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## **EO Collaborative Evaluation Workgroup October 19, 2010 Minutes**

### Customer Information Privacy Issues & the Baseline Study

- CMS already had a non-disclosure agreement (NDA) with CADMUS, the Coops would like to see this agreement.
- CADMUS took a randomized customer sample from CMS – name, address, telephone number, electric/gas customer. (Already had a NDA in place as part of their EO contract.)
- CADMUS just needs name, address and contact info. No consumption data. Would like to know if gas or electric provider.
- Mike Peters: Could they give a sample of x number of customers from the total number, with detailed information such as gross consumption (residential/C&I), number of meters and be told CADMUS needs 1,000 samples. Major concern is protecting customer list. Use billing company in St Louis that could do the randomization and provide the information.
- Is it possible to use the same NDA across the coops? (Copies distributed, electronic copy will be made available.)
- BWL: already doing an evaluation where customers are being called and this would add to the confusion. They do not release any information without the customer's permission. Their attorney would like to review any agreement, plus Jim Weeks MMEA. But this will not happen by the deadline.
- Site visit – letter is sent out explaining what ID will be shown and what will be done during the interview. The representatives state they are from CADMUS on behalf of the utility. Utility customer service reps are also aware of visits so they can field questions.
- CADMUS is not opposed to account managers accompany them on site visits to C&I customers.
- Parameters of the existing NDA contained in Baseline Study were discussed: excepted information, typos, insert MPSC authority to ask utilities for this information, limit scope change venue from MA to Michigan, hold harmless clauses, etc. If Rob Ozar or Paul Proudfoot were to send a letter stating “please do the following in compliance of PA 295” would be enough.

DELEG is an equal opportunity employer/program.

Auxiliary aids, services and other reasonable accommodations are available upon request to individuals with disabilities.

- Need to see DTE's NDA, Adela will share.
- BWL has 86,000 customers, what sample size does CADMUS need? It's helpful to know total sample size of utilities in order to get a representative size sample.
- Could have said they would just use CMS and DTE data, but a study has never been done that includes the UP.
- Rob: need to get a list of meter counts for coops and munis to CADMUS. From that, CADMUS could provide more information about the sample size they need.

#### Energy Savings Adjustment Process

- Rob: referencing the flow chart shared at this morning's Program Design meeting.
- MEMD change process is different than regular review of savings. Embedded in the annual reporting system of energy savings reported in the following year. Steps 1,2 & 4 – the rest should be deleted. Step 3 is not part of this, only included for consistency.
- Brad Cates: in evaluation, looking to provide savings by program, not by measure. Because of this, the process may not provide statistically accurate information to change a measure's MEMD value. Look at the top 10-12 energy savings measures and have CMS and DTE investigate them for specific values.
- For the first 2 years, no adjustments will be applied. Verification will be needed in 2012 according to Rob who has reviewed the EO Rules that are attached to the upcoming Order.
- Brad Cates: Of concern that he won't know what the rules say until the end of the year with a report due in March.
- Jennifer: Timing of the evaluation and do a full impact evaluation will be difficult. Need a year's worth of billing data to compare before/after usage.
- Shift the reconciliation to July or August at the earliest, since the utilities just won't have the information until later. June may be ok.
- Is it unreasonable to use 2010 data as part of 2011 or is there a hard line cut off date? Data is segregated by year? Ok to do, just label it as such. Usually matched up in the year in which it occurred for funding purposes.
- Takes time to come up with a script, gather the data and the calculations all take more than a month. And, it's not just one program, but performing the process on many elements.
- Rob: The current deadlines contained in the MPSC orders may be too aggressive. That can be fixed.
- Jeff: Questions about applying NTG factors will require more time and needs more input – send feedback to Karen.
- Rob offered that a phone conference be held to help move this process along by the end of the year.

- CADMUS: helpful to have everyone's comments the week before the next meeting.
- Rob will check with the Commissioners about the possibility of an amendatory order to change the reconciliation date. He asked the evaluators for feedback on how much time they would need – June, July? Art mentioned it might take a month for him to compile the results in a report.
- Bill: to run a cost/benefit may take longer.
- Adela: Next year's report may not need to be delayed because there won't be as much work.
- Current reporting schedule puts the first ones due at March 30, April 15 and 30, May 31<sup>st</sup>.

Next meeting date: November 16<sup>th</sup>.