



The Parker Ranch installation in Hawaii

## Guidelines For Retrieving Customer Usage Data from Utility

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Southwest Energy Efficiency Project  
DOE Technical Assistance Program  
Team 4 – Program & Project Development  
& Implementation

- Technical Assistance Program (TAP)
- Discussion of Identifying Utility Stakeholders
- Discussion of Procuring Customer Usage Data
- Suggestions to Streamline Data Collection Processes
- Overview of Data Reporting Requirements
- Q&A



- Questions and discussion after presentation
  - Have your questions ready
- To ask a question/make a comment
  - If you want facilitator to read your question – Type your question in “questions” box, specify speaker to address
  - If you want to speak – use “Raise hand” function and type question in “questions” box, when you are recognized you will be un-muted

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"As our new company logo, I'm not quite sure it's sending out the right message."

- **Webinar Poll**



# What is TAP?

DOE's Technical Assistance Program (TAP) supports the Energy Efficiency and Conservation Block Grant Program (EECBG), the State Energy Program (SEP) and the Better Buildings grantees by providing state, local, and tribal officials the tools and resources needed to implement successful and sustainable clean energy programs.



## TAP offers:

- One-on-one assistance
- Extensive online resource library, including:
  - Webinars
  - Events calendar
  - TAP Blog
  - Best practices and project resources
- Facilitation of peer exchange

## On topics including:

- State and local capacity building
- Energy efficiency and renewable energy technologies
- Program design and implementation
- Financing
- Performance contracting

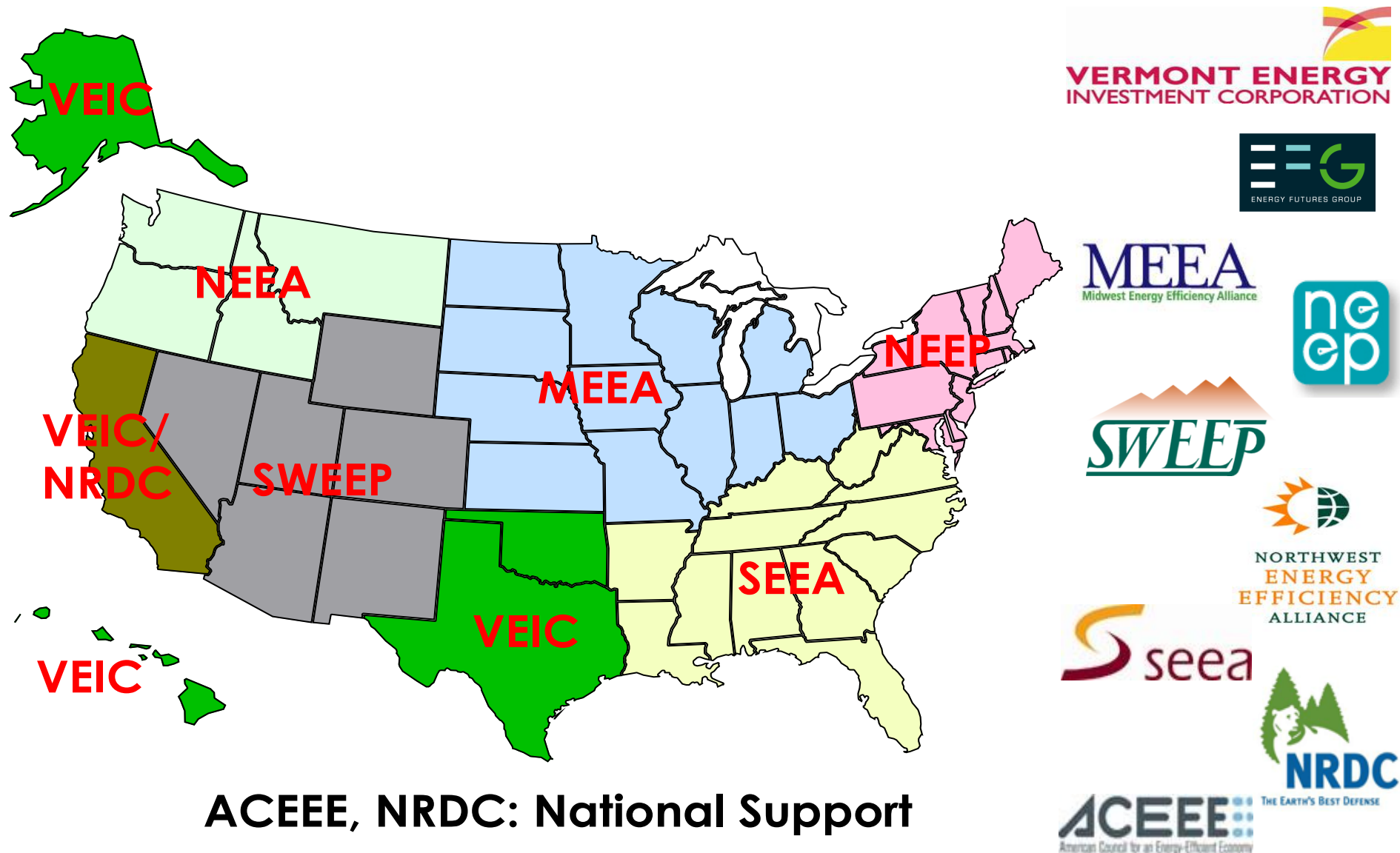
# Provider Network Resources

State and Local Capacity Building	<ul style="list-style-type: none"><li>• Trainings</li><li>• Workshops</li><li>• Peer-to-peer matching</li></ul>
Technical	<ul style="list-style-type: none"><li>• Renewable energy siting and development</li><li>• Review of technical specs for RFPs</li><li>• Strategic planning, energy management, and conservation strategies</li><li>• Green building technologies</li><li>• Building codes</li></ul>
Program Design and Implementation	<ul style="list-style-type: none"><li>• Policy and program development</li><li>• Coordinating rate-payer funded dollars with ARRA projects and programs</li><li>• Sustainable community and building design</li><li>• State and regional EE and RE assessments and planning</li><li>• EE and RE portfolio program design elements</li></ul>
Financial	<p>Program design support and guidance on financing mechanisms such as:</p> <ul style="list-style-type: none"><li>• Revolving loan funds (RLFs)</li><li>• Property-assessed clean energy (PACE)</li><li>• Loan loss reserves and enhanced credit mechanisms</li></ul>
Performance Contracting	<ul style="list-style-type: none"><li>• Designing and implementing a performance contract</li><li>• Leveraging private investment</li><li>• Reducing institutional barriers</li><li>• Tracking and comparing programs</li></ul>

# Who We Are: Team 4

U.S. DEPARTMENT OF  
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Renewable Energy



Draft a written data reporting plan that is acceptable to both the utility and the grantee; Avoid confusion from the start

- Identify specific data requested by Grantee
- Determine data access options; web base or customer service
- Specify data formatting and how data is to be communicated
- Identify utility contact and grantee contact responsible for data reporting
- Outline customer data privacy and release requirements
- Identify DSM opportunities and process to sharing projects
- Determine how data will be stored and maintained by Grantee
- Identify any parties that would have access to this data



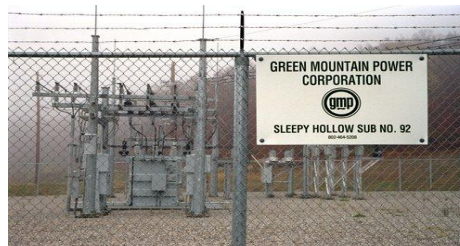
Provide your local Utility an opportunity to apply DSM funding in exchange for data reporting;

Taking a partner approach will encourage cooperation

- Identify specific measures from DSM programs that apply to Grantee
- Determine DSM processes; utility invoicing, reporting, quality assurance
- Determine budget and identify opportunities for collaborative savings

Identify other DSM efforts in your jurisdiction

- ARRA, State, Municipal and Federal DSM Funding Opportunities
- Identify project reporting, invoicing and approval processes



## Customer Data Options

### Best: Database Extract

- Utility provides quarterly extract of customer database
- Includes customer ID, name, address and usage
- Requires system to store and manage extract
- Preferred process for Grantees with many projects

### Better: Web Based Data Portal

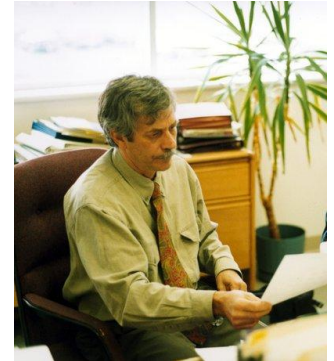
- Requires that Grantee retrieve customer data from web tool
- Grantee has direct control of data inquiries, no delays

### Good: Direct Data Transfer

- Grantee requests data and receives info email, fax or mail

## Find the Right Utility Contact

- Contact State Public Utility Commission
  - PUC Regulatory Contact for Jurisdictional Utilities
  - Ask regulatory contact for help in identifying the right stakeholder
- Contact Consumer Advocate for Utility Contact Information
- Utility Website or Utility Annual Report
- Written Request to Utility for Specific Contact Information
- Collaborate with other local groups to identify Utility stakeholders
  - Community Action Agency, Welfare Office, State Energy Office



- Identify problem resolution path; How to report / Who to contact
- Course of action if urgent data request is needed
- Course of action for delay in release of customer data report from Utility representative; Identify optional data reporting process
- Identify process to address customer privacy concerns or questions
- How can Grantee leverage utility DSM offerings?
- Identify DSM processes; project approval, reporting, invoicing



- Meet the Utility Stakeholders: (May include numerous departments)
  - Customer service, billing, DSM, business development, community development
- Review the specific data fields needed and obtain from the utility the required customer data release application if required
- Ask for a specific point of contact at your local utility to fulfill regular customer data requests
- Determine utility preference for batched or single data requests
- Identify reasonable turn around time for data requests to be fulfilled



- Grantees should coordinate with their staff and contractors to comply with the terms of the plan; maintain data integrity and privacy
- Determine where customer data will be stored in interim period
- What to do with missing or faulty data?
- Identify process for transferring data to contractors if needed for use in energy modeling tools or for quality assurance inspections
- Develop process for retrieving post completion customer usage data
- Archive all customer data to prevent data loss

- Move up the foodchain to resolve problems;
  - If the plan's off track, meet with stakeholders to build corrective action
  - Serious problems? consider regulatory or consumer advocate approach
- Meet in person to resolve key problems
  - Face to face meetings are key to developing utility relationships
- Schedule occasional conference calls to check in;
- Maintain lines of communication
  - Recognize utility efforts to share customer data/ Update grantee achievements
  - Recognize what's working as well as what's not working

- Required Data Points
  - Customer Name, and Address
  - Monthly Usage information (kWh or Therms) for 12 months
    - Both prior to project and post project completion
  - Customer rate class (if available)
- Optional Information
  - Cost per kWh or Therm
  - Customer payment information or credit information
  - Demographic information on the customer
  - Customer account numbers
  - Customer phone numbers or billing address

- DOE Data Reporting Requirements
  - 12 months consumption history pre and post
  - Interim data reporting process in place with Excel based form
  - Customer data used to determine percent savings of projects
    - Percent savings is a DOE required report element
- DOE Data Storage Tool
  - Oracle based tool currently under development
  - Designed to aid in data collection, tracking and reporting
  - Interim Excel based spreadsheet provided for reporting
  - Grantee required to provide interim data management

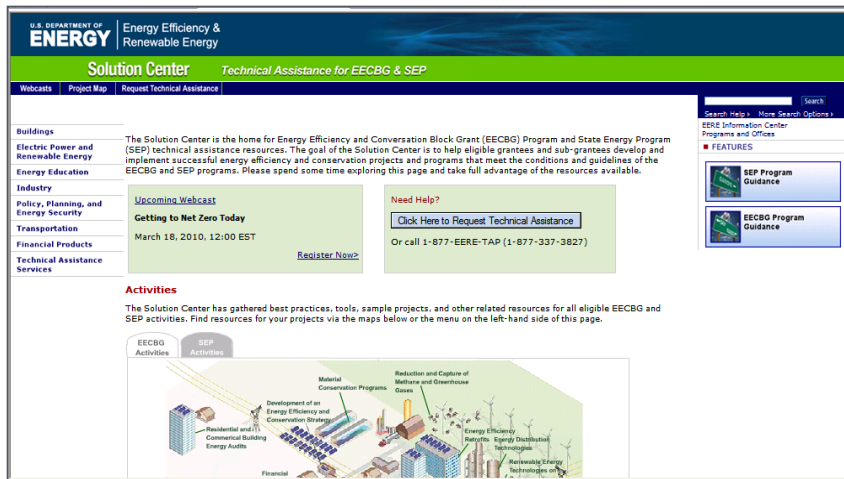
- Third Party Contractor for Data Acquisition
  - Data scraping of Utility web based data portals
  - Screen and format data requests into usable information
  - Charged with data management, reporting and queries
  - Contractors include; EFI, PSD and others



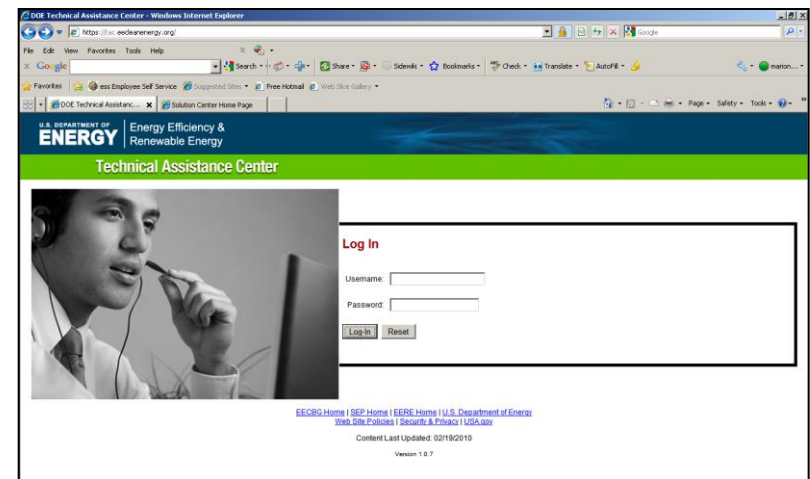


We encourage you to:

1) Explore our online resources  
via the [Solution Center](#)



2) Submit a request via the  
[Technical Assistance Center](#)

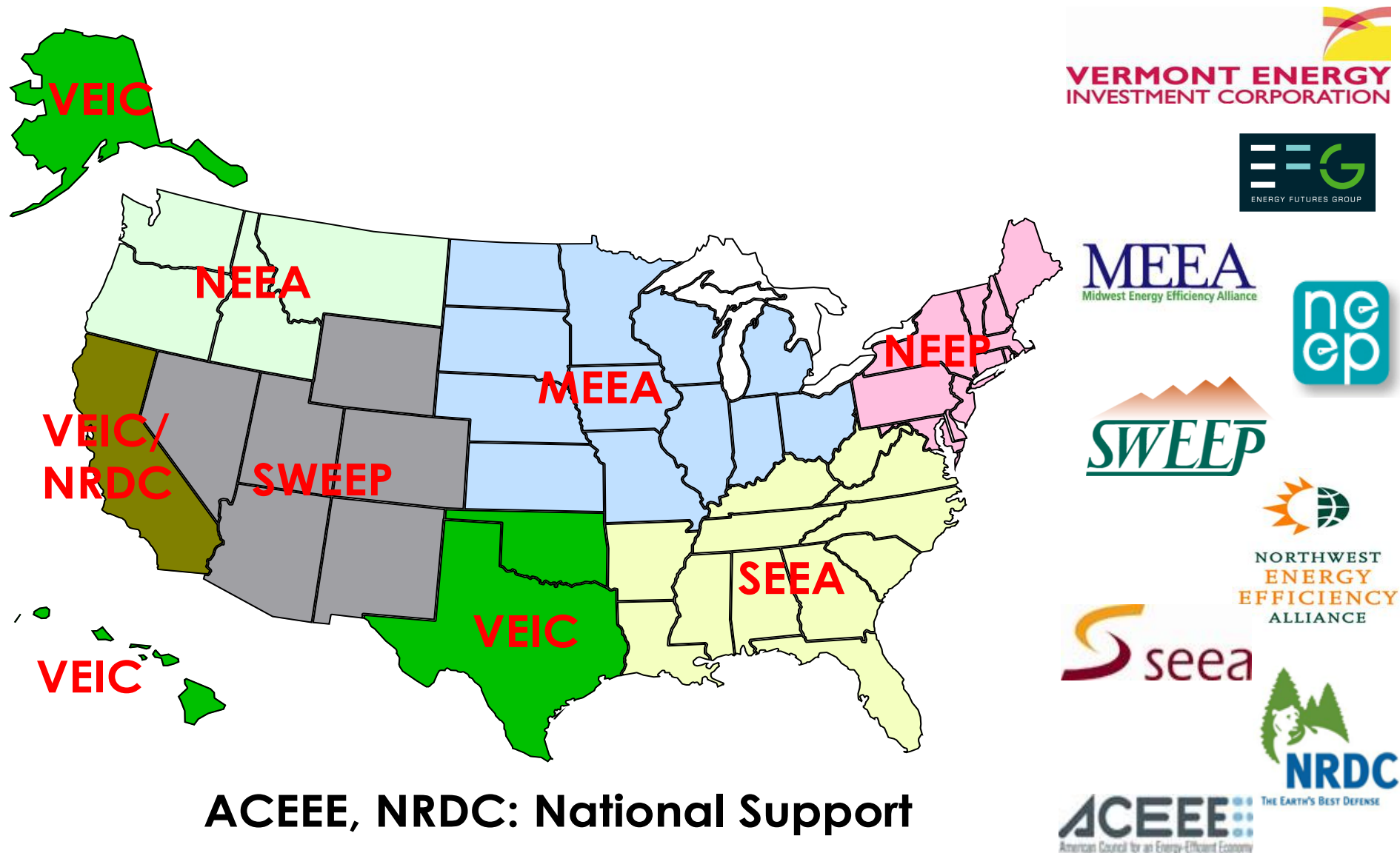


3) Ask questions via our call center at  
1-877-337-3827 or email us at  
[solutioncenter@ee.doe.gov](mailto:solutioncenter@ee.doe.gov)

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## Webinar-Data Customer Usage Poll

1. Working with Utilities
2. Data Use (customer screening, quality assurance, security)
3. Data Management (types, formats, reporting)
4. Imports into DOE Tool
5. Other.....



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