

CPUC Staff Ex Ante Review

CPUC Staff Project ID Number	PGE 22 T R 786 PRJ - 03948008 HVAC
CMPA Directory Link	https://deeresources.info/cmpa/projects/20426
PA	PGE
PA Application ID	PRJ - 03948008
PA Application Executed Date	
PA Program ID	PGE21007
PA Program Name	California Multifamily New Homes Program
PA Program Year	
Date of CPUC Staff Review:	1/17/2023
PA CMPA Upload Dates Included in this review:	
First PA Upload	7/5/2022
Second PA Upload	12/1/2022
Third PA Upload	N/A
Fourth PA Upload	
Fifth PA Upload	
Sixth PA Upload	
Seventh PA Upload	
Eighth PA Upload	
PA Measure Description(s):	
Measure 1	INTEGRATED BUILDING-RES-MULTI FAMILY - WHOLE HOUSE
Measure 2	HERS Incentive
Measure 3	
Measure 4	
Measure 5	
Measure 6	
Measure 7	
Measure 8	
Measure 9	
Measure 10	
PA Project Description:	Newly constructed multi-family housing
Bi-Monthly Upload kW Demand Reduction	-123.1
Bi-Monthly Upload Annual kWh Impacts	11,900.0
Bi-Monthly Upload Therm Impacts	16,643.0
PA Proposed Incentive \$ (to Customer)	\$58,480.00
Project Documentation kW Demand Reduction	-123.1
Project Documentation Annual kWh Impacts	11,900.0
Project Documentation Annual Therm Impacts	9,011.0
Project Documentation Incentive \$ (to Customer)	58,480.0
CPUC Staff Primary Reviewer Name	
CPUC Staff Primary Reviewer Firm	DNV
CPUC Staff Review Supervisor Name	
CPUC Staff Review Supervisor Firm	DNV
PA Primary Reviewer Name	
PA Primary Reviewer Firm	
CPUC Staff Project Manager	
CPUC Staff Policy Authorization (as needed)	
CPUC Staff Recommendation:	Prospective review disposition
For rejection, action required:	N/A
M&V Review:	Post M&V Review NOT Required

Action Number:	Summary of CPUC Staff Required Action by the PA:	Action Category	PA Response	ED Resolution
1	The review team acknowledges that the project was part of a legacy multifamily new construction program that sunset in 2019. Nonetheless the review team assessed the completeness of project documentation to identify opportunities for improvement in future iterations of the multifamily new construction program, should its projects be designated as custom. The Statewide Guidance Document Version 1.4 Section 3.2 identifies minimum submittal requirements for custom projects. Typically, a project feasibility study addresses many of these requirements; however, a PFS was not prepared for this project. In future iterations of the multifamily new construction program, the PA and implementer must present the following information, in a PFS or equivalent, that was unavailable in this project submittal: - Eligibility assessment - the submittal did not address project eligibility. - Baseline - while we presume Title 24 served as the baseline for the project measures, the project submittal did not address if other potential baseline sources should be considered (e.g., customer standard practice, industry standard practice). Additionally, a measure-by-measure comparison of baseline and proposed measure specifications was not available in project files. - EUL - the project files did not address measure-level EULs or provide a weighted EUL for the whole building measure. - Cost - project files did not include information on full or incremental costs that are necessary for the review team to assess the impact of the incentive on the customer's financial decision-making.	Missing documents		
2	The therm savings listed in most recent project documentation (9,011 therms) does not match the therm savings claim in the bimonthly upload (16,643 therms). Please correct the therms savings claim in the next quarterly upload.	Continue Document Upload		
3	The project submittal did not include evidence of program administrator technical review. Statewide Guidance Document Version 1.4 (Sections 3.1 and 3.3) stipulates that PA technical review is required for all custom projects.	Missing documents		

4	The program required applicants to complete an enrollment survey that included questions related to program influence. However, the project's enrollment survey was incomplete and lacked responses to key questions necessary to assess the program's technical and financial influence on the customer. As the next iteration of the multifamily new construction program is designed, the review team recommends that PG&E and implementers incorporate the enrollment survey guidance provided in Commission responses to EO-2022-01.	Program influence		

Note or Instruction Number:	CPUC Staff Notes or Instructions:	Instruction Category	PA Response	ED Resolution

CPUC Staff Recommendation Definitions	
CPUC Staff Recommendation	Definition
Application ready to proceed without exception	The PA will continue to upload application documents to the CMPA directory through the implementation and claims phases of the project. The PA may proceed to approve the project without waiting for CPUC Staff response. A project is waived from further review at the post-installation stage by CPUC staff, but the PA is responsible for post-installation (IR) review. There will not be conditional approval.
Application ready to proceed with exception(s), as noted	<p>The PA must make revisions or changes as noted in CPUC Staff's review comments before signed agreement with customer. The PA will continue to upload application documents to the CMPA directory through the implementation and claims phases of the project. The PA may proceed to approve the project without waiting for CPUC Staff response. If CPUC Staff decides to perform IR review of a project, CPUC Staff will notify the PA. The scope will be limited to determine if the project was carried out consistent with the application and notes provided during pre-installation review and to obtain information pertaining to whether the eligibility criteria or metrics should be revised.</p> <p>Unless the scope of work presented in project application has changed at IR review, the project will not be reviewed again in the areas specified below. Scope change is defined by substantial changes include significant modifications to the proposed equipment type, size, quantity, configuration, the expansion of a project to include additional retrofits, or the splitting of a project into multiple phases.</p> <p>The following areas will not be reviewed again by CPUC Staff:</p> <ul style="list-style-type: none"> • Calculation Tool • Calculation Methodology • M&V Plan • Baseline • Eligibility • EUL/RUL • Measure Type • Program Influence
Application rejected.	<p>The application is rejected as submitted. The PA shall promptly inform the applicant as to the reasons why the project was rejected and the specific recommendations for the conditions under which the project would be approved. CPUC Staff shall provide the reasons for the rejection or request for modification, including each basis as to why the project is rejected, or modification is requested. In addition, CPUC Staff shall provide specific recommendations for the conditions under which the project would be approved.</p> <p>If any party to the project is unsatisfied with the Commission's directions for the project, a dispute resolution process may be initiated by that party. The Commission shall adopt rules for the conduct of the dispute resolution process. – Section 381.2 (g) (3) (F)</p>
Advisory.	The PA is not formally required to follow instructions or recommendations given in an Advisory review. However, issues found will affect ESPI scoring and may come up again in Ex-Post review.