



Benchmarking California Role of Utilities

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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

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

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