliver three, one-hour training sessions on benchmarking and the business case for tune-ups and retro-commissioning. Dates have been set for October 23rd with the Northwest Energy Efficiency Council (NEEC) at the Smart Building Center, October 24th with BOMA King County and the Bellevue Downtown Association at the Lincoln Square Collaboration Center, and finally on November 6th with the Seattle Eastside Collaborate at GLY Construction's Main Office in Bellevue.

- On September 10th, the CRE team again was able to support awareness building of secondary glazing systems (SGS) at a networking breakfast for Seattle 2030 at the Smart Buildings Center. The presentation included a product demo, a discussion of the energy savings potential and non-energy benefits of the technology and concluded with detailed information concerning regional pay-for-performance utility programs.
- Currently, the CRE infrastructure program is planned to end by the end of the current business cycle. Planning is underway to develop an assessment of existing BetterBricks and CRE relationships, tools and resources, develop a strategy for the BetterBricks platform in NEEA's next business cycle, and develop a transition strategy for CRE assets for 2019, including Spark.

Strategic Energy Management (SEM)

- The 8th annual Fall Workshop of the NW SEM Collaborative is set for October 25th in Portland. [View the agenda and more on the event here](#). Please join and invite your colleagues to attend.
- Completed work on current award cycle for 50001 Ready innovation project funded by LBNL, and submitted an application for a follow-on award of an additional \$100k.
- Continued to support SEM Hub and the subset of SEM Hub tools that are NEEA owned and maintained, including minor upgrades to the new SEM Hub Energy Management Assessment tool.
- Developed SEM Hub Newsletter to be distributed at Fall Workshop.
- Participated in and presented at the 2018 National SEM Summit held during ACEEE Summer Study.

Memorandum – *Agenda item (Tier 1)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Debbie Driscoll, Strategic Market Manager

SUBJECT: Addressing Barriers to Networked Lighting Controls via the C+I Lighting Regional Collaboration

Our Ask of You:

- Awareness of ways in which the region is addressing barriers to networked lighting controls
- Support for sharing and utilization of networked lighting control marketing and training materials

Brief Overview:

For 2018, the C+I Lighting Regional Strategic Market Planning Steering Committee and the Lighting Program Manager Work Group selected “Increase Adoption of Networked Lighting Control Systems” as one of our two strategic priorities (Inform Program Planning for Commodity Lamps being the other).

In our July Lighting PM Work Group meeting, Michelle Lichtenfels and Anne Curran shared information on barriers to adoption of networked controls, and facilitated a discussion of ways we could collaboratively address those barriers. The results was the following set of concrete actions:

- Share networked controls marketing materials/resources via the Work Group. NEEA will “white label” materials so that other members can rebrand and utilize content.
- Offer regionally-consistent trainings. The NEEA Luminaire Level Lighting Control (LLLC) team is working with LDL to consolidate the best aspects of various training offerings piloted, and offering to subsidize trainings hosted by utilities through Q2 2019.
- Standardize on terminology. Networked Lighting Controls as the general term and LLLC when referring to controls and sensors integrated in to luminaire.

Updates on all C+I Lighting Regional Strategy progress is available in our [newsletter](#). Please contact Debbie Driscoll if you have questions about the C+I Lighting Regional Strategic Market Planning.

Memorandum – Agenda item (Tier 1)



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Anne Curran, Program Manager

SUBJECT: Luminaire Level Lighting Controls (LLLC) Update

Our Ask of You: Please review and bring any questions, recommendations or concerns to the Q4 CAC meeting.

Program Focus:

Energy efficiency programs have long pursued increased use of lighting controls, with limited success. LLLC systems are easier to install and program than traditional controls, and have the potential to deliver greater energy savings alongside other non-energy benefits. The initiative uses a multi-faceted approach to transform the market so that LLLC systems become standard practice for commercial buildings.

Progress to Date:

The LLLC program has laid a foundation for its long-term vision:

- **Product readiness:** National specifications are in place and there is strong product availability.
- **Training:** Training for installers is available for funders to host for their trade allies.
- **Energy Savings:** Savings rates have been established by Regional Technical Forum (RTF).
- **Codes:** Inclusion as an option in Washington building code and in the IECC national code base.
- **Incentive Programs:** A number of NEEA funders have incorporated incentives in their program designs or have dedicated resources to pilot activities.

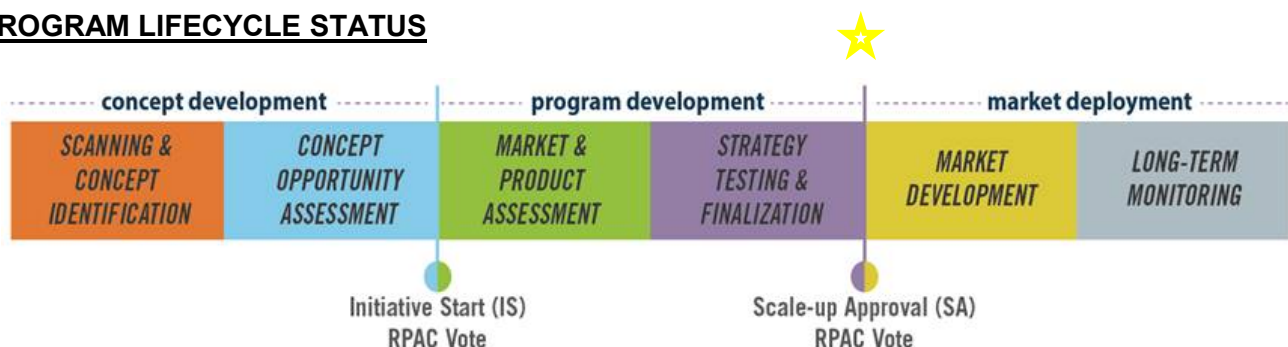
Planned Focus:

In its next phase, the program will continue to tackle market barriers around cost, skill and awareness to address the slow adoption of LLLC.

- **Training and Education:** Training and education for installers, designers and lighting specifiers.
- **Supply Chain Intervention:** Collaboration with manufacturers, sales agencies (manufacturer representatives) and distributors to bring additional sales and promotional focus to the region.
- **Building Awareness:** Foster awareness amongst decision makers and influencers through case studies, leverage of industry partnerships and support for funder programs.

LLLC program will be requesting approval from RPAC to enter its Market Development phase in Q1 2019. I will be setting up individual sessions with each of you and your teams, in December – January, to review plans in depth and gain feedback. Please contact Anne Curran at acurran@neea.org if you have questions about the LLLC program.

PROGRAM LIFECYCLE STATUS



Memorandum – *Agenda item (Tier 1)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Debbie Driscoll, Market Strategy Manager, Commercial

SUBJECT: Cost Effectiveness & Other Market Opportunities and Challenges To Be Discussed

Our Ask of You:

To foster a productive discussion on cost effectiveness in programs, please prepare thoughts and examples in response to the following questions:

- a. What are ways in which your utility is working to overcome cost effectiveness challenges, including, but not limited to incorporating non-energy benefits?
- b. What are barriers to whole building programs that use an EUI target?
- c. What specific regional support or collaboration would help to advance the issue of cost effectiveness?

OVERVIEW OF DISCUSSION TOPICS:

In our Q3 meeting, CAC members reviewed previously identified market opportunities and recommended the most relevant for further exploration in future CAC meetings. This memo (1) tees up our first topic of discussion, cost effectiveness, and (2) recaps the other topics prioritized for future discussion.

1) Discussion on Cost Effectiveness

The topic that sparked greatest interest was cost effectiveness challenges. Specifically:

- How programs are transitioning toward an EUI target
- How non-energy benefits are being used to address cost effectiveness issues
- Updates from other groups exploring cost effectiveness issues
- Way policy could support a broader view of cost effectiveness

In response to the strong interest in this topic, we invited Amy Cortese of the New Buildings Institute to share recently completed research on expanding the energy efficiency value stream. In this meeting, she will share an overview of the research along with policy recommendations and utility considerations. We will then leave ample time for discussion.

2) Topics for future meeting discussions

Additional topics that CAC members identified as most relevant will be considered for future meeting discussion topics are:

- New measure opportunities – emerging opportunities in general, with specific mention of “smart” and automated buildings, resource management, and plug load efficiency
- Demand management – success stories, national trends, how EE can manage peak loads, and opportunities for new customer services
- Building systems data – fault detection, ways to use the data, opportunities for new customer services

Memorandum – *Agenda item (Tier 2)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)
FROM: Maria Alexandra Ramirez, Stakeholder Relations Manager
SUBJECT: Process Change: Notetaking for Advisory Committees (ACs)

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Our Ask of You:

Please review this memo and bring any questions to the October 18th meeting.

Overview:

Effective Q4 2018, NEEA's AC notetakers will follow the Board's note-taking practice of capturing meeting participants, subjects, action items, decisions, owners and deadlines only. The highly-detailed notetaking NEEA has practiced with its ACs has been a significant resource investment for NEEA staff and AC members alike, particularly considering the 25+ AC meetings convened annually. Given that it's already standard practice to record NEEA AC meetings, the meetings are being captured and the recording can be made available indefinitely for much less cost. Moving forward, AC members can expect to receive a written summary of these key points and a link to the audio recording, should they be interested in further detail. Thank you for working with us on this efficiency.

Please contact [Maria Alexandra Ramirez](#) if you have immediate questions about this memo.

Memorandum – *Informational (Tier 2)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Maria Alexandra Ramirez, Stakeholder Relations Manager

SUBJECT: Proposed CAC Meeting Dates for 2019

Our Ask of You:

Please review the proposed CAC meeting dates for 2019 below and let us know of any conflicts and any proposed alternative dates, by Wednesday, October 31, 2018. Bring any questions, feedback, or concerns to the Q4 CAC meeting on October 18.

Proposed CAC Meeting Dates for 2019

Q1 2019	Q2 2019	Q3 2019	Q4 2019
Tuesday, February 12	Thursday, May 9	Tuesday, August 6	Tuesday, November 5

Please contact [Maria Alexandra Ramirez](#) if you have immediate questions about this memo.

Memorandum – *Agenda item (Tier 2)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Maria Alexandra Ramirez, Stakeholder Relations Manager

SUBJECT: Conference Coordination

Our Ask of You:

Please review the Upcoming Event agenda(s) linked below and contact [Maria Alexandra Ramirez](#) if there are specific topics/breakouts you'd like to hear about at our next CAC meeting.

Upcoming Events:

Date	Conference	Report
9/18/2018	CEE 15th Annual Industry Partners Meeting	Call Report (Internal)
10/7/2018	NIPPC Annual Meeting	Conduit Posting

Background:

In response to a NEEA Board discussion last year about conference/event attendance, NEEA developed

- (1) A tracking system to improve its management of who's going to what, and
- (2) Criteria that improves NEEA's ability to manage to its annual operations plan and budget.

There is a coordination opportunity here to ensure that we're connecting as appropriate in advance and sharing out key relevant takeaways afterwards with the region. This will be a standing housekeeping item for this Advisory Committee moving forward.

Memorandum – *Informational (Tier 2)*



October 18, 2018

TO: Commercial Advisory Committee (CAC)

FROM: Dulane Moran, NEEA Staff

SUBJECT: Update: Next Steps on Commercial Building Stock Assessment

Our Ask of You: Please review and consider how you might be able to encourage others in your organization to provide recruitment support for the CBSA. Please contact **Dulane Moran** (dmoran@neea.org) with any follow up questions.

CBSA Status

With the regional virtual catalog complete and a final sample in hand, the CBSA team is turning toward the daunting task of site contact and recruitment. Designated points of contact for each utility will receive the list of sites that could be contacted for recruitment in each service territory. Utilities will have approximately 30 days to review the list and 1) confirm sites are in their service territories and 2) alert us to any special instructions associated with a given account (for example if we should delay recruitment, or if an account representative would like to accompany us).

We will be actively engaging with many of you to access support at whatever level each organization can commit to, given our shared desire to meet study objectives on time and on budget. Options include:

1. Support by providing contact information for a given site, which facilitates contact and speeds recruitment.
2. Allowing the CBSA team to reference the associated utility in site recruitment scripts – the legitimacy of this association also speeds recruitment and reduces fear
3. Actively disseminating information about the study in customer materials, via email, or any other mechanism that can help speed recruitment and establish regional legitimacy
4. Direct participation in recruitment to help us with sites or building types that are proving to be a challenge

Project Timeline

Task	Year	2018				2019			
	Quarter	1	2	3	4	1	2	3	4
Prepare Virtual Catalog									
Develop Data Collection Tool									
Customer Contact Protocols									
Final Sample Design									
Train Assessors									
Collect Pre-Test Data									
Notify Utilities of Full Sample									
Recruit Sample Sites									
Conduct On-Site Assessments									
Analyze Data									
Finalize CBSA Database									