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November 9, 2010
Why did CA do benchmarking?

- **Governor’s Executive Order:**
  - Ordered state buildings to benchmark
  - Goal: Reduce energy use 20% by 2015 (vs. 2003)
  - Use Portfolio Manager to track
  - Done, but losing interest/follow-on

- **Utilities:**
  - Benchmark energy efficiency program participants
  - Help customers prioritize projects
  - Statewide Strategic Plan includes benchmarking

- **State law (AB1103):**
  - Disclose benchmarking data with real estate transactions
CA Early Goals

- Develop infrastructure for automated benchmarking
- Make benchmarking universally available
- Include in utility efficiency programs
- Use benchmarking to track progress toward statewide goals
- Utilities generally supportive
Early Issue #1: Confidentiality

- CA’s initial data release authorization:
  - Signed by building owner (utility account owner)
  - Authorizes utility to release customer billing data to Portfolio Manager
  - Grants utility access to customers’ benchmarking data (valuable information)
- Since largely automated through PM
Early Issue #2: Automation

- Automated billing data transfer from utility to PM facility accounts
  - Manual data transfer not sustainable for most users
  - Universal benchmarking must be simple/reliable

- Utility data people implement PM’s Automated Benchmarking System
  - Handles customer authentication
  - Gives utility access to benchmarked accounts
Early Issue #3: Tenant Data

- When individual tenants have meters and utility accounts
- Landlord cannot benchmark building without all tenants’ meter data
- If each tenant must sign disclosure…
- Utilities don’t always know what’s a “building” and which meters are in it (varies by utility)
Disclosure with Real Estate

- AB1103 state law requires disclosure upon sale, lease, refinance (whole bldg)
- Originally required as of January, 2010
- Only disclosed to parties, but...
  - Expect it to become standard info
  - Hope it will be used by appraisers
- Verification through normal due diligence process
- Buyers/tenants will know efficiency
AB1103 Enabling Regulations

- CA Energy Commission responsibility
- Work Group advising
- User Guideline being developed
- Delayed implementation schedule
  - Now starting July 2011
  - Phasing in by building size
    - Phase 1: single owner/meter >1,000 sf, and other bldgs >50,000 sf
    - Phase 2 (1 yr later): bldgs >10,000 sf
    - Phase 3 (2 yrs later): bldgs > 1,000 sf

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Role of Utilities in California Benchmarking
New Confidentiality Law

- SB 1476 – addresses confidentiality
  - Intended to deal with Smart Grid
  - Utilities still need consent to share data, except:
    - Aggregated data (no customer identifiers)
    - For energy management or EE programs
      - …and similar uses
      - 3rd party must provide security of data
      - Prohibits use of data for secondary purposes
    - As req’d or permitted by state/fed law or CPUC order
Utility Benchmarking Programs

- CPUC requires IOUs to benchmark commercial program participants
- Municipal utilities not yet engaged (except SMUD)
- IOUs/SMUD – have implemented ABS
  - Set up to handle large scale activity
  - But not pushing lots of benchmarking
- AB1103 delays taking pressure off
As benchmarking grows…

- Will become common knowledge
- Will be tracked over time
- Will enable utilities to compare customers across territory
  - E.g., compare all groceries
- Will become measure of societal progress toward energy efficiency
Questions/Comments

- Douglas Mahone, Chair
  Benchmarking Work Group
  (Supported by CA Utilities)

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