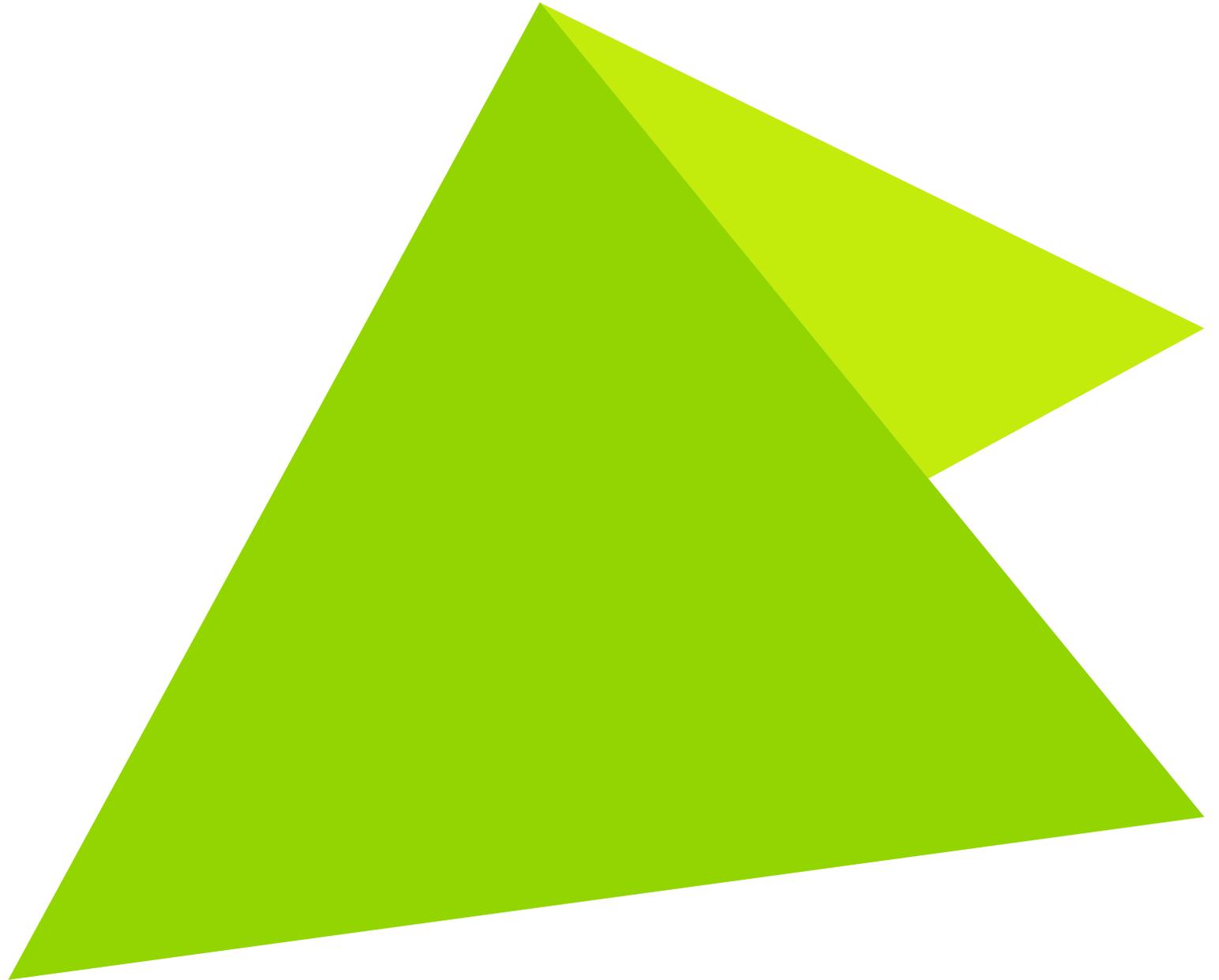




# Ongoing Engagement and Persistence in C&I Measures

EE SAG Small Group Meeting

February 22, 2021



# Purpose

How should effective useful life (EUL) be impacted by ongoing engagement?

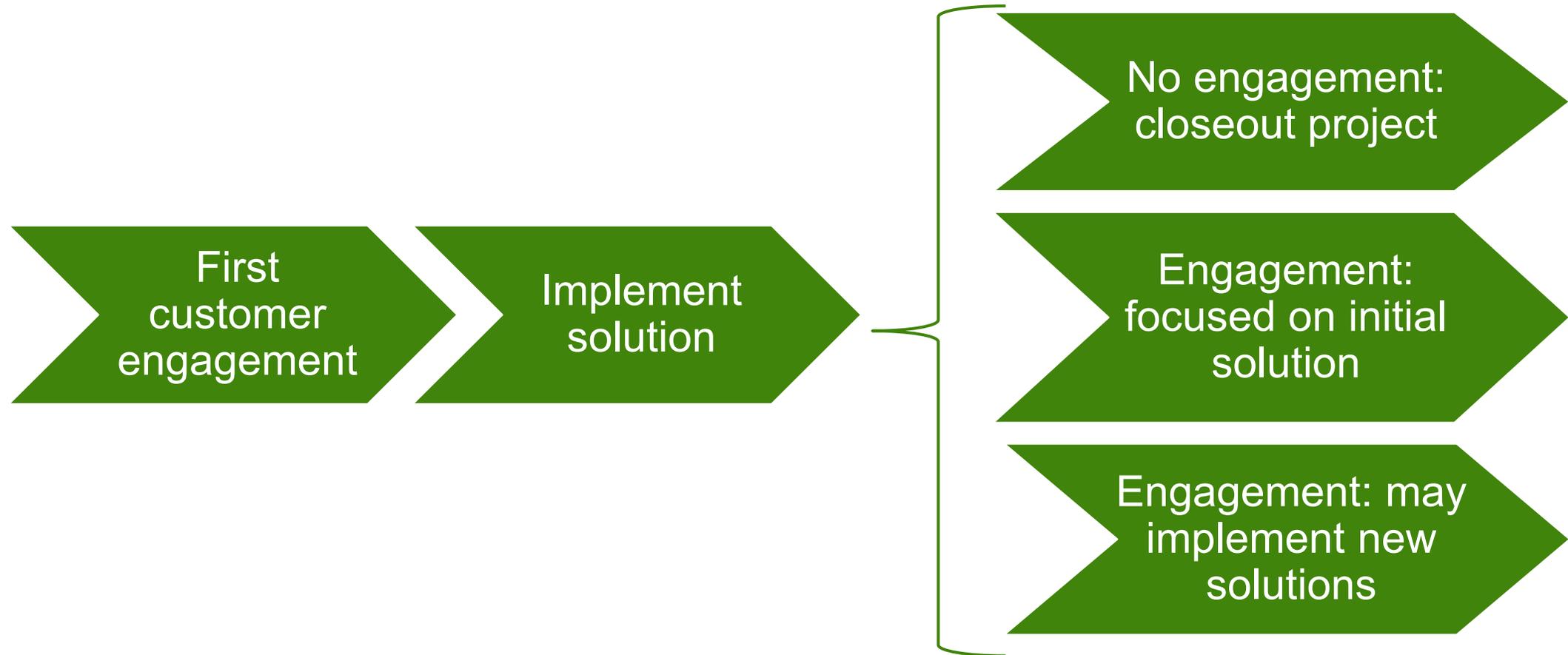
**Keep in mind: In Illinois, the EUL must be established when the solution is initially implemented and is never retroactively revised.**

- Engagement could take multiple forms
  - Monitor meter data and reach out to the customer as issues are seen
  - Follow up regularly with the customer via phone or email
  - Dispatch a service provider to the customer's site post implementation
- Utilities are trying to establish the value of ongoing engagement and want guidance on its impacts on EUL
  - Cost is conducting the engagement
  - Some benefits may be unrelated to FEJA goals (such as a customer's positive feelings about their utility or energy efficiency)



# Program Process

With and without ongoing engagement



# Four (4) Scenarios of Engagement

## Initial and New Solutions

The term “solution” is used instead of measure to identify an action such as temperature setpoint adjustment. A project is a set of solutions happening at a point in time.

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1

Initial solution only,  
no new solutions  
are suggested

2

Initial solution and  
new solutions are  
tracked together  
within the same  
project

3

Initial and new  
solutions are tracked  
separately and  
submitted as different  
projects

4

Engagement occurs  
on a regular cadence  
regardless of increase  
or decrease in  
savings

# Ongoing Engagement Scenario

Initial solution only, no new solutions are suggested

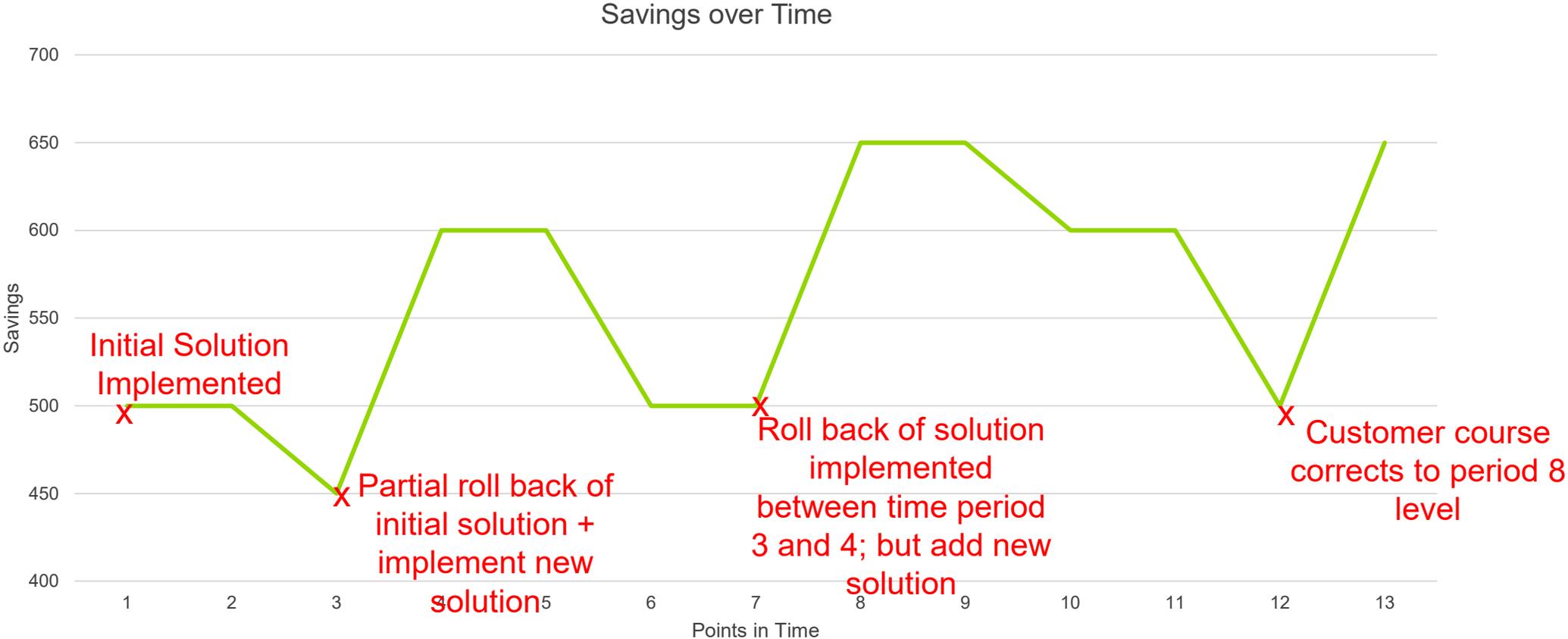
X marks points of engagement



# Ongoing Engagement Scenario

Initial solution and new solutions are tracked together within the same project

X marks points of engagement



# Ongoing Engagement Scenario

Initial and new solutions are tracked separately and submitted as different projects

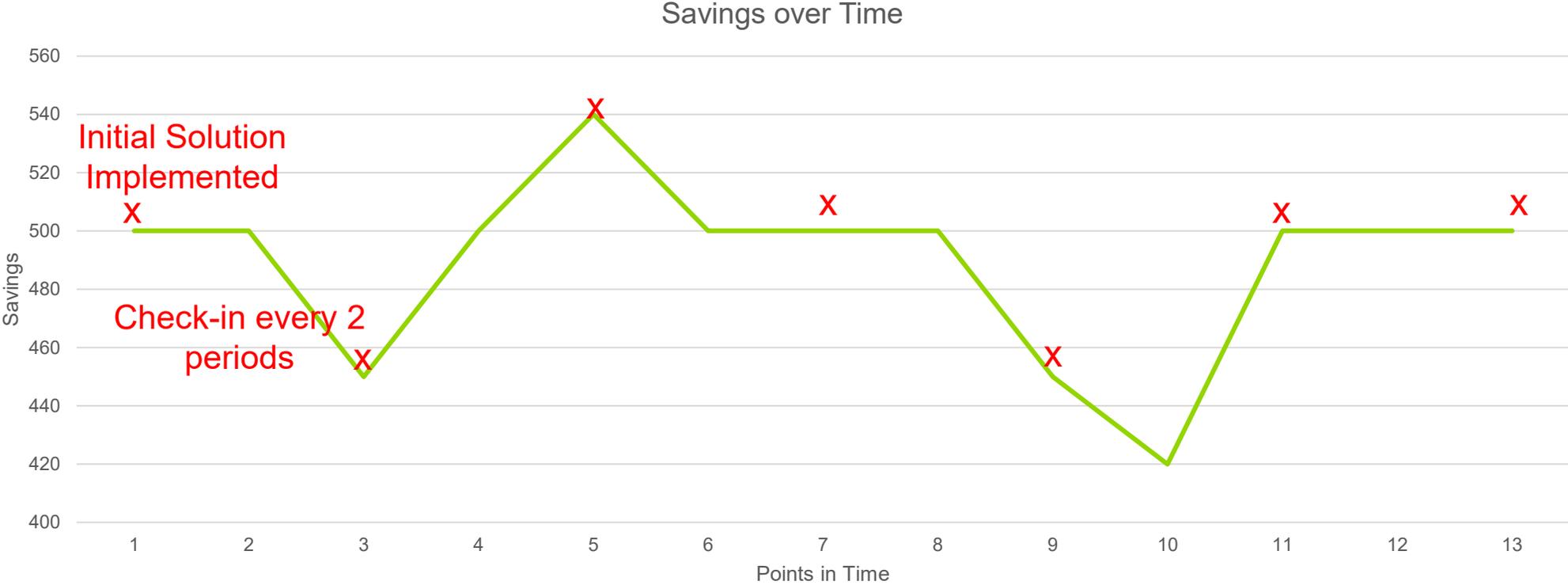
X marks points of engagement



# Ongoing Engagement Scenario

Engagement occurs on a regular cadence regardless of increase or decrease in savings

X marks points of engagement



# Purpose

Discuss the following questions:

How should EUL be impacted by ongoing engagement?

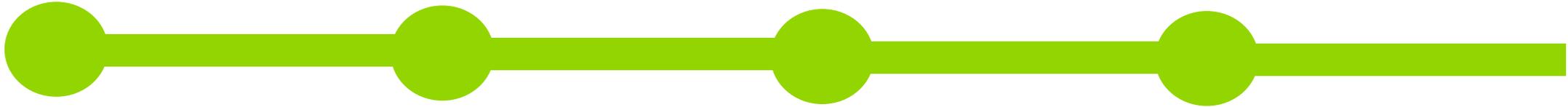
Does it matter which scenario (initial and/or new solutions) we're discussing?

Keep in mind: In Illinois, the EUL must be established when the solution is initially implemented and is never retroactively revised.

# How should EUL be impacted by ongoing engagement?

Is the answer different for the scenarios described herein?

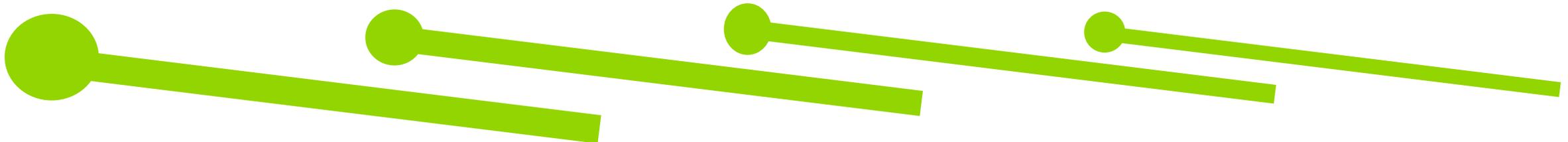
The EUL is short but the utility can consecutively claim the same customer/solution combination if the measure is still in place or re-implemented.



The EUL is long and based on the expected engagement length.



The EUL is somewhere in-between. There could be a plethora of options here; one example, follow the model of Home Energy Reports (HER).



# How should EUL be impacted by ongoing engagement?

Is the answer different for the scenarios described herein?

## SHORT

- EUL is based on how frequently the implementer has to renew or refresh the savings
- Clean to measure the average length between re-engagements
- The utility reclaims the same customer multiple times for the same solution if they successfully re-engage

## LONG

- The EUL is as long as the implementer continues to engage
- The length of the engagement may not be known when the EUL is set (the implementer could go out of business or the utility could end the contract)
- Re-engagement may not always be effective and thus does not guarantee ongoing savings

## IN-BETWEEN

- Different possibilities
- One example is HER
  - The savings decay from the initial engagement and then claim incremental savings from each re-engagement; but new savings may replace decayed savings
- Complicated for the implementer, the utility, and the evaluator to track and implement.
- May not be possible for programs that do not track consumption data.
- May not be possible to differentiate between solutions
- Requires research to estimate decay values

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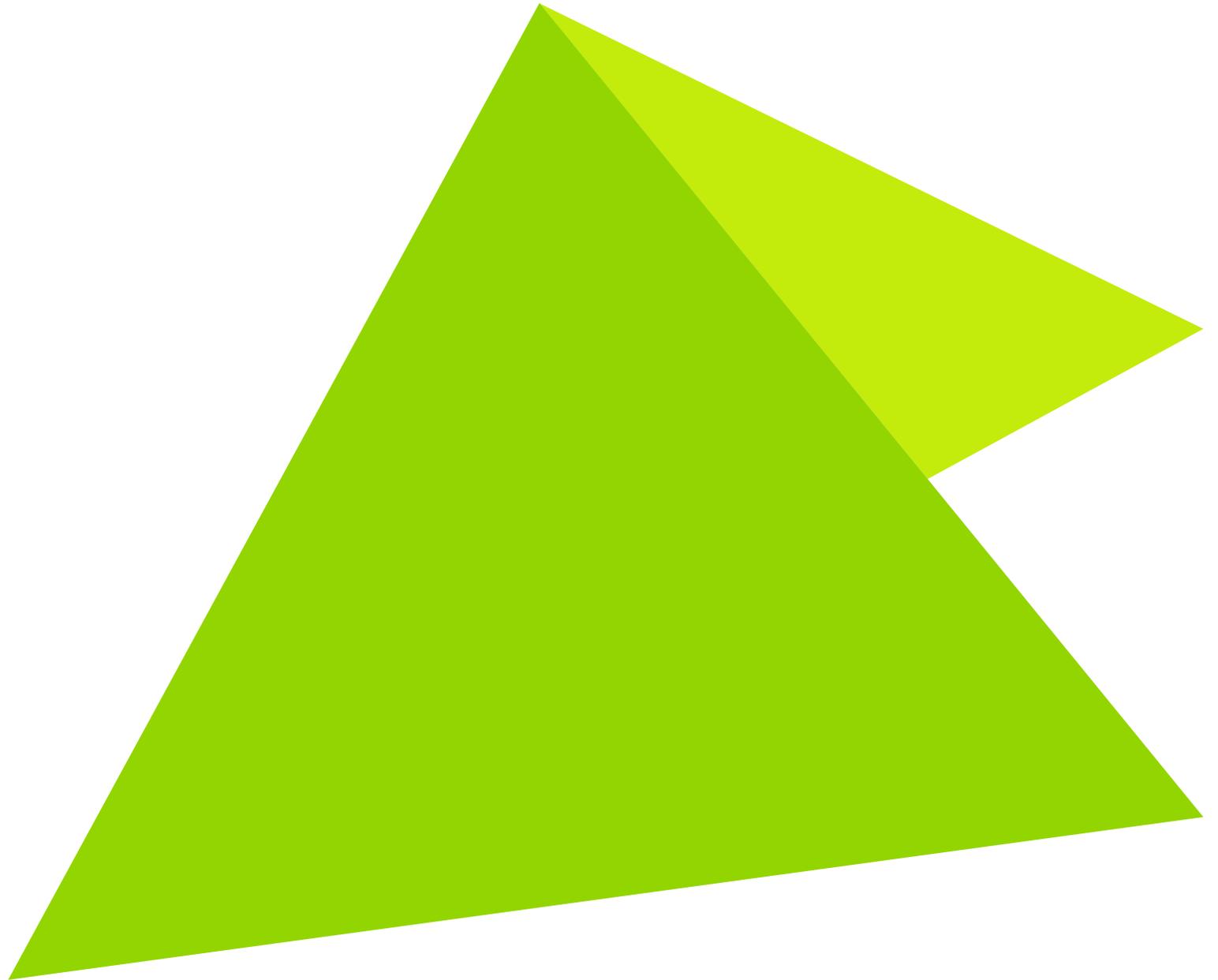
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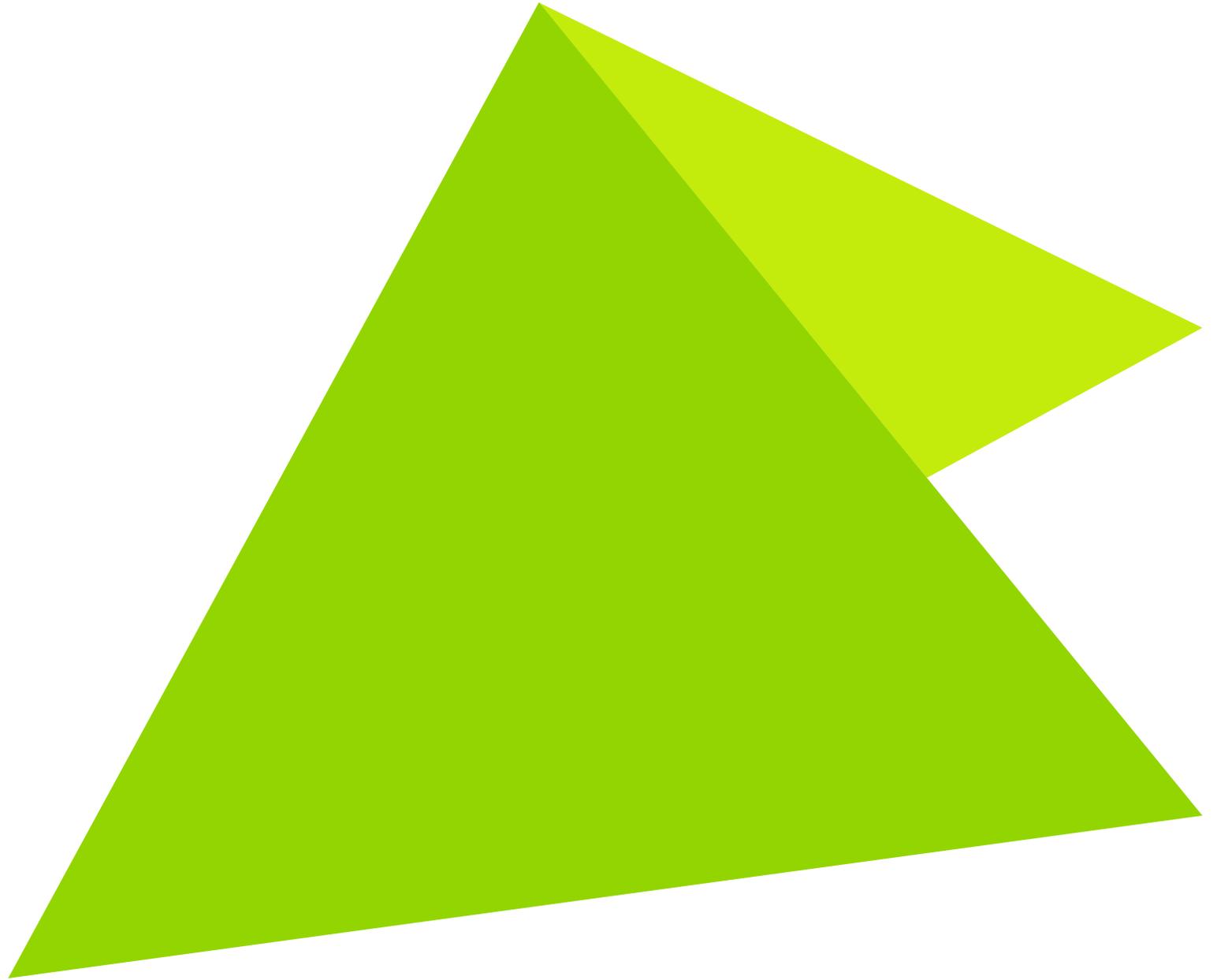




# CY2021 and COVID-19

EE SAG Small Group Meeting

February 22, 2021



# Normalization Options

For CY2020, stakeholders opted for evaluation to normalize CY2020 savings for all years of the EUL (option 1 below). Guidehouse wants to raise the question of normalization for CY2021 and the decision timeline.

	Description	Pros	Cons
1	Normalize savings for all years of EUL	<ul style="list-style-type: none"><li>• Does not benefit or penalize the utilities for higher or lower CY2021 or lifetime savings than expected due to the pandemic</li><li>• Follows our usual procedure for most programs of normalizing for weather and non-routine events</li><li>• Measures deemed in TRM will effectively be normalized and this option avoids inconsistency</li></ul>	<ul style="list-style-type: none"><li>• May over or understate actual CY2021 savings</li></ul>
2	Do not normalize savings in CY2021; normalize other years of EUL	<ul style="list-style-type: none"><li>• Captures savings that actually occur in CY2021 while not affecting savings for the rest of the EUL</li></ul>	<ul style="list-style-type: none"><li>• Benefits or penalizes the utilities for higher or lower CY2021 savings than expected due to the pandemic, affects gas and electric differently</li><li>• Inconsistent with measures in the TRM which will effectively be normalized</li></ul>
3	Do not normalize savings in any year of EUL	<ul style="list-style-type: none"><li>• Captures savings that actually occur in CY2021</li></ul>	<ul style="list-style-type: none"><li>• May misstate lifetime savings if CY2021 savings are not an accurate reflection of savings for the rest of the EUL</li><li>• Benefits or penalizes the utilities for higher or lower lifetime savings than expected due to the pandemic</li><li>• Inconsistent with measures in the TRM which will effectively be normalized</li></ul>

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