

Commercial Advisory Committee (CAC)
Tuesday, July 31, 2018
NEEA Office, Portland, OR



Attendees:

In Person:

Mark Lensen – Puget Sound Energy
Jennifer McMaster – Bonneville Power Administration
Oliver Kesting – Energy Trust of Oregon
Sinh Tran – Snohomish PUD
Sean Kissick – OR Dept of Energy (ODOE)
Kevin Smit – NW Power & Conservation Council

On Phone:

Katie Pegan – Idaho Office of Energy & Mineral Rsrcs.
Joe Fernandi – Seattle City Light
Natasha Houldson – Tacoma Power
Nancy Goddard – Pacific Power
Bill Hibbs – Clark Public Utilities

Guests: Kevin Van Den Wymelenberg, University of Oregon (phone)

NEEA Staff: Emily Moore, Maria Murphy, Christian Miner, Alisyn Maggiora, Stacy Blumberg, Maria Alexandra Ramirez, Neil Grigsby, Bing Liu, Debbie Driscoll, Warren Fish, Rachel Zakrasek, Elaine Miller, Natalie Fish, Anne Curran, Julia Harper

Resources

- *Packet link on Conduit:* <https://conduitnw.org/Pages/File.aspx?rid=4554>
- *Slides link on Conduit:* <https://conduitnw.org/Pages/File.aspx?rid=4567>

Welcome, Introductions, and Housekeeping Items

A. Welcome

- 1) Meeting commenced at 10:05am

B. Meeting [packet](#) review; see page 3 for links to newsletters and past meeting notes

- 1) CAC Conference Coordination (p.15)
- 2) Organizational Change for CCE Program (p.16)
 - i. CCE program will now fall under the Codes department
 - ii. Updates on CCE will still come through the CAC
 - iii. **Energy Trust** reiterated their support for this change
- 3) Washington Commercial Code Evaluation Study (pp.17-18)
 - i. Evaluations will be fully launched this fall – looking into effectiveness of new commercial codes
 - ii. Sr. Codes Manager, Bing Liu (NEEA) encouraged participation in the study; may need funder/utility help in recruiting buildings to participate.
 - iii. Please contact Steve Phoutrides (NEEA) with any questions: sphoutrides@neea.org | 503-688-5488.
- 4) MRE Newsletter & CBSA Update (p.19) – includes planned activities for the region
- 5) Emerging Technology Update (p.20)
- 6) Codes & Standards Update (p. 21-24)
- 7) C&I Lighting Regional Strategic Market Plan & Newsletter (p.25)

Portfolio Overview Updates

Emily Moore (NEEA) provided the overview. *The desired outcome is for committee members to be aware of key updates on commercial programs, as well as current NEEA Business & Operations planning. Refer to [slides 5-13](#) and page 4-7 in the [packet](#) for greater detail.*

A. Portfolio Overview Program Updates



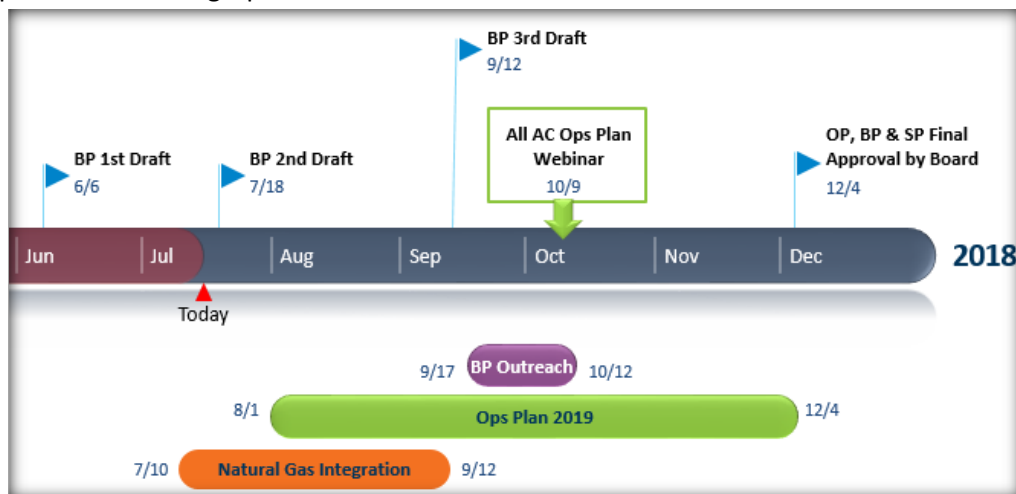
1) 2018 Focus Areas

- a) Luminaire Level Lighting Controls
 - i.) Preparing for advancement of program to market development in early 2019
 - ii.) Continuing Advanced Lighting Controls training in collaboration with utilities
 - iii.) Outreach to top manufacturers for more sales focus in Northwest
- b) Reduced Wattage Lamp Replacement
 - i.) 49% market penetration of low wattage lamps
 - ii.) Eight of 14 distributors are >50% LW market penetration
 - iii.) Planning transition to LTMT in 2019
 - iv.) Continuing focus in 2018 on leverage of the Distributor Platform
- c) Extended Motor Products
 - i.) Added to portfolio in Q1
 - ii.) Launched XMP Pumps Research Plan and Technical Work Group; next meeting is scheduled for Aug 22 at 2pm.
 - iii.) Gathering data on pump characteristics and operations
- d) High-Performance HVAC
 - i.) Added to the portfolio in Q2
 - ii.) Beginning market characterization work
 - iii.) Recruiting 3 additional pilot projects to gather additional data on school and retail installations

2) C/I Lighting Regional Strategic Market Plan – 2018 Priority Strategies

- a) Increase adoption of advanced lighting control systems
 - i.) Led by Michelle Lichtenfels, BPA and Anne Curran, NEEA – discussion at July Lighting PM Work Group on barriers that will inform work to identify training and marketing resources that the region can leverage
 - b) Inform program planning for commodity lamps
 - i.) Soft release of pricing data dashboard
 - ii.) Working on concept development for how to combine pricing data with RWLR sales data.
 - iii.) Next, there'll be work with the Lighting PM Workgroup to identify ways this can inform program decision-making
- 3) Update on Other Programs
- a) Window Attachments
 - i.) Support for AERC is strong, and growing
 - ii.) Refining target market to focus on commercial and multi-family
 - b) Commercial Code Enhancement
 - i.) Finalized State Coordination Plans for WA, OR and ID; began development for MT
 - ii.) Developed supporting material for two proposals for the WA code; one was just adopted related to the aligning a performance path baseline with ASHRAE 90.1 .
 - c) Top-Tier Trade Ally
 - i.) Continued traction of NXT Level 1: 137 individuals and 44 companies have received designation to-date
 - ii.) Planning for rollout of NXT Level 2 in Q4 in Seattle area
 - d) C+I Strategic Energy Management (SEM)
 - i.) EMA tool updated and available for customization
 - ii.) Leveraging DOE funds to support 50001 Ready and Community SEM
 - iii.) Planning for 8th annual Fall workshop of NW SEM Collaborative
 - e) Commercial Real Estate
 - i.) Continuing support of City of Seattle's TUA and the use of Spark to identify deep energy retrofit opportunities
 - ii.) Partnering with industry associations to promote awareness of SGS and LLLC

B. 2019 Operations Planning Update



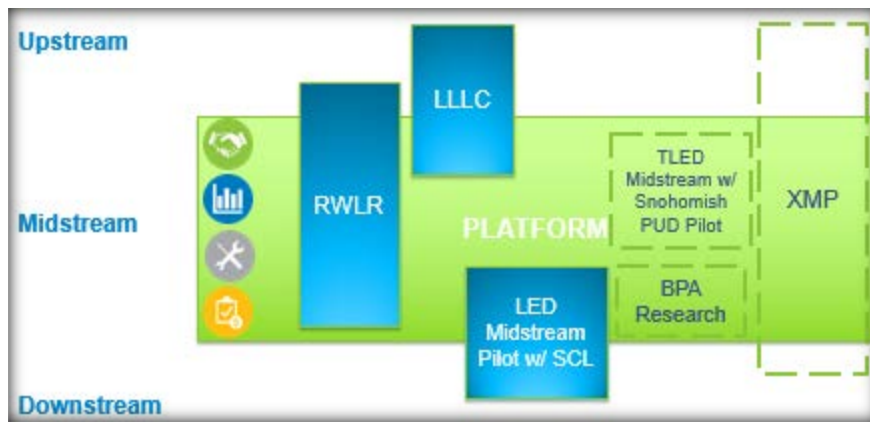
- 1) All-Advisory Committee webinar will be October 9; same format as last year
- C. 2020-2024 Business Planning Update (cycle 6)
 - 1) Progress thus far
 - a) Board reviewed the 2nd draft of the plan on Monday, July 30.
 - b) This is a public board workshop, all materials are available and posted on neea.org under events (find the meeting on the calendar)
 - c) There will be a public outreach process in the fall to review the draft plan
 - d) If you have input please talk to your Board representative or RPAC member
 - e) Goal is to have the plan approved at the December Board meeting
 - 2) Many of NEEA's funders are having to tighten their EE budgets; the current draft business plan represents a 5-year cycle budget slightly less than current funding cycle. Board business planning committee asked NEEA staff to prioritize energy savings programs and emerging technology; this put pressure on the investment levels for infrastructure programs..
 - a)
 - 3) There are a few proposed changes relevant to the commercial sector in current draft business plan; these are changes that the Board will consider in the coming trade-off conversations.
 - a) Business Plan is structured around Portfolio Categories, which cross sectors: Lighting, HVAC, Building Envelope, Consumer Products, Motor-driven Products, Water Heating, New Construction
 - b) Decrease in Infrastructure investments impacting commercial program portfolio
 - i.) CRE is proposed to be discontinued and consolidated with BetterBricks platform
 - ii.) SEM is proposed to be optional; if optional, a 'critical mass' of funders would be needed to support the existing SEMhub and regional resources
 - iii.) Integrated Design Lab 'base' funding is not included in the current budget proposed
 - iv.)
 - v.) Top-Tier Trade Ally is included in the core budget, with a budget reduction from the current cycle and planned transition to the market in the next cycle

Distributor Platform Pilot Update

Elaine Miller (NEEA) provided an overview of current midstream commercial lighting pilots. *The Desired outcome is to create awareness of pilot activities leveraging the Distributor Platform.* Refer to [slides](#) 14-28 and page 8-9 in the [packet](#) for greater detail.

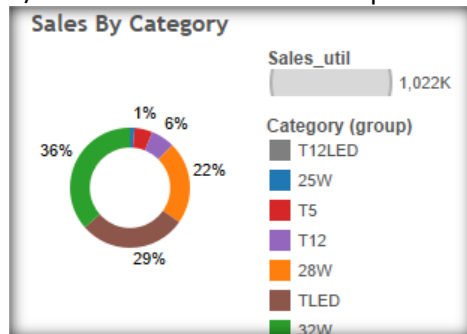
Presentation Highlights:

- A. Reminder: What is the distributor platform
 - 1) Value exchange
 - 2) Platform assets: relationships, data, contracts, interventions
 - 3) Engagement with the platform
 - a) Ex: LLLC was able to get data relatively quickly by leveraging the platform



B. Lighting Market is a moving target

- 1) Prices going down, especially replacement lamps
- 2) Baselines going up
- 3) Incentives going down but programmatic C+I lighting savings still going up!
- 4) Data indicates there are still opportunities in the market, particularly replacements
- 5) Snapshot of 2018 Sales to date – despite strong uptake of TLEDs, fluorescent still account for 2/3 of market sales and are expected to be significant share for years to come



- 6) Problems to solve
 - a) How do we send the right signal to customers to not just do a TLED, but a LED troffer with controls?
 - i.) **PSE** agreed this is an issue
 - b) How do we transition these replacement products? Some stay around a long time.
 - c) How do we still capture savings but do it at radically less program costs?

C. Pilots

- 1) Regional Goals
 - a) Maintenance market: Can we reach more of the market with a lighter touch?
 - b) Regional opportunity: Is there a viable midstream model for other Northwest utilities?
 - c) Other markets: Can we leverage the platform for measures beyond lighting?
 - d) "Commodity" products/measures: How does the platform enable strategies for measures that are becoming more mature? (and eventually will exit programs)?
- 2) Matching program strategy to measure/market objective

Program Approach	Measure Stage	Strategy	Cost
Downstream Incentives	New/Emerging	Strong incentives and project support to catalyze adoption	\$\$\$\$
Midstream Incentives	Established	Moderate incentives and lighter touch for straightforward measures	\$\$\$
Midstream MT	Commodity	Incentives focused on market penetration and widespread uptake	\$\$
No Program	Standard Practice	Documenting installations above Council baseline	\$

3) Seattle City Light Pilot

a) Pilot Goals:

- i.) Capture untapped portion of market – primarily maintenance market & increase kWh savings
- ii.) Align with peer utilities (like PSE) on incentive rates, eligibility, documentation requirements to reduce confusion
- iii.) Shift commodity products to a midstream channel starting Aug 1 – focus downstream channel on deep lighting efficiency (advanced lighting controls)
- iv.) Simplify customer/contractor participation process

b) **Seattle City Light** added that the recognition from the distributors has made training easier. Got a positive reaction at mid-July training. Positive change has been to partner with Luminaire Level Lighting Controls (LLLC) program. Excited to see how this can become a regional play.

c) Pilot Components

- i.) Two-pronged approach to 7 LED product categories (decorative lamps, MR16, omnidirectional, directional (PAR), recessed can retrofit kits, linear lamps, pin-based CFLs)
 - (low) point-of-sale per lamp incentives
 - market penetration bonuses across branches and categories
- ii.) Phase 1: 9 distributors (RWLR participants), covering 12 branches
- iii.) Phase 2 (January 1, 2019): additional distributors enrolled, MT incentive structures
- iv.) Full Category Data (efficient and inefficient products)
- v.) Removal of measures from downstream programs
- vi.) Timeline: August 1, 2018-December 31, 2019

4) Snohomish County PUD – targeting TLEDs

a) Pilot goals

- i.) Support Snohomish PUD in meeting energy savings targets within budget
- ii.) Improve program implementation efficiency
 - Capture savings through fewer transactions
 - Save staff time
 - Ensure high value customer touches
- iii.) Test new approaches to midstream programs
 - Apply RWLR lessons to a new measure
 - Understand measure transition from other programs
 - Gather market intelligence

b) Pilot Components

- i.) TLED measures only
- ii.) 3-4 branches in Snohomish PUD territory (also RWLR participants)
- iii.) Test MT strategies relative to per lamp incentives (e.g. market penetration bonuses, etc...)

iv.) Timeline:

- January 1, 2019 launch (tentative)
- 12-month duration

D. Discussion on Pilot value for Region

- 1) **How do you expect your programs to engage with commodity lamps in your portfolio in the coming years?**
- 2) **How can these pilots help inform and assist your portfolio as it evolves?**

Discussion:

- **Tacoma Power:** *Curious about budget and energy savings on the pilots – what’s been establish so far?*
 - **Seattle City Light** on budget, \$750,000 allocated for incentives in the first year. Most budgets are at a portfolio level instead of program level to allow for flexibility – cost of acquisition per kwh will be significantly cheaper now, down around \$.015/kwh (from \$.20/kwh) and hope midstream will come down to around \$.10/kwh. Energy savings are reliant on RTF’s UES numbers for TLEDs and CFLEDs since both of those do not currently have RTF measures. Savings per unit are a little less because it incorporates a market baseline, but we feel getting the increased volume will be worth the sacrifice.
 - **Snohomish PUD** followed a similar process for TLEDs on savings; will be lower than in the past.
 - Contact Elaine if you have additional questions emiller@neea.org | 503-688-5461.
- **PSE** *wondered about where Seattle City Light’s pilot fit in the program approach table on slide 24.* NEEA noted that it had just launched and ideally is headed toward Midstream MT.
 - **ACTION ITEM:** Elaine to add order of magnitude of program cost column to this table.
 - **PSE** noted they dropped their incentives significantly and lighting load has also dropped.
- **Energy Trust** still has some bandwidth into 2019 but will have to reconsider for 2020.
- **NEEA** noted that they will also be collecting pricing information if folks are interested in data like price points and / or wattage and efficacy.
- **Tacoma Power:** *Regarding tail end of verification – will pilots include anything on location inspections?* NEEA noted that with SCL, the first 6th months they will collect customer address info to help establish installation location, but then may shift to zip codes. PSE collects this data for sales of over 50 units.
- **PSE:** *Commodity market versus retrofit market – sales data incorporates everything? Yes.* NEEA added that they’re discerning whether they’re coming through the downstream or midstream program to ensure there’s no double counting of savings.
- **Pacific Power** added that this is an excellent example of NEEA/utility collaboration - nice work!

Market Opportunities Follow Up

Debbie Driscoll (NEEA) led the discussion. *The Desired outcome is for CAC members to be aligned on top priorities to inform future CAC agenda topics and panel discussions.* Refer to page 10-11 in the [packet](#) for greater detail. Refer to the [Q2 CAC notes](#) (p.14-15) for source detail on topics brainstormed.

Overview

A. Synthesis from Q2 CAC meeting brainstorming discussion

- 1) **Shifting baselines and the need to aggregate smaller slivers of savings across many loads will continue to make it more and more challenging to cost effectively capture savings.**
 - a) Most often mentioned challenge
 - b) Many focusing on customer and trade ally engagement as first strategy
 - c) Evaluating underserved markets for new sources of savings
- 2) **New measure opportunities on the horizon**

- a) Smart buildings and automation of facility operations
 - b) Data centers
 - c) Cryptocurrency
 - d) Indoor horticulture beyond cannabis
 - e) Plug load management
 - f) Electric vehicles
- 3) **Training and Workforce – within utility and trade ally communities**
 - 4) **Demand Management will change the rules of the game, adding time-of-use and two-way communication components to our work**
 - 5) **Municipal and corporate priorities for de-carbonization and resilience are driving a strong interest in distributed energy resources**
 - a) City and state carbon and resilience targets are driving electrification, tune-up requirements and other measures to aggressively meet targets.
 - 6) **Building systems data brings the possibility of new services, but confusion and concern on how to engage**
 - 7) **Collaboration – with each other and with trade allies – is an essential tool to addressing the challenges ahead**
 - a) Members cited tighter relationships with trade allies and collaborative discussions/efforts such as those happening through the C+I Lighting Regional Strategic Market Planning work as of growing importance when considering the changes and challenges ahead.
- B. Prioritization exercise
- 1) **#1 Cost Effectiveness Challenges**
 - a) **Energy Trust:** Having issues at the measure level with cost-effectiveness, and at the program level especially as lighting is shifting I (for example with multifamily).
 - b) **BPA:** The driver for us is the commitment to not raise rates in 2028, which means really controlling cost at the portfolio level.

What would help you better address this challenge?

 - c) **BPA:** In CCE codes conversations – moving towards an EUI target could be helpful; also, how to translate deployment of things that are considered cost-effective but have yet to be implemented.
 - d) **Energy Trust:** Non energy benefits, would be interested in hearing how others might be using this to prop up cost-effectiveness
 - e) **PSE** noted that they are working with the statewide advisory group that includes IOUS on cost-effectiveness, which may help. Rebecca Blanton at PSE is the subject matter expert on this. Could potentially have her come share out at a meeting.
 - f) **BPA:** Maybe there are other policy decisions that could be made, for ex using the utility cost test to discern investment-worthy opportunities.
 - 2) **New Measure Opportunities – *what kind of focus would make most sense to meet your needs in these areas?***
 - a) **PSE:** What’s on the horizon (emerging tech), what do we need to be ready for (market context and trends)
 - b) **NEEA:** IDLs might be a good resource for this (resource management, plug loads, etc.)
 - c) **PSE:** Smart Buildings Institute demo project is a good example of the future of SEM in a “smart” and automated building
 - 3) **Demand Management and adding time-of-use and two-way communication components to our work – *what are the particular challenges you face with this?***

- a) **Snohomish PUD**: We've tested winter peak load reductions with aggregated customers.
 - b) **PSE**: Two-way communication is something we're all going to face. We are rolling out AMI meters to help with demand management, but is there something else out there? Looking at national trends in connected homes in both electric and gas. Doing a pilot with Nest thermostats this winter to see if we can help manage load.
 - c) **BPA**: We've identified we need capacity savings in the summer and energy savings in the winter; so to what extent does EE help manage peak? The region is moving towards needing that. It's not controlling a load to go off when you want, it's that when it's on, it's drawing less.
 - d) **Seattle City Light**: We're still early in the process on our thinking around this.
 - e) **BPA** added that other utilities across the nation are likely thinking of this in terms of relationship management with customers and to evaluate the services they can provide.
- 4) Building systems data brings the possibility of new services, but confusion/concern on how to engage
- a) **BPA**: SEM experience reminds me of this – some customers are ready for it, some aren't.

What are the tough challenges within this?

- b) **PSE**: Fault detection type of feedback; some are using this to inform when things could come out of line; how deep do you go? Automated? Monthly review? Different ways to use the data, but where is it giving you flags? The key is how you use it with the customer.
- c) **Energy Trust**: Seen that with SEM and used data to make adjustments. Noticing similarity between 2a, 4 and 6

Preference on topic presentation?

- d) **Energy Trust** – depends on topic and expertise; for example, could bring in planning folks to talk about cost-effectiveness.
- e) **Seattle City Light**: could be either a utility representative or an industry expert depending on the topic.

Utility Share-outs/Round Robin

A. Energy Trust:

Completed new buildings rebid – selected CLEAResult. Starting budget process for 2019. Looking good at mid-year for reaching goals. Their Commercial Advisory Committee (CAC) mtg will be tomorrow, discussing pay-for-performance next steps; still have no one enrolled in their program. Just completed an evaluation of the multifamily market to assess opportunities, this will also be presented at their CAC tomorrow.

B. Snohomish PUD:

Lighting – closing program, reached 135% of goal. Underspend so have budget to start LLLC pilot in Q4 of this year. Keeping bonus through labor day for non-lighting projects. ESI SEM going strong, doubled the savings. Still have a couple new construction lighting projects going this year. Lighting-to-go slower than last year, likely due to reduced incentive. Working on budget and goal for next year.

C. BPA:

Launched Trade Ally Network (lighting plus HVAC). Contracting with Evergreen and Energy 350 on that. Conducted the Conservation and Demand Potential Assessments for BPA territories (not relying on regional assessment) - evaluating those assessments for EE and Demand Response. Also looking at demand side (non-wires) efficiencies that could be gleaned on the transmission side.

D. PSE:

Custom lighting projects have dwindled compared to past years. Seeking to improve biannual planning process. Looking at targeted energy efficiency and opportunities in capacity constrained areas to evaluate whether there's a difference in avoided cost in how we approach programs and incentives – growing interest in full due diligence on any large capital project.

E. ODOE:

Nothing critical to share.

F. Seattle City Light (SCL):

Commercial retrofit lighting program launches tomorrow; combining HVAC and lighting calculators, changed incentives and removed incentives that will go midstream, and redid program documents (e.g. specifications). Deep retrofit pay for performance program launch was slightly delayed, plan to launch in September now and starting to market to prospective customers. Working on EE disturbance pilot – need to do formal solicitation for specific use cases by end of year. Working on retro commissioning program launch on commercial building tune-up ordinance that will be a joint effort with PSE. Working on two RFPs: 1) virtual energy assessment and 2) DSM project tracking software.

G. Idaho Office of Mineral Resources:

Code board will review 2018 code this fall, starting in November (commercial, residential and energy code). Recommendations are expected in 2020. Will hold one-day conference around energy trainings for builders, likely in October; this is replacing the Energy conference they used to hold with NEEA's help. Some contractors will also do lunch and learns, mostly for state legislators to help understand changes in code, which will also occur this fall.

H. Pacific Power:

In planning phase for program changes for Washington for 2019. Savings results for 2018 are robust in Washington, on track to meet goals. Some challenges with cost-effectiveness, mainly stemming from measure costs. *Is anyone using the RTF tool baseline for lighting retrofits?*

- **Seattle City Light** noted they decided not to tackle that in their lighting calculator revisions, but intend to account for it in their reporting to BPA.

Looking to report first year savings, but do lifetime savings calculations and peel back measure life so that lifetime savings is the same, exploring this as a way to manage cost-effectiveness for lighting retrofits – not sure whether this will end up in our January 1 program or not.

- **Seattle City Light** noted that the RTF calculator is available on their site – suggest starting with this as it's fairly complicated to try to calculate on your own.

Have a single RFP on home energy savings and WattSmart business program, seeking contractors to run these programs.

I. Tacoma Power:

commercial SEM pilot program launched; Stillwater and Energy 350 managing that. Eight key account customers participating. First workshop is tomorrow of the two-year cohort. BPA has provided grant funding. looking forward to getting baseline models finalized, etc., excited to see the performance and savings numbers a year from now. Overall, on track to meet goals for the year. Have a couple large construction projects going on this year. Have some Power Management workgroups working on EVs and DR opportunities.

BetterBricks Platform and Proposed Consolidation with Commercial Real Estate Infrastructure in Cycle 6

Natalie Fish (NEEA) provided an overview of the Commercial Real Estate infrastructure program and BetterBricks and their proposed consolidation. . Refer to [slides](#) 36-49 and page 12-13 in the [packet](#) for greater detail.

Presentation Highlights:

- A. Distinction between Commercial Real Estate (CRE) in cycle 5 (2015-2019) versus cycle 6 (2020-2024)
 - 1) CRE program began in cycle 4, conducted market interventions and worked more directly with customer. The program was initially focused on bringing SEM practices into CRE portfolios in the Northwest.
 - 2) Part of the market intervention was the Market Partner Program, which guided leading commercial real estate firms to integrate Strategic Energy Management (SEM) practices into their business operations, empowering them to capitalize on the resulting benefits. Part of this effort involved the Kilowatt Crackdown competition
 - 3) CRE built relationships with CRE trade and member organization (ex. BOMA Oregon, Seattle 2030)
 - 4) CRE developed resources and tools for commercial real estate professionals (Spark Tool, CRE Hub)
- B. Overview of BetterBricks commercial platform
 - 1) Currently leveraged by six commercial building programs
 - 2) Platform is the mechanism to share efficiencies and streamline efforts with market partners, it is not the intervention
 - 3) BetterBricks targets building professionals, e.g. building owners, property managers, engineers, architects, building operators, the key personal owning, managing and operating a commercial building
 - 4) The BetterBricks brand and website have existed for nearly 20 years as the Alliance's market facing commercial brand.
 - 5) Key channels for building awareness of the technologies and practices in NEEA's commercial programs
 - 6) Leveraged by current and future commercial building programs, such as High-performing HVAC, Luminaire Level Lighting Controls, Extended Motor Products,
 - 7) BetterBricks trusted, third party source for awareness and education about efficient, high-performing products and practices
 - 8) Survey found that BB brand had 90% recognition rate among our target audience
 - 9) Examples of leveraging the BetterBricks Platform:
 - a) Worked with NEEC to support multiple programs: Window Attachments case study on SGS in their newsletter, Condensing Roof Top Units did a technology training to their members and LLLC
 - b) We're sending out LLLC flyers with tools from the Tool Lending Library, they had LLLC materials at the West Coast Energy Management Conference, Chris spoke about LLLCs at IFMA Seattle education event, and they had materials and mentioned LLLCs at the Smart Buildings Center Net Zero panel.

Discussion:

- **Energy Trust:** If the relationships are with customers specifically, then concerned about customer touch and creating confusion in the market place. Want customers to see us as trusted third party, so this needs to be well-coordinated.
 - NEEA clarified that the site is designed to provide awareness but further questions are directed to the utility. This is part of why we're seeking to transition away from the commercial real estate relationship program towards the web-based awareness resource.
 - Energy Trust was comfortable with the concept as a passive information resource.
- C. Purpose for transition
 - 1) Trusted, recognizable brand among target audience
 - a) The BetterBricks Platform coordinates efforts for training and awareness building with trade and member orgs

- 2) Market Coordination
 - 3) Cost Savings
 - 4) Alliance Program Leverage
 - a) Examples of cross program efficiencies as well joint NEEA/Funder opportunities
 - i.) Seattle 2030, LLC had a technology training, better coordination and regional leverage, both SCL and PSE attended
 - ii.) Window Attachments scheduled to have a technology training
 - 5) This transition also moves away from one on one customer touch points CRE did, to more mid-stream activity as desired
- D. Demo of BetterBricks website and CRE Hub
- 1) CRE Hub is only commercial real estate resources – a subset of BetterBricks
 - 2) BetterBricks targets the broader audience
 - 3) Weblinks: <https://betterbricks.com/> | <https://betterbricks.com/cre-hub/#/>
- E. Regional Support

Discussion:

What resources and relationships would be most valuable in supporting your commercial program work?

- **Energy Trust:** Like IMT – more information gathering would be good – having a channel for obtaining information.
- **BPA:** *We're more focused on work with trade allies, seems this is geared towards a different audience?* NEEA confirmed that this target audience is more so decision makers (designers, builders, property owners etc.).
 - **BPA** added that the contractors appreciate the help when their customers are more informed and ready to say yes, wonder if there's any general broad cross-promotion we could do here to help contractors get to yes.
- Attendees in the room affirmed this was the right direction for this program.
- **Seattle City Light** agreed on direction. Utilities are pretty good about ensuring their field staff are well trained on resources.
- **BPA:** Continued case studies/examples of how BetterBricks is used is helpful.
- **NEEA** added that 2019 will be a transition year and additional updates will be provided as business planning progresses and decisions are finalized.

SEM HUB Energy Management Assessment Demo

Warren Fish & Rachel Zakrasek (NEEA) provided the overview. *The desired outcome is for committee members to be aware of the tools available to them and NEEA's online training platform. Refer to [slides 51-63](#) and page 14 in the [packet](#) for greater detail. If you have questions about these tools please contact Warren (wfish@neea.org) or Rachel (rzakrasek@neea.org).*

Presentation Highlights

- A. NEEA's Current Roles in SEM
 - 1) Convene an active community of SEM practitioners and deepen their capabilities by teaming up to tackle shared challenges
 - 2) Gather, vet and maintain available SEM tools and resources, and offer them in a configurable platform that plugs and plays with programs
 - 3) NEEA is working to address this need by developing a set of tools that support utilities and the market in building market capability, awareness and demand for SEM.
- B. SEM Hub Energy Management Assessment tool & Learning Management System Demo
 - 1) Offering a 1-hour webinar demo that goes into further detail:

- a) August 22 from 2:00-3:00 pm
 - b) <https://neea.adobeconnect.com/a1100903420/r7iofzxuifgs/>
 - c) This will be recorded
 - d) All SEM program managers, team members and interested colleagues are encouraged to attend
- 2) Energy Management Assessment (EMA) Tool : <https://ema.semhub.com>
- a) Shifted the learning management tool over to an in-house NEEA system that connects better with the SEM Hub, improves user and facilitator/admin experience, is customizable to the company hosting the training, and yields significant cost savings.
 - b) You are welcome to test the tool, please use the term “test” in the input data to indicate that
 - c) Question set was devised via a group of diverse stakeholders that came out of a research project.
 - d) Customization is a collaborative effort with NEEA; logo, color profile preferences and a few other details are required to build a draft site.
 - i.) Energy Trust of Oregon is currently customizing this tool for their Commercial SEM program.
 - ii.) It was originally noted in the meeting that PSE is also using this, which was incorrect; PSE is considering it.
 - e) Utility and customer information is securely protected.
- 3) [SEM Hub Online Courses using NEEA’s Learning Management System](#) (LMS)
- a) Central administration, documentation, tracking, reporting, and delivery of e-learning courses or training programs.
 - b) “Anywhere” and “Anytime” access to e-learning material
 - c) 17 online courses available to any user – when customizing this platform for use in your SEM program, you can also add own resources, learning modules and other content
 - d) Customizable platform is currently being utilized by Puget Sound Energy with at least 60 active program participants.
 - e) Utility and customer information is securely protected.
 - f) LMS Platform Capabilities

Discussion:

- **BPA** wondered what other NEEA programs are on the LMS platform. Currently, Ductless Heat Pumps, Top Tier Trade Ally, and Luminaire Level Lighting Controls NXT Level training are using it; others are exploring this as well.

Wrap up/Feedback on Meeting

- A. Public Comments
 - 1) None
- B. Wrap-Up/Meeting Feedback
 - 1) None
- C. Next meeting & topic ideas
 - 1) Q4 meeting is Thursday, October 18, 2018 in Portland at NEEA’s office
- D. Meeting adjourned at 3:13pm