



North American Energy Standards Board

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NAESB DSM-EE ACTIVITY SUMMARY FEBRUARY 22, 2008

DSM-EE PROJECT – ASSIGNED TO RETAIL GAS, RETAIL ELECTRIC AND WHOLESALE ELECTRIC:

- **April 11, 2007:** Several representatives of the NAESB WEQ, REQ, and RGQ as well as representatives of the US Department of Energy, US Environmental Protection Agency, FERC, and other industry experts met at the Department of Energy offices in Washington, D.C. to discuss the NAESB effort to draft business practices for Demand Side Management and Energy Efficiency. Ongoing Energy Efficiency and DSM projects and programs by other groups (such as NAPEE) were reviewed by the meeting attendees. The following resolution outlines the scope of the initial effort by NAESB to draft business practice standards for these topics: It was decided that NAESB should begin its standards development focus on measurement and verification of energy savings and peak demand reduction from both a wholesale and retail electric market perspective. A future schedule of meetings for DSM and Energy Efficiency should be posted on the NAESB website shortly.
- **May 24, 2007:** 75 NAESB members, FERC, DOE, EEI, ISO and State regulatory personnel, experts in DSM and energy markets participants (22% more than the first meeting) met in person and by conference telephone at NAESB headquarters in Houston to refine the scope of Phase 1 activities, agreeing on a specific list of tasks and assigning subgroups of volunteers to work on each task. At this meeting, no less than 28 individuals spoke to the group.
- **June 18, 2007:** 51 NAESB members, FERC, DOE, EEI, ISO and State regulatory personnel, experts in DSM and energy markets participants met in person and by conference telephone at BGE offices in Baltimore to further refine the scope of Phase 1 activities by reviewing the initial task list and revising it with more detailed deliverable requirements and dates, and with identification of base documents to support completing each task.
- **July 26, 2007:** 46 NAESB members, FERC, DOE, EEI, ISO and State regulatory personnel, experts in DSM and energy markets participants met in person and by conference telephone at AGA offices in Washington DC to present deliverables of existing demand response measurement and verification protocols and a list of 41 possible topics and subtopics for NAESB model business practices. The task force reviewed all 41 possibilities, deciding whether to draft MBPs and which ones can be grouped together.
- **September 14, 2007:** The results of the meeting including possible standards text were sent out for comment including notes, considerations and possible standards text. Comments were requested on each of the nine standards development areas including whether the remarks were directed to wholesale or retail markets, pre program evaluation or post implementation evaluation, or to DSM or EE projects.
- **September 25, 2007:** A DSM-EE meeting was held in Austin, Texas hosted by ERCOT. The purpose of the meeting was to review the comments, determine the level of progress made towards the task list and determine if adjustments to the task, focus or schedule were needed. When reviewing the comments it was determined to focus in five areas specific to demand response programs, and develop business practice standards that would prove helpful – (1) DR programs administered by ISOs and RTOS in the wholesale markets, (2) DR programs administered by utilities in wholesale markets, (3) DR programs administered by utilities in the retail markets, (4) a glossary to support the DR programs, and (5) a preamble to put the business practice standards in context. To focus on the DR programs, each of the three areas outlined will develop a matrix that describes the aspects of the DR programs in effect today, planned, or has been in effect in the past.
- **November 6, 2007:** Several of the NAESB leadership met with Commissioners Kerr and Ervin of NC to gain further understanding of expectations for DSM-EE NAESB activity for electricity for the retail markets.
- **November 11, 2007:** NAESB participated in a panel on DSM-EE at the NARUC Annual Meeting in Anaheim.
- **November 30, 2007:** Meeting hosted by Dominion in Richmond. During the meeting, each of the five groups described the progress made and plans to date. Drafts of the three matrices were reviewed, as was a draft glossary



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and outline for the preamble. It is possible that the two wholesale matrices will be combined, as The calendar for 2008 was also set. The next meeting is scheduled for January 23 in Baltimore hosted by BGE.

- **December 3, 2007:** A meeting was held with Commissioner Mason of Ohio to gain further understanding of expectations for DSM-EE NAESB activity for natural gas for the retail markets.
- **January 23, 2008:** Meeting hosted by BGE in Baltimore. During the meeting, each of the four task groups (wholesale matrix, retail matrix, glossary and preamble) discussed their progress with a focus on demand response programs and aspects of those programs that would be relevant to development of business practices for measurement and verification.
- **Planned, March 28, 2008** – Planned meeting hosted by NAESB office in Houston
- **Planned, May 30, 2008** – Planned meeting hosted by ISO-NE in Holyoke
- **Planned, July 30, 2008** – Planned meeting hosted by NAESB office in Houston
- **Planned, September 30, 2008** – Planned meeting hosted by ERCOT in Austin
- **Planned, December 2, 2008** – Planned meeting hosted by NAESB office in Houston

THE FOLLOWING INCLUDES:

- DSM-EE DISTRIBUTION LIST
- WHOLESale MATRIX AND WORK PLAN
- RETAIL WORK PLAN AND MATRIX



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Paul N. Smolen, Fox, Smolen & Associates
Grace Soderberg, National Association of Regulatory Utility Commissioners
Julia Souder, North American Electric Reliability Corporation
Richard Spellman, GDS Associates, Inc.
Grey Staples, Mendota Group, LLC
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Marc Tannenbaum, Evergreen Software Inc.
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Daniel Violette, Summit Blue Consulting
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Sandra Waldstein, Vermont Public Service Board
Mack Wallace, TXU Energy
Richard Walker, MidAmerican Energy Company
Alicia Ward, Midwest Energy Efficiency Alliance
Scott Wardle, Occidental Chemical
Paul Wattles, Electric Reliability Council of Texas
The Honorable Jon Wellinghoff, Commissioner, Federal Energy Regulatory Commission
Karen Wei, The Structure Group
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Jay Zarnikau, Frontier Associates
Richard Zelenko, Dominion Retail Inc.
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Marija Zivanovic Smith, Gridpoint

ISO/RTO Work Plan for NAESB Wholesale EE/DSM Standards

#	Task	Description	Deliverable	Completion Date	Who
1	Finalize Framework	The draft framework will serve as a basis for documenting the technical M&V requirements for the different ISO/RTO products. It should guide each ISO-RTO in answering the questions of Why, When, and What M&V is done.	Each ISO should provide comments on the Objectives, Frequency and Description. Each ISO/RTO should add any additional comments that it feels it needs to describe the products, (this will help to synthesize any commonalities between products and ISO/RTOs). If the list of product classes are not representative, please comment.	10/30/07 <i>Complete</i>	All
2	ISO/RTO Conference Call	This call is designed to discuss comments submitted in regard to the Framework	Come to consensus on the Framework	Week of November 19 , 2007 TBD <i>Complete</i>	All
3	Report to NAESB DSM/EE Standards Committee	At the September 25th meeting the ISO/RTOs tacitly agreed to report back to the Committee on how we plan on completing the task by the end of the 1st quarter of 2008.	Report to NAESB DSM-EE Task Force the status of the ISO/RTO Wholesale standards development.	11/30/07 <i>Complete</i>	P. Wattles, E. Winkler
4	Add M&V technical data	Each ISO/RTO will fill in the matrix with appropriate technical requirements and how the M&V activity is implemented (where appropriate) for each of its products and each M&V area.	A completed Draft Matrix with the general description of the M&V areas, products and technical information in M&V requirements for each ISO/RTOs range of products.	12/15/07 <i>Complete</i>	All
5	ISO/RTO Conference Call	This call is designed to review progress on data synthesis from the Framework	Develop status update on development of wholesale standards	January 14 2008 <i>Complete</i>	All
6	Report to NAESB DSM/EE Task Force	Status report of Wholesale standards	Report to NAESB the status of the ISO/RTO Wholesale standards development.	1/23/2008	P. Wattles, E. Winkler
7	Update M&V Technical Data	ISO/RTOs will update matrices with appropriate expanded technical requirements.	Expanded draft Matrix	1/30/2008	All
8	ISO/RTO Conference Call	This call is designed to review progress on data synthesis from the Framework	Develop status update on development of wholesale standards	Week of 2/11/08, TBD.	All
9	Draft Wholesale Standards	Synthesize Technical Requirements into draft Standards	Draft Standards will be developed by processing the technical requirements provided by all the ISO/RTOs to find commonalities and or create ranges of requirements	2/29/08	E. Winkler lead, Scott COE, review by All
10	ISO/RTO Conference Call	This call is designed to review and discuss the draft wholesale standards.	Provide agreement on draft standards to be submitted to NAESB	Week of March 10, 2008. TBD	All
11	Present Wholesale standards developed by ISO/RTOs to NAESB DSM/EE Standards Committee	ISO-RTO document presented as a draft for wider NAESB stakeholder consideration and comment	Report to NAESB on documented ISO/RTO Wholesale DR M&V standards for use in developing proposed NAESB standards and/or model business practices.	3/28/08 Houston TX	P. Wattles, E. Winkler

Yellow denotes added item

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Please add names to this list if appropriate

Retail Matrix Work Plan for NAESB EE/DSM Standards

#	Task	Description	Deliverable	Completion Date	Who
1	Finalize the retail matrix spreadsheet	The retail matrix spreadsheet will provide the basis for a utility survey to determine what types of M&V are currently underway for current or past DR programs and what is planned for new programs.	<ul style="list-style-type: none"> ▪ Decide if spreadsheet needs to be reformatted. ▪ Add additional columns – past programs, current programs, proposed programs ▪ Add examples from BGE and Alabama Power 		
2	Conference Call	See agenda	Come to consensus on the approach for retail matrix	1/17/08	Work group
3	Finalize cover letter for survey	Develop a cover letter to transmit the survey to target utilities	Provide cover letter draft for review Describe what is expected and how to respond.		
4	Identify survey targets	Identify who the survey will be sent to	List of survey participants		
5	Mail and distribute survey	Decide on date to send the survey	Individual utilities will be expected to list past, current and potential DR programs along with the requested information in the matrix based on the representative examples to be provided with the matrix		
6	Collect and summarize survey results	The survey instrument will request each participant to submit their responses. Responses will be reviewed and segregated into types of programs	A summary report will be produced which describe the quality of the responses and the general types of programs that were submitted. This will be a qualitative assessment to determine the next steps of evaluation and the level of effort required		
7	Report to NAESB	Report out on preliminary assessment of the responses with a proposed work plan to complete the analysis and recommend next steps	Discussion at March NEASB meeting		3/28/08
8					
9					

Class of DR Resources		M&V Aspects of the DR Programs				
Specifications of the DR Program Being Described		Qualification/ testing/ auditing	Data reporting-frequency and monitoring	Meter and equipment standards	Performance/ baseline	Statistical sampling of non-interval metered loads
Capacity	Submitter	Verification: Operate a pilot program to determine that at least 95% of devices both receive and respond to signal to turn off WH at the beginning of the program. Depending on the manufacturers and devices, the verification may come from a signal back from device, a data logger, or an IDR on the meter. Ongoing, a sample of at least 250 devices should be tested at least every 5 years to determine the overall failure rate and to develop a net to gross ratio. This ratio will be applied to the deemed kW per customer reduction from the load study.	Data from IDR will be collected on monthly meter reading route for pilot and sample accounts. When program is implemented, the profited reduction from this sample will be deemed to be the reduction for the program population. Monthly data will be required for PMI settlement	The customer's meter will continue to be used for billing determinants. The WH control switches should be included in the periodic meter tests to verify that 95% of the devices remain operational. The communication signal must be tested annually. Accounts in the load profile sample should have an end-user recorder on the water heaters as well as a whole house recorder. Thirty minute interval data is adequate, although fifteen minute data on the water heater is considered preferable.	The algorithm that provides a reasonable estimate of normal customer usage absent any water heater interruption will be utility (and program specific). The CBI formula that is approved by the utility's ISO should be an acceptable default alternative.	An initial sample of 250 homes will provide a reasonably accurate estimate of load reduction that should be within +/- 5% of the true mean at a 90% confidence interval. The estimate for each demand reduction should be calculated with a 90% confidence level and the accuracy determined for each load reduction. An average error bound within +/- 10% will be considered to be accurate. If the net to gross operability study has remained at or above 90%, a sample of 100 homes will be adequate and should produce an error bound within +/- 5%. If net to gross operability drops below 90%, then a full sample of 250 homes will be required. If a tighter error bound is necessary, a larger sample will be required. (NOTE: This recommendation based on "PJM Deemed Savings for Legacy AC/WH Programs" report.)
	Status	Program not in effect today				
	Product type					
	Category					
	Program or Product Name	Residential Water Heater Control Program				
	Trigger Events	when system load is critical (defined as _____) or when zone load is priced at or above \$ _____ or transmission constraints in zone (defined as _____)				
Energy Price	Submitter	Each customer site will provide a dedicated IBM compatible PC with a modem in order to receive the price transmissions and the telecommunication equipment needed for the company to communicate with the meter (dedicated phone line, cellular phone modems, etc.). The company will provide the software to allow receipt of the RTP prices as well as to perform analytical and graphical functions. The company will install an IDR. A rate contract will be executed to insure that the customer fully understands the rate and agrees to a one year minimum commitment. (NOTE: the existing RTP rate is currently closed to new customers.)	The company will maintain access through the provided phone line and will collect half-hourly load data every 24 hours.	Standard billing meter and IDR meeting company standards for accuracy. Modem and phone line provided by customer.	See Dominion VA Power rate sch. RTP; paragraph V: DETERMINATION OF BASELINE KW LEVELS; BASELINE ENERGY LEVELS; AND INCREMENTAL ENERGY USAGE.	Not supplied.
	Status	Program not in effect today				
	Product type					
	Category					
	Program or Product Name	Real Time Pricing rate (RTP)				
	Trigger Events	when system load is critical (defined as _____) or when zone load is priced at or above \$ _____ or transmission constraints in zone (defined as _____)				
Ancillary Services	Submitter	Domain				
	Status	Not completed in the matrix				
	Product type					
	Category					
	Program or Product Name					
	Trigger Events					
Energy Voluntary	Submitter	Domain				
	Status	Not completed in the matrix				
	Product type					
	Category					
	Program or Product Name					
	Trigger Events					

NAESB DSM&EE Retail Matrix Draft
 For Presentation on January 23, 2008

Class of DR Resources		M&V Aspects of the DR Programs				
Specifics of the DR Program Being Described		Qualification/ testing/ auditing	Data reporting-frequency and monitoring	Meter and equipment standards	Performance/ baseline	Statistical sampling of non-interval metered loads
Capacity	Submitter	Alabama Power	Interval metered data captured and maintained. Actual load evaluated when IS call occurs. Normal load levels evaluated when no call occurs. This allows for a determination of expected results when called. Program requirements are that customer drop to firm level during a call. No "reduction" constraints utilized.	Utilizes revenue quality meters.	The IS customer is required to cut load to the contracted firm load level. Actual load dropped is determined by evaluating pre and post event load levels of each customer.	N/A
	Status	In effect Today	Two way communication devices. We send test and customers respond. Test periodically. In addition, "in field" tests are performed periodically as well.			
	Product type	Interruptible Load				
	Category	Capacity				
	Program or Product Name	Industrial Interruptible Program, IS Program				
	Trigger Events	During a System Reliability Alert "System Alarm" notice. Can be utilized for locational reliability issues, if necessary.				

NAESB DSM-EE Retail Matrix Draft
For Presentation on January 23, 2008

Class of DR Resources		M&V Aspects of the DR Programs				
Specifications of the DR Program Being Described		Qualification/ testing/ auditing	Data reporting-frequency and monitoring	Meter and equipment standards	Performance/ baseline	Statistical sampling of non-interval metered loads
Capacity	Submitter	Alabama Power	Two way communication devices. We send test and customers respond. Test periodically. In addition, "in field" tests are performed periodically as well. Generators are remotely started monthly for reliability purposes.	Utilizes revenue quality meters.	No baseline requirements. Equipment rating and reliability testing determines expected reduction for a call.	N/A
	Status	In effect Today				
	Product type	Utilization of customer-owned generation				
	Category	Capacity				
	Program or Product Name	Stand By Generator Program				
	Trigger Events	During a System Reliability Alert "System Alarm" notice. Can be utilized for locational reliability issues if necessary.				
Energy	Submitter	Alabama Power	TOU metered data captured and maintained. No change or reduction constraints exist.	Utilizes revenue quality meters.	No performance levels expected therefore no baseline required.	N/A
	Status	In effect Today				
	Product type	TOU Rates				
	Category	Energy price				
	Program or Product Name	TOU Rates				
	Trigger Events	Various types of TOU rates exist for various types of residential, commercial, and industrial customers. Rates vary by fixed customer charge, season, and time of day. Majority of rates are based on summer and non-summer seasons with peak, intermediate, and off-peak rate periods.				
Capacity	Submitter	BGE	In addition to the periodic sampling of switch operability, BGE conducts Load Research Studies to estimate the average impact for each participant in the program.	For its Load Research Studies, BGE uses ANSI certified meters that have been approved by the PSC for load recording.	For the development of average impacts for water heating, BGE compares non-event days to event days using a comparison of means. The difference between these two (2) load shapes forms the average impacts. PIM requires, average impacts for each hour between noon and 8 p.m. The non-event profile is comprised of the hottest days of the summer.	Load data are obtained from meters that were installed on 65 customers' water heaters. This stratified sample design provides a confidence of 90% ± 10% accuracy.
	Status	In effect Today				
	Product type					
	Category					
	Program or Product Name	BGE's Residential Water Heater Control Program (Rider 6)				
	Trigger Events	BGE can activate switches up to 15 times per year for reliability or economic reasons.				
Capacity	Submitter	BGE	In addition to the periodic sampling of switch operability, BGE conducts Load Research Studies to estimate the average impact for each participant in the program.	For its Load Research Studies, BGE uses ANSI certified meters that have been approved by the PSC for load recording.	For the development of average impacts for air conditioning, BGE compares non-event days to event days using regression analysis. The model estimates the average impact provided a particular weather conditions. PIM requires average impacts for each hour between noon and 8 p.m.	Load data are obtained from meters that were installed on 100 customers' air conditioner units. This stratified sample design provides a confidence of 90% ± 10% accuracy.
	Status	In effect Today				
	Product type					
	Category					
	Program or Product Name	BGE's Residential Air Conditioner Control Program (Rider 5)				
	Trigger Events	There is no limit to the number of times BGE can activate switches for reliability or economic reasons.				

NAESB DSM+EE Retail Matrix Draft
 For Presentation on January 23, 2008

Specifics of the DR Program Being Described		M&V Aspects of the DR Programs				
Class of DR Resources		Qualification/ testing/ auditing	Data reporting frequency and monitoring	Meter and equipment standards	Performance/ baseline	Statistical sampling of non-interval metered loads
To the extent that NAESB can provide some protocols that would assist groups such as ISOs in evaluating the effectiveness of programs would be helpful.						
Time of Use Examples: Schedule of prices published such the consumer can determine his energy consumption based in part on price signals published.						
Real Time Pricing						
Demand Charges						
Peak Time Rebates						
Planning Peak Alerts						
Interruptible/Curtailable Management Rates						
Thermal Storage/Energy Storage						
Standby Generation Rates (emergency generators and distributed generators)						
Smart Appliances						
Ancillary Programs						

NAESB DSM/EE Retail Matrix Draft
For Presentation on January 23, 2008

Class of DR Resources		Specifics of the DR Program Being Described		Deployment Limitations	Regulatory and market context
Capacity	Submitter	Dominion			
	Status	Program not in effect today			
	Product type				
	Category				
	Program or Product Name	Residential Water Heater Control Program			
	Trigger Events	when system load is critical (defined as _____) or when zone load is priced at or above \$ _____ or transmission constraints in zone (defined as _____)			
Energy Price	Submitter	Dominion			
	Status	Program not in effect today			
	Product type				
	Category				
	Program or Product Name	Real Time Pricing rate (RTP)			
	Trigger Events	when system load is critical (defined as _____) or when zone load is priced at or above \$ _____ or transmission constraints in zone (defined as _____)			
Ancillary Services	Submitter	Dominion			
	Status	Not completed in the matrix			
	Product type				
	Category				
	Program or Product Name				
	Trigger Events				
Energy Voluntary	Submitter	Dominion			
	Status	Not completed in the matrix			
	Product type				
	Category				
	Program or Product Name				
	Trigger Events				

NAESB DSM&EE Retail Matrix Draft
 For Presentation on January 23, 2008

Class of DR Resources		Specifics of the DR Program Being Described		Deployment Limitations	Regulatory and market context
Capacity	Submitter	Alabama Power		Customer has options to choose various call constraints. Chosen option determines the credit amount to the customer for non-firm load.	PSC regulated tariff
	Status	In effect Today			
	Product type	Interruptible Load			
	Category	Capacity			
	Program or Product Name	Industrial Interruptible Program, IS Program			
	Trigger Events	During a System Reliability Alert "System Alarm" notice. Can be utilized for locational reliability issues if necessary.			

NAESB DSM&EE Retail Matrix Draft
For Presentation on January 23, 2008

Class of DR Resources		Specifics of the DR Program Being Described		Deployment Limitations	Regulatory and market context
Capacity	Submitter	Alabama Power		Program rules set minimum 250 kW size to participate in the program. Program call constrained to 8 hours per day, 5 days per week, 240 hours per year.	PSC regulated tariff
	Status	In effect Today			
	Product type	Utilization of customer owned generation			
	Category	Capacity			
	Program or Product Name	Stand By Generator Program			
	Trigger Events	During a System Reliability Alert "System Alarm" notice. Can be utilized for locational reliability issues if necessary.			
Energy	Submitter	Alabama Power		Various TOU rates are available to customers needing specific SIC codes. Some require separate metering for specific end uses such as irrigation pumps, electric vehicle charging, etc.	PSC regulated tariff
	Status	In effect Today			
	Product type	TOU Rates			
	Category	Energy price			
	Program or Product Name	TOU Rates			
	Trigger Events	Various types of TOU rates exist for various types of residential, commercial, and industrial customers. Rates vary by fixed customer charge, season, and time of day. Majority of rates are based on summer and non-summer seasons with peak, intermediate, and off-peak rate periods.			
Capacity	Submitter	BGE		BGE can activate switches up to 15 times per year for reliability or economic reasons.	
	Status	In effect Today			
	Product type				
	Category				
	Program or Product Name	BGE's Residential Water Heater Control Program (Rider 6)			
	Trigger Events	BGE can activate switches up to 15 times per year for reliability or economic reasons.			
Capacity	Submitter	BGE		BGE can activate switches up to 15 times per year for reliability or economic reasons.	
	Status	In effect Today			
	Product type				
	Category				
	Program or Product Name	BGE's Residential A/H Conditioner Control Program (Rider 5)			
	Trigger Events	There is no limit to the number of times BGE can activate switches for reliability or economic reasons.			

NAESB DSM/EE Retail Matrix Draft
 For Presentation on January 23, 2008

Specifics of the DR Program Being Described		Deployment Limitations	Regulatory and market context
Class of DR Resources			
To the extent that NAESB can provide some protocols that would assist groups such as ISOs in evaluating the effectiveness of programs would be helpful.			
Time of Use Examples: Schedule of prices published such the consumer can determine his energy consumption based in part on price signals published.			
Real Time Pricing			
Demand Charges			
Peak Time Rebates			
Planning Peak Alerts			
Interruptible/Curtailable Management Rates			
Thermal Storage/Energy Storage			
Standby Generation Rates (emergency generators and distributed generators)			
Smart Appliances			
Ancillary Programs			