#### Meeting held: 9:00 am – 12:00 pm--Meeting Recording available to supplement notes

Microsoft Teams meeting

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Phone Conference ID: 112 815 063#

#### 

#### Attendees:

|  |  |  |  |
| --- | --- | --- | --- |
| **CNGC** | **CNGC – Continued** | **NEEA** | **Guests** |
| Kary Burin | Sonya Wald | Peter Christeleit | Jeremy Hibbert-Energy Pro |
| Mike Parvinen | Stephanie Reed |  | Britton-Energy Pro |
| Desiree Bickmore | Sheila McElhinney | **WUTC** | Alex Corneglio-EnergyX |
| Caleb Reimer | Ty Jennings | Byron Harmon | Aaron Savatti-EnergyX |
| Noemi Ortiz |  |  | Jamie Abrusci-EnergyX |
| Brian Robertson | **TRC** | **Public Council** |  |
|  | Brian Farnsworth | Corey Dahl |  |

*The meeting was recorded to capture all discussions and is distributed to CNGC/CAG members via the Company’s website at:* [Cascade Natural Gas Conservation Advisory Group Meetings - Cascade Natural Gas Corporation (cngc.com)](https://www.cngc.com/energy-efficiency/cascade-natural-gas-conservation-advisory-group-meetings/)

*\*\* Time stamp for each agenda item is located beside the topic header below in this format HH:MM*

***The Agenda is embedded below:***

******

### Safety Moment - *led by Caleb Reimer - 0:37*

* Home Office Safety.

### Roll Call & Review Q3 action items - *led by Desiree Bickmore - 2:00*

**Action Items: None**

**Decisions Made: None**

**Noted Discussion:**

* Completed roll call.
* No action items from Q3 meeting.

### Quarterly Portfolio update - *led by Brian Farnsworth & Caleb Reimer*

### Commercial Highlights *– led by Brian Farnsworth - 06:45*

**Action Items:**  **None**

**Decisions Made: None**

**Noted Discussion:**

* + Compared progress last year to the progress this year to reach goal - these numbers are estimates and have not gone through a rigorous end of year verification.
  + Provided therms saved incentives to Commercial/Industrial customers. On track to meet **81%** of the 2023 annual goal**.**

### Residential Program Highlights and Activity through Q3 2023 - *led by Caleb Reimer* *- 09:05*

**Action Items:**  **None**

**Decisions Made: None**

**Noted Discussion:**

* + Informed members of a handful of residential highlights, including the EE West collaboration.
  + Compared this year’s progress to last year for residential therms and incentives.
  + The Residential program is on pace to meet 118% of the 2023 annual goal. We have the potential to meet the 2022-2023 Biennial residential goal.
  + Rebate application submissions increased in Q4.
  + The Point-of-Sale (POS) program continued to see success and growth throughout Q3. CNGC will be seeking to grow the number of POS participants in Q4 and throughout 2024.
  + Informed of how tools and training are crucial to the POS program with our TA’s:
    1. POS Contractor Signature Sheets have been created to assist contractors in gathering information needed to submit POS rebates
    2. CNGC is continuing education for Trade Ally contractors on the program and how to navigate the Trade Ally portal

### Pilot Update – *led by Alex Corneglio & Jamie Abrusci (Guests from EnergyX) – 16:30*

### Home Energy Report (HER)

**Action Items:**  ***Caleb to contact Seattle City Light regarding why they discontinued their behavioral energy program, per Cory’s suggestion.***

**Decisions Made: None**

**Noted Discussion:**

* Alex (EnergyX) summarized what the Home Energy Report (HER) project is.
* Customers (9,000) receive a home energy report. A series of six (6) reports will be sent over 12 months by email or mail. As of September 2023, one (1) series of reports has been sent.
* Project culminates in 2024.
* Security is the number one focus and was set at the MDU and CNGC level.
* An example of the HER was provided showing the document the customers receive.
* Key pilot stats and results to-date were provided.
* Cory Dahl had several questions on the HER:
  + What this program looks like and how outcomes are measured?
    1. Are neighbors’ usage being used to compare?
       - * Answer by Alex: They are comparing customers to themselves and idealized versions of their own building.
    2. Is the methodology of providing recommendations based on actual data?
       - Answer by Alex: The data largely comes from publicly available sources and publicly available energy audit data from the region which we are operating. AI and statistical analysis are conducted on energy data provided by CNGC.
    3. What if assumptions are wrong, do you take that into account when measuring your savings?
       - Answer by Alex: We certainly do, this is where statistical pieces come in at the end. Customer feedback is also incorporated within these programs in aggregate or by individual customers.
    4. How do you account for any interim rate changes that occur during the period that you’re studying the effects of the program?
       - Answer by Alex: When we’re tabulating savings, we look at actual gas consumption, when we look at what may have impacted customers to save that’s where we involve a control group.
    5. To understand the sample provided that we’re looking at, are these customers that have opted-in or customers who will receive an email?
       - Answer by Alex: My understanding is that these customers have provided a consent in other areas of the CNGC program and with every report we send out, a customer can revoke their consent at any time.
    6. Does your analysis of results account for some sort of self-selection by us in terms of results?
       - Answer by Alex: Those are things we look at towards the end of the program so we’ll try to use available demographic data to screen out why customers may have behaved in a certain way. When we selected the treatment group, we didn’t specifically look for any sort of factors that may be historically correlated with greater program participation. We tried to get a good mix of customers that would be representative of Cascade territory.
       - Kary confirmed that we had a conversation early in the pilot about high-energy consumers, but stepped away from that as we wanted it to be completely random and concerned that high-energy consumers would skew the results.
       - Sonya also confirmed nothing in selection criteria looked at consumption, just that they were an active consumer. The list provided was completely random.
    7. Big concern is verification of savings, how you look to actually say yes, this is this program and not some other factor that influenced customer savings?
       - Per Kary and Caleb, we are working with another third-party provider who will be looking at a broader scope in EM&V and will have this on their radar as well. Statistical analysis of the control group (4,000 customers) will also be utilized.

### Point of Sale Program (POS) – *led by Jeremy Hibbert & Britton (Guests from Energy Pro) - 50:38*

**Action Items:**  **None**

**Decisions Made: None**

**Noted Discussion:**

* Jeremy (Energy Pro) gave some background on the company.
* Mentioned how the POS program has been a great contributor to customers doing upgrades.
* Increases the credibility of the program
* Provides instant cash incentives for customers, benefiting those who would otherwise be unable to complete the energy efficiency measure
* An outline of the successful door canvassing model was provided.
* Britton went over how the company maintains quality and integrity.
* The EnergyPro team commends Cascade for running this program smoothly by continually communicating and innovating the offering.

### Low-Income Weatherization *– led by* **Sheila McElhinney & Noemi Ortiz** *- 01:04*

**Action Items: None**

**Decisions Made: None**

**Noted Discussion:**

* Sheila presented jobs completed and measures.
* Cascade has weatherized over 100 homes during a calendar year for the first time.
* Agencies provide estimates of what they think they can accomplish for the year through MOU’s.
  + Byron asked for a bit more context on the projections, most Agencies aren’t meeting the projections. Do they often tend to overshoot their projections?
    - Sheila stated that at the end of each program year, we ask each agency to sign an agreement with us, which was precipitated by the agencies. Historically, a lot of the agencies fall back on what they accomplished the previous year as a benchmark.
* Byron asked what are some potential bottlenecks that may be limiting their ability to pursue these projects?
  + - * Sheila stated she believes it is staffing and contractor availability.

***Low-Income Weatherization Incentive Program (WIP) Proposed tariff revisions:***

* Proposed tariff revisions were sent to the CAG members on 10/4/23.
* Per Noemi, this revision is to align the WA tariff with the OR tariff. (*See Agenda for the Tariff Revision information)*

### Quality Control Inspections *-* **led by Noemi Ortiz & Sheila McElhinney** *- 01:15*

**Action Items: None**

**Decisions Made: None**

**Noted Discussion:**

* Noemi provided information on what has changed in 2023 and the CNGC Inspection Service Providers.
* Sheila clarified how the selection process is determined for project inspections.
* Self-install measures are reviewed but not inspected.
  + Byron asked if quality inspections only apply to the low-income program.
    - Per Sheila, no, these quality inspections are for a subset of the residential program.

### WSEC Impacts – *led* **by Ty Jennings** - *01:27*

**Action Items:**  **None**

**Decisions Made: None**

**Noted Discussion:**

* Ty provided an update on the WSEC.
  + Implementation of 2021 WSEC has been delayed again – March 15, 2024.
* WSEC will allow federal minimum efficiency natural gas equipment for residential and commercial, primarily for new construction.

### EM&V Update – *led* **by Caleb Reimer** - *01:33*

**Action Items:**  **None**

**Decisions Made: None**

**Noted Discussion:**

* + ADM Associates, Inc (ADM) contract has been renewed through 2026.
  + Caleb overviewed the final report for the Commercial Program Impact EM&V, which was filed on 9/15/2023.
  + ADM has been selected to complete Biennial Program Process EM&V as outlined in section 9d of the conditions document of Docket UG-210838. Results are anticipated Q2 2024.

### Biennial Conservation Planning Update - **led by Caleb Reimer** *- 01:36*

**Action Items:**  **None**

**Decisions Made: None**

**Noted Discussion:**

* + Caleb went over some highlights of the 2024/2025 BCP draft.
  + A draft of the 2024-2025 Biennial Conservation Plan including Exhibits and Work Papers with proposed Tariff changes were provided to the CAG on 10/12/23. Comments are requested by 11/3/2023.
  + Cascade intends to file the final version of these documents by 11/15/23.

### Wrap-up and Meeting Schedule *-* **led by Caleb Reimer** *- 01:39*

**Action Items:**  ***Dez to send invites to CAG members for 2024 CAG/CNGC quarterly meetings.***

**Decisions Made: *Invites emailed on 10/19/23 to CAG members for 2024 quarterly meetings.***

**Noted Discussion:**

* 2024 Meeting Dates:
* 2024 Meeting schedule will be dispersed prior to year end
* Recommendations for content are fully welcomed for these meetings