

ENERGY DATA ACCESS COMMITTEE Q2 2016 MEETING MINUTES

JUNE 21, 2016 1:00 – 5:00 PM

**Conference Room 2C, Gas Company Tower
555 W. 5th Street, Los Angeles, CA 90013**

Meeting Minutes			
Time	Topic	Lead(s)	Notes
1:00 – 1:15	Welcome and Opening Remarks	Jody Lawler	SoCalGas will open: <ul style="list-style-type: none"> ▪ Safety message ▪ Roll call ▪ EDAC purpose
<ul style="list-style-type: none"> ▪ Meeting called to order at 1:05PM ▪ Total attendees is 38, 16 in person, 22 via online webinar 			
1:15 – 1:30	Public Comments Period	All	Open comment period for non-member participants.
<ul style="list-style-type: none"> ▪ No public comments were made within the reserved period or during the course of the meeting 			
1:30 – 1:55	Old Business <ul style="list-style-type: none"> ▪ Vote to adopt revised EDAC Charter ▪ Report out on IOU Q1 action items ▪ Letter of Authorization ▪ Report out on Energy Division action items 	Lena Lopez Jody Lawler Chris Vera Amy Reardon	<ul style="list-style-type: none"> ▪ Vote and adoption of revised EDAC Charter ▪ Conclusions to IOU action items ▪ Business requirements for Third Parties ▪ Status of completed action items; others to be discussed in LG matters and New Business sections
<p>Revised EDAC Charter</p> <ul style="list-style-type: none"> ▪ Motion to adopt entered and seconded ▪ Vote to adopt charter revisions granted by all EDAC members present, 12 in total <p>Report out on IOU Q1 action items</p> <p>Institutional Review Board</p> <ul style="list-style-type: none"> ▪ IOUs will continue to require completion of IRB process for all requests for residential and non-residential data that include Personally Identifiable Information (PII). ▪ IOUs have received certificates from Academic Researchers requesting non-residential data thereby establishing precedence for IRB review in order to meet the requirement set forth in the Decision to request certification. ▪ If Academic Researchers indicate the IRB process cannot be completed for non-residential data requests, IOUs will consider each request on a case-by-case basis and will seek legal counsel when needed. <p>Data Request Logs</p> <ul style="list-style-type: none"> ▪ SoCalGas will update log to align with IOUs by including cancelled requests. Log will be updated by end July, and will include reference to additional requests in EDRP Q2 Advice Letter. <p>ACTION ITEM: SOCALGAS will complete updates to Data Request Log by the end of July.</p>			

- URL links to the IOU EDRP sites are included in the CPUC EDAC page. Per SDG&E, the link to their site incorrectly directs to PG&E site

ACTION ITEM:

Amy Reardon, CPUC Energy Division Advisor, will make corrections to IOU URL links on the EDAC page of the CPUC site.

Data Quality, Alignment and Standardization

- This topic will be addressed later in the program under IOU Reporting Methodology and IOU Commonly Requested Data.

Letter of Authorization

- Consent is required to receive customer data requested for secondary purpose; SDG&E is researching ways to simplify the process; business case is currently in progress. Various models are under consideration including online CISR form ‘embedded’ on third party’s site. EDAC and IOU’s are encouraged to also find solutions to ease consent process.
- Consent forms may be kept for a pre-determined period of time; however, legal challenges may prevent using the same consent across multiple organizations. New consent required when customer moves.
- Solution planned by beginning of 2017; specific technology has not been determined, features may include front and back end components, web form, printable form, and ability to track active consents.

Report out on IOU Q1 action items

- This topic will be addressed later in the program under Quarterly Advice Letters and Provisioning Other Data Sets.

1:55 – 3:00	<p>Local Government Matters</p> <ul style="list-style-type: none"> ▪ Local Government Sub-Committee ▪ Implementing CAPs 	<p>Tim Treadwell</p> <p>Cory Downs and Nilmini Silva-Send</p>	<ul style="list-style-type: none"> ▪ Status of activities including survey results; sub- committee’s recommendations ▪ LG energy usage data needs
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Local Government Sub-committee

Presentation Points of Interest

- Survey available 5/9-6/16; distributed via LGC newsletter, CSE, LG email distribution list, and program/project team email
- From open comments:
 - Boundary issues (zip code vs. municipal)
 - Delay in EDAC rule impact (wave of inventory updates)
 - Lag in data access
 - Data consistency over time
 - Desire for standardized data access portal
 - Speed of access
 - Availability of historical data
 - Small jurisdictions are disproportionately impacted by rules
- Proposed Next Steps
 - Continue to work with LGC and other partners to expand sample
 - Complete additional data analysis
 - Add geographic and city size controls

ACTION ITEM:

- **Sub-committee will reconvene to work on proposed next steps, or others as defined by sub-committee.**
- **Cory Downs will coordinate/facilitate the next meeting.**

Implementing CAPs

Presentation Points of Interest

- GHG inventories are the foundation for CAP reporting, LG’s need more detail
- Typical data for GHG comes from 6 sectors: electricity, natural gas, transportation, water, wastewater, solid waste
- Data needed for GHG Inventory includes: use by city (not ZIP Code), Bundled, Direct Access, Customer Class (C,I,R)
- Prior to EDRP: bundled and direct access, direct access, customer class
- Since CPUC Decision 14-05-016 privacy needs may result in: aggregation across city boundaries, data aggregated out, aggregation by customer classes, aggregation of bundled with DA, need to destroy raw data

ACTION ITEM:

- **IOU’s suggest that information be further reviewed by Local Government subcommittee.**
- **Cory Downs will coordinate/facilitate the next meeting.**

3:15 – 4:50	<p>New Business</p> <ul style="list-style-type: none"> ▪ Quarterly Advice Letters ▪ Provision of Other Data Sets <p>▪ IOU Reporting Methodology</p> <p>▪ IOU Commonly Requested Data</p> <p>▪ Round Table</p> <ul style="list-style-type: none"> ○ Building Benchmarking 	<p>Amy Reardon Amy Reardon</p> <p>PG&E, SCE, SOCALGAS, SDG&E</p> <p>Natalie Martinez</p> <p>Amy Costadone/ SCE, SOCALGAS, SDG&E</p>	<ul style="list-style-type: none"> ▪ Formatting standards ▪ Identify and propose process for provisioning data sets via EDRP ▪ Public Reports by Customer Class ▪ Data elements commonly requested from IOUs ▪ Open discussion ▪ Report on progress to date
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Quarterly Advice Letters

- No discussion needed on this topic due to the information shared on the effort underway by the IOUs to include cancelled requests along with reason for cancellation on their respective Data Request Logs.

Provisioning Other Data Sets

- Per CPUC representative Decision 14-05-016 language allows IOUs to provide data other than consumption. Colleagues of CPUC Energy Division staff have asked if EDRP can be used as a means of requesting datasets other than those specified in the use cases. Some examples are: performance monitoring, macro consumption. Energy Division staff looking to EDAC for recommendations on response to parties interested in ‘other’ data.
- IOUs recommend adherence to EDA rules and confirmation of primary purpose. They further state that privacy is of utmost importance; energy usage is the customer’s data and utilities are stewards of that data (which is collected for specific purpose). Customers must be notified to have the opportunity to allow or disallow sharing of their data. Cost is another consideration – how can the IOUs justify to customers that their data will be made available and they will bear the cost?
- Overall, IOUs would like specific information such the type of data, purpose, users and any details that can help to clarify ‘other’ data sets.

ACTION ITEM:

- **Amy Reardon, CPUC Energy Division Advisor, will take information back to colleagues and possibly invite a colleague to attend Q3 EDAC meeting to speak on topic.**
- **SCE will include topic on Q3 agenda if interest from CPUC still exist.**

IOU Reporting Methodology

- IOUs explain their method of classifying customers as Commercial, Industrial, and Residential (see Appendix on page 5). Questions from EDAC include:
 - 1) By SOCALGAS’s description, is a surfboard factory considered industrial? Yes; industrial customers engage in manufacturing activities that change raw materials to create another product. In addition to the description, SOCALGAS uses NAICS codes to further identify customer types.
 - 2) Are restaurants industrial customers? No, they are classified as commercial.
 - 3) Is the customer type determined when the account is initiated? Yes, it then becomes the customer’s responsibility to notify SOCALGAS if the type of business changes.
 - 4) In regards to SCE’s Industrial classification (all commercial rates with demand greater than 500kW), how does SCE aggregate when classification changes from Commercial to Industrial? The classification is based on the rate at the time the EDRP request is fulfilled. As for PG&E, rate schedule mapping determines customer classification; rate changes require a minimum number of months on the rate to prevent seasonal rate swapping.
 - 5) Does SDG&E use customer classifications similar to SOCALGAS’s for gas service? The SDG&E methodology model focuses on electric service; although probable, SDG&E will verify that their classifications align with SOCALGAS’s methodology.

IOU Commonly Requested Data

- Moved to Q3 EDAC meeting due to time constraints.

ACTION ITEM:

SCE will include topic on Q3 EDAC agenda.

Round Table

IOU Building Benchmarking Status

- PG&E provides overview of AB802. Detailed Requirements phase is complete, design phase has commenced; implementation is planned for December 2016.
- SCE reports their system and approach aligns with IOUs. Governance approval is in progress; a full solution will be rolled out by the end of Q1 2017; however, an intermediate solution will be available in January 2017 as required.
- SDG&E and SoCalGas are working together to develop solution. A web front-end is planned, currently able to perform online transaction via Portfolio Manager; may need manual or semi-manual solution for January.
- IOUs ask if requirements are complete. CEC responds that ideas are under discussion, but not ready to release.
- Maria Stamas of NRDC asked if IOUs have encountered any challenges with mapping buildings to meters or providing Excel files. Per IOUs, it is difficult to map buildings without information coming from building owners. PG&E, SOCALGAS, and SDG&E may use Energy Star Portfolio Manager where data is available in Excel version.

4:50 – 4:55	Q3 2016 Meeting Planning	SCE	Discussion of date and location for Q3 EDAC meeting
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Proposed Dates

- Wednesday, September 21, 2016
- Wednesday, September 28, 2016

ACTION ITEM:

SCE will send Doodle Poll and will confirm date at the beginning of August.

4:55 – 5:00	Adjournment	All	Final wrap-up and action items.
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Meeting adjourned at 5:05pm

PARKING LOT ITEM:

Census blocks and census codes

APPENDIX

Customer Class	SCE	SOCALGAS	SDG&E	PG&E
Agricultural	DEFINITION: Applicable where SCE determines that 70% or more of the customer's electrical usage is for Agricultural Power Service use, or for general water or sewerage pumping purpose.	DEFINITION: Not applicable; SoCalGas does not post energy use by Agricultural Use Class on the EDRP site	DEFINITION: SDGE does not have an explicit Agricultural class. Tariffs PA and PAT1 can be used a proxy when identifying an Ag customer class	DEFINITION: Rate eligibility: 70% or more of annual consumption is for agricultural end-uses, as defined in PG&E Electric Rule 1.
	METHODOLOGY: All rates with the agricultural and pumping profile	METHODOLOGY: Not applicable	METHODOLOGY: Tariffs with a Schedule PA type rate	METHODOLOGY: Customer is billed on a agricultural rate schedule
Commercial	DEFINITION: Commercial services with the following demand kW range GS1 rates – (Small, 0 to 20 kW), GS2 rates (Medium, 20 to 200 kW), GS3 rates (Large, 200 to 500 kW)	DEFINITION: Business used for buying and selling of goods and services: retail stores, service providers, restaurants, public pool or recreations facility, senior facility with central kitchen and eating area.	DEFINITION: Commercial services with the following demand kW (Small, 0 to 20 kW) (Medium, 20 to 200 kW) (Large, 200 to 500 kW)	DEFINITION: Billed rate schedule is non-residential, other than those mapped to Industrial or Agricultural classes
	METHODOLOGY: All commercial rates in this classification	METHODOLOGY: Gas usage for customer accounts with commercial code designation	METHODOLOGY: Combination of tariff and revenue class 'C'	METHODOLOGY: Identified by rate schedule mapping
Industrial	DEFINITION: All customers whose monthly maximum demand is expected to exceed 500 kW or have exceeded 500 kW in any three months during the preceding 12 months.	DEFINITION: Related to factories and manufacturing operations that create a product or modify raw or unfinished materials into another product. Includes some farming operations: slaughter, canning, freezing	DEFINITION: All customers whose monthly maximum demand is expected to exceed 500 kW or have exceeded 500 kW in any one month during the preceding 12 months.	DEFINITION: Mandatory: exceeds 499 kW demand for 3 consecutive months in 12 month period Voluntary: billed on a rate schedule mapped to Industrial class
	METHODOLOGY: All commercial rates with demand greater than 500kW	METHODOLOGY: Gas usage for customer accounts with industrial code designation	METHODOLOGY: Customers that have crossed the 500 kW threshold are coded with a customer class code of 'I'	METHODOLOGY: Identified by rate schedule mapping
Residential	DEFINITION: Domestic service for a Single-Family Accommodation or an individually metered Single-Family Dwelling in a Multifamily Accommodation.	DEFINITION: Gas service at Single-Family, Multi-Family, and mobile home dwelling units. Does not include enterprises such as rooming houses, boarding houses, dormitories, rest homes, convalescent or care facilities, military barracks	DEFINITION: Domestic service for a Single-Family Accommodation or an individually metered Single-Family Dwelling in a Multifamily Accommodation.	DEFINITION: Rate eligibility: 50% or more of annual consumption is for residential end-uses, as defined in PG&E Electric and Gas Rule 1.
	METHODOLOGY: All residential rates in this classification	METHODOLOGY: Gas usage for customer accounts with residential code designation	METHODOLOGY: Combination of tariff and revenue class 'R'	METHODOLOGY: Customer is billed on an Residential rate schedule