



California Energy Commission  
1516 9<sup>th</sup> Street  
Hearing Room A  
Sacramento, CA 95814

**AGENDA**  
(Revised 10-5-2012)

**AB 758 Staff Workshop  
Comprehensive Energy Efficiency Program  
For Existing Buildings Scoping Report**

**Monday, October 8, 2012**

9:00 a.m. – 5:00 p.m.

**Tuesday, October 9, 2012**

9:00 a.m. – 5:00 p.m.

**DAY 1: Monday, October 8, 2012, 9:00 a.m. – 5:00 p.m.**

**Introduction (10 Minutes) (9 – 9:10)**

Dave Ashuckian, Deputy Director  
California Energy Commission, Efficiency and Renewable Energy Division

**Opening Comments (30 Minutes) (9:10 – 9:40)**

Commissioner Andrew McAllister, Lead Commissioner, Energy Commission  
Commissioner Mark Ferron, California Public Utilities Commission

**Summary of Comprehensive Energy Efficiency Program for Existing Buildings Scoping Report  
(45 Minutes) (9:40 – 10:25)**

- Bill Pennington, Energy Commission
- Simon Baker, California Public Utilities Commission
- Public Questions and Comments

**BREAK (10 Minutes) (10:25 – 10:35)**

**Panel 1: Residential Energy Upgrade Programs (120 Minutes) (10:35 – 12:35)**

*This panel will explore how the design and implementation of residential energy upgrade programs can effectively serve consumers, provide cost effective upgrades and achieve scale.*

**Moderator:** Christine Collopy, Energy Commission

**Panelists:**

- Devon Hartman, California Building Performance Contractors Association
- Tiger Adolf, Building Performance Institute
- Kate Meis, Local Government Commission
- Siobhan Foley, California Center for Sustainable Energy
- Joseph Oldham, City of Fresno
- Jeff Gleeson, Pacific Gas & Electric

**Panelist Questions:**

1. *What customers are choosing building performance upgrades today? Where are the opportunities for scaling upgrades?*
2. *What value do building assessments bring the homeowner and/or contractor? What should be their role in upgrade programs?*

3. *What is the role of rebates in efficiency upgrade programs? Can financial products/financing strategies motivate deeper retrofits in lieu of rebates? Are both needed to motivate deeper retrofits?*
4. *How can “reactive” interaction with customers (e.g., HVAC tune-ups or water heater replacements) best be leveraged to encourage whole house upgrades? How can such customer interaction encourage or enable future upgrades?*
5. *What milestones and metrics are most appropriate for measuring success of programs to motivate upgrade activity? Against what criteria or guiding principles should potential AB758 program initiatives be assessed and prioritized?*
6. *How can quality assurance be provided without excessive impact on the customer experience?*
7. *How can Marketing, Education and Outreach efforts leverage and coordinate with other efficiency programs, implementers and regions?*
8. *What workforce development is desirable for the residential sector?*

**Panel 1: Commissioner Questions and Comments**

**Panel 1: Public Questions and Comments**

**LUNCH (on your own) (60 Minutes) (12:35 – 1:35)**

**Panel 2: Residential Ratings (105 Minutes) (1:35 – 3:20)**

*This panel will address the role and purpose of residential building ratings, and where and how they can be integrated into the market.*

**Moderator:** Bill Pennington, Energy Commission

**Panelists:**

- Conrad Asper, California Building Performance Contractors Association
- Jonathan Budner, Southern California Edison
- Jack Clark, California Center for Sustainable Energy
- Russell Bayba, Build It Green
- Eric Beriault, The Energuy
- Spencer Rosen, Energy Integrity (WebEx)
- Rick Wylie, Beutler Corp

**Panelist Questions:**

9. *Under what conditions would it be appropriate to include an energy rating in an upgrade project?*
10. *At what other points in the life of a building would an energy rating be desirable?*
11. *What market barriers exist that limit the growth of the voluntary market for HERS ratings and assessments? Is there a role for ratepayer or public funding to overcome these barriers, if so, what level is appropriate and commensurate to benefits?*
12. *Is there a role for HERS providers and HERS raters in the whole house upgrade programs offered by utility providers or in financing offerings supported by public dollars?*
13. *What improvements could be made to the California HERS program and its use in utility whole house upgrade programs?*

**Panel 2: Commissioner Questions and Comments**

**Panel 2: Public Questions and Comments**

**BREAK (10 Minutes) (3:20 – 3:30)**

**Panel 3: Energy Upgrades for Multifamily/Low-Income (90 Minutes) (3:30 – 5:00)**

*This panel will highlight opportunities for whole building upgrades for multifamily buildings, coordination with low-income programs and addressing barriers to achieving deeper upgrade projects.*

**Moderator:** Devi Eden, Energy Commission

**Panelists:**

- Ted Bardacke, Global Green
- Nathan Bruner, San Diego Gas & Electric
- Karim Bouris, MAAC Project
- Heather Larson, StopWaste.org
- Matt Schwartz, California Housing Partnership Corporation

- Alicia Gaylord, BRIDGE Housing
- Sophia Hartkopf, Heschong Mahone Group, Inc.

**Panelist Questions:**

14. How do we address low-income consumers in whole building programs?
15. How can low- to moderate-income consumers gain access to deeper upgrade projects?
16. How can whole building programs be meshed with existing low-income programs? What barriers would need to be overcome? How can the fact that multifamily buildings have a mix of tenants that qualify for low-income assistance and tenants that do not qualify, be addressed so that whole building upgrades are feasible?
17. What are effective strategies for overcoming the split-incentive barrier, such as when building owners pay for the energy efficiency improvements but the benefits accrue to the renters?
18. What lessons learned from the San Diego multifamily whole building pilot should be extended into a statewide program? What issues need to be addressed?

**Panel 3: Commissioner Questions and Comments**

**Panel 3: Public Questions and Comments**

**Closing Remarks**

**DAY 2: Tuesday, October 9, 2012, 9:00 a.m. – 5:00 p.m.**

**Introduction (10 Minutes) (9 – 9:10)**

Dave Ashuckian, Deputy Director  
California Energy Commission, Efficiency and Renewable Energy Division

**Presentation: Scoping Report Market Characterization and Program Goals (40 Minutes) (9:10 – 9:50)**

- Martha Brook, Energy Commission
- Commissioner and Public Questions and Comments

**PANEL 1: Residential/Nonresidential Data and Information Decision Support Initiatives (105 Minutes) (9:50 – 11:35)**

*This panel will discuss the need for public access to energy efficiency market data and what value “smart meter” data can provide for screening buildings/building owners for efficiency opportunities.*

**Presentation**

DOE’s Building Performance Database {35 Minutes – part of 105 Minute-panel}  
Elena Alschuler or Cody Taylor, U.S. Department of Energy (WebEx)

- Commissioner and Public Questions and Comments

**BREAK (10 Minutes) (10:25 – 10:35)**

**Moderator:** Martha Brook, Energy Commission

**Panelists:**

- Mimi Frusha, Renewable Funding
- David Jacot, Los Angeles Department of Water and Power
- Steve Schmidt, High Energy Audits
- Fran Inman, Majestic Realty
- Cassie Bowe, SunPower Corporation

**Questions:**

19. What can be learned from the California Solar Initiative (CSI) online database experience that can be extended to energy efficiency upgrades?
20. What are the major barriers to accomplishing comprehensive data collection and centralized public access to market data?
21. What safeguards exist for protecting consumer information while still allowing access to data?
22. What options exist to collect pertinent energy savings and market characterization data without collecting personal and business sensitive data?
23. What emerging initiatives hold promise to utilize smart meter data to inform decision making by homeowners/business owners/contractors/financers?

**Panel 1: Commissioner Questions and Comments**

**Panel 1: Public Questions and Comments**

**LUNCH (on your own) (60 Minutes) (11:35 – 12:35)**

**PANEL 2: Nonresidential Building Energy Performance Tools (130 Minutes) (12:35 – 2:45)**

*This panel will discuss the opportunities and current limitations of benchmarking, performance rating, operations monitoring and diagnostic tools to assess, identify, prioritize and sustain energy performance improvements in nonresidential buildings.*

**Presentation**

*Energy Ratings and Disclosures in the United States and European Union {40 Minutes, part of 130 Minute-panel}*

Andrew Burr, Institute for Market Transformation (WebEx)

- Commissioner and Public Question and Comments

**Moderator:** Martha Brook, Energy Commission

**Panelists:**

- Alecia Ward, The Weidt Group
- Denny Mann, Marina Mechanical
- Karl Brown, California Institute for Energy and Environment
- Mike Kaplan, Retroficiency (WebEx)
- Lin Ortega, County of Santa Clara

**Questions:**

24. *How can energy performance tools be used successfully in the multitude of nonresidential business markets in the state? Can these tools be cost-effectively deployed in small and medium buildings?*
25. *What is the proper role of public and ratepayer funded programs to increase the access to, and penetration of, energy performance tools for nonresidential buildings?*
26. *Is it appropriate to require performance ratings for all nonresidential buildings sometime in the future? Should building performance ratings be publicly disclosed?*
27. *Is it appropriate to require monitoring equipment in certain types and/or sizes of nonresidential buildings to improve the persistence of public and ratepayer funded efficiency improvements?*

**Panel 2: Commissioner Questions and Comments**

**Panel 2: Public Questions and Comments**

**BREAK (10 Minutes) (2:45 – 2:55)**

**PANEL 3: Nonresidential Building Upgrade Programs (110 Minutes) (2:55 – 4:45)**

*This panel will explore the potential development of nonresidential whole building programs and what needs exist in the marketplace to support such programs.*

**Moderator:** Justin Regnier, Energy Commission

**Panelists:**

- Carol Zabin, UC Berkeley's Center for Labor Research and Education
- Bill McNamara, Energy Management & Design
- Jenna Olsen, Pacific Gas & Electric
- Derrick Rebello, QuEST – Oakland Shines

**Questions:**

28. *How can whole building upgrade programs be encouraged in the nonresidential sector? Should advanced upgrades for specific equipment (e.g., advanced lighting or HVAC controls) be considered “whole building?” What should the criteria be for considering a program “whole building?”*
29. *Given the diversity of nonresidential businesses and buildings, which energy saving strategies, tools and implementation approaches can be applied across the diversity? What are the conditions that*

*will necessitate unique program elements to improve the efficiency of specific sectors of the nonresidential building market?*

30. *What workforce development is needed to meet the efficiency goals in nonresidential buildings? How can workforce development be better integrated with the delivery of energy efficiency upgrades?*
31. *What barriers are there to achieving upgrades in small nonresidential buildings (less than 25,000 square feet)? What strategies exist for overcoming the split-incentive barrier in small nonresidential buildings, such as when building owners pay for the energy efficiency improvements but the benefits accrue to the tenants? What community or business organizations can serve as partners for overcoming the barriers in achieving upgrades for small nonresidential buildings?*
32. *What role should continuous commissioning play in nonresidential building upgrade programs?*

**Panel 3: Commissioner Questions and Comments**

**Panel 3: Public Questions and Comments**

**Closing Remarks**

**Additional Questions:**

Below are additional questions that the Energy Commission is interested in hearing about. They are overarching in nature, and cross more than one panel discussion. Feel free to discuss these questions at the workshop or provide written comment as outlined in the workshop notice.

33. *What is the proper role for regulations to achieve energy efficiency through AB 758? What are the appropriate points in the life of buildings (trigger points) where regulations could be applied?*
34. *How could the real estate industry play a role to encourage assessments, rating and upgrades as a means of differentiating homes where owners have invested in upgrades?*
35. *Should non-energy benefits (NEBs) be recognized in cost-effectiveness criteria for an upgrade program, and if so, how? Are there important distinctions between ratepayer-funded and other publicly funded upgrade programs in how NEBs are addressed?*
36. *What process improvements or funding solutions would facilitate better compliance with the Building Energy Efficiency Standards? What actions could be taken to encourage contractors to pull permits?*
37. *How should building energy simulation software be used to make recommendations for energy upgrades? How could actual energy use, before and after the upgrade, be considered?*
38. *Should California pursue a "HERS-lite" rating option (see page 65 of AB 758 Scoping Report)? Could this be used as a screening tool? How could it be used?*
39. *How effective are workforce training efforts to prepare building officials, experienced contractors and new workforce entrants for energy upgrade programs? What education or training gaps exist?*

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#### **DAY 2 – Nonresidential, Tuesday, October 9, 2012**

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