

# Energy Efficiency Transition Filing & Reporting Requirements Stakeholder Meeting

**Mercer County Community College  
Conference Center**

Wednesday, December 18, 2019  
2:00 – 4:00 pm



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# WELCOME



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New Jersey Board of  
Public Utilities

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# Agenda

**Welcome** (Kelly Mooij, Deputy Director, Division of Clean Energy, NJ Board of Public Utilities)

**Overview & Agenda** (Stacy Ho Richardson, Office of the General Counsel, NJ Board of Public Utilities)

**(1) Minimum Filing Requirements**

**(2) Reporting Requirements**

**(3) Tracking System**

**Questions/Comments/Summary/Next Steps**



# Scope of Meeting & Definitions

Energy efficiency programs:

- Minimum Filing Requirements: information needed to evaluate petitions for new and modified programs
- Reporting Requirements: information needed to evaluate program progress and performance
- Tracking System: vehicle to house the data

# Positive Outcomes of Effective Filing & Reporting Systems

Energy efficiency programs that are:

- Cost effective
- Successful in meeting legal and policy goals
- Always improving

# Meeting Objectives

Identify the following regarding filing and reporting systems for energy efficiency and peak demand reduction programs:

- Desired outcomes for New Jersey
- Barriers to successful systems
- Best practices

# Clean Energy Act

- The Board shall require each electric public utility and gas public utility to reduce the use of electricity, or natural gas, as appropriate, within its territory, by its customers . . . . (N.J.S.A. 48:3-87.9(a))
- Each electric / natural gas public utility shall be required to achieve annual reductions in the use of electricity of two percent / 0.75 percent of the average annual usage in the prior three years within five years of implementation of its energy efficiency program. (Ibid.)

# Clean Energy Act

- The Board shall adopt quantitative performance indicators (QPIs) that establish reasonably achievable targets for energy usage and peak demand reductions (§87.9(c)) (*emphasis added*)
- Each electric and gas public utility shall establish energy efficiency programs and peak demand reductions programs that comply with QPIs adopted by the Board (§87.9(d))

# Clean Energy Act

- Each electric and gas public utility shall file implementation and reporting plans, as well as evaluation, measurement, and verification strategies, to determine the energy usage and peak demand reductions achieved by the programs. The filings shall include details of expenditures made by the utility and the resultant reduction in energy usage and peak demand. (§87.9(d)(3)) (*emphasis added*)

# Clean Energy Act

- Each electric and gas public utility shall file an annual petition to demonstrate compliance with the energy efficiency and peak demand programs, compliance with the targets established pursuant to the QPIs, and for cost recovery of the programs. (§87.9(e)(1)) (*emphasis added*)

# Proposed Filing Timeline

- Spring/Summer 2020
  - › Board directs the utilities to file programs
- Fall 2020
  - › Utilities submit filings
- Fall 2020 – Spring 2021
  - › Board reviews filings
- July 2021
  - › New EE and PDR programs begin

# Minimum Filing Requirements

New Jersey Minimum Filing Requirements for  
Petitions under N.J.S.A. 48:3-98.1

- I. General filing requirements
- II. Program description
- III. Additional filing information
- IV. Cost recovery mechanism
- V. Cost/benefit analysis
- VI. Evaluation, measurement, and verification

# Minimum Filing Requirements

## I. General filing requirements

- a. All filings, information, and data pertaining to specific proposed programs
- b. Information and financial statements
- c. Supporting explanations, assumptions, calculations, and work papers for each proposed program and cost recovery mechanism petition
- d. Supporting testimony
- e. Requests for exemptions
- f. Draft public notice for proposed increase in rates, charges, etc.

# Minimum Filing Requirements

## II. Program description

- a. Detailed description of proposed programs:
  1. Description
  2. Market segment/efficiency targeted
  3. Delivery method
  4. Estimated program participants
  5. Total projected annual kWh/therms and peak reduction
  6. Relationship to existing programs
  7. Existing incentives
  8. Proposed incentives

# Minimum Filing Requirements

## II. Program description

- b. Comparison to in-state programs
- c. Comparison to out-of-state programs
- d. How proposed programs comport with NJ state energy policy (EMP, GHG emissions reports)
- e. Intended utilization of employees, contractors
- f. Resolution of customer complaints
- g. Marketing
- h. Market barriers

# Minimum Filing Requirements

## III. Additional Filing Information

- a. Incremental activity (including on employment) and impact on competition in the marketplace
- b. Proposed method for treatment of Renewable Energy Certificates and any air emission credits and offsets, including Regional Greenhouse Gas Initiative carbon dioxide allowances and offsets

# Minimum Filing Requirements

## Discussion

- Feedback about current filing requirements, including required information and process
- What are best practices for filing requirements?

# Reporting

1. Current requirements
2. Data quality control / verification using consistent definitions and assumptions, e.g., based on protocols, technical resource manual, etc.

# Reporting

## 3. Potential future data requirements

- › Committed and actual dollars spent per program, by sector (e.g., low and moderate income, small businesses, large energy users) and category (e.g., administration, marketing and sales, contractor training, incentives, inspections and quality control, evaluation)

# Reporting

3. Potential future data requirements, cont'd
  - › Projected and actual participants, by program
  - › Projects in progress and completed, including zip code, cost, program incentive, savings
  - › Projected and actual energy saved per program, by fuel source and sector, including:
    - » Actual and lifetime energy savings
    - » Annual and lifetime demand savings

# Reporting

3. Potential future data requirements, cont'd
  - › Projected and actual cost of measures, including costs borne by participants or leveraged from third parties
  - › Projected and actual benefit-cost analysis of programs, including:
    - » Avoided costs and other net program benefits
    - » Incremental and total costs
  - › Actual energy sales by sector

# Reporting

3. Potential future data requirements, cont'd
  - › Rate and bill impacts of programs
  - › Greenhouse gas emissions reductions
  - › Jobs created and retained
  - › Payment times for contractors

# Reporting

## 4. Frequency, format, and types

- › Quarterly reports (quantitative and potentially qualitative)
- › Annual reports (quantitative and qualitative, including impact evaluations)
- › End of program term reports (quantitative and qualitative, including impact and process evaluations)
- › Public facing reports

# Reporting

## Discussion

- › Feedback about current reporting requirements regarding data and process
- › What is needed from the next reporting system to meet Clean Energy Act goals?
- › What is a successful reporting program?
- › Access: what data should be tracked?
- › Use: How should data be used?
- › What are barriers to success?
- › What are best practices?

# Tracking System

Current practices by utilities and the State –  
features and utilization

- › IMS
- › LEEN (Comfort Partners)
- › Utilities (NJ and other states)

# Tracking System

## Discussion

- Advantages and disadvantages of current tracking systems
  - › What are utilities using in New Jersey (legacy systems) and other states to track EE data?
- Desired outcomes of the next tracking system
  - › What is needed from a tracking system to meet Clean Energy Act goals?
  - › What is a successful tracking system?
  - › Best practices and lessons learned?

# Tracking System

## Discussion

- Ideal features/capabilities/ utilization
  - › How and when should advanced M&V (automated data processing / increased data granularity) be integrated?
  - › Is a dynamic / automated platform needed for it to be useful? For example, should there be a monthly data dashboard?
  - › Should it be a statewide system?

# Tracking System

## Discussion

- Ideal features/capabilities/ utilization (cont'd)?
  - › What level of detail should it hold? For example, should it be able to hold demographic and tax data?
  - › Should it be able to hold downloaded utility records and data provided by contractors?
  - › Should it be able to work / connect / cross-reference with other (e.g., utility, State) systems?

# Tracking System

## Discussion

- Ownership and transparency of data
  - › Who should own the system and data?
  - › How accessible to the public vs. the utilities and State should it be?
- Barriers to a successful tracking system?

# Questions/Comments

## Summary & Next Steps



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# Written Comments

Members of the public may file written comments with the  
Secretary of the Board of Public Utilities at

**44 South Clinton Avenue**

**9th Floor, Post Office Box 350**

**Trenton, New Jersey 08625-0350**

**Attn: Aida Camacho-Welch**

Written comments may also be submitted electronically  
in PDF or Word format to:

**[EnergyEfficiency@bpu.nj.gov](mailto:EnergyEfficiency@bpu.nj.gov)**

Please include a subject line of “Filing & Reporting.”

All comments must be received on or before 5 PM on

**Friday, January 10, 2020**

# THANK YOU



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