**ISP STUDY REQUEST FORM FOR PG&E’s Study Team, V2017.7**

**The information provided in this request form will be used to justify the need for an ISP study, the types of ISP study (market-based, sunset, or custom-/site-specific), and the applicability of the study outcomes.**

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| **ISP Study Information** | |  | **Tracking** (IOU USE) | |
| ISP Title | PGE-ISP- |  | ISP Study Request |  |
| Measure |  |  | ED Notification |  |
| Description of the measure (technology/process/practice) and its applicability (project type, segment, range of market, etc.):  List and describe known alternatives to the measure, which also meet customer’s technical and functional needs: | |  | ISP Report Due |  |
|  | ISP Report Received |  |
|  | Submitted to ED |  |
|  | Published on \_\_\_\_\_\_ |  |

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| **ISP Requestor** | | | | |
| IOU, Implementer, or CPUC |  | | Gas /  Electric | |
| Department |  | | | |
| Contact Name(s) |  | Telephone # | |  |
| Contact email(s) |  | | | |
| Program Name |  | | | |

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| **ISP Study Scope** | | | | | |
| The objective of an ISP study is to mitigate IOU’s risks in spending resources in claimed energy savings that could be discounted or dismissed, through studying and recommending whether or not the measure (technology, process, or practice) is a common practice today in a specific sector and segment application.  The ISP study will investigate today’s purchase and installation trends of an energy efficiency measure (EEM) for a specific sector, and analyze factors affecting the decision-making on selecting and installing of such an EEM. Study methods may include research and reviews of code/regulation impacting the customers, development of survey instruments (i.e., interview questions), and interviews with customers, vendors/suppliers/manufacturers, designers, and/or subject matter experts to analyze and understand current trend of the EEM purchase, and alternative/competing measures if any that also meet the technical and functional needs for the applications/processes.   * Years since the proposed EEM has been introduced in the market * Years the proposed technology has been in the program * Applicable market size and customer factors identified prior to ISP study * Regulatory or industry standards driving technology or process solution selection * Current adoption trend of the measure - whether it is commonly purchased or installed today * Factors affecting the selection of the EEM in today’s practice trend   **Please provide the following information as it is necessary for defining the study scope and deciding the types and approaches in the ISP study for which you are requesting.**  **First, please describe how you expect to use the study outcomes and applicable markets:**  1) How do you expect to use the outcomes from this ISP study, for deemed and/or custom projects?  Custom  Deemed  Sunset. Please additional comments if applicable:  2) Is the proposed set of measures applicable to a limited or broad market? Please give your best estimate for applicable market size (the like customers or plants):  Small (under 20)  Large (100+)  Other (please specify\_\_\_\_\_)  **Second, please elaborate the proposed measure (i.e., technology/process/practice) and its competing/comparable measures, including differences in efficiency, reliability, maintenance, lifetime, material costs and labor costs.** | | | | | |
| Installation Types | ALL | New | Retrofit | Retrofit Add-on | Normal Replacement |
| Building Types |  | | | | |
| Industry/Market |  | | | | |
| Project Name |  | | | | |
| Measure Baseline |  | | | | kWh /  Therms |
| **Background Notes:**  **To facilitate the review and study, please provide contact information of suppliers, customers, and experts known to you, if possible. Use an extra page when necessary.**  **Please describe your prior experience or opinions about this measure, including factors that motivate or deter wider applications of the measure today.**  **Please answer the following questions. If your answer is “YES” please elaborate the details.**  1) Will implementing this measure in a custom project likely produce savings of 200,000 therms or 500,000 kWh or more?  YES NO  2) Will Portfolio High Impact Measures (HIM) in a program cycle aggregates likely approach savings of 5,000,000 kWh or 1,000,000 therms or more?  YES NO  3) Is this measure multiple-technology solution for the same application?  YES NO  4) Is this a new or emerging technology?  YES NO  5) Is there any code/regulation mandating this measure/technology?  YES NO  6) Is the measure the only solution available for this application?  YES NO | | | | | |

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| **IOU Support Documents** (support documents are recommended if available) | | |
| Project Proposal  If a specific project is involved, then the SOW should include the project description; information on the technology being purchased and where it is being applied. The SOW may also provide information to define the scope of the application, such as size and capacity of the equipment required and the applicable market segment. | Technical Audit / Preliminary Assessment (TA/PA)  TA/PA is a report/form that is typically produced by IOU’s account rep, describing what the current situation (baseline), the measure, and the cost are for measure implementation. Includes estimates of expected energy savings and the possible incentive amount. | Energy Assessment  EA is similar to a TA/PA, with a more in depth analysis of energy use and savings, such as an Excel spreadsheet. This may include actual measured data if it’s already available. |
| ED Disposition  Often the ED has already seen the project during its application stage and pulled it for Ex Ante Review; they can also pull a project after it has been completed. The ED makes a preliminary determination if the project is Industry Standard Practice and will cite their concerns about the project; this document provides significant guidance to the ISP investigation. | Technical Specs  Product tech specs are provided by the manufacturer, including energy use and efficiency information. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |