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NAESB Standards for Measurement and Verification of Demand Response



Association of Energy Service Professionals

CORY CUMMINGS
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NORTH AMERICAN ENERGY STANDARDS
BOARD

Organization of NAESB by Quadrant and Segment



Wholesale Gas – 5 Segments

- End Users
- Local Distribution
- Pipelines
- Producers
- Services

Wholesale Electric – 7 Segments

- End Users
- Distribution/LSE
- Transmission
- Generation
- Marketers/Brokers
- Independent Grid Operators/Planners
- Technology and Services

Retail Gas – 3 Segments

- End Users/Public Agencies
- Utilities
- Service Providers/Suppliers

Retail Electric – 3 Segments

- End Users/Public Agencies
- Distributors
- Service Providers/Suppliers

NAESB Scope of Work



NAESB's scope is cited in the NAESB Certificate (Article 2, section 1):

“The objects and purposes of NAESB are to propose and adopt voluntary standards and model business practices designed to promote more competitive and efficient natural gas and electric service, as such standards apply to electronic data interchange (“EDI”) record formats and communications protocols and related business practices that streamline the transactional processes of the natural gas and electric industries.”

ANSI Principles of Standards Development



- ANSI Principles of Standards Development

Open. Any materially affected and interested party has the ability to participate

Balance and Lack of Dominance. The consensus body shall be balanced and shall not be dominated by any single interest category or organization.

Due Process. All objections shall have an attempt made towards their resolution. Interests who believe they have been treated unfairly shall have a right to appeal.

Consensus. More than a majority but not necessarily unanimity.

Voluntary. Standards are not binding unless adopted by a governmental entity as part of a code or set of regulations.

NAESB Standards



- Transparency
- Inclusion
- Balance
- Documented and Accessible Process
- Tie into the regulatory process
- Accountability

Voluntary Standards



- From the organization's perspective, all standards are voluntary and may be provided to regulatory agencies as status reports as they are published.
- The standards and model business practices may incorporate regional or operational differences
- Regulatory agencies may choose to adopt standards or model business practices, but NAESB will not advocate such action.
- The organization will not monitor for compliance, provide performance measures for compliance, nor will it define sanctions for non-compliance.
- The organization will not advocate before any regulatory body.

Participate



All participants, regardless of NAESB membership status, are welcomed to the meetings and subcommittee efforts.

If you are interested in participating, you can contact me:

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Wholesale Demand Resources Measurement and Verification Standards

November 17, 2011

Eric Winker, Ph.D.
Resource Analysis and Integration
ISO New England

About ISO New England

Not-for-profit Corporation

- Created in 1997 to oversee New England's restructured electric power system; Regulated by Federal Energy Regulatory Commission

Regional Transmission Organization

- Independent of companies doing business in market; no financial interest in companies participating in the market

Major Responsibilities

- Reliable operation of the electric grid
- Administer wholesale electricity markets
- Plan for future system needs



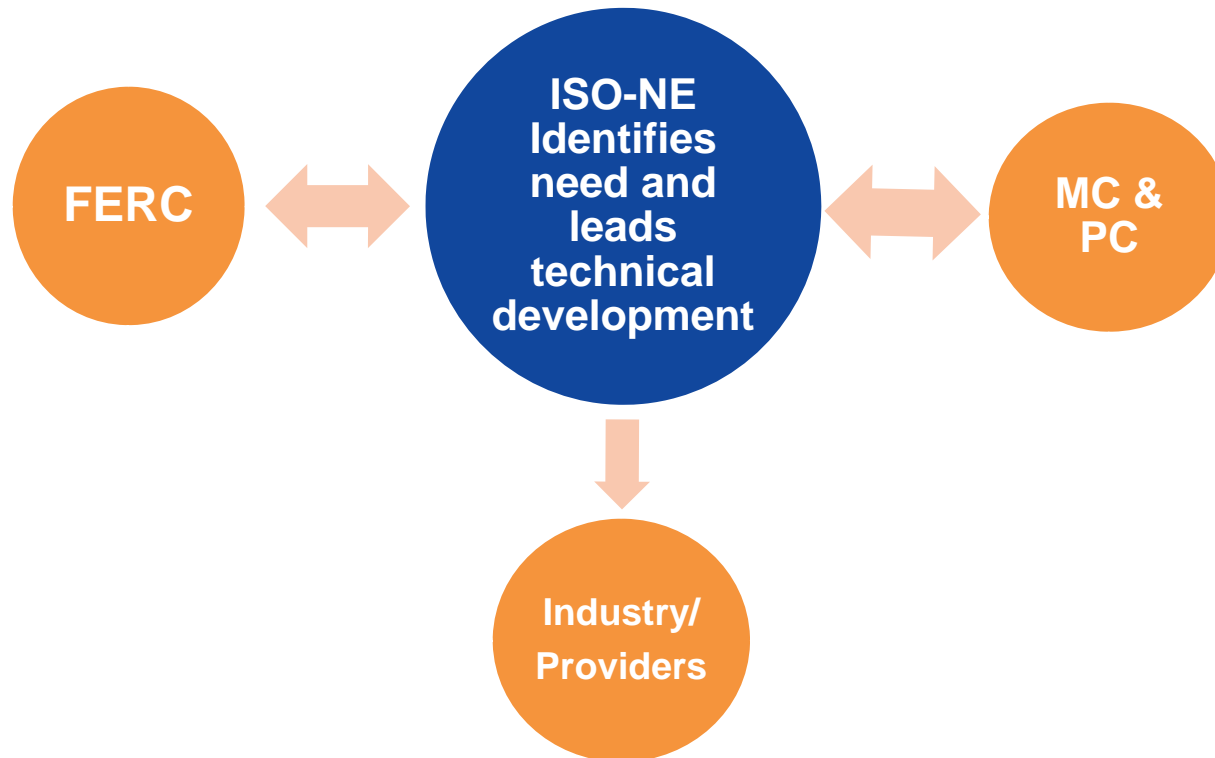
New England's Electric Power Grid at a Glance

- 6.5 million households and businesses; population 14 million
- More than 300 generators
- Over 8,000 miles of high-voltage transmission lines
- 13 interconnections to electricity systems in New York and Canada
- Approx. 32,000 megawatts of total supply and 2,750 megawatts of demand resources
- All-time peak demand of 28,130 megawatts, set on August 2, 2006
- More than 450 participants in marketplace
- \$5-11 billion annual energy market value



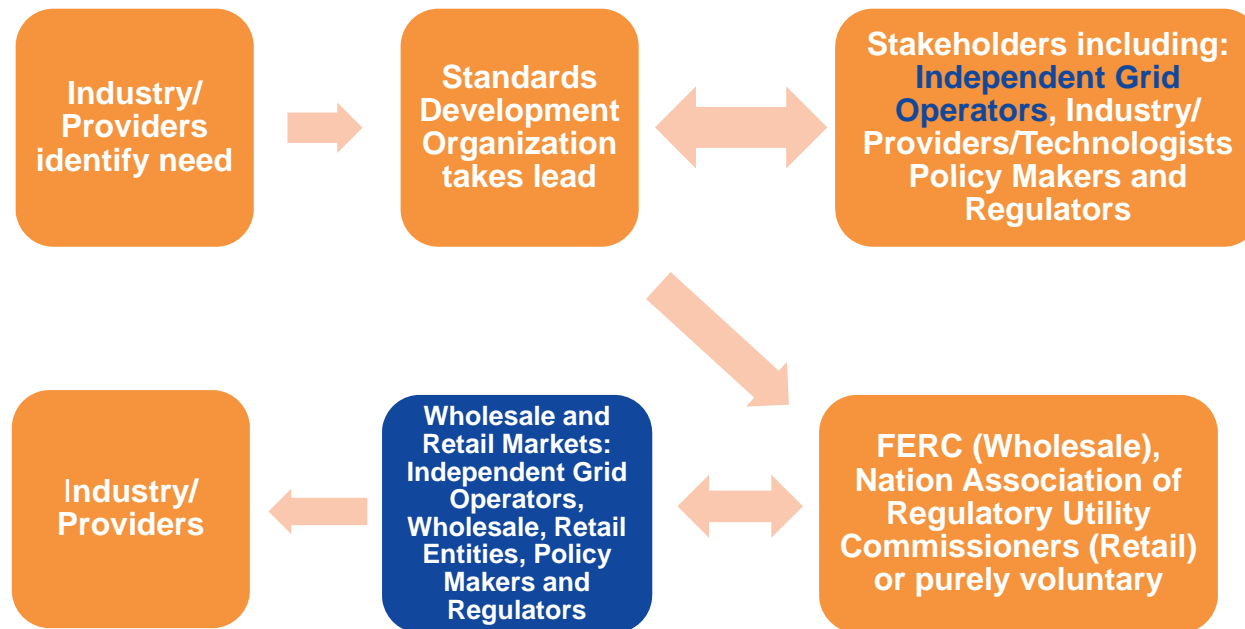
ISO/RTO Standards Development Process

- Programmatic Approach



NAESB Standards Development Process

- National Standards Development Approach



NAESB (WEQ) Measurement and Verification of Demand Response, Phase I and Phase II

- **Purpose** – Develop Business Practice Standards for Measurement and Verification of Demand Response Products in Wholesale Markets.
- **Applicability** – ISO/RTOs, not applicable to other wholesale markets
- **Requestor** – Advanced Energy and North Carolina Utility Commission
- **Activity Initiation Date** – 2006
- **Completion Date** – April 2011 (FERC ORDER 676-F)
- **Status** – FERC order 676-F issued in April 2011 required ISO/RTOs to adopt Phase I WEQ-015 standard by reference in OATT Section 24. Also required NAESB to develop “more detailed technical standards” in one year. Phase I was primarily led by the ISO/RTOs, Phase II was primarily led by Industry.

NAESB (WEQ) Measurement and Verification of Energy Efficiency

- **Purpose** – Develop Business Practice Standards for Measurement and Verification of Energy Efficiency Products in Wholesale Markets
- **Applicability** – ISO/RTOs and other wholesale administered markets
- **Requestor** – Advanced Energy and NC PUC
- **Activity Initiation Date** – 2006
- **Completion Date** – May, 2011
- **Status** – Entities currently without PUC regulated DSM programs need for benchmark measurement of demand reduction. Added to this request are standards for use of DSM in satisfying RPS and GHG credits. Activity includes input from NARUC on process and scope. Parallel process for Retail standards underway, nearly 6 months behind wholesale standards.

Demand Response and Energy Efficiency Measurement & Verification (M&V) Standards

Demand Response Products and Services Standards Applicability

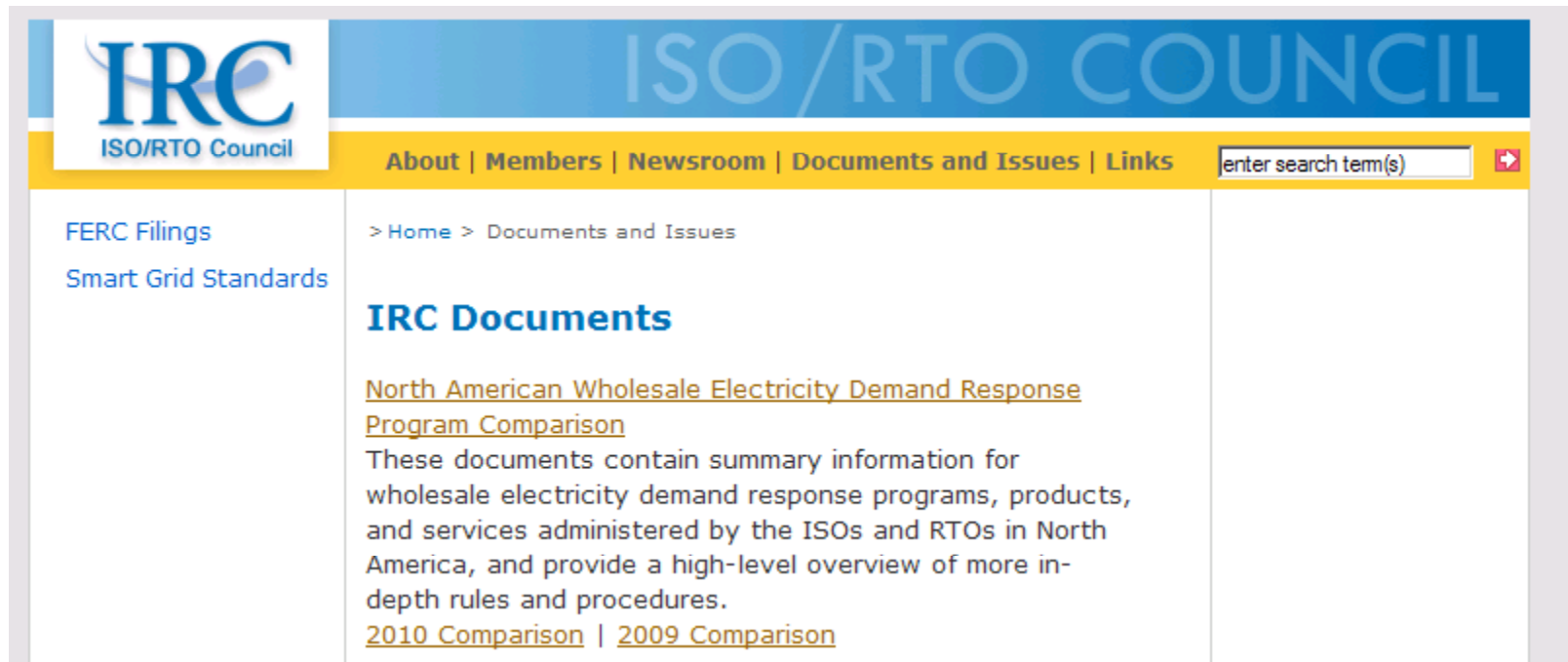
- These standards do not establish requirements related to the compensation, design, operation, or use of Demand Response services
- System Operators are not required to offer these Services and may not currently offer each of these Services
- Applicable only to Independent System Operators

Demand Response Products and Services Standards Applicability (cont)

- **Energy Service**
 - A type of Demand Response service in which Demand Resources are compensated based solely on Demand reduction performance.
- **Capacity Service**
 - A type of Demand Response service in which Demand Resources are obligated over a defined period of time to be available to provide Demand Response upon deployment by the System Operator.
- **Reserve Service**
 - A type of Demand Response service in which Demand Resources are obligated to be available to provide Demand reduction upon deployment by the System Operator, based on reserve capacity requirements that are established to meet applicable reliability standards.
- **Regulation Service**
 - A type of Demand Response service in which a Demand Resource increases and decreases Load in response to real-time signals from the System Operator. Demand Resources providing Regulation Service are subject to dispatch continuously during a commitment period. Provision of Regulation Service does not correlate to Demand Response Event timelines, deadlines and durations.

ISO/RTO Council Matrix of Demand Response Programs

<http://www.isorto.org/>

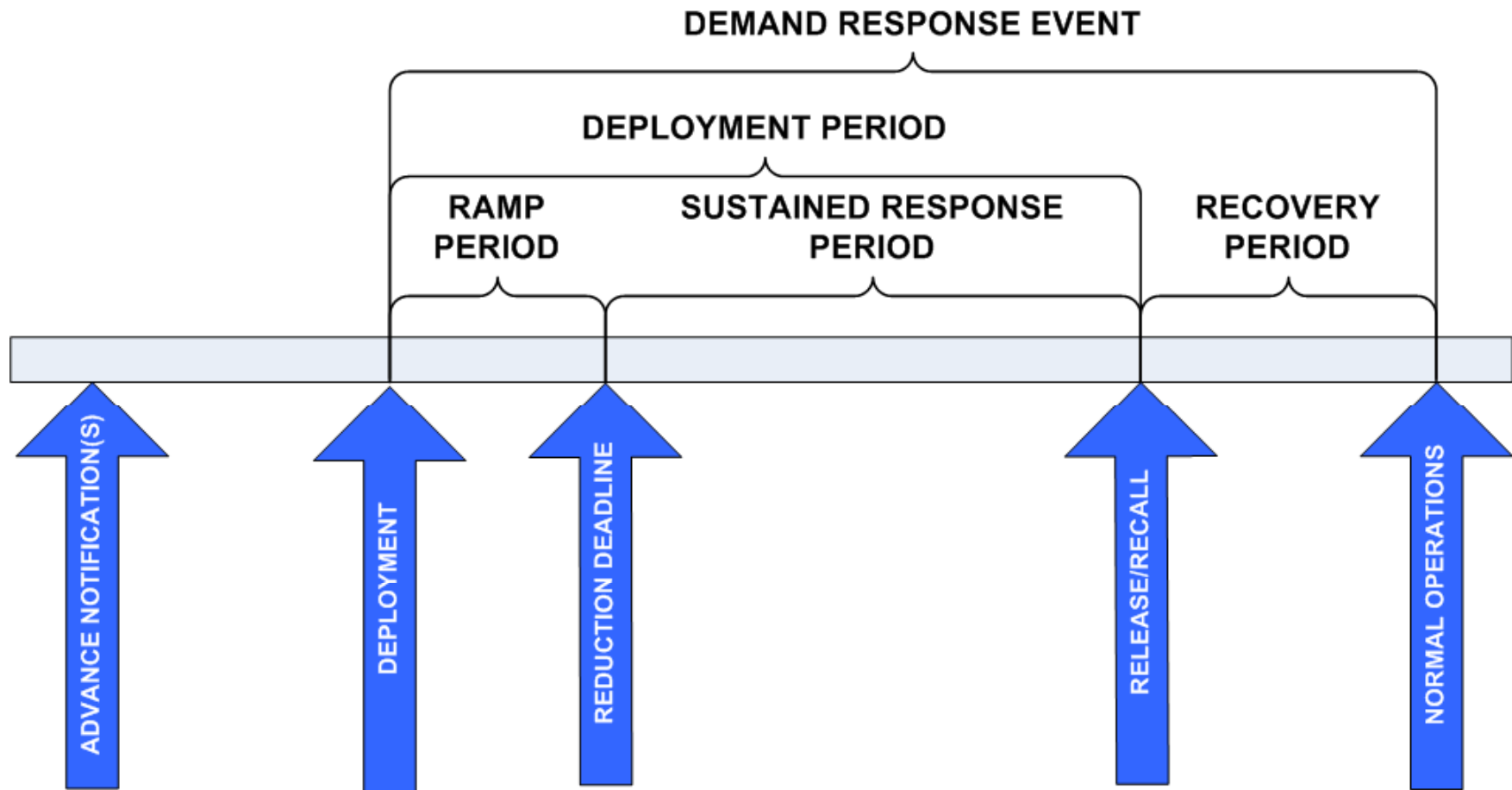


The screenshot shows the ISO/RTO Council website. The header features the IRC logo and the text 'ISO/RTO COUNCIL'. Below the header is a navigation menu with links for 'About', 'Members', 'Newsroom', 'Documents and Issues', and 'Links'. A search bar is located on the right side of the navigation menu. The main content area is titled 'IRC Documents' and contains a link to 'North American Wholesale Electricity Demand Response Program Comparison'. Below this link is a paragraph of text describing the documents and two additional links: '2010 Comparison' and '2009 Comparison'. The left sidebar contains links for 'FERC Filings' and 'Smart Grid Standards'.

Demand Response Products and Services Standards Overview

General	Telemetry	After-the-Fact-Metering	Performance Evaluation
<ul style="list-style-type: none">• Advance Notification• Deployment Time• Reduction Deadline• Release/Recall• Normal Operations• Demand Resource Availability Measurement• Aggregation• Transparency of Requirements	<ul style="list-style-type: none">• Telemetry Requirement• Telemetry Accuracy• Telemetry Reporting Interval• Other Telemetry Measurements• Communication Protocol• Governor Control Equipment• On-Site Generation Telemetry Requirement	<ul style="list-style-type: none">• After-the-Fact Metering Requirement• Meter Accuracy• Details of Meter/Equipment Standards• Meter Data Reporting Deadline• Meter Data Reporting Interval• Clock/Time Accuracy• Validating, Editing & Estimating (VEE) Method• On-Site Generation Meter Requirement	<ul style="list-style-type: none">• Rules for Performance Evaluation

Demand Response Products and Services Standards Event Timing



Demand Response Products and Services Performance Evaluation Methodologies Standards Overview

Baseline Information

- Baseline Window
- Calculation Type
- Sampling Precision and Accuracy
- Exclusion Rules
- Baseline Adjustments
- Adjustment Window

Event Information

- Use of Real-Time Telemetry
- Use of After-the-Fact Metering
- Performance Window
- Measurement Type

Special Processing

- Highly-Variable Load Logic
- On-Site Generation Requirements

Demand Response Products and Services Performance Evaluation Methodologies

- A performance evaluation methodology is used to determine the Demand Reduction Value provided by a Demand Resource. The standards include descriptions of acceptable Baselines and alternative performance measurements.
 - Maximum Base Load
 - Meter Before / Meter After
 - Baseline Type-I
 - Baseline Type-II
 - Metering Generator Output

Demand Response Products and Services Performance Evaluation Methodologies (cont)

- Maximum Base Load
 - A performance evaluation methodology based solely on a Demand Resource's ability to reduce to a specific level of electricity consumption or demand, regardless of its electricity consumption or demand at Deployment.
- Meter Before / Meter After
 - Metering Before Deployment vs. Metering After Reduction Deadline is a performance evaluation methodology where electricity consumption or demand over a prescribed period of time prior to Deployment is compared to similar readings during the Sustained Response Period.

Demand Response Products and Services Performance Evaluation Methodologies (cont)

- **Baseline Type 1 (Interval Metered)**
 - A Baseline model based on a Demand Resource's historical interval meter data which may also include but is not limited to other variables such as weather and calendar data.
- **Baseline Type 2 (Non-interval Metered)**
 - A Baseline model that uses statistical sampling to estimate the electricity consumption of an Aggregated Demand Resource where interval metering is not available on the entire population.
- **Behind-The-Meter Generation**
 - A performance evaluation methodology, used when a generation asset is located behind the Demand Resource's revenue meter, in which the Demand Reduction Value is based on the output of the generation asset.

Energy Efficiency Measurement and Verification Standards Principles

- Provide consistent and reliable evidence of Energy Efficiency reductions in electrical usage for qualification and performance in markets.
- Compliance with these M&V requirements shall be the responsibility of the EERP.
- Broaden implementation and acceptance of energy reduction measures and practices.
- Not designed to establish or support any regulatory policy.

New Wholesale Electric Quadrant Definitions from EE Standards

Term	Definition
Demand Reduction Value	The measurement of reduced electricity usage by a Demand Resource during a Demand Response Event or Energy Efficiency performance hours expressed in MW.
Energy Efficiency	Installed measures on Retail Customer facilities that achieve a permanent reduction in electric energy usage while maintaining a comparable quality of service.
Energy Efficiency Baseline	Energy usage that would have occurred without implementation of the subject measure or project.
Energy Efficiency Capacity Resource	A type of Demand Resource used in capacity markets in which demand is reduced over a defined period of time measured in MW.
Energy Efficiency Resource Provider	An entity that is responsible for delivering Energy Efficiency.
Measurement and Verification	The process of determining reductions in usage and/or demand resulting from Demand Response or Energy Efficiency.

Energy Efficiency Standards Performance Measurement Methods

- **Acceptable Methodologies**

Measurement and Verification methodologies used by the EERP shall be appropriate to the measure type and sensitivity requirements of the measurement techniques. Acceptable methods shall include:

- 021-6.1.1** IPMVP Option A: Partially Measured Retrofit Isolation/Stipulated Measurement.
- 021-6.1.2** IPMVP Option B: Retrofit Isolation/Metered Equipment.
- 021-6.1.3** IPMVP Option C: Whole facility/Regression.
- 021-6.1.4** IPMVP Option D: Calibrated Simulation.
- 021-6.2** Alternative Acceptable M&V Methodologies.

Energy Efficiency Standards Baseline Criteria

- **Energy Efficiency Baseline Criteria**

Energy Efficiency Baseline conditions used by the EERP shall reflect the conditions under which new energy efficient equipment or processes are installed to provide a service function. The four conditions shall include:

- 021-7.1.1** Replacement of functional equipment still within its current useful life.
- 021-7.1.2** Replacement of functional equipment beyond its current useful life.
- 021-7.1.3** Unplanned replacement or failed equipment.
- 021-7.1.4** New construction.

Energy Efficiency Standards Baseline Criteria (cont)

- **Standard Energy Efficiency Baseline**

Nameplate rating of the equipment meeting the level of efficiency required by applicable state code, federal product efficiency standard, or standard practice, whichever is most stringent.

- **The Current Load Energy Efficiency Baseline**

Existing load of operating equipment across the performance hours. The current load Energy Efficiency Baseline is determined at the time of commitment in the case of forward commitment or at the time of installation as set forth in the Governing Documents.

Energy Efficiency Standards Other Requirements

- Statistical Significance
- Sampling Requirements
- Demand Reduction Value Calculations
- Measurement Variables and Monitoring Frequency
- Measurement Equipment Specifications
- Data Validation



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NAESB Retail Demand Response & Energy Efficiency M&V Model Business Practices

Phil Precht

*Management Consultant, Pricing & Regulatory Services
Baltimore Gas and Electric Company*



November 17, 2011

Disclaimers

- The views presented are those of the presenter and not necessarily those of BGE
- Phil's Disclaimer
 - *Following graduation from the U.S. Naval Academy in 1968 and service in the Navy, Phil joined BGE in 1973*
 - *Over the following 38 years, Phil's experience was in rates, Tariffs, and Retail Customer Choice*
 - *Phil was indirectly involved with GISB and in the development of NAESB*
 - *He is currently Co-Chair of the Retail Executive Committee and the Retail Business Practices Subcommittee, the Chair of the Retail Electric Demand Response Work Group, as well as participating on a number of other subcommittees*
 - *Phil became involved in NAESB's Demand Response and Energy Efficiency efforts to monitor them*
 - *Bottom Line – Phil is not an expert in Demand Response or Energy Efficiency M&V*

Contents

- Structure of Retail Model Business Practices
- Preliminary Concepts
- Demand Response M&V
- Energy Efficiency M&V
- Enrollment in Demand Response Programs

Structure of Retail Model Business Practices

Similarities Between Retail and Wholesale Electric

- Basic process is the same
 - Subcommittee develops the Model Business Practices/Standards
 - *Anyone can participate and vote (i.e. you do not need to be a member of NAESB)*
 - *Voting is balanced by industry segment – Balancing prevents any segment from packing the room to get a majority vote*
 - After passing at the subcommittee level, the Recommendation is circulated to the industry for a 30-day Formal Comment period
 - Executive Committee considers the Recommendation and any Formal Comments received
 - *To vote at the Executive Committee, one must be a NASEB member and be a named voting representative or alternate*
 - *The Recommendation must pass a super-majority vote – i.e. it must receive 67% of the votes as well as at least 40% of all segment votes*
 - After passing the Executive Committee, the Recommendation is sent out for Ratification by the NAESB membership

Differences Between Retail and Wholesale Electric

- Wholesale Electric (and Wholesale Gas) NAESB Standards are filed with the FERC
 - *FERC issues a NOPR and generally makes the NAESB Standards **mandatory** for jurisdictional parties*
- Retail Model Business Practices are **voluntary** and are only provided to NARUC for information
 - *It is up to the Authorized Regulatory Authority or the Distribution Company to incorporate the Model Business Practices into its rules*
- Thus, the distinction between “Standards” and “Model Business Practices”

Books

- Retail groups topics into Books – a different Book for each topic
- Currently 25 Books
 - A large number deal with topics associated with Customer Choice
- Demand Response M&V is Book 13
- Energy Efficiency M&V is Book 19
- Enrollment in Demand Response programs is Book 24

Retail Numbering Convention

- Retail Model Business Practices follow a numbering convention which is q.x.y.z.a
 - q =
 - RXQ – Applicable to both Retail Electric and Retail Gas
 - REQ – Applicable to only Retail Electric
 - RGQ – Applicable to only Retail Gas

 - x = The number of the specific Book

 - Y =
 - 1 = Principles
 - 2 = Definitions
 - A = Business Definitions
 - B = Technical definitions
 - C = Abbreviations and Acronyms
 - 3 = Model Business Practices
 - 4 = Models
 - 5 = Related Model Business Practices
 - 6 = Technical Implementation

 - z = Functional grouping

 - a = Sequentially assigned number

Structure of Retail Model Business Practices

- Executive Summary
 - Attempts to describes what the Model Business Practices cover
- Introduction
 - Primarily “boiler plate” language which describes NAESB and how to request changes to the Model Business Practices
- Business Processes and Practices
 - The numbering convention starts here
 - Principles – High level guiding principles (e.g. the Applicable Regulatory Authority's rules take precedence)
 - Definitions of terms
 - Retail has a Glossary Subcommittee – Primary purpose is to avoid conflicts in definitions
 - Model Business Practices – These are the business rules – equivalent of Standards
- Models – Process Flows
- Technical Implementation
 - IR – Information Requirements
 - TEIS – Technical Electronic Implementation Subcommittee

Preliminary Concepts

Current Status

- Model Business Practices for M&V for both Demand Response and for Energy Efficiency programs have been developed consistent with those developed for Wholesale Electric
 - *Definitions of terms have been developed jointly with WEQ*
 - *Except for a few minor differences, the definitions match*
 - *Model Business Practices do not match word-for-word, but follow the same concepts*
- Retail Model Business Practices for M&V for Demand Response programs have been completed and Ratified
 - *Any modifications desired will require the submission of a Request to NAESB*
 - *Not a roadblock – Retail will act in a timely fashion to address any Requests*
- Still under development are Model Business Practices for M&V for Energy Efficiency programs and for Enrollment in Demand Response programs
 - *Any party can participate in the Work Groups developing the Model Business Practices and can vote on the proposals*

M&V

- M&V = Measurement and Verification
 - *A formal Retail definition has not yet been developed, but Energy Efficiency is beginning to work on one*
 - *Wholesale Electric has a Ratified definition*

- Please note that this does not include Impact Evaluation or Evaluation – No “E” at the beginning
 - *This does not mean that the issue is closed*
 - *To include in Demand Response will require a Request*
 - *To include in Energy Efficiency – just join the conference calls and express your opinions*
 - *Defining the terms may help to reach consensus*

- Nor do the Model Business Practices include Program Design or Cost/Benefit
 - *This is outside scope*
 - *The Model Business Practices only are to deal with M&V, or EM&V as ultimately decided*

Retail Demand Response M&V

Contents of Model Business Practices for M&V of Demand Response Programs

- REQ.13.3.1 General Characteristics of a Demand Response Event
- REQ.13.3.2 Measurement of Load
- REQ.13.3.3 Statistical Sampling
- REQ.13.3.4 Performance Evaluation Methods

REQ.13.3.1 General Characteristics of a Demand Response Event

- There are 7 Model Business Practices which cover:
 - *Everything in accordance with the Governing Documents which should specify:*
 - Advance Notification Requirements; and
 - Deployment of the Demand Response Resource(s)

 - *Program Administrator specifies:*
 - Reduction Deadline;
 - Ramp Period, or Ramp Rate;
 - Release / Recall; and/or
 - Any requirement for a return to Normal Operations

 - ***Note: Capitals indicate a defined term***

REQ.13.3.2 Measurement of Load

- There are 8 Model Business Practices which cover:
 - Use of either Telemetry or After-the-Fact Metering
 - Meter & meter clock/time accuracy
 - Meter data reporting deadlines
 - Meter data recording interval
 - Method of Validating, Editing and Estimation (VEE)
 - *Please note that there are some differences in the definitions of VEE, but NAESB has standardized the definition*

REQ.13.3.3 Statistical Sampling

- Especially in mass markets, can not realistically meter every customer
- There are many currently accepted methodologies
 - *AEIC Load Research Manual is considered the “bible” for load research and discusses statistical sampling*
 - Other methodologies are provided as examples
 - *General steps are listed*
 - *“The sample drawn should comport to a level of statistical significance that supports the goals of the program”*
 - Means that NAESB has not defined a specific methodology or parameters that should be followed

REQ.13.3.4 Performance Evaluation Methods

- 4 Methods are included:

- **Maximum Base Load**

- *Definition: A performance evaluation methodology based solely on a Demand Resource's ability to maintain its electricity usage at or below a specified level during a Demand Response Event*

- **Meter Before / Meter After**

- *Definition: A performance evaluation methodology where electricity Demand over a prescribed period of time prior to Deployment is compared to similar readings during the Sustained Response Period*

- **Baseline**

- *Definition: A method of estimating the electricity that would have been consumed by a Retail Customer or Demand Resource in the absence of a Demand Response Event. It may be calculated using interval metering and/or statistical sampling techniques.*

- **Metering Generator Output**

- *Definition: A performance evaluation methodology in which the Demand Reduction Value is based on the output of a generator located behind the Demand Resource's revenue meter.*

Remember - - -

- The Model Business Practices intentionally avoid being too detailed.
- They allow for regional / state / Distribution Company service territory differences since NAESB does not set policy.

Energy Efficiency M&V

Current Status

- The Retail Energy Efficiency Working group is continuing its work on developing Model Business Practices for M&V
- The process has involved many conflicting opinions. It has been an interesting conversation and is continuing
- After a couple of re-writes, a small group of Distribution Companies accepted the assignment to, once again, re-write the Model Business Practices to more closely follow the WEQ Ratified Standards
 - The NAESB Board of Directors has issued a guideline saying that, unless there is a good reason, Retail Model Business Practices should be consistent with the Wholesale Electric Standards
- The re-write was presented to the Work Group at its last conference call
 - Several participants had concerns and questions
 - These are to be presented to the small work group and will be addressed at the next conference call

Outstanding Issues

- There are 2 major outstanding issues:
 - Continuing discussion on the scope of the Model Business Practices (i.e. the Distribution company re-write)
 - *Although the direction from the Board may make this discussion moot*
 - Should the Model Business Practices address EM&V or the more narrow M&V
 - *Definition of the terms may help if they can be narrowed to something that is associated with the original intent of M&V*
- One thing that both factions can agree on is that the Model Business Practices should not be overly prescriptive

Distribution Company Re-write of Model Business Practices

- REQ.19.3.1 M&V Methodologies
 - IPMVP Options – International Performance Measurement and Verification Protocols
 - Alternative methodologies are also acceptable if approved by the ARA

- REQ.19.3.2 Energy Efficiency Baseline Conditions

- REQ.19.3.3 Decided to be incorporated in 19.3.1

- REQ.19.3.4 Statistical Significance
 - Where statistical sampling may be necessary

Model Business Practices *(continued)*

- REQ.19.3.5 Energy Efficiency Value Calculations / Demand Reduction Value Calculations
 - Preferred method is using measured energy (kWh) or Demand (kW)
 - Provision for modifiers or proxy values

- REQ.19.3.6 Measurement and Monitoring

- REQ.19.3.7 Measurement Equipment Specification

- REQ.19.3.8 Data Validation (i.e. VEE)

Enrollment in Retail Demand Response Programs

Scope

- Initial Request – Develop standardized process for enrolling in Demand Response programs
- Confusion at first since a Retail Customer simply needs to call the Distribution Company.
 - *Following discussions with the Requestor, became clear that focus should be on when an aggregator is involved*
- As MBPs were being developed, realized MBPs were needed for leaving the programs and when account information changes
 - *Scope was expanded to Enrollment, Drop and Account Information Change in Demand Response Programs*

Status

- Developed a full set of MBPs
- Developed 3 sets of Process Flows
 - *Enrollment*
 - *Drop*
 - *Account Information Change*
- Two new definitions need approval by the Glossary Subcommittee – Expected December 14
 - *Demand Response Service Provider (in lieu of using aggregator)*
 - *Retail Customer Information Request*
- Next scheduled conference call of the Work Group scheduled for January 12
 - *Plan a quick run through of the MBPs and Process Flows*
 - *Hope to vote the documents out of the Work Group*

Status — *(Continued)*

- Does not end the ability of any party to participate or submit comments
 - This is a Work Group that reports to the DSM-EE Subcommittee
 - Any party can submit Formal Comments to the Executive Committee
- All documents are posted on the NAESB web site

Model Business Practices Contents

- REQ.24.3.1 General Practices
 - 6 MBPs
- REQ.24.3.2 Obtaining Authorization from Retail Customers
 - 10 MBPs
- REQ.24.3.3 Practices for Enrollment
 - 37 MBPs
- REQ.24.3.4 Engineering Firm Payment
 - 18 MBPs
- REQ.24.3.5 Practices for Drop
 - 20 MBPs
- REQ.24.3.6 Practices for Account Information Change
 - 11 MBPs

Further Work

- Possible Phase 2

- Joint effort with Retail BPS, may develop a standard form for obtaining Retail Customer's Authorization
- Several areas require the Retail Customer to give written Authorization for the Distribution Company to release information to a third party
- Standardized form makes sense
- Not yet on Retail Annual Plan
 - *Discussion and decision yet to come*

Questions ?



QUESTIONS

Dial: 888-797-3007; Passcode: 753630#; Press *1 to ask a question