

Non-Wires Assessment: Structure and Conclusions

David Le – EE Non-Wires Solutions Project Manager

Jean Oates – NWS Assessment Lead

BPA Energy Efficiency



Overview

- The evaluation function at BPA
- What is a process evaluation?
- Why assess the Non-Wires Solutions initiative?
- How was the consultant for this project selected?
- What tasks and deliverables were specified in the request for proposals?
- What methodology did the contractor use?
- Major recommendations of the assessment and discussion points
- Next Steps



The evaluation function at BPA

- The energy program evaluation team at BPA is recognized internationally for the quality, objective work it does.
- Members of the team have conducted or managed hundreds of process and impact evaluations since the 1980s. The results of the evaluations have improved programs and saved BPA dollars.
- The evaluation team is committed to delivering uncompromised, objective results that lead to program improvement.



What is a process evaluation?

- Process evaluations seek to identify the causes behind the effects of a program, i.e., the processes that are part of program or project design and operation.
- Although the final NWS report is titled “Process Evaluation,” this project is narrower in focus than a typical process evaluation and is more properly called an assessment.
- The NWS assessment of the internal BPA processes and progress is based on the perspective of BPA employees



What is a process evaluation? *(continued)*

- A process evaluation (and this assessment) is structured to:
 - Determine what should have happened (goals)
 - Find out what actually happened and why (results)
 - Solicit perspectives from those involved
 - Identify barriers to success of a program, which might include inadequate communication or unclear or unstated goals and other barriers
 - Look at aspects of the target market
- The goal of the NWS assessment was to provide valuable information for program managers to use in fine tuning and increasing the effectiveness of NWS.



Why assess the NWS initiative?

- To determine:
 - What worked well and what did not in support of NWS development and progress according to the original stated goals
 - What barriers to success exist
 - If recommendations from the “Expansion of BPA Transmission Planning Capabilities” report were fully adopted and implemented.
 - To explore and potentially improve internal BPA functions related to NWS based on the results of the assessment.



How was the consultant for this project selected?

- The list of potential contractors consisted of some who had conducted evaluation work for BPA and others discovered through additional research.
- The RFP was sent to three companies who were determined to have transmission and energy efficiency experience, as well as evaluation skills.
- GDS Associates, Inc., was selected to conduct the Non-Wires Solutions assessment based on the firm's experience in the areas above, and based on the high quality, responsive proposal it submitted.



What tasks and deliverables were specified in the request for proposals?

- BPA provided background on NWS and the purpose of the assessment, as well as key aspects of NWS.
- The statement of work suggested tactics, although bidders were free to propose alternative methods to address those key aspects.
- Tactics suggested included:
 - Review of NWS documents
 - In-person or telephone interviews with key BPA staff or former staff involved with NWS identified by Transmission or Energy Efficiency staff and management.



What methodology did the contractor use?

- GDS methodology included:
 - A review of NWS-related documents
 - Development of a set of questions used to guide the interviews (unlike a survey where all questions are asked in precisely the same manner and wording)
 - In-person or telephone interviews conducted by a cross-discipline team that included an individual with expertise in interviewing techniques and an individual with technical knowledge of transmission and distribution system planning.
 - Following careful review by the BPA evaluation team, GDS followed up on any issues/findings that needed clarification. GDS did not change any results based on BPA comments.



Major recommendations of the assessment and discussion points

- Recommendation 3: Review the NWS planning process timeline and make any changes that are necessary to assure that Energy Efficiency gets involved early enough to allow non-wires alternatives to be fully planned and developed as viable solutions.
- Discussion points:
 - Transmission planning process not compatible with NWS needs
 - Late changes in preferred plan-of-service does not sync with current NWS process
 - Long term planning as recommended by “Expansion of BPA...” report not implemented
 - Others?



Major recommendations of the assessment and discussion points *(continued)*

- Recommendation 4: Conduct a review of existing Transmission and Energy Efficiency Planning tools to determine if new or enhanced tools are needed to fully integrate non-wires alternatives into the transmission planning process. This should include a review of the benefit/cost analysis methodology to determine if it is properly capturing all of the benefits and all of the costs of both transmission and non-wires alternatives.
- Discussion points:
 - Potentially revise screening template and develop better indicators
 - Develop screened projects ranking tool
 - Transmission cost estimating process can be an issue and is larger than NWS
 - Others?



Major recommendations of the evaluation and discussion points *(continued)*

- Recommendation 2: Review existing NWS goals and identify or add joint Transmission Planning and Energy Efficiency tactical (staff level) goals to be worked on by a joint team of technical/planning staff from both organizations. This team should report to the existing joint NWS management team. The joint goals should be measurable and reflected in the individual performance goals of all team members.
- Discussion points:
 - Potentially useful exercise as continual development and refinement of NWS process
 - Staff resources limited for both Transmission and Energy Efficiency
 - Others?



Next Steps

- Solicit input from Roundtable
- Develop action plan to address recommendations by March 31, 2008
- Implementation of action plan by September 1, 2008

