

**CPUC Staff Ex Ante Review**

CPUC Staff Project ID Number	SCE 24 T C 968
CPUC Directory Link	<a href="https://dceresource.micromba/projects/1266">https://dceresource.micromba/projects/1266</a>
PA	SCE
PA Application ID	
PA Application Executed Date	11/07/200
PA Program ID	SCE 3P SEM 001
PA Program Name	Commercial Energy Manager Program
PA Program Year	1900
Date of CPUC Staff Review:	
PA CMA Upload Dates included in this review:	
First PA Upload	#N/A
Second PA Upload	#N/A
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	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:	None
Bi-Monthly Upload kW Demand Reduction	
Bi-Monthly Upload Annual kWh Impacts	
Bi-Monthly Upload Therm Impacts	
PA Proposed Incentive \$ (to Customer)	
Project Documentation kW Demand Reduction	
Project Documentation Annual kWh Impacts	
Project Documentation Annual Therm Impacts	
Project Documentation Incentive \$ (to Customer)	
CPUC Staff Primary Reviewer Name	
CPUC Staff Primary Reviewer Firm	
CPUC Staff Review Supervisor Name	
CPUC Staff Review Supervisor Firm	
PA Primary Reviewer Name	
PA Primary Reviewer Firm	
CPUC Staff Project Manager	
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	Some of the measures identified were already in progress prior to the treasure hunt (e.g. the facility). Please clarify whether any of the noted measures in the opportunity register were pursued as part of another energy efficiency (EE) program.	Continue Document Upload		
2	The Mid-Year Report notes that the selected model variables both meet statistical qualifications and participant expectations for representing the energy consumed at the site. The relevant variables that continue to be collected as part of the Energy Data Collection Plan are described in Table 6.  However Table 6 does not list the selected relevant variables. Please update the report to include the relevant variables in Table 6 or revise the language to reflect that savings will be determined using bottom-up calculations.	Continue Document Upload		
3	The Mid-Year Report states that bottom-up calculations are the most likely approach for savings calculation due to the unavailability of site data at this stage with the report noting that the data has not yet been provided by site staff citing the short turnaround between participant engagement and submission of mid-year reports.  However the reviewers find this explanation insufficient as the site has completed a two-year baseline and is halfway through the first reporting period. This provides ample time to develop a data collection process and plan. The reviewers believe the site staff should either provide the data or offer a valid explanation for its unavailability. The reviewers recommend that the implementers follow up with site staff regarding the data and document their efforts to collect it	Calculation method		
4	Please include the final First Year Performance Period Report savings calculation files and savings models or calculations (if applicable) at the end of the first reporting period.	Continue Document Upload		

CPUC Staff Recommendation Definitions	
CPUC Staff Recommendation	Definition
Application ready to proceed without exception	<p>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.</p>
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>• EUI/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 81.2 (g) (3) (F)</p>
Advisory.	<p>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.</p>