



Attachment 5, Appendix 2:

BECAR

On-site Verification Materials

May 30, 2014

It is important to note that the Appendix Table of Content refers to several evaluation studies that were used in conducting the biennial review. These evaluations, previously filed and provided to CRAG members, are omitted from this Biennial Conservation Report due to the volume of pages and redundancy of their inclusion. Only those items noted as item A. in the table of contents are included in this Report.

**PUGET SOUND ENERGY
2012-2013 BIENNIAL ELECTRIC
CONSERVATION ACHIEVEMENT REVIEW
(BECAR)
APPENDICES – VOLUME II**

Submitted to **PUGET SOUND ENERGY**

**WASHINGTON UTILITIES AND TRANSPORTATION
COMMISSION**

Submitted by **SBW CONSULTING, INC.
2820 Northup Way, Suite 230
Bellevue, WA 98004**

In association with **DNV GL, INC.
Oakland, CA**

**RESEARCH INTO ACTION
Portland, Oregon**

May 19, 2014 (FINAL)

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A. ON-SITE VERIFICATION MATERIALS

Key materials used during the targeted on-site verification effort (described in Section 2.3) are provided here. These include examples of the introductory letters sent to each business and single-family residential customer who was sampled.

The last item is an example of the on-site form that surveyors used to guide their inquiries and data collection.

Introductory Letters to Customers

Business



Puget Sound Energy
P.O. Box 97034
Bellevue, WA 98009-9734
PSE.com

Month Day, 2013

Customer Name
Business Address
City, WA, 98XXX

Dear *Customer Name*:

Puget Sound Energy (PSE), the Washington Utilities and Transportation Commission (WUTC), and other stakeholders are engaged in a study that provides an independent third party review of electric savings from PSE's 2012-13 energy efficiency programs. This study will help PSE improve their programs and better serve their customers.

SBW Consulting, Inc. (SBW), of Bellevue, Washington, has been retained to conduct the review. As part of their efforts, they are inspecting a small number of energy efficiency projects, which were completed during the two-year period. Your business in *city name* might be randomly selected as one of the PSE 2012-13 program participants to be part of this study.

PSE would greatly appreciate your support in this effort by agreeing to participate in this study. We expect that these inspections will be brief and have minimal impact on your operations. They will consist of a visual examination of the efficiency measure(s), and a few questions for an individual at the facility knowledgeable about the project. You may have already been visited by a PSE inspector, but SBW would like to re-visit your business as part of this review. All information collected as part of this effort will be kept confidential.

In the near future, you will receive a call from SBW to set up an appointment for the inspection.

Thank you very much for allowing us to complete this important work, as it will serve to further assist PSE in delivering energy efficiency programs that help commercial and industrial customers use energy wisely. Should you have any questions or concerns, please contact either the SBW study manager, Bing Tso (425-827-0330) or the PSE project manager, Jim Perich-Anderson (425-462-3529).

A handwritten signature in black ink, appearing to read 'David Landers', is written over a white rectangular area.

David Landers, PE, CEM

Manager, Business Energy Management
Puget Sound Energy

Single-family Residential



Puget Sound Energy
P.O. Box 97034
Bellevue, WA 98009-9734
PSE.com

Month Day, 2013

Customer Name
Customer Address
City, WA 98XXX

Dear Customer Name:

Puget Sound Energy (PSE), the Washington Utilities and Transportation Commission (WUTC), and other stakeholders are engaged in a study that provides an independent third party review of electric savings from PSE's 2012-13 energy efficiency programs. This study will help PSE improve their programs and better serve their customers.

SBW Consulting, Inc. (SBW), of Bellevue, Washington, has been retained to conduct the review. As part of their efforts, they are inspecting a small number of energy efficiency projects, which were completed during the two-year period. Your residence in *city name* might be randomly selected as one of the PSE 2012-13 program participants to be part of this study.

PSE would greatly appreciate your support in this effort by agreeing to participate in this study. We expect that these inspections will be brief. They will consist of a visual examination of the efficiency measure(s), and asking you a few questions about the project. You may have already been visited by a PSE inspector, but SBW would like to re-visit your home as part of this review. All information collected as part of this effort will be kept confidential.

In the near future, you may receive a call from SBW to set up an appointment for the inspection. If you agree to participate, they will give you a \$20 Visa® gift card, redeemable anywhere Visa® is accepted, upon completion as a token of our appreciation for your assistance.

Thank you very much for allowing us to complete this important work, as it will serve to further assist PSE in delivering energy efficiency programs that help residential customers use energy wisely. Should you have any questions or concerns, please contact either the SBW study manager, Bing Tso (425-827-0330) or the PSE project manager, Jim Perich-Anderson (425-462-3529).

A handwritten signature in black ink, appearing to read 'Jeff Tripp', is written over a light gray background.

Jeff Tripp
Manager, Residential Energy Management
Puget Sound Energy

On-site Form

2012-13 PSE Third-party Review: Detailed Review – On-site Verification

Date Verified: _____

Verifier: xxxxx

Site Info:

Project ID – 22511 xxxxxxxx DR E, xxxxx, 98xxx

Address – 22511 xxxxxxxx DR E

Contact Name and Phone Number – xxxxxxxx, 555-555-5555

Program/Domain/Element – Single Family Existing Exclude Weatherization/Homeprint/Water Heat

Participation Year – 2010

Measures – Water Heater Electric

1. Individual(s) interviewed

2. Verification activities, e.g., inventoried sample of fixtures, checked nameplate, observed settings, interview manager

3. Were measures associated with the sampled project implemented as described in project documentation¹?

• If not, did the program err, or was it because of a factor out of PSE's control?

• If measures installed different than described, describe what was installed:

4. Is the project eligible (e.g., PSE electric customer², measure(s) appropriate to program³)?

¹ If there is a discrepancy and no one on-site can explain, then answer is "unknown."

² Verify only if customer near PSE Electric Service Territory border; check meter or electric bill.

³ Verify only if installed measures different from project documentation