

**Energy Data Access Committee Meeting (EDAC)
Meeting Summary**

September 1, 2015

1:00 p.m. – 5:00 p.m.

SCE Energy Education Center

6090 N. Irwindale Avenue. Irwindale, CA 91702

Call-in Number and Web Meeting capability provided for remote participants

Attendees: EDAC Committee Members	In-person	<ol style="list-style-type: none"> 1. Andrea Gough, CEC 2. Mark Toney, TURN 3. Garen Grigoryan, PG&E 4. Jody Lawler, SoCalGas 5. Mark Podorsky, SCE 6. Chris Vera, SDG&E 7. Stephanie Pincetl, UCLA Institute of the Environment and Sustainability
	Remote	<ol style="list-style-type: none"> 8. Karen Notsund, UCB Energy Institute at Haas 9. Barry Hooper, Local Government Sustainable Energy Coalition 10. Michael Murray, Mission Data 11. Amy Reardon, California Public Utilities Commission 12. Maria Stamas, Natural Resources Defense Council 13. Lee Tien, Electronic Frontier Foundation 14. Timothy Treadwell, Center for Sustainable Energy 15. Chris Myers, Office of Ratepayer Advocates
	Not in Attendance	N/A
Additional Attendees	In-person	<ol style="list-style-type: none"> 1. Natalie Martinez, SCE 2. Paul Monette, SCE 3. Frank Kao, SCE 4. David Fanous, SCE 5. Ron Mohr, LA County 6. Bill Kim, SoCalGas 7. Diana Grajeda, SoCalGas 8. Peter Tanios, SoCalGas 9. Frank Spasaro, SoCalGas
	Remote	<ol style="list-style-type: none"> 10. Jeremy Battis, CPUC 11. Laurel Rothschild, Energy Coalition 12. Joseph Oldham, Local Government Commission 13. Additional conference call participants not identified

Meeting Objectives:

Southern California Edison (SCE) hosted the 3rd quarter Energy Data Access Committee (EDAC) meeting in Irwindale, California on September 1, 2015. Below are the meeting summary captured during the discussion. On behalf of SCE, thanks to all for your active engagement to each of the topic areas

Welcome: Mark Podorsky, SCE

SCE hosted the 3rd quarterly EDAC meeting in which safety protocols were given and the purpose of the EDAC committee meetings were communicated:

- To provide advice regarding a utility’s protocols for reviewing data requests,
- To act as an informal body to review disputes between a utility and a requestor, and
- To act as an on-going forum to discuss and review changes in protocols in response to changing technological abilities” EDAC decision, pg.98

Topics Discussed

1. Whole Building Data with Tenant Consent (Maria, NRDC)

- Purpose: Provide an update on the tenant consent form and present their proposed recommendation for improving the sharing of building level data with building owners. NRDC presented their proposals that were gathered from IOUs with the assistance of Caroline McCormack that represents California Housing Partnership Corporation.
- Notes:
 - Maria from NRDC presented information that consisted of challenges and recommendations to assist building owners.
 - Challenges: There is currently a 3 year constraint for existing Customer Information Service Request (CISR) forms (except for PG&E) and not the duration of the tenant residency. Owners have to track and resubmit CISR forms to request customer data even though there is an active form on file. Preference for the file format for fulfilling the request is Excel vs a PDF document.
 - Green Button option is largely infeasible as it requires owners working with each tenant to set up individual tenant accounts with valid email addresses. Additional steps are required for owners to later aggregate all of the individual usage into a total usage amount for the building.
 - Recommendation for IOUs include data format consistency, Automatic download or email option, Option to extend time period for waivers, Offer paper option for enrolling in Green Button, Clarify data access options and update the CISR form to make the process easier to request and receive data
 - Suggestion to vote to accept these recommended changes in the 4th Quarter EDAC meeting. Response – Some of these changes are modifications to existing tariffs and would require changes through the regulatory process. IOUs need to take information back to stakeholders and understand financial, operational and technology impacts.
 - Next step is for Maria to continue down this path and follow up with remaining issues at the next EDAC meeting.
 - Maria also briefly presented a new California Department of Community Services and Development (CSD) program for Large Affordable Multi Family Buildings which will be looking to get access to data to target inefficient buildings and to evaluate and measure savings.
 - ACTION ITEM:** The IOUs agreed to take these recommendations, discuss in a separate Joint IOU meeting, and provide feedback at next EDAC meeting.

9.Attached documentations:



Background-MF-Data Suggested-Improvement-
-With-Consent-By-Utilities-MF-Data-By-Utilities

2. EDAC Central Communication for the group to use (Chris Vera, SDG&E)

- Purpose: Agree to the appropriate communication method and roster update.
- Notes:

1. Spoke to team related to Google Groups. Few are taking advantage of it. The team agreed that there needs to be some centralized area where the team can store notes and an updated roster/distribution list.
2. Recommendation: Several attendees recommended using “drop box”.
3. **ACTION ITEM:** Chris Vera will take the lead to get a tool up and running to support the group.

3. **Academic Research Data Requests (Chris Vera, SDG&E)**

- a. Purpose: Discuss issues the IOUs are experiencing related to Academic Research requests that are submitted through EDRP.
- b. Notes:
 1. Some Research Institutions have communicated to the IOUs that the Institutional Review Board (IRB) requirement for academic researchers are not necessary, because the requested information is not considered Personally Identifiable Information (PII), despite the requests containing account numbers, addresses and other information considered PII by the IOUs.
 2. Consensus is that IRB certification is necessary for any data considered PII. This not only applies to California institutions, but it’s a federal guideline which applies to any researchers out of state.
 3. Some academic researchers feel IRB is not needed when the Non-Disclosure Agreement (NDA) should be reasonable enough to protect customer data. Mark Toney explained that in the hearings, the IRB was presented to the Commission. The purpose of the IRB was to ensure protection of a customer, a human subject, not specifically data as what the NDA would cover.
 4. Recommendation to develop a list of data elements considered to be PII and use as reference for future academic researcher requests. (**ACTION ITEM: Karen/Stephanie/Lee to develop a list**)
 5. The IOUs would benefit from an IRB high level talking points for reference to what is considered IRB review required. (**ACTION ITEM: Karen/Stephanie to develop talking points**)
 6. IOUs are receiving data requests from academic researchers outside of California. There is concerns that California ratepayers are paying for this, but are not benefiting from the research. The question posed to the team was: Should California ratepayers in California pay for data requests from researchers outside of California?
 7. In the decision, it does not limit to only researchers within California. Therefore, unless anything changes via a regulatory decision, California IOUs should fulfill these data requests and California ratepayers will pay for it.

4. **Executive Director Notification (Amy Reardon, CPUC)**

Purpose: To discuss the inconsistency of notifying the executive director

1. Amy explained that there is an inconsistency of notification to the Executive Director when data requests are approved to be fulfilled by the IOU.
2. She has received copies of some but not all.
3. **Decision:** For future notifications to the Executive Director, the IOUs will “cc” Amy Reardon. Amy will also leverage the data request log located on the IOU websites which are updated frequently to reflect disposition of data requests.

5. **Data Requests Update and Issues (IOUs)**

Purpose: To provide the committee an update on data requests and address concerns the IOUs are currently experiencing

1. IOUs data request updates was deferred due to time limitations.
2. CEC stated that there are inconsistencies in the IOU's file naming conventions for the publically available reports on IOUs website.
3. **ACTION ITEM:** The IOUs will investigate and have discussion to ensure consistency.

6. Local Government Data Access (Amy Reardon, CPUC; Jeremy Battis, CPUC; Barry Hooper, SF Dept. of Environment)

Purpose: To discuss comments received by the local governments since the last EDAC meeting.

1. The CPUC staff has received comments from local governments that their data needs are not being consistently met.
2. The key reason local governments need information are: Elected officials are interested in community level data to understand specific energy use patterns and fulfill Climate Action Planning obligations.
3. Laurel (Energy Coalition): Recommend partnering with local government partnerships
 - i. Census block data is preferable over zip code data within the Community wide data reports for action planning. However, some IOUs do not have census block data.
4. **ACTION ITEM:** CPUC to communicate to IOUs the feedback they received from Local Governments on specific issues or challenges they are facing so the IOUs know exactly where to target their efforts.
5. Ron Mohr from County of Los Angeles presented issues related to the submittal of data requests from a customer's perspective. Ron Mohr stated concerns as it relates to receiving data. In some instances, the submitted Customer Information Service Request (CISR) form has been rejected due to incompleteness. He also stated he wasn't receiving the necessary data because the IOU electronic data delivery mechanism was not practical for him to support.
6. SCE will take Ron's concerns back and determine if there is a solution to address Ron's issues.
7. Furthermore, it was recommended that the EDAC meetings be advertised and extended to more external groups. Recommendation was to send invites leveraging the Energy Efficiency distribution list. This will be discussed in the next EDAC Meeting.
8. **ACTION ITEM:** IOUs to provide job aid/FAQ that provides information related to the EDRP Process.
9. **ACTION ITEM:** SDG&E to add the following agenda item – Should the meeting invites get sent to the Energy Efficiency distribution list?
10. Motion made to the team (Stephanie Pincetl, UCLA Institute of the Environment and Sustainability)
 - a. Request to add an additional member to the committee for consideration.
 - b. Chris Vera 2nd the motion.
 - c. Local governments communicated that 1 additional member is acceptable to consider in order to increase geographic representation, with the understanding that representation would come from southern California.
 - d. Viewpoints: 1) Additional members may result in inequitable representation as approved by joint agreement from all groups represented in the committee; 2) How will the addition of another local government seat help the overall goal of the committee; 3) This may not solve the local government issues; 4) Given that the committee was designed, with input from ED, ORA and CEC, to be a balanced membership of 15 members (the odd number prevents vote ties), an addition of another member will imbalance this committee.
 - e. Recommendation: this topic to be added to the next EDAC meeting for discussion.
 - f. Suggestion to also make Local Government Data Access a standing agenda item in future EDAC meetings.

- g. Suggestion to consider the addition of a second Local Government member in lieu of an existing “other interested parties”, currently on the committee.
- h. **ACTION ITEM:** SDG&E will add this as an agenda item to the next EDAC meeting

7. Anonymization Data Standards (Garen Grigoryan, PG&E)

Purpose: To get clarity on the anonymization data standards outlined in the EDA decision

1. Broad definition: Anonymous data is individually identifiable information that has been altered in a way that no longer directly identifies and can't be reasonably be used to identify an individual.
2. IOUs have received some requests for “anonymized” data that includes what IOUs consider PII information. From IOUs perspective, specific geographic markers, such as, Latitude/Longitude, NAICS codes, street name, or a building reference, that can easily pinpoint to a customer, are typically considered PII triggers.
3. For research institutions, the challenge is when the requested data includes what is typically considered PII and therefore should trigger an IRB review and certification. However, some IRBs are responding that “there is no need for an IRB review since the data is anonymous” or that “there is no human subject testing in that study”. This creates a dilemma for the IOUs for complying with the Energy Data Access (EDA) decision, given the different interpretation of what is PII and what should therefore trigger an IRB certification.
4. It would be helpful to have some guidelines and industry acceptable practices both for California research institutions as well as those outside.
5. Suggested point of view: we should be thinking about the data from a perspective of what can be re-identified and not necessarily be thinking about what should be anonymized, because even anonymized data (regardless of level of anonymization) can be re-identified with the appropriate rigor, skill and the use of external data sets, available publically.
6. The team recommended reaching out to subject matter experts to determine the best approach for the anonymization of data.
7. Synthesized data was discussed as an alternative to anonymizing the data which may remove the privacy concerns and may provide the level of details for Local Governments (or other interested qualified parties) to utilize the data for climate action planning or other needs.
8. Synthesized data may also provide a consistent and functional data set in an expeditious fashion (if key stakeholders can agree on the parameters in advance), removing PII and timing concerns, for the qualified third parties interested in the customer usage data.
9. **ACTION ITEM:** Stephanie Pincetl will bring a speaker to the next meeting to discuss different approaches and best practices to anonymization and to discuss the concept of synthesizing a data set.
10. **ACTION ITEM:** SDG&E will add this as an potential agenda item to the next EDAC meeting

8. Meter to Address Mapping (Amy Reardon, CPUC)

Purpose: To discuss the 3rd party need to map meters to buildings

- a. Amy explained that building owners are requesting usage information for meters be provided to the building owners. In order to do this, the meters must be mapped to the building.
- b. The IOUs explained that their systems don't support metering mapped to buildings because it is not consistent with the current billing hierarchy across all IOUs. This effort would require an extensive amount of work. Furthermore, there is no whole building identifier in the billing systems.
- c. There are other complex issues to consider (e.g. meter changes, technology changes, cost) and could be handled outside of this meeting.

- d. CEC is leading workshops with the IOUs and Public Owned Utilities (POUs) to discuss this topic under the AB1103 building benchmarking requirements. Allow more time until CEC can work through the process.

9. *Public comments period:*

- a. No comments from public.

10. *Next EDAC Meeting Announcement (Chris Vera, SDG&E)*

- a. SDG&E will host the next meeting in San Diego in early December
- b. Team is recommending in person participation as much as possible.