Measure Insights User Training

E Source

Rachel Buckley

Jordan Tobey

Web conference

Your trainers

Rachel Reiss Buckley

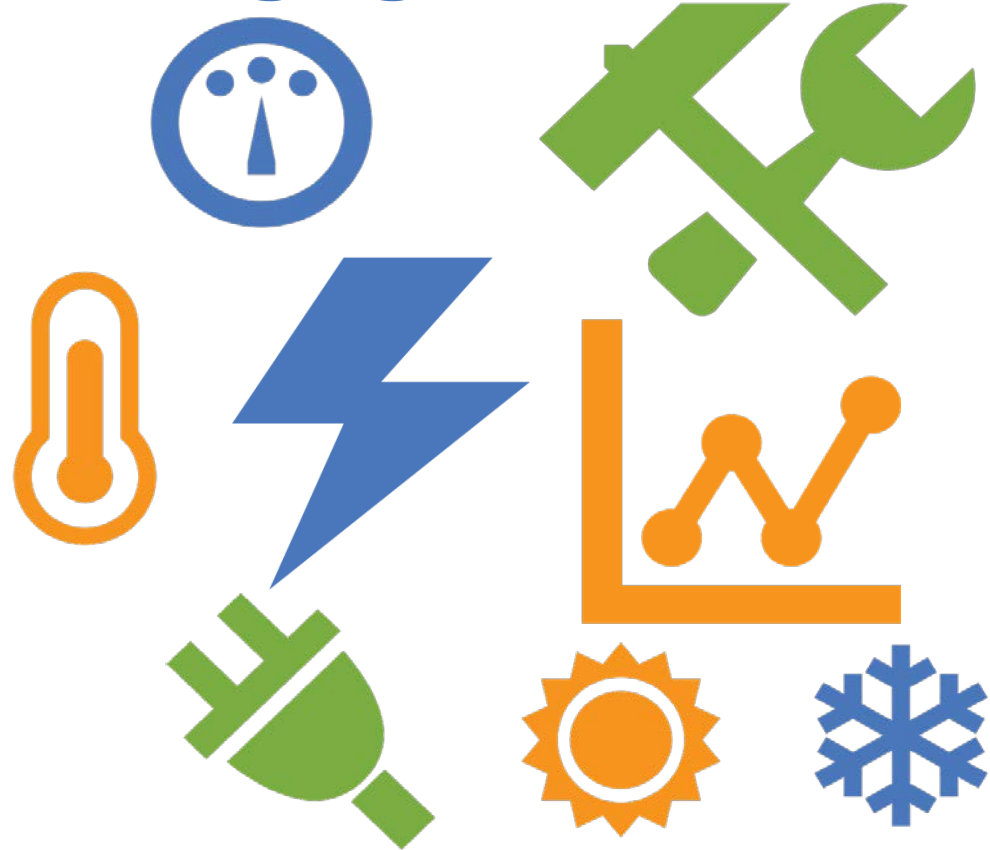Senior Director, Customer Energy Solutions,
E Source

Jordan Tobey

Manager, Data Products, E Source

Measure Insights training agenda

- Introductions

- Measure Insights overview

- How to use TRM Values

- Your use cases

- Q&A

DSM tools to make your life easier

Measure Insights gives us program input data
DSMdat provides us with who's doing what
DSM Insights tells us how utilities are actually performing
DSM Evaluation Library offers the story behind program performance

Intent	MEASURE INSIGHTS — Program inputs	DSMdat — Program profiles	DSM INSIGHTS — Program and portfolio results	DSM EVALUATION LIBRARY — "Why" behind results
Measure attributes	✔			
Baseline assumptions	✔			
Incentives		✔		
Measures		✔		
Results			✔	
Spending			✔	
Source	Technical reference manuals	Utility websites	Filings	Impact and process evaluations

How the tools fit together for portfolio development

How much savings are they planning for each measure to get to the program estimates?

- Who else already has a program with that measure?
- What incentives do they provide for the measure?

- How well does that program perform?
- How much are they planning to spend and to save with that program?

- Why did the program design change course?
- Why did the program perform the way it did?

Do you need to know …

… the expected useful life for low-flow showerheads?

… the incremental cost for variable-speed motors?

… the annual energy savings for LED lamps?

…the annual hours of operation for chillers?

Measure Insights

Compiles

TRM data

into a

structured online database

of measure-specific assumptions

and inputs to base

DSM program calculations on

Where technical reference manuals (TRMs) fit in the DSM cycle

A pentagonal cycle diagram with TRMs at the center:
- Program planning & design
- DSM goal setting
- DSM program evaluation
- Regulatory requests
- Business development

The state of TRMs

30 publicly available TRMs
(Not representative of 30 states)

Some are regional

Some states have multiple, by sector

None are easy to find

Oft-cited challenges of using TRMs

It takes FOREVER to respond to these urgent regulatory requests.

These PDFs make it impossible to benchmark measure-level data.

What are the assumptions behind these measure inputs? They're not cited!

I couldn't find a TRM to build an accurate savings level and left savings on the table!
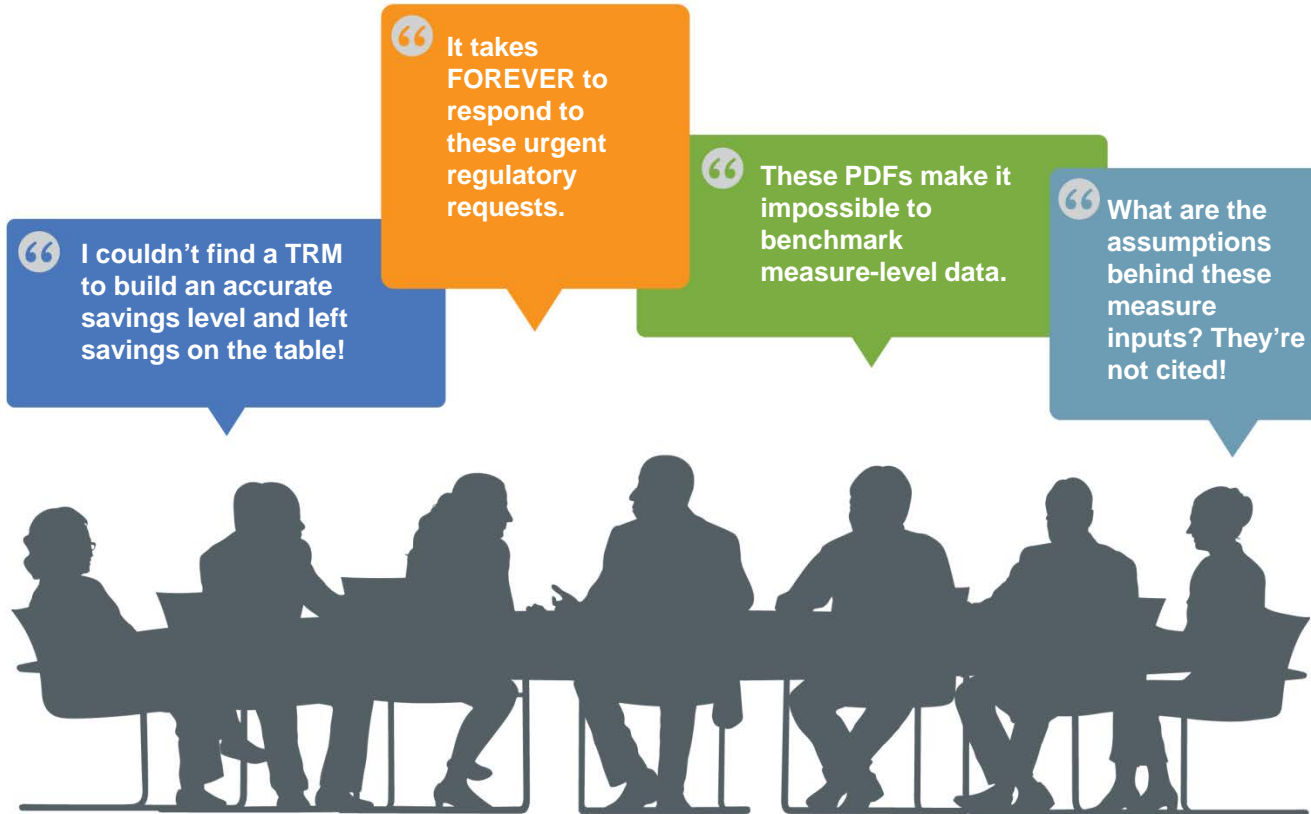
Measure Insights coverage

32 states and provinces

251 unique technologies

247 value types

108,037 measure-specific data points

Measure Insights' key elements

Focus on **VALUES** and **SOURCES** (*not* calculations)

VALUE types

▼

- Measure life
- Incremental cost
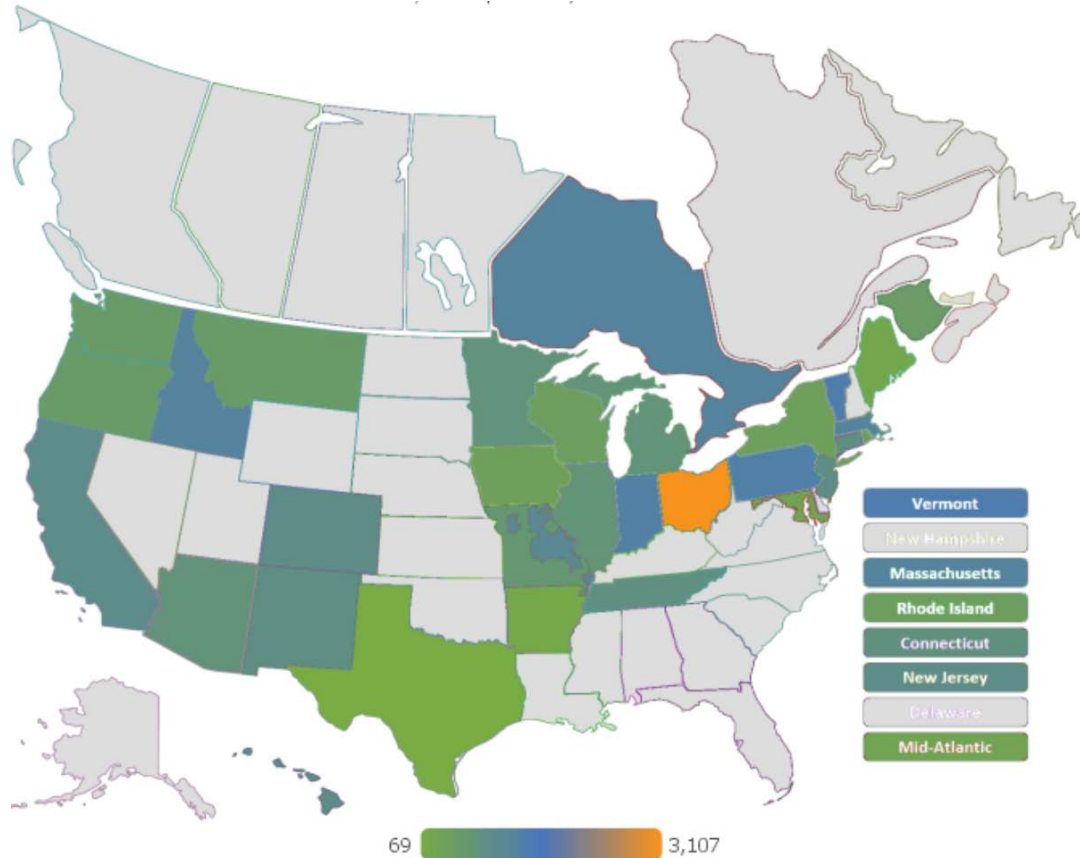- Kilowatt-hour savings
- Operating hours

Each VALUE has

▼

- Unit of measure
- Comparison type

All available TRMs

Legend:
- Vermont
- New Hampshire
- Massachusetts
- Rhode Island
- Connecticut
- New Jersey
- Delaware
- Mid-Atlantic

69 — 3,107

How we keep it updated

1 The administrator publishes a new TRM or an update to an existing TRM

2 Insights team indexes the TRM

3 Available in
Measure Insights
within a month

Measure Insights dashboards

TRM Explorer

See a list of available TRMs and explore measures by state/region

TRM Measure Coverage

View measures across jurisdictions to determine how common it is

TRM Values

Look across all available TRMs for actual values, with charts, for specific measures

TRM Explorer

Navigate through one TRM at a time

Local measure names tied to E Source technology taxonomy

View current and expected TRM filing dates

Dockets - Documents	Explorer	Performance	Cycle Tracker	Program B/C Ratios	EM&V	Budget Detail	Category Trends	Sector Trends	TRM Explorer ▼

Current and Expected TRM Filing Dates

Jurisdiction	TRM Version	Territory Type	Format	Days Since Last Published	Current TRM Date	# Local Measures	Expected TRM Filing Date
Texas	TX - V6.0	Statewide	PDF	69	Nov 30 2018	67	Nov 30 2019
Arkansas	AR - V8.0	Statewide	PDF	156	Sep 4 2018	105	Aug 31 2019
Maine	ME - 2018	Statewide	PDF	221	Jul 1 2018	116	Jul 1 2019
Mid-Atlantic	MID-ATL - V8.0	Regional	PDF	282	May 1 2018	100	May 1 2019
Iowa	IA - V2.0	Statewide	PDF	402	Jan 1 2018	137	Sep 30 2019
New York	NY - V5.2	Statewide	PDF	402	Jan 1 2018	85	Aug 1 2019

TRM Measure Coverage

View measures across jurisdictions to determine

Most common (benchmarking)

Least popular (new opportunities)

TRM Technology Coverage Detail

| Building & Performance | C&I Equipment | Generation, Delivery & Reliability | **HVAC & Refrigeration** | Lighting | Mot |

# Local Measures	Jurisdiction																						
TechnologyMeasureHierarchy	AM	AR	AZ	CA	CO	CT	HI	IA	ID	IL	IN	MA	MC	ME	MI	MN	MO	NB	NJ	NM	NO	NY	OH	ON	P
...............Adjustments										1															
...............Anti-Sweat Heater Controls											1									1	1				
...............Boiler Tune Up		1			5			2		3	2			5	1					1					
...............Central Air Conditioner	1	1				1	1	1		1	2	2	1			2	1			1	1	2	4		
...............Computer Room Air Conditioner (CRAC)													3	1											
...............Ductless Mini-Split Heat Pump	1				3	1		1		1		1	2	5		2	1	1		1					

TRM Values

View measure data values across jurisdictions

Benchmark the assumptions from your TRM

Find measure values for measures not in your TRM

Accessing Measure Insights

www.esource.com/measureinsights
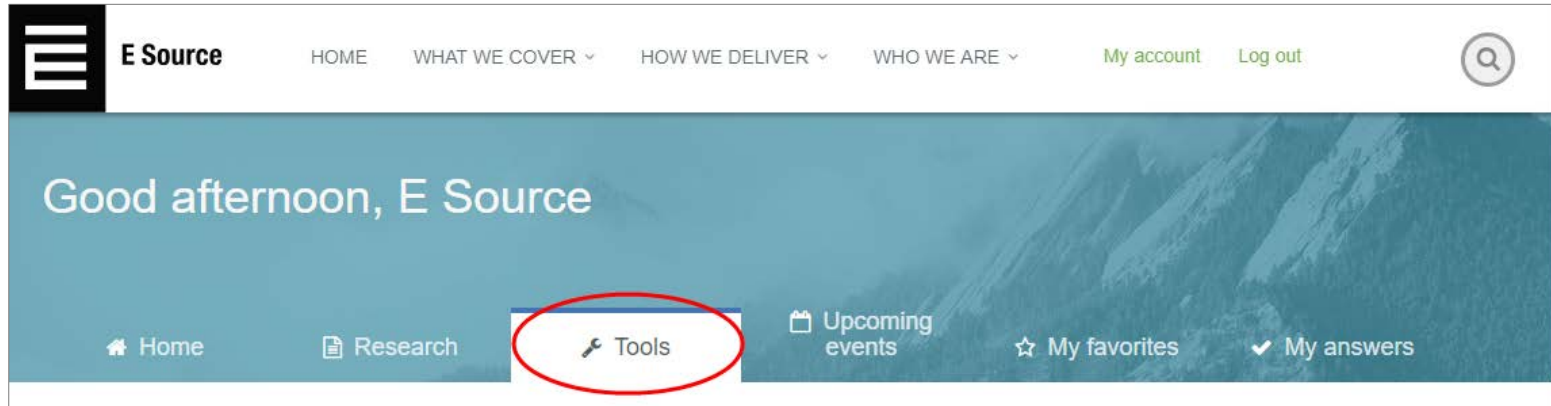
Measure Insights members

Existing members say

The team has been super-responsive to meeting our data needs.

Our program forecasts are more accurate for 2019 because of Measure Insights.

Wow! Measure Insights has saved our engineering team so much time.

You've made it so accessible to validate what we're doing.

It's not just a product

Access to our team

Insights tools usage tips

![DSM INSIGHTS - E Source logo]

![MEASURE INSIGHTS - E Source logo]

➡️ Don't use the back button in your browser
(Use in-tool breadcrumbs and x instead)

➡️ Use Chrome as your browser
when possible

Insights tools functionality

Blue text = click through to next level of info

⬆ = export

= in-tool navigation

= switch to table view

= maximize table to enable column sorting

If the hovers don't work for you
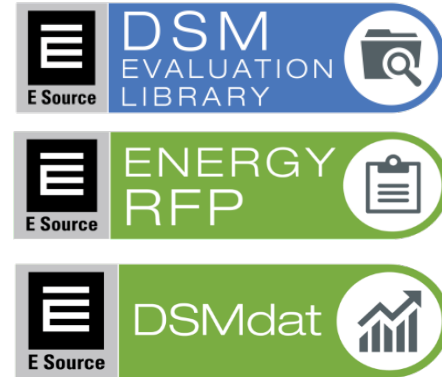
Use Firefox

or

Turn off your touchscreen in Chrome. Instructions are here: www.esource.com/DSMI-About-Usage-Tips/Usage-Tips-DSMI

Enter *chrome://flags/#touch-events* into the browser search bar, select Disabled from the drop-down menu, and click Relaunch Now.

License

MEASURE INSIGHTS

DSM INSIGHTS

DSM EVALUATION LIBRARY

ENERGY RFP

DSMdat

Specific number
of users

Enterprisewide

Don't miss the monthly newsletter

Sign up at
www.esource.com/email_preferences

Training and customer support

Monthly scheduled training sessions; custom training upon request

In-tool help menu with recorded training

Quarterly engagement check-in meetings

On-demand technical support

Monthly newsletter with usage tips, tool updates, and training dates

For more information

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