

**CPUC Staff Ex Ante Review**

CPUC Staff Project ID Number	SCE_24_Other_C_937 [REDACTED]
CMPA Directory Link	<a href="https://deeresources.info/cmpa/projects/15264">https://deeresources.info/cmpa/projects/15264</a>
PA	SCE
PA Application ID	[REDACTED]
PA Application Executed Date	
PA Program ID	[REDACTED]
PA Program Name	[REDACTED]
PA Program Year	
Date of CPUC Staff Review:	4/30/2024
PA CMPA Upload Dates Included in this review:	
First PA Upload	3/19/2024
Second PA Upload	
Third PA Upload	
Fourth PA Upload	
Fifth PA Upload	
Sixth PA Upload	
Seventh PA Upload	
Eighth PA Upload	
PA Measure Description(s):	
Measure 1	SEM OM projects ONLY Whole Building behavioral operational and process efficiency optimization
Measure 2	
Measure 3	
Measure 4	
Measure 5	
Measure 6	
Measure 7	
Measure 8	
Measure 9	
Measure 10	
PA Project Description:	SEM project with several potential EPIAs such as [REDACTED]. Site will be using a top-down modeling approach for electricity savings and bottom-up for natural gas savings. Note that gas incentive rates are still in negotiations and may change by year-end report.
Bi-Monthly Upload kW Demand Reduction	[REDACTED]
Bi-Monthly Upload Annual kWh Impacts	[REDACTED]
Bi-Monthly Upload Therm Impacts	[REDACTED]
PA Proposed Incentive \$ (to Customer)	[REDACTED]
Project Documentation kW Demand Reduction	[REDACTED]
Project Documentation Annual kWh Impacts	[REDACTED]
Project Documentation Annual Therm Impacts	[REDACTED]
Project Documentation Incentive \$ (to Customer)	[REDACTED]
CPUC Staff Primary Reviewer Name	[REDACTED]
CPUC Staff Primary Reviewer Firm	[REDACTED]
CPUC Staff Review Supervisor Name	[REDACTED]
CPUC Staff Review Supervisor Firm	[REDACTED]
PA Primary Reviewer Name	[REDACTED]
PA Primary Reviewer Firm	[REDACTED]
CPUC Staff Project Manager	[REDACTED]
CPUC Staff Policy Authorization (as needed)	
CPUC Staff Recommendation:	Advisory
For rejection, action required:	N/A
M&V Review:	Post M&V Review (M&V Results and Final Calculations) Required

Action Number:	Summary of CPUC Staff Required Action by the PA:	Action Category	PA Response	ED Resolution

Note or Instruction Number:	CPUC Staff Notes or Instructions:	Instruction Category	PA Response	ED Resolution
1	The provided project documentation included the top-down model; however it's an initial model including only data from the baseline period. Hence no savings were calculated in the provided model. The reviewers determined to the initial model to be valid and appropriate for this type of facility. The reviewers expect the final model to include the data for the reporting period along with installed measure descriptions. The final model must include a description of all measures completed with dates and if available their estimated impact. Please provide Y1 completion report when available.	Continue Document Upload		
2	The reviewers recommend providing more details regarding the changepoint in the baseline period -noted in the midyear report- that resulted in shortening the baseline period from █ years to █ year. Would it not have been possible to just remove the period during which the changepoint occurred or similar adjustment? Was it necessary to remove the entire year from the model?	Calculation method		
3	The mid-year report notes that █ new buildings were constructed as part of the whole. █ Was the energy consumption of those █ buildings integrated into this model? Are there any established processes/classes that will be moved to those █ buildings? Not much details were provided regarding those █ buildings; please include more details regarding those █ buildings impact on the facility's operations and this model.	Calculation method		
4	The mid-year report notes that a "Notification of Bottom-up Method of Determining Energy Savings" is provided to support the bottom-up approach for natural gas savings. However that notice/memo is not included in the provided project documentation. The reviewers understand that possibly no natural gas projects may be installed; hence no natural gas savings are to be claimed. However if any are installed/claimed the reviewers require the participant to provide that explanation. The reviewers want to reiterate that top-down approach is the preferred approach per the SEM M&V guide and bottom-up calculations should only be used if a top-down model is not feasible.	Calculation method		
5	The reviewers recommend that the participant populates the applicable fields for completed measures with estimated savings and costs in the Opportunity Register if possible. The estimated savings and costs are effective tools for participants to prioritize measures and can streamline identification of capital measures	Other 1		

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"> <li>• Calculation Tool</li> <li>• Calculation Methodology</li> <li>• M&amp;V Plan</li> <li>• Baseline</li> <li>• Eligibility</li> <li>• EUV/RUL</li> <li>• Measure Type</li> <li>• Program Influence</li> </ul>
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.