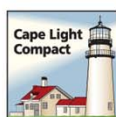


2025 Custom Screening Tool

Jerry Song, National Grid

WE ARE MASS SAVE®:



- Part I: Policy and Purpose
- Part II: Initiative Types & Project Baselines
- Part III: Tool Updates
- Contacts

Part I: Policy and Purpose

Purpose of the Tool



- Determine cost effectiveness of custom projects and determine if they save energy and 2030 GHGs
- Provide uniform screening policies and allocation of project costs and savings across the state
- Uniform documentation of project basics
 - Who was involved (PAs, customer, vendors)
 - Iterations of project screening or evolution of savings
 - Default calculation of kW, energy loadshape, and weighted measure life (for whole building)
 - Remind user how to handle non-central measure inputs (loadshape, secondary fuels, O&M penalties)

Purpose of the Statewide Policies



- Policies are in place to support the purpose of the tool
- Policies are owned by the C&I Management Committee
- Limitations of Screening Policies
 - Policies are only intended to apply within the tool itself to ensure similar results and fair allocation
 - All incentive decisions are made outside of the tool and may consider factors other than the BCR results
 - How the results are used outside of the tool is determined by the individual PA

Spirit of the Final Policies



- Bundling Measures:
 - **Screen projects as a bundle** – measures for one customer at one contiguous location *that are all installed at about the same time*
 - Initiative and fuel savings selected for each measure – **can screen multiple initiatives together**
- Project Inputs:
 - **Gross savings** will be used in the screening tool
 - **Prescriptive savings should not be used** in custom screening
 - **Only project costs** will be used in the screening tool (Total Resource Costs)
 - Electrification and fuel switching measures should consider **changes to all fuel types** (positive and negative) – can include delivered and regulated fuels
 - **Project savings and costs must use same baseline**
- Screening Results:
 - **Screening process should be consistent across the state, although decisions after screening need not be**
 - Project BCR more important than measure BCR
 - Payback not emphasized
 - **Allocation of savings and costs** is done per measures and is based on % benefit of electric and gas benefits for dual fuel measures

Understanding the BCR



- Why? – PAs responsible for delivering all cost effective measures to our customers
- $Benefit\ Cost\ Ratio = \frac{Sum\ of\ Benefits}{Total\ Resource\ Costs}$
- We use *Total Resource Costs*
 - Not always equivalent to customer costs
 - Do *not* remove costs covered by grants, **but may remove state and federal tax credits (discuss with PA for more information)**
- Benefits are calculated for all inputs, including negative inputs
- Benefits are *system* benefits
- The BCR is not meant to gauge whether or not a project makes sense for a particular customer, but whether or not the system benefits are high enough to warrant spending ratepayer dollars

Understanding Allocation



- Why? Shared projects should be fairly divided and tracked between PAs in terms of costs and benefits
- Allocation is calculated separately for each measure
- Allocation divides measure savings and costs between the two PAs based on the “PA Claiming Saving”
- If the “PA Claiming Savings” is:
 - Electric– all measure inputs are allocated 100% to the electric PA.
 - Gas– all measure inputs are allocated 100% to the gas PA.
 - Dual – All electric (kWh, kW) and delivered fuel *savings* are directed to the electric PA and all natural gas (therm) *savings* are directed to the gas PA. Other inputs (costs and savings) are allocated to each PA based on the contribution of their fuel *benefits*.
 - Gas Electrification – 62% of all savings (not just electric) goes to electric PA and 38% goes to gas PA

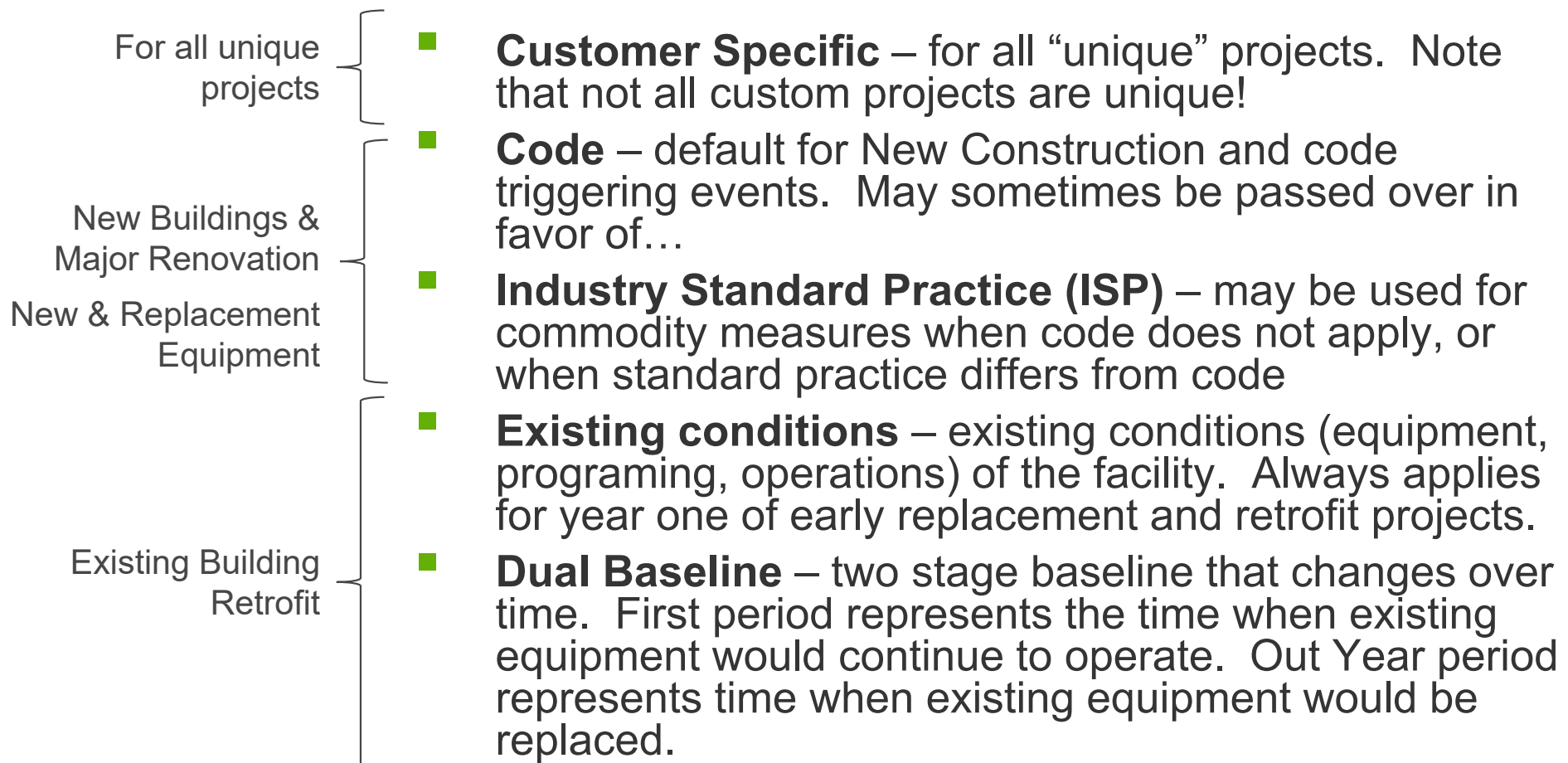
Part II: Initiative Types & Project Baselines

Types of Initiatives



- Projects are broken out into three initiative categories
 1. New Buildings & Major Renovation
 2. New & Replacement Equipment
 3. Existing Building Retrofit
- Different initiatives can have different baselines that impact calculation methodologies

Baseline Strategies



Baseline Repository



- The Baseline Repository is a compilation of the best-known energy efficiency baseline information for commercial and industrial energy efficiency measures in MA
- **Purpose of Repository: Minimize baseline risk from project development through evaluation**
 - Serves as a central reference for measure baseline information
 - Leveraged by implementation and evaluation staff
 - Consistent starting point for baseline decisions
- Ongoing refinement
 - Updated whenever a baseline is changed due to targeted primary research (ex. ISP studies) or other findings
 - Undergoes annual review to check for outdated information, errors, etc.
 - Feedback is always welcome!

Repository Content Categories



Evaluator-vetted measures

Evaluators are confident in information. **Very little risk of baseline changing** during evaluation if an evaluator-vetted baseline is correctly applied.

In-progress measures

Evaluators are less confident in information (cannot consider vetted), but may still represent best-available. **Some risk of baseline changing** during evaluation.

Provisional findings

Documentation of project findings and feedback received through the ex-ante review process, Baseline Advisory Group (BAG) discussions, or other evaluation research. Not binding beyond the project for which they were completed, but **provided as informational reference only**.

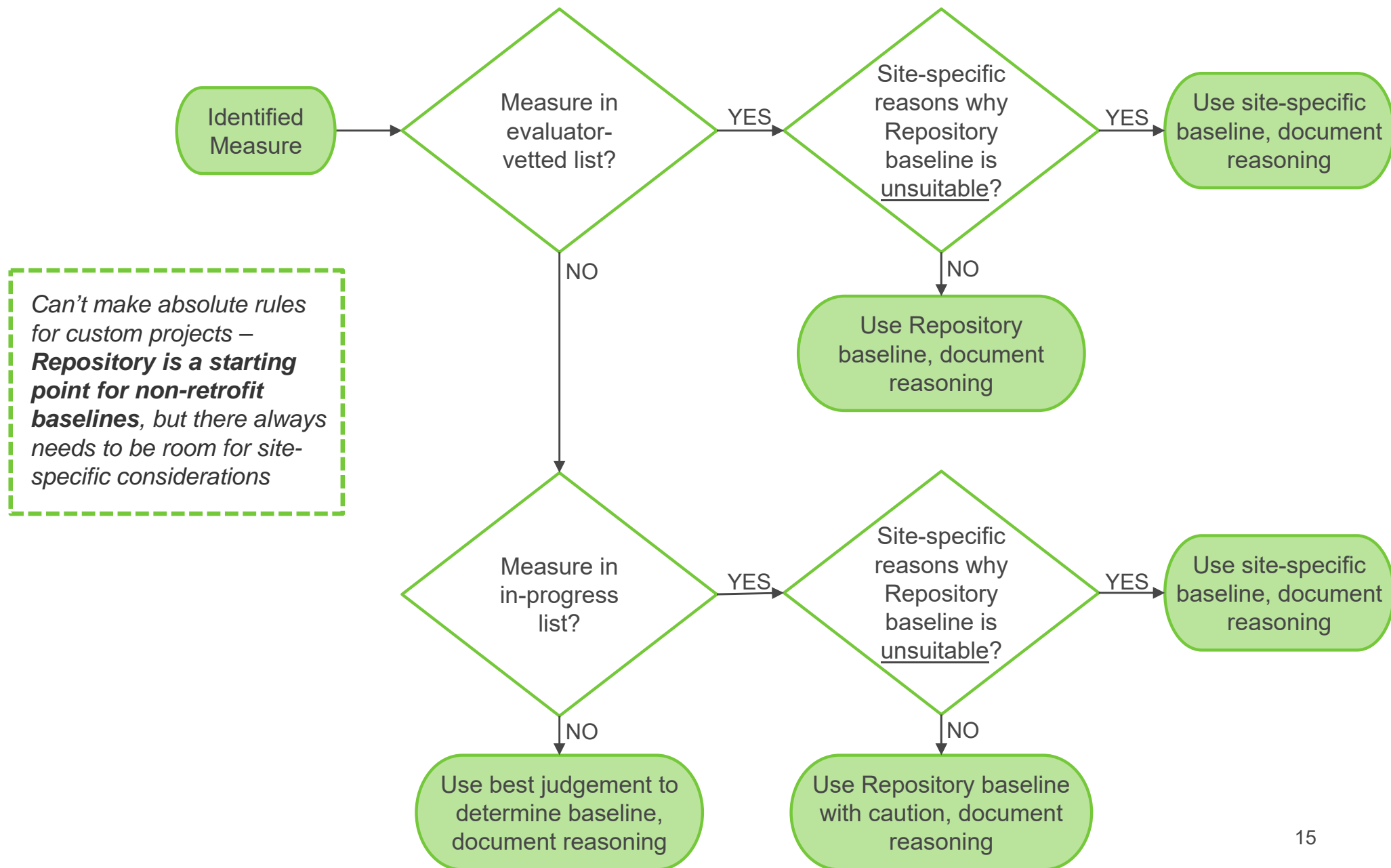
Repository Content Fields



Example of an evaluator vetted Repository entry:

Field	Example Contents
Measure Group Name	Refrigeration
Measure Name	Ultra-low temp freezers (between -70°C and -80°C)
Baseline Relative to Code	ISP in place of code requirement
Baseline Type	Both New construction and replace on failure
Evaluation Baseline Description	Baseline efficiency 0.55 kWh/day/ft3 Ultra-low temp (ULT) freezer definition: "freezer designed for laboratory application that is capable of maintaining set point storage temperatures between -70°C and -80°C."
Next Revision Date	Q1 2029
Study Date	9/19/2023
Notes	Results from 2023 ULT Freezer ISP study report.

Decision Roadmap



How to Access the Repository



- Where to find: [MA EEAC](#) website under recent years C&I studies
- Direct link to latest Repository copy: [here](#)



Recap



New Buildings & Major Renovation

Measures installed at the time of new ground-up facility construction, or as part of a major renovation

New & Replacement Equipment

Measures installed in response to the failure of a previously functioning system

Existing Building Retrofit

Measures installed as an add-on to a preexisting system, or installed replace a fully operational preexisting system

Baseline is defined by industry standard practice (ISP). Relevant codes and standards sometimes represent ISP, but not always. Baseline Repository provides a starting place.

Baseline defined by preexisting conditions. If dual baseline: first period represents the time when existing equipment would continue to operate, Out Year period represents time when existing equipment would be replaced.

Note: baseline is customer-specific for all unique measures

Part III: Tool Updates

Updates to 2025 Tool



- Updated for new measures and new electrification tracking methodologies
- Updated AESC, GHG Reduction, and other values for 2025
- Removed some custom NEI entries
- UI Tweaked for more useful Measure and Result Overview
- Better Error Diagnostics
- Streamlined for smaller file size
- Default Loadshapes tab now pre-populates measure-specific % On Peak

- **General Questions**
 - Jerry Song (Jerry.Song@nationalgrid.com)
- **Screening Policy Questions – Contact the C&I MC**
 - Ryan Willingham (Ryan.Willingham@eversource.com)
 - Josh Kessler (Joshua.Kessler1@nationalgrid.com)
- **Integrated Design – NC Subcommittee**
 - Kim Cullinane (Kim.Cullinane@eversource.com)
 - Joel Martell (Joel.Martell@nationalgrid.com)
- **Baseline questions – your PA evaluation team or the EMC**
 - Aakanksha Dubey (Aakanksha.Dubey@nationalgrid.com)
 - William Walker (William.Walker@eversource.com)
- **Errors/updates/questions on the tool**
 - Jerry Song (Jerry.Song@nationalgrid.com)

Questions?



- If you don't use the tool itself, feel free to drop off

To the Tool!

Thank you

Custom Screening Tool

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