

# Proposal for Quarterly Reporting to CAEECC and Subcommittees

## I. Purpose:

To ensure transparency, provide metric progress, assess budget, and understand how programs are being administered/implemented as well as discuss potential modifications if needed after observing responses from the market among other external influences on the Business Plan implementation.

## II. Approach:

All reporting should minimize duplicative and avoid unnecessary reporting (e.g., remove those items that no one will be analyzing). Reports should rely on current data reporting as much as possible, with updates to EEstats tableau options or supplements as needed either via CAEECC discussions or CPUC guidance (e.g., annual advice letter, annual reporting, etc.). The data reporting will follow the current CPUC timeline, which results in Q1 data being reported at the Q2 meeting. CAEECC also needs to determine whether all data is reported at every quarter or whether only some information is regularly reported while some “deep dive” data is provided less frequently.

\* the following is primarily derived from eestats tableau – pictures in Appendix A\*<sup>1</sup>

## III. Quarterly reporting at CAEECC meetings:

Proposal for quarterly CAEECC meetings with the following reports:

1. *Overall portfolio progress*
  - a. Energy savings
  - b. Emissions reductions
  - c. Expenditures (with breakdown)
  - d. Cost-effectiveness
  - e. Provided in total bar chart and with geographical location map
  - f. Overall chapter metrics from approved Business Plans
  
2. *Sector specific high-level data* **[will need to add Public to EEstats]**
  - a. Energy savings
  - b. Emissions reductions
  - c. Expenditures (with breakdown)
  - d. Cost-effectiveness
  - e. Provided in total bar chart and with geographical location map
  - f. Sector metrics from approved Business Plans

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<sup>1</sup> All of the data suggested is currently being reported to the CPUC. There will need to be added refinements for subsectors presented in the Program Administrators (PAs) Business Plans (BPs).

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3. *Examination of PA achievements regarding non-sector specific metrics*  
*[likely to be defined as part of supplemental information]*
  - a. Implementation of bidding requirements including progress on solicitation strategy *[assuming supplemental information on PA solicitation strategy; would need to determine how to measure this given the dependence of progress on the market and other external factors]*
  - b. Identification of additional needed programs/RFPs, and modifications to existing programs/contracts
  - c. **Pending clarification from Commission** regarding Tier 2 Advice Letter and Annual Reporting requirement modifications (if any), review of scheduled submissions of PA activities to assess [e.g., April for Annual Report and July/August for Annual Advice Letter]
  - d. PA proposed amendments to Business Plans, implementation plans, budgets or programs as needed either as a result of reporting or other timely modifications pending observations in the market
4. *Summary of subcommittee subsector findings, discussions, and next steps. This is TBD pending conversations but some possible report outs could include:*
  - a. Trends observed over the past quarter regarding particular subsectors (e.g., progressing as expected vs. much lower/higher than anticipated)
  - b. Discussion that occurred at the subcommittee (e.g., what main issues were raised and how were they resolved or follow-ups)
  - c. Next steps (e.g., what modifications – if any - are anticipated for the following quarter given these observations and discussions)

## IV. Subcommittee quarterly reporting at CAEECC subcommittee meetings:

Proposal is to have quarterly subcommittee meetings (once up and running). Either rotating which subsectors are reporting or doing all subsectors every quarter (TBD). The following would be reported at the CAEECC subcommittee meetings.

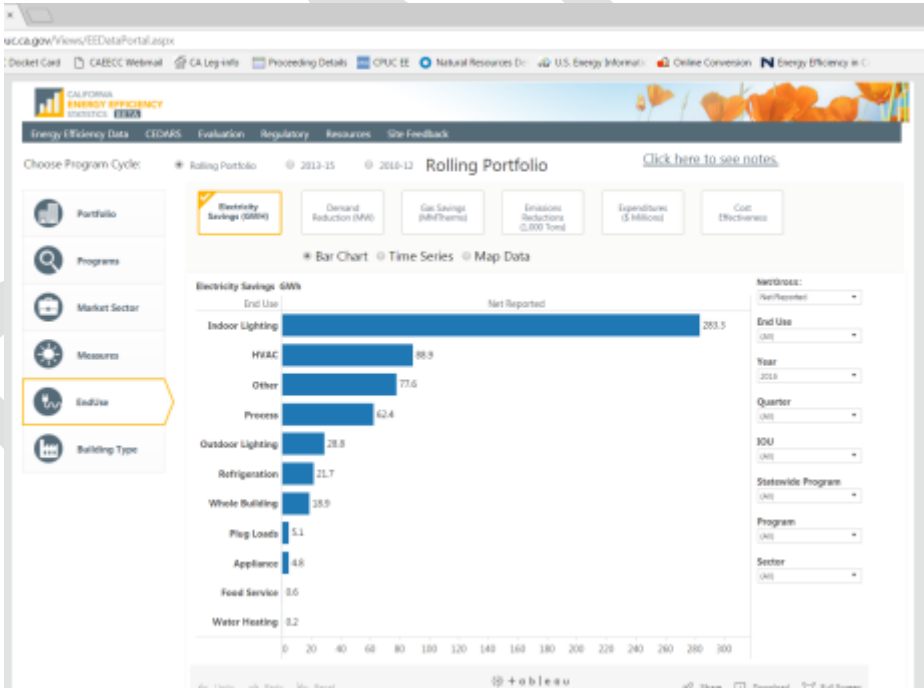
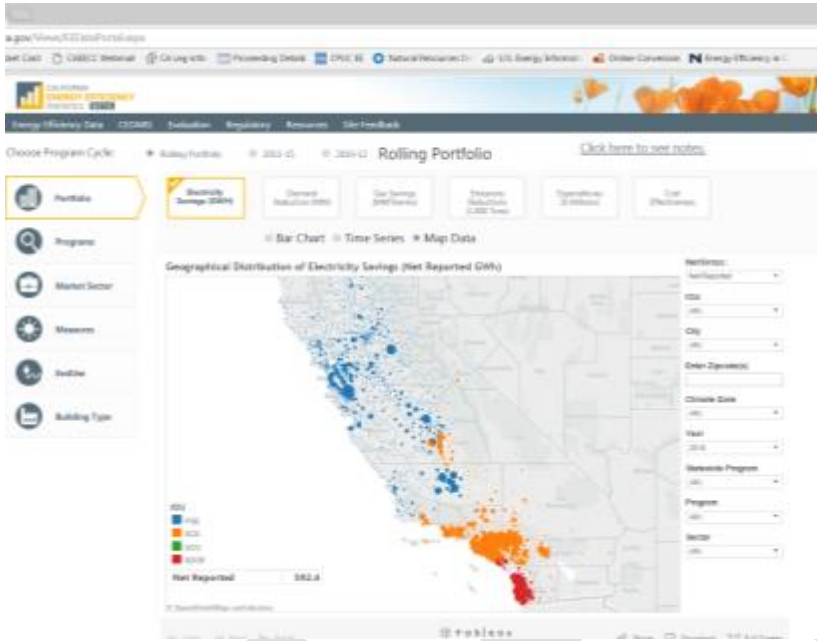
1. *Overall sector information*
  - a. Energy savings
  - b. Emissions reductions
  - c. Expenditures (with breakdown)
  - d. Cost-effectiveness
  - e. Provided in total bar chart and with geographical location map
  - f. Sector metrics from approved Business Plans
  - g. Program metrics (TBD)

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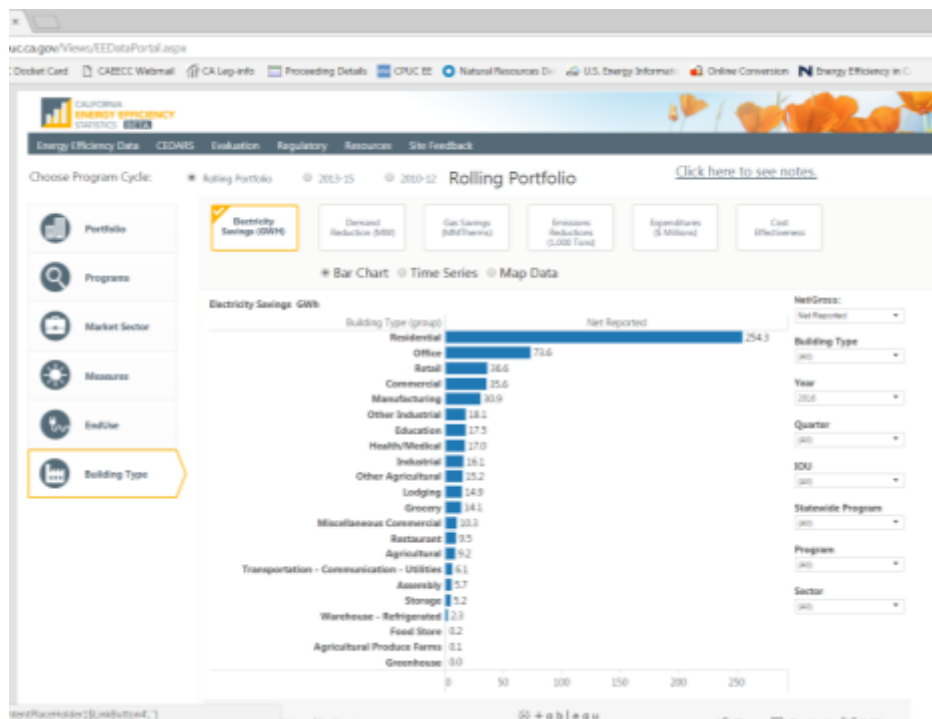
2. *Subsector detailed information (should match PA BPs subsectors)*
  - a. End uses
    - i. Energy savings
    - ii. Emissions reductions
    - iii. Expenditures (with breakdown)
    - iv. Cost-effectiveness
    - v. Provided in total bar chart and with geographical location map
  - b. Building Types
    - i. Energy savings
    - ii. Emissions reductions
    - iii. Expenditures (with breakdown)
    - iv. Cost-effectiveness
    - v. Provided in total bar chart and with geographical location map
  - c. Programs
    - i. Energy savings
    - ii. Emissions reductions
    - iii. Expenditures (with breakdown)
    - iv. Cost-effectiveness
    - v. Provided in total bar chart and with geographical location map
3. Trends
  - a. Provide commentary on trends (e.g., why X is not getting savings, why PDQ is doing well, what's missing now that we see data, etc.)
  - b. Plans for next quarter (e.g., RFPs, advice letters, pilots, fund shifting, etc.)

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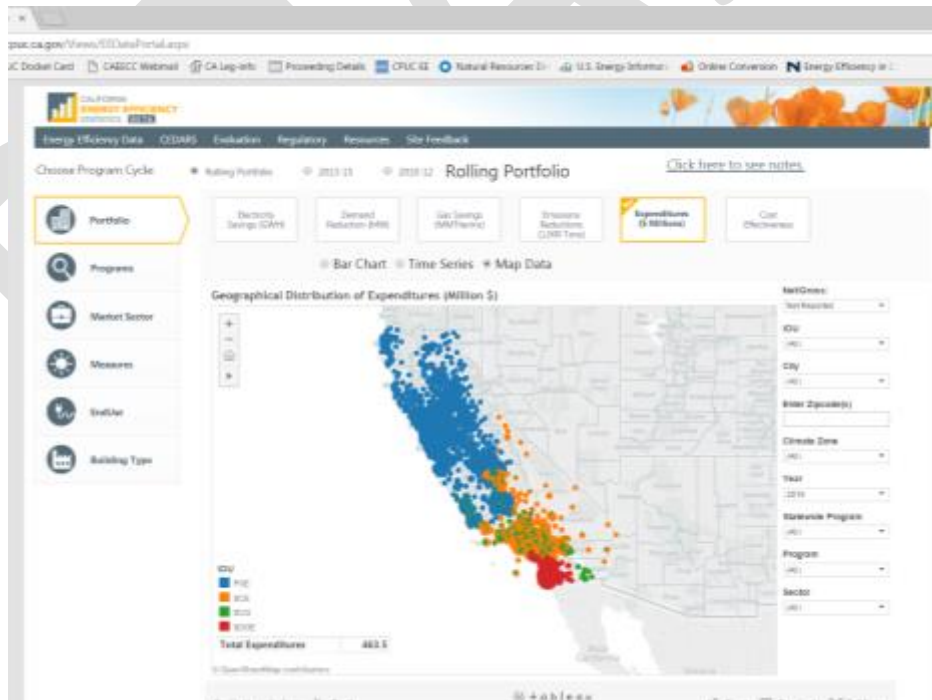
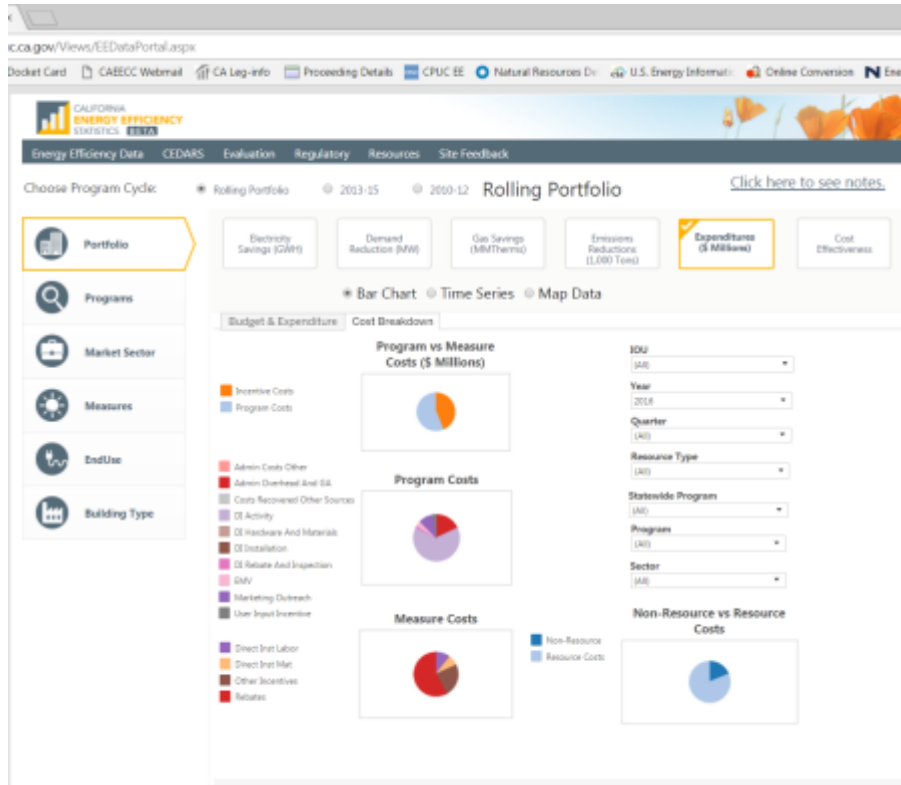
## Appendix A: EESTATS EXAMPLES



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## Notes

Lara Ettenson/NRDC: I have a general understanding of portfolio and what the issues are. Regular quarterly reporting will raise some of these issues. Just reporting will not be worth it. The intent of CAEECC reporting will be more about progress. We are looking for meaningful conversation about how to address issues if a program is halting for some reason, for example. Reporting should be not duplicative. What do we need to ensure that we understand the progress of the portfolio?

Data reporting would follow what is actually happening. Q1 data you will see in Q2 data reporting.

Almost everything on this list came from EE stats. Pictures are the types of things you can get on EEstats.

Metrics are not on EEstats. I need to talk to Amy [Reardon] about difference between CEDARS and EEstats.

Jenny Berg/BayREN: CEDARS is the new platform. Everything will eventually go to CEDARS. Currently we still file monthly and quarterly reporting through EEstats.

Hazlyn Fortune/CPUC: We will be facing the same issues for former PIPs with transition to whatever you decide you want the Implementation Plans to look at. That is one of the issues you were supposed to be discussing in 2017. PIPs were supposed to be transitioned.

Jenny Berg/BayREN: PAs were allowed to update PIPs and upload into EEstats.

Lara Ettenson/NRDC: I think everyone agreed to IP format already.

Lara Ettenson/NRDC: We need to talk about how metrics will be filed and how we will understand how portfolio is progressing against the metrics. We can have an influence on metrics that are created for the IPs. Once contract is done, then third-party will develop IP. Once IPs are written, we need metrics. Metrics can be vetted and developed by stakeholders.

Meghan Dewey/PG&E: Wouldn't metrics be part of contracts? Implementers would also want that.

Lara Ettenson/NRDC: When does anyone who is not a financially interested party be allowed to review?

Meghan Dewey/PG&E: When the program is implemented.

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Mike Campbell/ORR: My expectation and vision is similar to what Meghan is describing. I see high level metrics. Business Plan metrics need to align with the Business Plans. The only time we'd get into contract-level metrics would be when they are way off.

Lara Ettenson/NRDC: Ok, once metrics are done, then we would be getting into this type of discussion. [Reviewing proposal.] At the CAEECC meeting level, does the reporting seem reasonable? Any concerns?

Jenny Berg/BayREN: This is not really a concern about reporting but we need to consider reporting requirements. It should not be busy work that nobody looks at.

Lara Ettenson/NRDC: I agree. We should not just report to report. We need to have some sort of structure for identifying issues early and doing something with them. We need to have more meaningful discussions.

Jenny Berg/BayREN: What does it mean to be successful? New programs take a long time to get going.

Mike Campbell/ORR: Metrics should not show that a program is not working. Approved BP metrics should track start-up of program through life of program. Some of the metrics we expect in BPs is the path for solicitation, etc. Also, how is money tracking in budgets? Are we getting savings per money spent?

Lara Ettenson/NRDC: That makes sense, yes. How do we define progress? We need to be cognizant in what we are checking against.

Mike Campbell/ORR: PAs will have an opportunity to say, "here is what happened and how we are planning to fix it." There will be innovation and not everything will work, but we need metrics to see if things are worth continuing or re-working. I'm not looking for a "gotcha" but want to have meaningful evaluation.

Jenny Berg/BayREN: You don't necessarily get the whole picture when you look at EEstats. I appreciate the collaborative effort attempt.

Lara Ettenson/NRDC: When I looked at EE stats, I tried to assess what is happening. There is a lot of data, but it is not always organized by what a program actually does. Is there an opportunity to discuss how the data that utilities provide is organized? I don't know if there is a way to cull categories of programs. Are people interested in trying to cull the information in new ways? If you are reporting in sometimes obscurer program names, is there a way to report differently? Is there something we can do to make the data more accessible?

Michelle Costello/SDG&E: Are you asking as it relates specifically to EEstats, or are you looking for another avenue?



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Lara Ettenson/NRDC: Can we make some changes to what is in PA spreadsheet loaded into EEStats to find better data? Or is this an issue of how utilities do reporting to the Commission?

Matt Evans/SCE: Maybe reporting is by NAICS code or building type.

Lara Ettenson/NRDC: Maybe I need to work with Amy [Reardon] to improve functionality so that the data is more accessible to stakeholders.

Matt Evans (SCE)/Jenny Berg (BayREN)/Beckie Menten (MCE): There is a reporting PCG, once a quarter

Amy Reardon/CPUC [on phone]: Lara and I can talk. My contract for EEStats has been re-classified. There is almost no money in my budget to do anything with EEStats right now. We should focus on what you want to see. We should do it as efficiently as possible.

Lara Ettenson/NRDC: Is there an opportunity to work on CEDARS during the transition?

Amy Reardon/CPUC [on phone]: Yes, but no money to work on this right now.

Athena Besa/SDG&E [on phone]: We have been in conversation with ED about how to move forward with 2017 and 2018. There is ongoing EM&V. Moving forward, we should work out how we want this to be without duplicating efforts. And we need to make sure the Commission allocates budget to do this work.

Lara Ettenson/NRDC: I'll keep that in mind as we move forward.