

July 31, 2018

# *Commercial Advisory Committee*



- **Name, Organization, and...**

*If you chose to take time off, where would you go?*



# Agenda

- *Welcome, Introductions, Packet Review*
- *Commercial Portfolio Update, Review of Biz & Ops Plan*
- *Midstream Commercial Lighting Pilots*
- *Market Opportunities Follow Up – Part A*
- *Lunch!*
- *Market Opportunities Follow Up – Part B*
- *CAC Member Share Out/Round Robin*
- *Break!*
- *BetterBricks Platform & Proposed Consolidation with CRE Infrastructure in Cycle 6*
- *New SEM Hub EMA Tool Demo*
- *Adjourn*

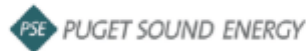
# *Informational Updates*

- CAC Conference Coordination (p.15)
- Organizational Change for CCE Program (p.16)
- Wa. Commercial Code Evaluation Study (pp.17-18)
- MRE Newsletter & CBSA Update (p.19)
- Emerging Technology Update (p.20)
- Codes & Standards Update (p. 21-24)
- C&I Lighting Regional Strategic Market Plan & Newsletter (p.25)



*Questions?*

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July 2018

# *Commercial Portfolio Update*

Emily Moore



  
neea

# Commercial Portfolio Q3 2018 Update

Window Attachments



Luminaire Level Lighting Controls




Commercial Code Enhancement



Reduced Wattage Lamp Replacement



Extended Motor Products




Top-Tier Trade Ally



Commercial Lighting Regional Resources

High Perf. HVAC



C/I Strategic Energy Management



Commercial Real Estate



LONG-TERM  
MONITORING  
ONGOING

# 2018 Focus Areas

- Advancing Luminaire Level Lighting Controls
- Transitioning Reduced Wattage Lamp Replacement
- Leveraging Distributor Platform
- Launching two new initiatives
- Continuing to engage on the C+I Lighting Regional Strategic Market Plan

2018 OPERATIONS PLANNING

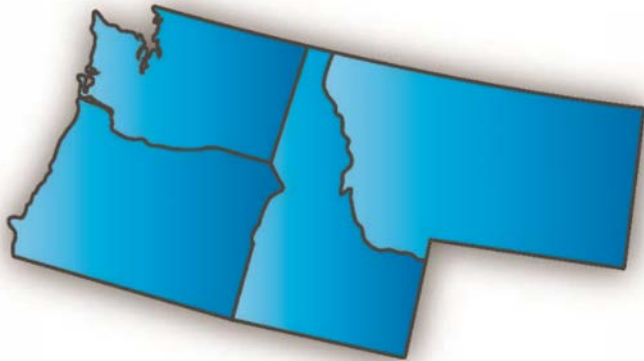




# Update: 2018 Focus Areas

Program	Key Progress
 <p>Luminaire Level Lighting Controls</p>	<ul style="list-style-type: none"><li>• Preparing for advancement of program to market development in early 2019</li><li>• Continuing Advanced Lighting Controls training in collaboration with utilities</li><li>• Outreach to top manufacturers for more sales focus in Northwest</li></ul>
 <p>Reduced Wattage Lamp Replacement</p>	<ul style="list-style-type: none"><li>• <b>49%</b> market penetration of low wattage lamps</li><li>• Eight of 14 distributors are &gt;50% LW market penetration</li><li>• Planning transition to LTMT in 2019</li><li>• Continuing focus in 2018 on leverage of the Distributor Platform</li></ul>
 <p>Extended Motor Products</p>	<ul style="list-style-type: none"><li>• Added to portfolio in Q1</li><li>• Launched XMP Pumps Research Plan and Technical Work Group</li><li>• Gathering data on pump characteristics and operations</li></ul>
 <p>High Perf. HVAC</p>	<ul style="list-style-type: none"><li>• Added to the portfolio in Q2</li><li>• Beginning market characterization work</li><li>• Recruiting 3 additional pilot projects to gather additional data on school and retail installations</li></ul>

# *C+I Lighting Regional Strategic Market Plan: 2018 Priority Strategies*







Increase adoption of advanced lighting control systems



Inform program planning for commodity lamps (TLED, HID-LED, CFL-LED, etc.)

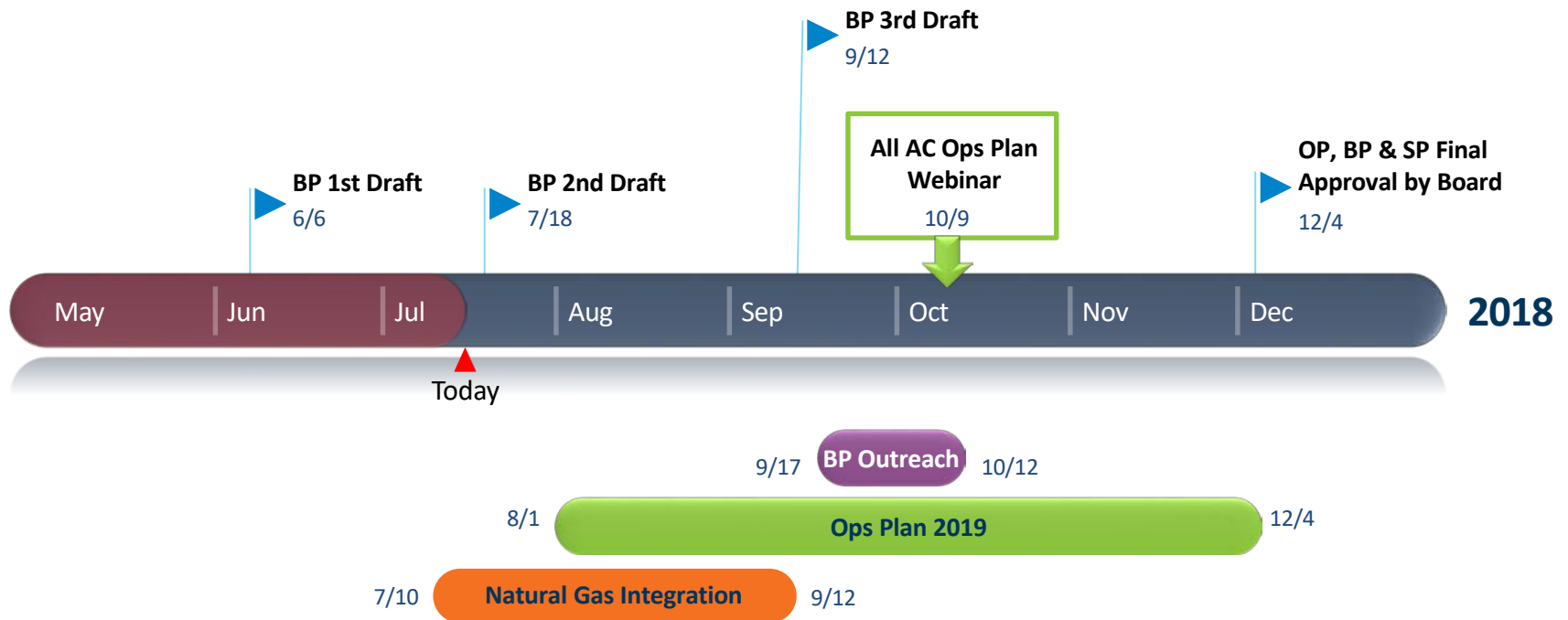
# Update: Other programs

Program	Key progress
 <p>Window Attachments</p>	<ul style="list-style-type: none"><li>• Support for AERC is strong, and growing</li><li>• Refining target market to focus on commercial and multi-family</li></ul>
 <p>Commercial Code Enhancement</p>	<ul style="list-style-type: none"><li>• Finalized State Coordination Plans for WA, OR and ID; began development for MT</li><li>• Developed supporting material for two proposals for the WA code</li></ul>
 <p>Top-Tier Trade Ally</p>	<ul style="list-style-type: none"><li>• Continued traction of NXT Level 1: 137 individuals and 44 companies have received designation to-date</li><li>• Planning for rollout of NXT Level 2 in Q4 in Seattle area</li></ul>
 <p>C/I Strategic Energy Management</p>	<ul style="list-style-type: none"><li>• EMA tool updated and available for customization</li><li>• Leveraging DOE funds to support 50001 Ready and Community SEM</li><li>• Planning for 8<sup>th</sup> annual Fall workshop of NW SEM Collaborative</li></ul>
 <p>Commercial Real Estate</p>	<ul style="list-style-type: none"><li>• Continuing support of City of Seattle's TUA and the use of Spark to identify deep energy retrofit opportunities</li><li>• Partnering with industry associations to promote awareness of SGS and LLLC</li></ul>

# *Discussion*

- What questions do you have?
- Which programs do you feel you need more information or follow-up on?

# Business and Operations Planning Timeline





# ***Commercial Changes in draft 2020-24 Business Plan***

- 7 Portfolio Categories
  - Lighting, HVAC, Building Envelope, Motor-Driven Systems, New Construction, Consumer Products, Water Heating
- Decrease in Infrastructure investments

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# *CAC Update: Distributor Platform*

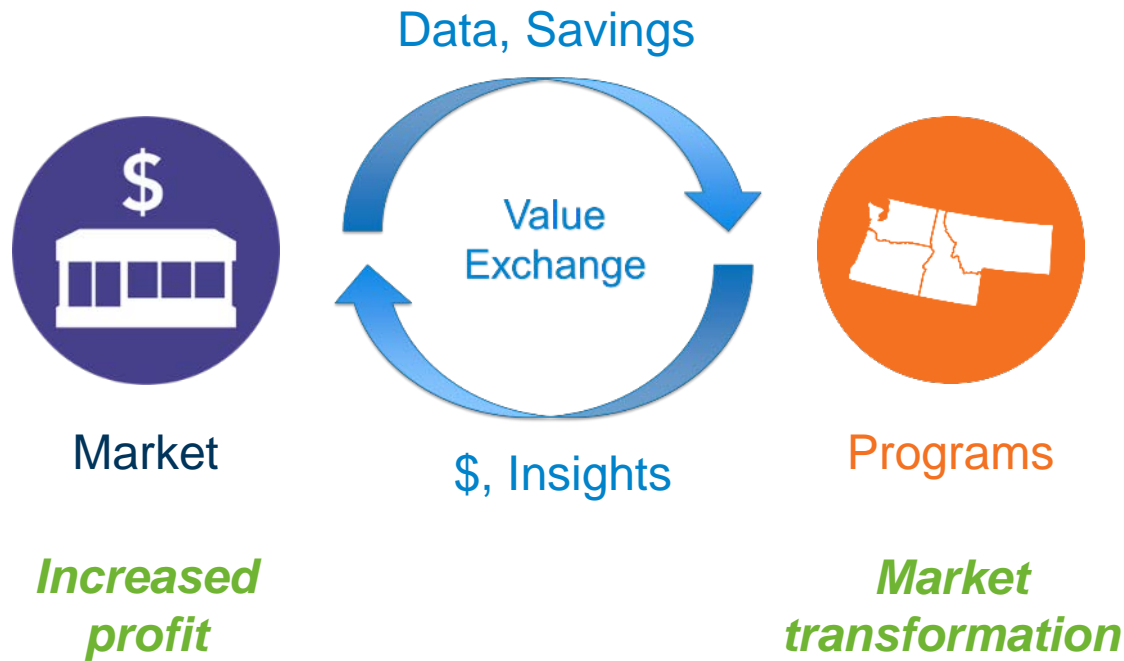
Elaine Miller



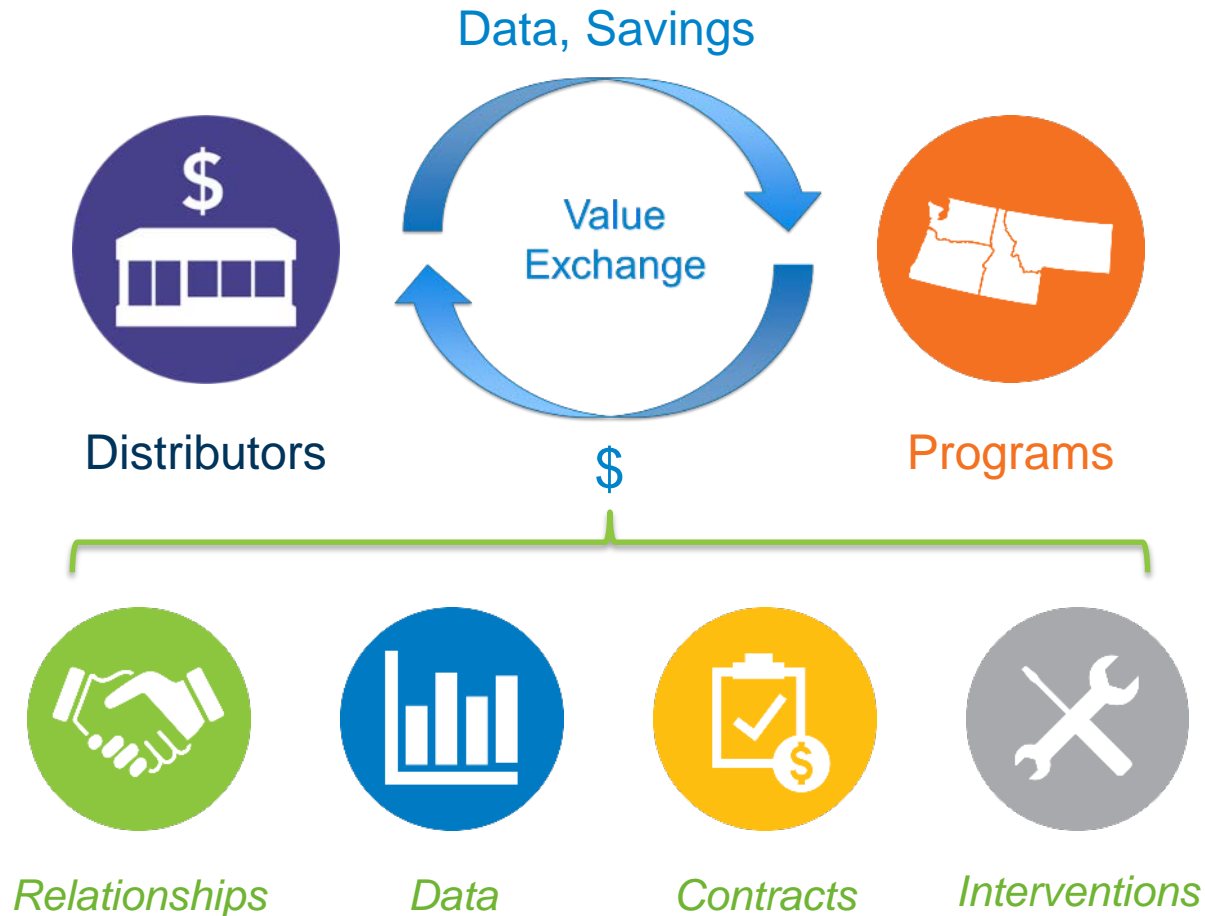
# *To Cover Today*

- What is the Distributor Platform?
- Pilot update
- Discussion on Opportunities Pilots Provide the Region
  - How do you expect your programs to engage with commodity lamps in your portfolio in the coming years?
  - How can these pilots help inform and assist your portfolio as it evolves?

# *Distributor Platform*

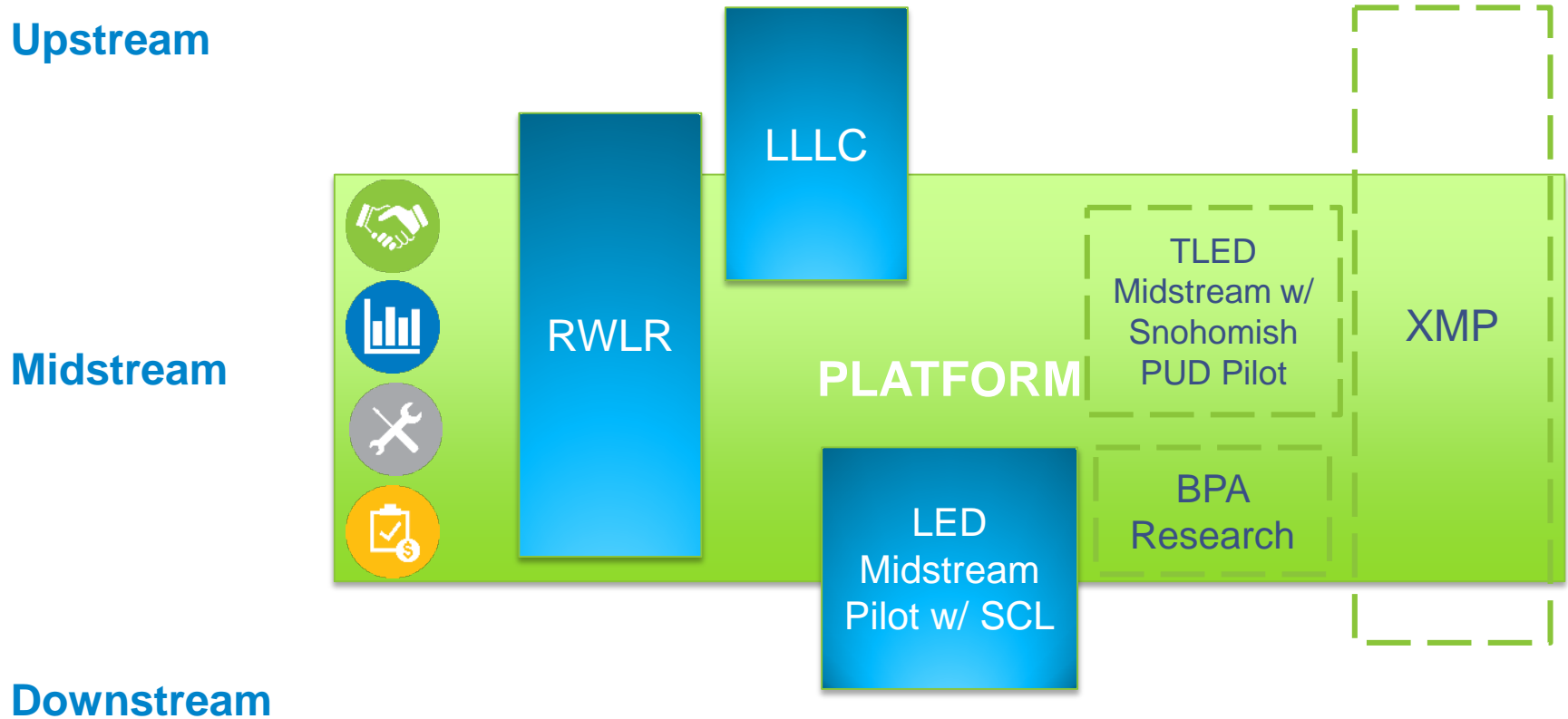


# Distributor Platform Assets





# Programs Engage Platform To Support Goals

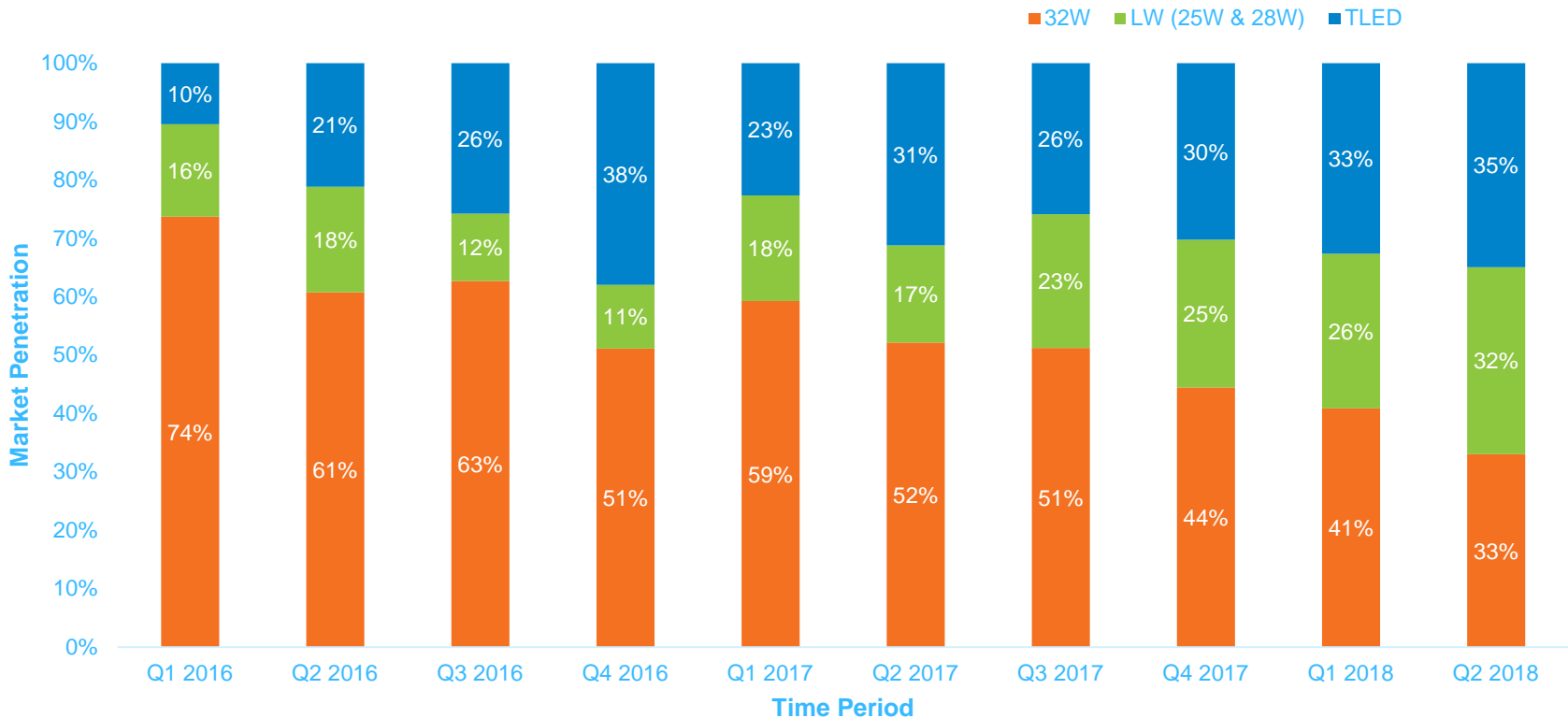


# *Lighting Market is a Moving Target...*

- Prices going **down**, especially replacement lamps
- Baselines going **up**
- Incentives going **down**, but programmatic C&I lighting savings still going **up** ???!

# RWLR T8 Market Trends

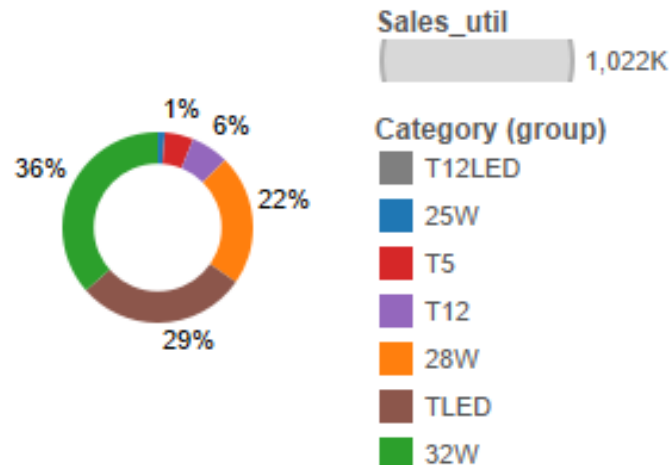
## T8 Market Penetration, by Quarter



LW, TLED, and 32W have roughly equal market share in Q2 2018

# Current Landscape Gives Us Some Problems to Solve

Sales By Category



Snap shot of 2018 sales to date

- How do we send the right signal to customers to not just do a TLED, but a LED troffer with controls?
- How do we transition these replacement products? Some stay around a long time.
- How do we still capture savings but do it at radically less program costs?

# ***Pilots: Regional Goals***

- Maintenance market: Can we reach more of the market with a lighter touch?
- Regional opportunity: Is there a viable midstream model for other Northwest utilities?
- Other markets: Can we leverage the platform for measures beyond lighting?
- ”Commodity” products/measures: How does the platform enable strategies for measures that are becoming more mature? (and eventually will exit programs)?



# 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	\$

# *SCL Pilot Goals*

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

# *SCL Pilot Components*

- Two-pronged approach to 7 LED product categories
  - (low) point-of-sale per lamp incentives
  - market penetration bonuses across branches and categories
- Phase 1: 9 distributors (RWLR participants), covering 12 branches
- Phase 2 (January 1, 2019): additional distributors enrolled, MT incentive structures
- Full Category Data (efficient and inefficient products)
- Removal of measures from downstream programs
- Timeline: August 1, 2018-December 31, 2019

# ***Snohomish PUD Pilot Goals***

## **Test a new program approach to commodity LED replacement lamp measures**

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

# *Snohomish PUD Pilot Components*

- TLED measures only
- 3-4 branches in Snohomish PUD territory (also RWLR participants)
- Test MT strategies relative to per lamp incentives (e.g. market penetration bonuses, etc...)
- Timeline:
  - January 1, 2019 launch (tentative)
  - 12-month duration



## Discussion

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

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# *Market Opportunities Follow-Up: Part A*

Debbie Driscoll



# Ideas to Explore in Future CAC Meetings:

1. **Cost effectiveness challenges due to shifting baselines and smaller slivers of savings across many loads**
2. **New measure opportunities**
  - a) Smart buildings & automation
  - b) Data centers
  - c) Cryptocurrency
  - d) Indoor horticulture beyond cannabis
  - e) Plug load management
  - f) Electric vehicles
3. **Workforce training within utility and trade ally communities**
4. **Demand management and 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 DER**
6. **Building systems data brings the possibility of new services, but confusion/concern on how to engage**
7. **Collaboration with each other and with trade allies is an essential tool to addressing the challenges ahead**

Lunch Time Exercise: ***Pick your top 3 ideas for future CAC discussions***



***Lunch!***

# *Cool Adventures!*



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# *Market Opportunities Follow-Up: Part B*

Debbie Driscoll



# ***CAC Member Share-out***

***Break !***

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# ***BetterBricks Platform: Consolidation with Commercial Real Estate Infrastructure***

Natalie Fish





# *Ground to Cover Today*

CRE and BetterBricks Overview

BetterBricks Platform: Tools, Resources, Relationships

Discussion on Regional Leverage



# Commercial Real Estate (cycle 4)



*Relationships*

CRE built relationships with property management firms

ex. Unico, CBRE, AAT



*Tools &  
Resources*

SEM practices and property manager competitions and events

ex. Kilowatt Crackdown, Market Partners Program



# Commercial Real Estate (cycle 5)



## *Relationships*

CRE built relationships with CRE trade and member organization  
ex. BOMA Oregon, Seattle 2030



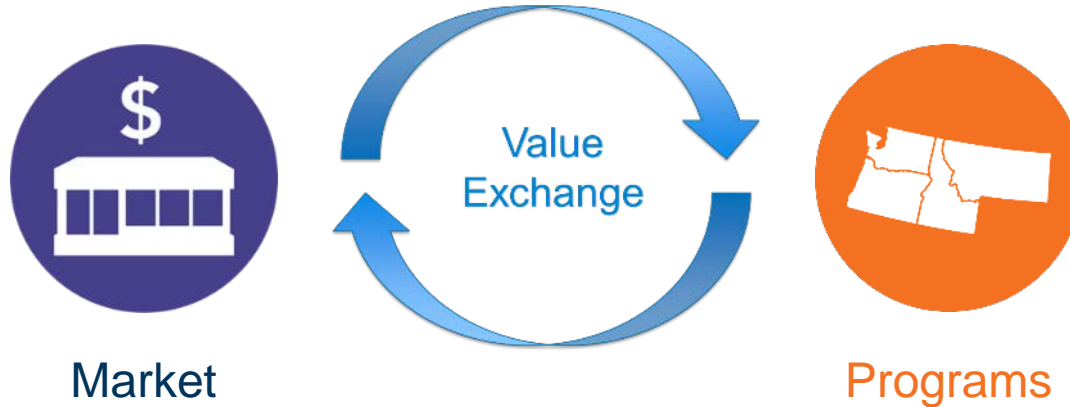
## *Tools & Resources*

CRE developed resources and tools for commercial real estate professionals  
ex. Spark Tool, CRE Hub

# *BetterBricks*



# *Platform Definition*



**A system to enable efficient value exchange  
between market partners and programs**

# BetterBricks- Commercial Platform



*Relationships*

Relationships with trade and member organization

ex. Northwest Energy Efficiency Council, Institute for Market Transformation, Better Buildings



*Brand and Channels*

BetterBricks brand, website, newsletter



*Data Collection*

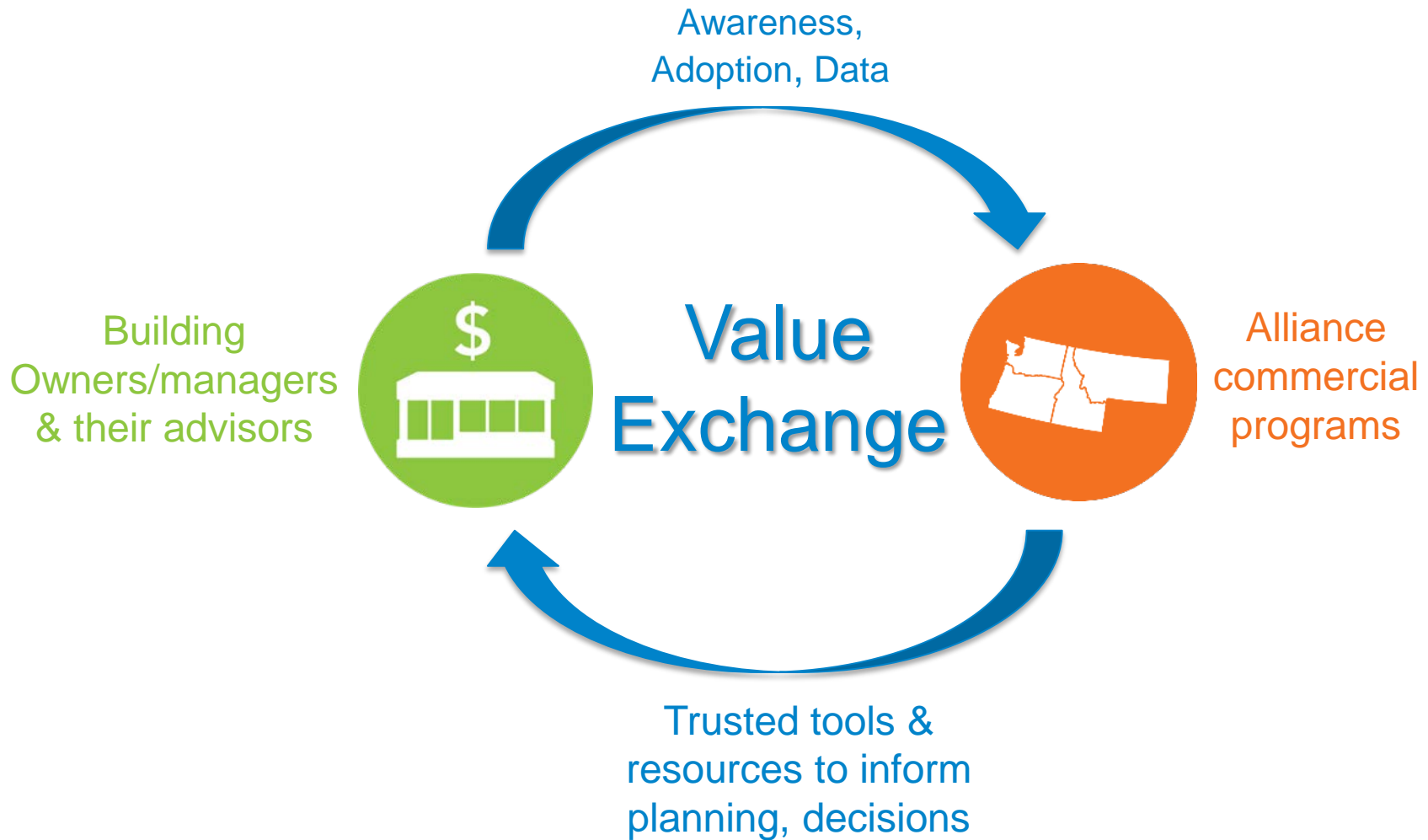
BetterBricks Community (market research online community), digital surveys, web analytics



*Tools & Resources*

Access to reduced wattage lamp replacement calculator, CRE Hub, Spark, etc.

# BetterBricks Platform



# *Why Transition CRE Relationships and Tools to BetterBricks Platform?*



BetterBricks trusted, recognizable brand among target audience



Market Coordination



Cost Savings



Alliance Program Leverage

# BetterBricks Website

SEARCH BLOG CONTACT CREATE A COLLECTION



ABOUT SOLUTIONS CASE STUDIES RESOURCES UTILITY PROGRAMS

## The efficient way to better business

Offering resources, support  
and cost-effective solutions  
that lead to holistically  
efficient buildings



# CRE Hub

## CREHUB

Tailored to your needs and preferences, the CRE Hub helps you narrow your list of resources to quickly access the ones you need the most for building design, use, operation, and maintenance.

Select a topic to begin



### Building Lifecycle

From maintenance to major renovation, learn how to improve the efficiency of your existing building.



### Non-Energy Benefits

Find resources to improve the health, safety or aesthetics of your building.



### Problems & Solutions

If you have a specific problem to solve, use these resources to find your solution.



### Technology

Search by technology type to find the specific product you'd like to learn about.



# Commercial Programs Currently Leveraging BetterBricks Platform



# *Discussion*

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





*Thank you*

*[nfish@neea.org](mailto:nfish@neea.org)*

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# Cool Adventures!





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# ***SEM Hub Tools & Resources***

Warren Fish

Rachel Zakrasek

Nick Leritz



neea



# NEEA's Current Roles in SEM

- Convene an active community of SEM practitioners and deepen their capabilities by teaming up to tackle shared challenges
- Gather, vet and maintain available SEM tools and resources, and offer them in a configurable platform that plugs and plays with programs

# SEM Hub: EMA & LMS Demonstration

# Energy Management Assessment (EMA) Tool



The screenshot shows the landing page for the SEM Hub Energy Management Assessment Tool. At the top left is the SEM Hub logo. To its right, the text reads "Energy Management Assessment Tool". Below this, the main heading is "COMPLETE YOUR ENERGY MANAGEMENT ASSESSMENT". A paragraph of text describes the tool's purpose: "The Energy Management Assessment (EMA) Tool offers a strategic and confidential analysis of your organization's current energy management business practices and specific areas of opportunity. The EMA Assessment and other SEM Hub resources can then help you develop or improve your Strategic Energy Management (SEM) practices for your organization." Below this is a section titled "TAKING THIS ASSESSMENT WILL HELP YOU:" followed by a bulleted list of four benefits: "Review your current energy practices", "Identify priority actions for improvement", "Implement an energy management program", and "Compare your practices against your peers".

**semhub** Energy Management Assessment Tool

## COMPLETE YOUR ENERGY MANAGEMENT ASSESSMENT

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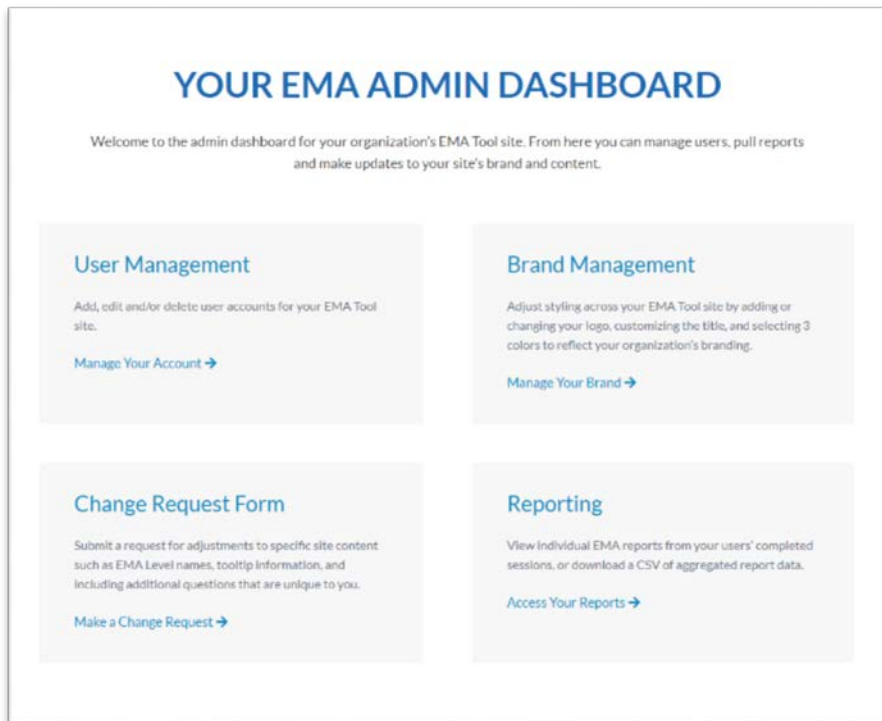
**TAKING THIS ASSESSMENT WILL HELP YOU:**

- ✓ Review your current energy practices
- ✓ Identify priority actions for improvement
- ✓ Implement an energy management program
- ✓ Compare your practices against your peers

- Newly updated and improved
- Customizable
- NEEA owned for sustainable management



# EMA Updates and Improvements



- Improved user experience
- Customization
- Admin dashboards
- Reporting

# Customizable EMA

The screenshot shows the user interface of the Energy Management Assessment Tool. At the top left is the logo for the Global Cold Chain Alliance. The header includes the text 'Energy Management Assessment Tool' and a link 'BACK TO SEMHUB.COM'. The main heading is 'COMPLETE YOUR ENERGY MANAGEMENT ASSESSMENT'. Below this is a paragraph describing the tool's purpose. A 'Session Dashboard' box on the right contains a 'Go to Dashboard' button. A list of benefits is provided under the heading 'TAKING THIS ASSESSMENT WILL HELP YOU:'. At the bottom, there are links for 'Review the quick start guide' and 'Take a sample assessment'. The text 'How it works' is partially visible at the bottom of the interface.

**GLOBAL COLD CHAIN ALLIANCE®** | Energy Management Assessment Tool | [BACK TO SEMHUB.COM](#)

## COMPLETE YOUR ENERGY MANAGEMENT ASSESSMENT

The Energy Management Assessment (EMA) Tool offers a strategic and confidential analysis of your organization's current energy management business practices and specific areas of opportunity. The EMA Assessment and other SEM Hub resources can then help you develop or improve your Strategic Energy Management (SEM) practices for your organization.

**TAKING THIS ASSESSMENT WILL HELP YOU:**

- Review your current energy practices
- Identify priority actions for improvement
- Implement an energy management program
- Compare your practices against your peers

[Review the quick start guide](#) → | [Take a sample assessment](#) →

How it works

**Session Dashboard**  
Find and edit current or past session rep from your session dashboard.  
[Go to Dashboard](#)

- Domain
- Logo and branding
- Terms & Conditions
- Admin dashboard enables user management and reporting

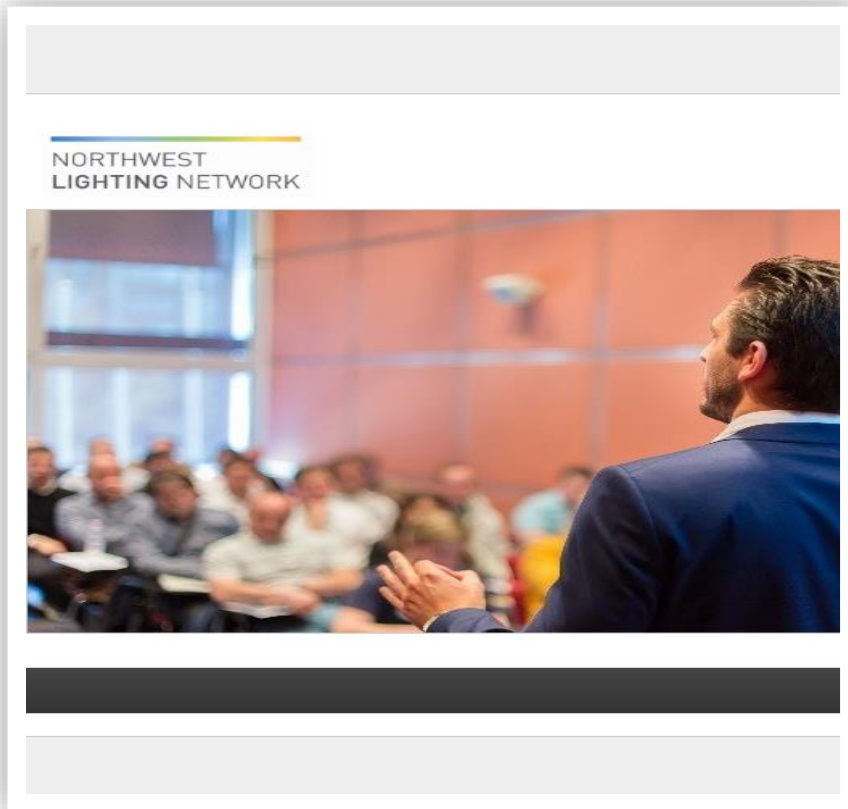
# ***EMA Tool Demo***

# SEM Hub Online Courses via Learning Management System (LMS)



- Anytime/anywhere access
- Central administration
- 17 online courses available to any user
- Customizable LMS platforms

# Customizable LMS Platforms



- Domain
- Logo and branding
- Home page content
- Pick and choose SEM Hub online courses
- Add your own resources and learning modules

# *LMS Platform Capabilities*

- Formal and informal learning
- Administer surveys, tests and assignments
- Hold webinars
- Award certificates & CEU's
- Dashboard & reporting features
- Custom registration
- Custom email notifications
- Newsletter capability
- And much more!



# ***LMS Demo***






RESOURCES FOR TODAY'S  
ENERGY **MANAGEMENT**

**JOIN THE DEMO:**

**August 22, 2018, 2:00-3:00 pm**

**[https://neea.adobeconnect.com/\\_a1100903420/r7iofzxuifgs/](https://neea.adobeconnect.com/_a1100903420/r7iofzxuifgs/)**

Learn more at: **[SEM HUB.com](https://SEM HUB.com)**



## Energy Management Assessment (EMA) Tool

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[Get Started or Take a Sample Assessment](#)

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# *Meeting Wrap-Up*

- Any public comments?
- Any feedback on any of the following?
  - Agenda
  - Pre-meeting packet materials
  - What worked?
  - What was missing, needs improvement?
  - Did you understand relevance to THIS committee?
  - Anything else?

# Thank you, CAC!!

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