

Notes from Energy Efficiency Coordinating Committee #11

11/2/2016 9:00AM to 5:00PM Location: Sheet Metal Workers Union Local 104 offices

Meeting Co-Chairs: Lara Ettenson, NRDC, Meghan Dewey, PG&E

Facilitator/Notes: 2050 Partners, Inc.

[Meeting materials](#) can be found on the CAEECC website.

Notes: Presentations are generally not summarized in these notes. Please see presentation slides and other meeting materials on www.CAEECC.org website for context. Lack of attribution for meeting participant comments is intentional by agreement of Coordinating Committee.

draft

Welcome and Background: Facilitator

- Welcome to our 11th CC meeting. We are trying to record the session today to support capturing notes.
- We are assisting CC Co-Chairs in ensuring we have transparent, fair process not dominated by any one interest group.
- Thanks you to Dave Dias and Sheet Metal Workers Local 104 for hosting
- Dave Dias: Safety message, intro to facility
- Facilitator: Thank you all for coming.
- CAEECC is a process authorized by CPUC in 10/2015 to create a consistent informal forum for discussion. It is designed to inform and provide input to PAs as they develop BPs and later IPs and beyond.
- CAEECC has no authority. It is designed to provide input and influence PAs as they move forward. The hope is for better products and smoother process as we discuss and narrow the issues.
- Re-cap of stages through the year to date. Now we are in Stage 4: review of draft BPs from each PA.
- Please email comments to facilitator@caeccc.org if you don't have a good opportunity to speak or text me.
- Reminder: If you wish to provide anonymous comments that is fine. We do not have to provide attribution – we will post mailing address later

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- Introduction of CC members and those in the room
- Agenda Review
 - During residential sector, we will address some organizational issues that apply to all of the sectors.

- Rules of engagement: CC members have priority rights to speak. ED staff also welcome to comment at this time. Then we open up to public comments when there is time
- Will start with Updated BP Review Checklist
 - Vision/Market Characterization
 - Barriers/Challenges
 - High Level Approaches/Intervention Strategies
 - Metrics
 - Unclassified
 - EM&V Considerations
 - Coordination/Integration – cross-cutting/IDERs/EVi

Question: When should we raise questions that are not sector specific?

Facilitator: During Residential Sector discussion.

Question: There has been discussion throughout the process about the checklist. Is it safe to assume this checklist has been ED approved?

Facilitator: Yes. The version I have passed around here is ED approved.

Response (from ED staff): Clarification from ED, we continue to watch and are thinking about these things. This may not be a final product.

Co-Chair: Is checklist still in progress?

Response (from ED staff): I'm just making an overall statement. CPUC is still looking at all this so it may not be complete.

Co-Chair: When can we know that the checklist will be done?

Response (from ED staff): We have no intention to add anything at this time. If something comes up, we will let you know.

[Facilitators note: The Checklist was approved by lead ED staff person prior to the meeting, unbeknownst to this commenter]

Facilitator: We want to get through everything today. We have time reserved for a webinar on November 7 for follow up issues. Today we are trying to focus on what is actually in the BPs. We don't need to re-hash what has not been included in the draft BPs. There is a tremendous amount of substance in draft BPs so we want to focus on what has been written. It will help the PAs to understand if they are missing something from their big picture visions. PAs are not expected to provide a lot of discussion. This is for stakeholders to provide input. PAs can provide clarification, if appropriate. We also want to avoid talking about minutiae of program design. That is not appropriate for BPs. Our next meeting is a webinar on November 7; it will be cancelled if not needed. Next meeting after that is November 16; probably 9:30-5:00 but need to see where we get today. November 21 is deadline for comments on all BPs [Facilitator's note...except SCE BP which is due December 1]. December 7 is the last CAEECC meeting for the year.

Residential Sector Chapter Input

Facilitator: Stakeholders can add overarching comments during this session. All Residential sector subcommittee Co-Chairs are here.

Comment: I have an overarching request that in all tables re budgets and money include 2015/2016 data so we have a reference year to look back on as we move forward. Otherwise we have to look this information up.

Question: When will we see Statewide sections in draft Business Plans? Will they be available for review before December?

Co-Chair: We understand how eager stakeholders are to see this information. The PAs are striving to get this done the week after Thanksgiving. Most of this is programs so more appropriate for Implementation Plans. PAs only expect to provide high level strategic analysis at this time. I anticipate what we will see will be more complementary to existing strategies.

Response (from PA): You should see some of the color of Statewide programs in current draft Business Plans. We want to know what stakeholders really want to see beyond programs for Statewide. Codes and Standards, ET, and WE&T are already included in draft BPs. Some of the information is more applicable to Implementation Plans. As a PA, I'd like to understand better what you are looking for? I know roles and responsibilities is a big one, but what else do you want to see?

Question: Do stakeholders get a 10-day extension to provide follow up comments to draft BP submitted by SoCalEdison because they filed late?

Response: Yes, we proposed that

Facilitator: I don't think we should do that.

Comment: The people I represent will be upset if they don't get extra time to provide comments to SoCalEdison draft because it was just posted two days ago. I thought they would get extra time.

Facilitator: Let the record show, Edison offered an extension for comments. But everyone still has 3 weeks to respond to draft BPs in writing. It is going to get confusing if we allow for 2 comments periods. I'm not really sure it will make a difference. Do people want extra time to respond to Edison draft BP?

Comment: In good faith we can try to get our comments in on November 21. But if we need an extra week, we'd like SoCalEdison to accept those.

Response: Edison is fine with that.

Comment: The Coalition for Energy Efficiency also wants an extension to provide comments to SoCal Edison draft BP.

Co-Chair: I'm fine to go with whatever everyone wants.

Comment: We want CAEECC process to provide meaningful input. For at least 6 months, I have been asking for drafts. PAs have said they need more time. One entity decided to ignore agreed to deadlines for draft BPs. ORA will submit everything we can on time. I think CEEIC and all

other stakeholders can have as much time as they need. PAs are in the drivers' seat here. They can decide what they want to include in their BPs. But they get to hear what other parties want to say and want to provide as push back.

Facilitator: People will have extra days to comment on SoCalEdison draft BP.

Comment (from PA): PAs worked very hard to meet draft deadlines. I would hope people do not give us feedback after the deadline. We have completely re-drafted our chapter based on stakeholder feedback.

Comment: We have had a number of Coalition [for Energy Efficiency] calls to discuss this. Basically our position is that this meeting was stated to be our best opportunity to discuss PA BPs. Most of the BPs were just provided a couple weeks ago. We have not had enough time to review before this meeting. How can we be ready to give meaningful feedback on such short notice? If this meeting is our best opportunity to provide input, we have not had our best opportunity to review.

Facilitator: To clarify, the language about "best opportunity" is in the context of discussions. Stakeholders can still provide written comments.

Comment (from PA): I understand these issues. As far as I'm concerned people can write whatever they want when they want. We will get to it when we do. We have a deadline as to when your comments will count. If you submit comments past the deadline, we'd like to see what you are thinking but we may not give full consideration if submitted late.

Facilitator: Comments to Edison's draft BP are due December 1.

Question: This has to do with doubling of savings of the portfolio. We want that SB 350 increase shown. A lot of tables say "TBD." Will those tables really show doubling in revised drafts?

Co-Chair: CEC is establishing the doubling by next year. This is the problem with submitting BPs now and then things are going to change.

Comment: Maybe it would be helpful to provide information explaining why the tables don't have doubling.

Comment: Regarding solicitations, SDG&E did a timeline and addressed third party support. I thought those discussions were very helpful. I would like more information about solicitation plans. MCE should also include plan for solicitations. Looked like SoCalEdison said it would solicit for everything. Is this the same as SDG&E? One's a schedule and one is verbiage?

Response: SoCalEdison hasn't discussed transition yet. We are talking about open solicitation – two times per year – so no timeline.

Comment: Discussion about transition in SoCalEdison's draft BP would be particularly important if nobody knows which sectors it will address and when.

Response: PG&E also appreciated SDG&E's discussion on transition. It was a good start. PG&E will follow SDG&E's model. I'd like to hear what else stakeholders would like to see in SDG&E's transition discussion.

Facilitator: Ask for what you expect to see. It is not enough to say, "there is not enough content."

Comment: I have a laundry list of issues:

- At a high level, BPs need to be something that you can evaluate the success of a program on. We want to see things that PAs will use to measure if they have achieved their goals. How do you determine if something is successful?
- There are elements of every plan that are good. I don't want to seem too negative.
- Bidding strategy should be fundamental to everything that PAs are doing. PAs need to explain that they are targeting certain activities in a certain way for a reason and they have thought that through. PAs need to tie what they are proposing to why. I think this is missing.
- We would also like to see things associated with timeline for what is being bid out.
- Market characterization: look at how PG&E tried to describe the market.
- You should have goals to achieve things that you address in market characterization. You need to clearly defined metrics that tie to the goals. To the extent that PAs have defined, measurable metrics, that is great.
- PAs need to include how budget ties to activities.
- There needs to be cross-cutting with how each plan ties to Statewide programs – address overlap, timing strategy, etc.
- SB 350 – We are not totally sure where things are going to land, but PAs still need to have a plan. PAs can't just say, "we don't know."
- PG&E should include Diablo Canyon settlement.

Co-Chair: Closing out solicitation ... when I reviewed PG&E's draft BP I could see market characterization with graphics and maps. It would be helpful to connect the gaps. Plus, SDG&E's end-use savings discussion was helpful. BayREN and SoCalGas did this with income. Put it all together, and we get a clear picture for where you are going and provide something to track back to.

Comment (from PA): I want to further this discussion about solicitation strategy. We are trying to balance. IOUs do not propose and design programs. Our BP lays out the framework and 10 year vision with strategies and sample tactics. We want implementers to bring us the ideas. We need to recognize that implementers need to bring the programs to fill the gaps. I agree that our solicitation strategy can be more detailed, but we live by the intent of the Decision and let the market drive solicitations.

Comment: I get that and I understand. If there are expectations going out to bid, be sure to include. Or if you are waiting to bid, please state that and why.

Comment: I agree. The timeline for solicitation is important. PAs are in the driver seat for solicitation strategy. There is only so much that can go out for solicitation that market place can absorb. Edison's supplement is in the right direction.

Response: Edison's plan is to include this information in executive summary and then portfolio chapter.

Comment (from PA): Unless we talk about actual strategies in BPs, we need feedback on our draft design solicitations. I am hoping to walk away from this meeting today with good feedback on the strategies in our plans.

Facilitator: Any specific comments on drafts regarding residential sector?

Comment: My coalition has a broad interest in making sure that BPs address the needs of low income multi-family tenants. To make that work, we need help for landowners. Thank you to BayREN and MCE for doing such a good job. We are also pleased to see SoCalEdison has specific section on low income sector. We will reiterate the comments that we made in May 2016. We are concerned that we didn't see specific section on low income multi-family in drafts submitted by PG&E, SoCalGas and SDG&E.

Co-Chair: The scope of draft BPs does not address low income. This is a general funding issue. PAs won't be able to give more specifics on low income plans.

Comment: We are looking at what has been traditionally funded from the general portfolio budget. We are not referring to EEFA budget. We are making sure there is some tailoring and that this sub-segment has specific concerns and specific needs.

Facilitator: Are you addressing market characterization or content on market intervention?

Response: Multiple segments. Three BPs considered this in their scope. We hope some inclusion of this issue in revised drafts for other three BPs.

Comment (from PA): I am making a request for feedback. BayREN completely re-vamped our single family residential chapter based on feedback from stakeholders. We are now focusing on middle income sector.

Co-Chair: I noticed that BayREN redrafted this chapter in response to concerns regarding traditional home upgrade programs. It was popular but not achieving cost effective goals. Do you envision challenges to move away from this program?

Response: We are having discussions with PG&E given our shared territory for this program. I think the outcome will be really good with regard to leveraging. There may be another incentive program but on a different scale.

Co-Chair: There is a challenge with hard to reach (HTR) definition. Is this still a problem for PAs? We have been looking for broader definition and the Commission said it will address later. Is this issue getting in the way of strategies?

Response (from PA): BayREN used policy manual definition as well as resolution definition. This has been a challenge. The benefit of being able to categorize things as HTR helps with cost effectiveness. This is something we should take up again. It is very hard to reach the new definition.

Co-Chair: I appreciate the multi-family sector call out. I understand it was at a high level. More was done in some BPs than others. A lot of comments from May were more Implementation Plan-related.

Comment: I'd like to see more specifics regarding metrics. For example, Edison has a discussion of existing building retrofit – short term and long term. What are the specifics for short term and long term strategies? Metrics need to tie to issues.

Question: On residential upgrade programs, I don't understand landscape of who is doing what, how is overlap happening, what is plan for rolling out. How do these all fit together BayREN, MCE and PG&E?

Co-Chair: I liked BayREN and SoCalGas income discussions. I would suggest that other PAs do something more like this. PG&E did a good job of owning and renting. That helps us on path to understand the market. I don't have a lot of specific comments on strategies. I'm more likely to provide comments that metrics don't match issue, or requesting for combined tables to make things clearer.

Facilitator: I noticed a few BPs had same metrics for different barriers. Not sure how you will disentangle what is causing the effect on that metric.

Comment: SDG&E's goal no. 3 (discussion about innovative strategies and new approaches) is just general goals. But then SDG&E provides as approaches what it is already doing for existing strategies. This seems like a disconnect.

Co-Chair: Thank you to Central Coast REN for your work on this proposal. It feels like it could be a local government partnership. So why a REN and not a partnership? If a REN, then call out the three criteria, including what gap are you filing that couldn't otherwise be filled.

Response: Yes, we'll address that.

Comment: The metrics don't seem particularly connected in many sectors. Metrics should measure success. If metric doesn't tie to strategy and goal, then we won't be able to tell if there has been success. Just getting someone to sign up for program is not really working toward success of goals as described.

Question: Who is the contact person for Central Coast REN?

Response: Alejandra Tellez – County of Ventura

Comment: We are seeing from BayREN and Central Coast REN a drive to time of sale related strategies. On legislative bills for EE and water use efficiency, the legislature deliberately left out time of sale because it is not the effective way to rollout efficiency. This is not a favorable approach. Please keep that in mind.

Agricultural Sector Chapter Input

Co-Chair: I'd like to see connections to metrics and consolidation of tables. These are similar comments for all chapters. Each PA has a different structure for its tables. PG&E's tables are the most comprehensive. Others are separated out. It would be better to consolidate tables and reduce redundancy.

Comments:

- PG&E agricultural sector has a discussion about using TOU rates to change ground pumping behavior. I'm not sure if that is an efficiency thing. Including some discussion of how matinee pricing would be useful.
- MCE strategies do not appear to differ from what it is doing on residential side. We would like to see specific needs to agricultural sector addressed. MCE should make the case if it is the same as residential.

Facilitator: Because so many ag customers mix ag with other sectors, one PA talked about having all those features in agricultural sector plan. What does PA think about one stop shop?

Response: yes, that is SDG&E's concept. General issue we tried to lay out for ag sector in our territory is that we have a lot of ag customers but they are small so tend to be ag and res at the same time. We'd like to put out ag and res to implementers to come up with one stop shop solutions.

Co-Chair: To SDG&E, I understand the clear gap in expertise, but aren't you bidding out everything? This addresses a specific gap. With regard to strategic energy management (p.142), can you identify why it is strategies here and tactics somewhere else?

Comment (from ED staff): Even though I don't have comments today, I will have written comments. Need to discuss with others at the Commission before I can submit my written comments.

Comment: I'd like to suggest that PG&E include language that shows local government partnerships actively support small and HTR ag sectors. We do this with both small and turn-key projects.

Co-Chair: I want to see if PAs did a good job of linking to AB758 action plan.

I'd also like to announce that Martha Brook has new position at CEC – Policy Advisor for Commissioner McAllister.

Industrial Sector Chapters Input

Comments:

- PG&E's metrics and participation metrics: terms are used broadly. In industrial sector, there is so much variation in size. It would be nice to break percent out into small versus large. The number of customers does not work in industrial sector.
- SEM (strategic energy management): I wasn't clear that capital projects were part of SEM and yet I read the Decision as including capital. I'd like to go back and look at those sections and confirm that capital projects can be included in SEM.
- I have members who would like to see SEM used as an overall approach versus one program. Approach would allow multiple implementers, but applied to different sectors.
- Industrial and commercial: I keep hearing that CPUC and IOUs have been meeting over a period of time to discuss SEM. As that moves forward, it would be great to include implementers in these discussions. I'd like to see implementers be able to come and talk about how they see SEM playing out in market.

Response: There will be a workshop for SEM.

Response (from ED staff): I have been working with certain leads from IOUs for a substantial period of time, before CAEECC was formed. We are developing a medium level protocol for SEM program and an evaluation protocol for SEM. We will be having a workshop in mid-December. Documents will be released before the workshop.

Comments:

- SoCalGas: Lessons from EM&V are not discussed or incorporated. Market barriers are not well documented. Some program strategies are applied repeatedly. We are looking for rationale about why things are expected to work and when they will be used.
- Levelized costs is an overarching issue. We'd like to see a metric for levelized costs, eg., it will cost this much per until savings. It will help identify the expectation that although some thing may seem more expensive at the beginning, they will be more effective as time goes on. Example, "levelized cost for this program will be __X__."
- SDG&E single savings goal: Focus is on participation, not savings. Edison has something similar.
- PG&E's upfront section: Useful information described what has worked in the past and what hasn't. This is good information for implementers that will lead to informed and effective bids.

Co-Chair: Changes from the past is a good discussion. PG&E did a good job on this. I also liked its holistic tables. I like comprehensive look. I also noticed a lot of assertions and not as much rationalizing about why certain strategies will work. If you were doing it before, what are you

doing differently going forward? A lot of strategies in EE are pretty similar across the country. Describing your logic would be helpful. Citing the heck out of everything – like PG&E – was helpful in understanding some of the rationalization. SDG&E included discussion of strategy versus tactic in different chapters (example, p. 119). What is the difference?

Comment: Overarching comment: PAs need to substantiate discussions of what barriers are and what they are asserting will get over the barriers. PAs need to explain why that strategy will work. We are looking for more discussion and citations.

Facilitator: Do any stakeholders have any questions about how PAs are going about changing their approach regarding third party contracts? Or re-orientation toward targeting customers based on AMI data?

Co-Chair: I have questions but these are more for Implementation Plan purposes.

Comment: The utilities have a lot of data and there are a lot of companies that provide data to the utilities. Does that data transfer over to the implementers when they are preparing their bids?

Comment (from ED staff): If this issue is more reliance on AMI data, it has to be worked out with third parties bidding for the programs.

Comment (from PA): When third parties win bid and pass security, we give them AMI data.

Comment: I second using SEM as an approach rather than one program. I really like that concept. I also think it would be useful to see more thinking about how WE&T will support SEM. We need to make sure the market can support SEM. They need to understand what they will do to carry forward.

Response (from PA) I think that is part of SEM design and that is programmatic. We are looking at the market to give us the solutions. Implementers need to tell us how they will use SEM in program designs.

Comment (from ED staff): We have discussed having training for a certification program for SEM implementers and program managers. It is an issue that is being considered.

Question (from PA): Can we get CPUC thoughts on SEM as a concept as opposed to a larger statewide program? The Decision suggests SEM as a possible downstream program. Maybe that is not the best approach.

Response (from ED staff): I think we are looking at this as a downstream statewide program. Protocol that is being developed is based on Pacific Northwest SEM programs which require training. Maybe it should be called Strategic Planning if less than the 6-year program we are looking at. I have not thought about it in depth. So far discussion has been limited to industrial.

I think it is a question of nomenclature: what can be taken out as an approach rather than a program. We'd like to kick it off with industrial and see how it goes.

Comment: With regard to AMI aspect and how it identifies market barriers, it seems like it is a way to help identify market barriers but it is not in and of itself a strategy. I'm not clear how this fits overall with what you are trying to do with market barriers.

Co-Chair: Is SDG&E proposing new strategies for energy management plans in harbor and military districts?

Response: Yes.

Comment: I want to follow up on comments on SEM. I feel strongest about SEM as an approach. I definitely support that. Many customers have come close to SEM approach in past few years and some already have it in place. I'd like to establish rules of what qualifies as SEM as soon as possible and put those in place. I reiterate support for approach rather than program.

Comment: We may provide comments on whether it makes sense to pilot SEM as downstream statewide program.

Comment (from ED staff): I'm not sure how this will translate to a statewide program. We haven't really discussed what it means to be a statewide downstream program in this context yet.

Comment: It would be great to have a small group to work this out further. A group could dive in deeper and think through whether this should be a downstream statewide program or an approach. The issue begs having a conversation.

Facilitator: SEM was one of the 4 downstream pilots from the Decision.

Comment: Yes, it is important to clarify this sooner rather than later since it is addressed in Decision.

Comment: This is consistent with the approach proposed by MCE. Elements would be statewide if it was not being done as a program.

Comment: I want to caution about rushing out the door with SEM statewide programs. I would be concerned about rushing a program. I'm not sure how consistent this is with the Decision. We want to be very clear about what the guidance was from the Decision.

Comment (from PA): Kay Hardy is leading a working group of IOUs on SEM. We have discussed things like existing conditions.

Cross-Cutting Chapters: Emerging Technology, Codes & Standards, Workforce Education & Training, and Financing

Emerging Technology

Co-Chair: There is a gap between ET getting through the programs and then getting to codes and standards. If we are trying to get ET to be what ends up being C&S, then it would be helpful to see where ET fits into each chapter. I'm not sure where this comment fits. Where is the conversation about how we ensure that we get through the valley of death?

Response (from PA): Part of SCE's approach is to bring new technologies into our portfolio. Part of this is going on behind the scenes.

Co-Chair: I'd like to see that notion out front in BPs.

Response (from PA): Section E draft chapter regarding market transformation provides SCE's vision for how that works. We are happy to respond to further comments.

Co-Chair: Yes, you do have a pretty picture. I'd like to see this discussion weaved through other chapters, not just in ET chapter. How do I understand the journey from ET to other sectors? Larger question is how much detail do we need in each chapter.

Comment (from ED staff): I want to share a couple things from ETP lead oversight role at CPUC. I've moved to DR, so I'm leaving EE, but it will be a long transition. I worked with ET utility staff. ET program focuses on measures that can be immediately cost effective because they immediately start to produce savings. Long term plan is not really happening. Commission has not grappled with market transformation. Utilities are not seeing extra funding for incentives that could fund these measures while they move from starting to cost effective. I didn't see a linkage between codes & standards and new technologies. Right now it would be strategic for ET to work closely with C&S. I would like to see a linkage between long term codes and standards goals and ET.

Comment (from PA): I agree with these comments from CPUC. Support needs to be there and it is there. In section E, SCE discusses collaborating closely with codes and standards. We have worked together in the past to leverage to reach codes. Market has to move in direction to drive costs down so technologies can be cost effective. We left this broad in our BP, but can provide more detail if you need.

Comment (from ED staff): Also, SMUD allows some of their measures a 5-year window before they need to be cost effective. This allows more time for cost-effectiveness.

Facilitator: I've seen similar programs. Non-cost effective programs could become cost effective with investment in vendor capability and familiarity building.

Question (from PA): Are you discussing an overall policy change here?

Response (from ED staff): I'm not aware of policy rule that prohibits that. Yes, I think there are portfolio level cost effective rules.

Comment (from PA): In the past we have enjoyed much more headroom in cost effectiveness. That has been going down every year. Now we are at 1.0 but heading toward .7. There is no headroom for measures that are not cost effective.

Facilitator: And there is a time link between introducing new technology and making it cost effective.

Comment (from ED staff): There are some policy constraints. I think people can think about creative ways to deal with this. ET is in non-C&S side of budget, but not with regard to TRC.

Comment (from PA): This is interesting to explore. I believe that we can't incentivize measures through ET. ET costs are not counted as part of our threshold TRC. We have a window of opportunity to use ET and increase budget to do more exploratory things, but we still need policy changes.

Comment (from ED staff): In the good old days of 2008/2009, IOUs asked for policy changes in portfolio changes. Commission delayed adopting portfolio until it addressed policy change requests.

Facilitator: This is something we can address on November 16 as part of policy letter.

Comment: With regard to ET, the split on ET between SCE and SoCal Gas is not clear. I don't understand why this makes sense. BP strategies for electric and gas seem very similar. I'm not clear why we need two administrators for this.

Codes and Standards

Comment: Throughout BPs there is a lot of discussion about AB 802, but discussion of AB 802 is not part of codes and standards and existing buildings. How does this effect existing buildings? PG&E could have further discussion on this. For statewide Codes and Standards, there is no discussion about how it will get bid out. Please include plan for bidding this out.

Co-chair: Previously, ORA raised the issue that proposals will raise codes and standards and there is issue with stranded potential. C&S team said they planned to ready the market to make sure that when new code comes the market will be ready, not shocked. PAs should be doing things in each sector so that there is not such a big gap when new code comes into play. I expected to see some strategy so that new codes are not so hard to reach. I think it is important to help people get ready for new codes to lessen the gap in the market. We need to be ready for early adoption of code. There should be connection to new codes in each sector. Otherwise we will perpetuate the program that AB 802 is trying to solve. Another comment: BayREN had some connections with PG&E workshops; refer it and don't duplicate it. There has

been some conversation about simplifying the database to see how well compliance is. I would like to see how easy it would be to go paperless.

Response: BayREN proposed a kiosk.

Co-chair: Is paperless proposal imbedded here? In our era, we should not need big stacks of paper.

Response (from PA): Codes and standards section from PG&E addresses that suggestion.

Co-Chair: Question for BayREN and themes around wraparound services: How are codes and standards wraparound service fit in?

Response: I'm not sure we have a quick answer to that.

Co-Chair: I'll provide further comment in writing.

Comment (from ED staff): I agree with Co-Chair's comments and would like to reinforce them. I commend PG&E for including code readiness in its proposal. PG&E has an existing code readiness sub-program. We need activities to ensure there is not shock to the market with new code requirements take effect. There can be capacity building activities with builders and crews. WISE (Working Industry Standards for Efficiency?) gets builders ready for new requirements such as high performance walls and attics in 2019. This has been a good partnership with California builders. This is an example of a code readiness program that is trying to avoid market shock. PG&E has a nice diagram (p.42) that illustrates how technology can move to actual code measure. If there is need for an incentive program, how can these programs link up and avoid market shock? We'd like to see more linkages. It would be helpful to understand why other IOUs are not embracing code readiness program approach as well.

Facilitator: PAs can respond further later.

Co-Chair: If folks think codes and standards is broken, why not have a case study to simplify? Is there a strategy to simplify codes and compliance? Is there an opportunity to streamline this? How do we address at a fundamental level that our codes are too complex? It is a barrier issue. Is there an opportunity to fix things?

Comment (from PA): I'm assuming you will provide further comments about this question.

Comment: CEC welcomes those types of strategies to work with the Commission. Look at existing code and existing compliance processes and re-design.

Comment (from PA): Some of this discussion was edited out of our plans because it is more for the IP process but we can bring it back in.

Comment (from ED staff): Is there any discussion in BPs about transitioning to new codes, like ZNE?

Response: SCE has been working with the CPUC and the City of Santa Monica, which just adopted ZNE reach code for low rise residential.

Comment: We have been identifying that reach codes are good but there is a lot of work regarding training to meet compliance goals. I've always thought there should be a State certification for inspectors. Inspectors need to be knowledgeable and trained to thoughtfully carrying out inspections. Reach code are great but insulation being installed properly needs to be caught up.

Response: SCE has been providing this type of training for the past 3 years. We are working with City of Santa Monica to provide this type of training statewide.

Comment: I appreciate that and think it is great. Have you been going out and looking at inspections to see if it is really happening?

Facilitator: We don't have control over state policy. This issue can go into policy letter if necessary.

Comment (from ED staff): I want to draw people's attention to graph in PG&E's codes and standards chapter (p.43) which shows tremendous potential to reach double goals. We need to keep doubling of EE in mind. To do that we need more collaboration and working together across programs in C&S sector. We need to keep thinking about how we can do this better to avoid stranded savings.

Comment: PAs have talked about local reach codes. This is an opportunity to coordinate with local governments. With support from IOUs, we might be able to provide wraparound service locally if they know it will bring support from statewide resources.

Workforce Education & Training

Question: I'm wondering if we can talk a little more about specifically how PAs are planning to coordinate with CEC regarding SB 350 goals and mandates. What are you thinking about that?

Response: SB 350 is still being discussed. SDG&E will provide more comments when appropriate. We do not have more detail at this time because SB 350 is still being worked out.

Further response: PG&E specifically cites SB 350 in our BP, but not a specific approach to SB 350. We acknowledge that we expect to see more initiatives like this over the next 10 years. Our strategy is around specific dedicated resources to long term strategic planning. It may seem like we should be doing this and maybe we should.

Question: I'm trying to see what PAs said they would do in latest PIPs for Statewide WE&T and see connection with BPs. I'm struggling to make connection to make sure whatever PAs said continues to BPs. Is there a way for stakeholders like me looking at past documents to efficiently look at these two documents and compare and contract?

Response: The short answer is no. There is no way to compare documents because they fundamentally serve different purposes – one is an Implementation Plan and other is a new draft Business Plan. These documents serve different functions. I (PG&E) would be happy to meet with you and talk to you about where we see some of our specific tactical items going into programs rolling forward.

Comment: When we read IPs for statewide WE&T, we didn't have same definition of BP and IP. Old plans include broader issues that could apply to BPs here. Definitions have changed. We should not limit ourselves to what the documents are called.

Co-Chair: Do you want to see a connection to the past in WE&T chapter?

Comment: I don't want to use the word "past" with WE&T and financing. What's past might actually be present or something that was authorized by the Commission as something we should be doing now. I want to understand what diverges from PIPs.

Response: We'd (SDG&E) would also be happy to meet to further discuss.

Comment: WE&T is only a small percentage of the portfolio, but it is a huge value for CalCERTS. How does this come into play and how does it show across the portfolio in the different sections? Energy code standards are a huge value to gain savings. We have a statewide C&S team that works specifically with building departments. How are PAs supporting codes and standards in the programs? How does building education and training across the board become a theme in the overall portfolio? Residential and commercial standards are complex and difficult to achieve. I'd like PAs to mention work is already occurring and how that will play out in the 10 year plan. Opportunity is also a key issue. We'd like to see discussion of opportunity in WE&T chapters and whole plan.

Co-Chair: Referencing MCE's workforce supply diagram (figure 24, p. 51), is MCE planning to assert itself in these processes or is this more of a story?

Response: This is a diagram of proposed plan for workforce. It reflects program we are proposing on immediately preceding page.

Co-Chair: Please make sure to caption diagrams so we know what we are looking at. Also, regarding workforce training certification, is that leveraging _____? How does this fit with WE&T chapter? There might need to be some updating.

Response: We may need to clarify our certification program.

Comment (from ED staff): UC Berkeley Labor Center provides updated recommendations regarding required certifications for workforce programs. It is also developing strategy for curriculum for workforce training for ZNE standards. PAs should put out third party bids for curriculum training. We need architects and engineers to provide innovative designs and they need training to do that.

Comment: In CEC action plan update, in draft now and available for review, we added a strategy about creating an industry action plan. We don't want curricula developed without our input.

Comment (from ED staff): We need full participation of existing experts in this area. As we move forward on certifications and licensing, we need to make sure we are not eroding stakeholder expectations.

Comment: We want certification and we need training in the industry. There has been push back from the CPUC. We have to prove that training makes a difference. We are not going to make our goals without controls. There have been all these barriers. We're not sure how we get over the hump of how to prove that training makes a difference.

Response (from PA): There is no ordering paragraph and no commitment from IOUs that there would be incentive for CalTCP. I would appreciate that IOUs not be portrayed that we are out of alignment with what we said we would do.

Comment: CalTCP had a program committed with Edison that was stopped. We are all here because we are trying to improve the state. We need to have trained labor force to move forward.

Response: We should also talk about specific language around this policy. If we want to offer incentives there are needs around resource acquisition. Currently to receive incentive dollars, it has to be shown to be cost effective. Maybe we need to look at alternative opportunities.

Financing

Question: When I reviewed BPs, they are generally lacking EM&V considerations, discussions on budgets, and program updates. There is a lot that is generally missing about financing pilots that were authorized. Specific question for PG&E: why is e-flick not mentioned? Why does PG&E have nothing to say on financing pilots?

Response: We speak broadly about strategies. We are not ignoring them at all – just discussed pilots and level we thought were appropriate for BPs.

Comment: Financing section is empty, says "TBD."

Response: SoCalGas is lead IOU on financing.

Comment: It is also confusing who is lead, because says PG&E is lead on e-flick?

Response: SoCalGas is currently lead for finance pilots. The way we understand it, lead PA would provide conversation in their document and others would refer to our discussion. We need to figure out a way to refer to lead PA. Our description on pilots would be where discussion on financing exists. PG&E is proposed new lead. That won't happen until after we file so right now SoCalGas is lead. Approval of new leads won't happen until after we file BPs.

Question: So do we just direct all our comments on financing to SoCalGas? What do I do with other PA BPs on financing?

Facilitator: We don't have a firm schedule on this. There are some topics that are not included in BPs, including Statewide. Hopefully some of this will be sorted out shortly.

Comment: I didn't realize that BPs are incomplete. This is news to me.

Co-Chair: Some of these issues might be resolved by Statewide coming together. PAs will work together to align their financing discussions. If there are differences, please comment on specifics that you see.

Comment: The biggest difference that has to be do with residential is e-flick. PG&E is lead on that one, but discussion in PG&E's draft BP is empty.

Facilitator: PAs are working on this.

Comment: I am reviewing BPs with the checklist. PG&E discussed more of different issues regarding financing that SCG did not. Now they are discussing changing leads.

Facilitator: Statewide elements of BP has been on a different track. Comments period closed a week or so ago. Submit comments on what you are not satisfied with.

Co-Chair: Some of confusion comes because some of cross-cutting are already Statewide. Then Decision came out in August. There is some overlap. Nothing is final until it is filed.

Question: Does it really matter who is the lead? Until decision is made, SCG is lead.

Co-Chair: Just put your issues in comments. It doesn't matter who is the lead.

Response: PG&E does intend to continue e-flick.

Comment: Please email me where you have that in the BP. According to CPUC, e-flick should be a Statewide pilot.

Response: PG&E was the only one who was approved to implement e-flick.

Comment: CalCERTS's request is that when a utility has a program, then its finance piece should be in BP. When Statewide has its piece it should be a holistic discussion: where the market is going for next 10 years, what is happening with all programs. This is not a standalone issue. It is deeply integrated into WE&T. This is another piece that helps us move the market. We don't want this to be treated as a bucket. We really want to see how this is going to be tied into the strategies. We want to see this as part of your overall strategies.

Response: SoCalREN strategy in BP has been exactly that. A lot of sub-programs are described in sector chapters. But at the end of the day they are part of our entire strategy on how to achieve state's objectives. We found this extremely challenging. Specifically, on PACE program, SoCaREN philosophy is that we want to do what local governments want to do. PACE is a local government program. To the extent PACE is moving the market, we believe that is clearly a domain for local governments to make it work.

Further response: Please put your comments in writing and share with us so we can figure out how to incorporate them in our BPs. We need stakeholders to give us something we can use in BP so then they become our joint product.

Comment: We will do so. We want WE&T to have classes for contractors to educate them. Having classes is very successful and educates them that there are multiple products. Also, a good study was done this year by CAEATFA on financing.

Comment: SDG&E has classes to provide education to contractors. Please provide as much detail as you can for specific recommendations. We will share best practices, as well.

Facilitator: I'd like to clarify one issue. The comment period on Statewide downstream pilots has come and gone. We have passed the time for downstream statewide comments.

Commercial Sector Chapters Input

Comment: We talked about SEM this morning. My comments apply to commercial sector as well.

Facilitator: In the sense of intervention strategy as opposed to a single program?

Response: Yes.

Comment: Comment period on Statewide piece is closed. But you can still provide comments to BPs.

Response: I recognize the comment period is technically over but I will still provide my comments.

Facilitator: It will be hard to PAs to incorporate comments on this issue.

Comment: PG&E's analytics are useful, but my team is perplexed regarding gas use (p.2). The spark line looks like it is decreasing. That seems like a disconnect from what you are stating. SoCalGas Table D-2 includes a variety of problem statements and program strategies that are the same list each time. Need to explain why using the same list.

Co-Chair:

- MCE didn't really change anything so you don't really have barriers. Hard to track from one way to the next where MCE is going from where it is coming. Draft BP makes assertions without clear connections.
- How does MCE and PG&E overlap with each other. You both know there will be issues with overlap of programs going forward. I'd like to see what those issues are and how you plan to address them.
- I'll also send specific data requests for MCE and BayREN. Can you get data in your region from PG&E?

Response: Maybe.

Question: Can you clarify what you want with regard to overlap issue? MCE's current BP has default administrator proposal.

Facilitator: Are you sticking with that?

Response: That is MCE's current iteration. There might be some changing around the edges. That is good concrete feedback. We will consider it further.

Co-Chair: Maybe you can provide strategy of how you intend to coordinate, even if not for specific programs.

Co-Chair: BayREN's draft BP has tables with different visions and outcomes that don't necessarily track. Vision seems aligned with what you are saying, but it gets confusing. Take a fresh look and make sure vision is consistent throughout. Section on micro-financing is interesting. I was glad to see that. I liked commercial building screening tool. CEUS graph is PG&E's. Make sure to label graphs and give credit. Bigger challenge is whether strategies track to metrics.

Comment:

- BayREN's focus on technical assistance and marketing seems good. Discussion of market barriers could use citations to back up analysis so not just assertions.
- In section 2 of SoCalGas's BP there is no information about past cycles so it is challenging to see baseline.

- Edison’s table 3 tries to connect program strategies to market barriers. There is not much outside the table that describes that and the linkages are not very strong. Section on pilot programs is stronger.

Co-Chair: Comments regarding SDG&E draft BP

- SDG&E’s snapshots are helpful in the beginning. PG&E snapshots are also helpful. PAs might want to remind readers about the snapshots.
- It is helpful to see what is existing and what you are thinking about in the future.
- Generally, I had a challenge the way SDG&E’s BP is laid out.
- Market characterization should come sooner.
- I would also encourage you to match programs within your table. Check so it doesn’t sound like you have two different programs for the same thing.
- Current and new offerings (p.44): You have goal, strategy and tactics, then a bunch of programs listed. I wonder if it would be better to bundle them into building solutions or something else. It could be inferred that you are suggesting programs ...
- Love a lot of graphics...they are very helpful
- Potential: You did the most with use of the potential study. Where is doubling going?
- Two strategies (p.58) sounds like they would be one.
- Everyone should address cross-promotion

Comment: SDG&E says it “will promote innovative solutions” (p.57) around the market. This is vague.

Question (from SDG&E): When you talk about cross-promotion, are you talking about EE programs or DSM?

Co-Chair: I’m thinking about EE programs and maybe WE&T. It would be nice to see cross-promotion for all programs.

Co-Chair: My overarching comments are about complying with direction in checklist. PG&E: regarding table 3 (p.18), you made me think you want to check just one per event but I think there is more overlap. You can leverage these for other problems.

Facilitator: When you make comments, provide as many specifics as possible. You can use other PAs as examples if you see drafts with things that you really like and want others to copy.

Public Sector Chapter Input

Co-Chair:

- BayREN: your draft BP speaks a lot of market transformation but I feel like your strategies aren’t necessarily market transforming. If something were to be market transforming, it would be happening at a much bigger scope. Building Energy

Management System – seems great. You are in such a unique position that there may be more opportunities to fill gaps.

- PG&E: I know that public wasn't a potential study but I liked what SDG&E did. PG&E could do something similar.
- For everyone: medium time frame, partnering with statewide agencies ... why can't that happen sooner than year 4?
- Not everyone put energy efficiency executive orders on the table. That is really important. SDG&E had ports.

Comment:

- PG&E had a couple new initiatives (green bond and job order contracting) that sound interesting but there was not enough detail to really understand what you intend to do.
- All PAs - I encourage you to review PG&E metrics. PG&E provided far and away strongest metrics in public sector.
- Edison: A lot of stakeholder feedback from draft chapter has not been addressed. Metrics and map to market barriers identify 19 market barriers. We would like to see you prioritize them. PACE is not a program that targets the public sector. It probably belongs in a different chapter.
- SDG&E: Market barriers do not link to market characterization. These appear to be derived independently. There are assertions that don't have a factual basis. "The whole building approach will be the best way ..." is an example of an assertion without factual support.
- SoCalGas: There is a lack of specificity on solicitation schedule. Regarding metrics, focus on participation counts and useful but it is not tied to a particular intervention or barrier you are working on.

Co-Chair:

- All PAs say things like, "We will continue our successful ..." Why was it "successful"? How you define success is one of the key issues here. It would be helpful to understand how you define success.
- SDG&E: You have good graphics. It is interesting to see kilowatt usage but I didn't see potential on top of that (Response: That is not available for public). I didn't understand tactics (p.87). Stakeholder engagement plans are interesting. I think I get what you are talking about but I'm not really sure who the stakeholders are. Please be a little clearer on that. Solicitation strategy will make some of issues clearer. P.90, sounds more like an audit. I know you are cautious about being too specific, but please be open enough for bidder to come in with idea. P.93, strategy: demonstrate ME&O; there is so much more that could be included.
- SoCalREN: There should still be some suggestions for improvements. Please include protocols for identifying overlap. Even if you don't know how you are overlapping, there should be a process for checking. Decentralized energy systems (p.38): is that really an EE strategy?

Response (SoCalREN): It is EE and everything else.

Co-Chair: I would suggest providing more content in connection with EE.

Facilitator: When will SoCalREN provide a revised draft?

Response: The plan is to provide a revised draft on November 19.

Facilitator: That sounds like you are planning for substantive changes.

Response: Yes. Maybe we can have an extended comments period. There will be no new programs or sub-programs. But SoCalREN will be providing missing chapters. In residential sector chapter, we will talk about home upgrade and PACE. We will also provide missing data.

Co-Chair: I think this is worse from a timing standpoint than Edison. I don't know what to do with this. My thought it that stakeholders should comment on what has been provided so far. If revised draft is different, we may not comment until formal proceeding. That is the risk they took.

Question: Who is responsible for the LGSEC proposal?

Facilitator: We have had two substantive discussions about this proposal. At least one CC member was not willing to be part of a consensus approving the proposal. We believe that we have dispatched CAEECC's obligation to entertain that proposal so now it is moving outside the CAEECC process.

Comment: SoCalREN believes that if consensus is not reached to put LGSEC's BP forward, any PA can file the BP with the Commission. SoCalREN has agreed to file that BP on behalf of LGSEC. We will have discussions with BayREN to see if they would like to file with us.

Co-Chair: We requested clarification from the judge asking whether CAEECC did its due diligence on this issue? We also asked some other process questions. They will reply to everyone on service list. Then PAs can seek clarity if they have further questions.

Question: For anybody interested in participating, can you clarify on the website how to participate? How does this affect the 3County REN BP?

Facilitator: Go to the LGSEC 10/27 meeting webpage for more information. Comments should go to Margaret Bruce of the Local Government Commission. We will route all comments we receive to LGSEC/Margaret Bruce. Central Coastal REN is different. It is proceeding with its BP. The difference between these is based on the different treatment in the Decision.

Comment: SCE's public sector BP extrapolated experience from territory to statewide. Financing is brought up but discussion is not specific enough. There is an issue with construction financing. We'd like to see a mechanism that protects funds against loss; to provide construction financing pay back. We'd also like to see an explicit plan for installation of

lighting. We'd like to see technical support to identify opportunities for retrofits. We are not properly leveraging state programs for retrofits. In general, moving funding earlier in the process (rather than rebates on the back end) would be effective.

Comment: The challenges for State involve disconnect of local governments and other public agencies. For IOU programs, we are still in program silos. All our issues are the same. In SoCalREN BP, we talk about idea that public agencies should all be working under a public agency program.

Comment: On-bill financing issue affects commercial, as well. Thinking about shifting order in draft BPs about where the money goes. With Executive Order, there is a potential that savings from PA would be a free-rider. AB 758 says to leverage these funds. If PAs don't count as savings, we need to be cautious on policy side.

Comment: Local laws might mean that savings don't count.

Co-Chair: It's not a law. It is an executive order.

Comment: We had similar issue, and it was my understanding that local ordinances do not apply to that rule. I'm not sure about as executive order.

Comment: We commented on first draft of statewide administration and other partnerships. Some of our comments have not been addressed. I'm not excited about all the TBDs. I'm getting feedback that they are looking for guidance on this. Utilities are not sure how this is going to work. They are being conservative about how to deal with this. I'd appreciate insight on how this might work.

Co-Chair: I'm wondering if this is something that we should also seek clarification from judge on. I'm guessing what you are experiencing was not on their radar when this was written.

Question: Regarding questions for ALJ, will she provide answers to service list?

Co-Chair: Yes. Questions:

- Should timeline for BPs be 2018-2025? Or should it be 10 years?
- Are all Statewide Programs, Third Party implemented...Ordering paragraph 5 vs. ordering paragraph 10
- If you were a PA who wanted to do a mid-stream program that no other PAs wanted to do, could you do that?
- Clarification re LGSEC- have we done what we need to do with that proposal?

Comment (from ED staff): We can do a check-in with ED as well if that is helpful. We can't speak for the Commission.

Facilitator: Thank you. We had conversation with ED Staff earlier. They supported us reaching out to the Assigned Commissioner.

Comment: I'm want to clarify, there is no discussion of K-12 sector partnership. Is that true?

Co-Chair: K-12 is not a specific partnership like UC and CSU.

Comment: I'd like to propose that PAs consider statewide administered K-12 partnership. There is great opportunity to drive efficiency toward ZNE goals. I'd like to put that out there. We would like to hear more in detail about what programs are offered for K-12 schools. I'd like to know about more up about upfront metering, data analysis, and all the other work that the other partnerships enjoy. What is remainder of deadlines by which we can get response or see that PAs have heard our requests?

Facilitator: Comments on draft BPs are due November 21 (except for Edison, due December 1). BPs are due January 15, 2017. PAs do not have to address your comment.

Co-Chair: They don't need to incorporate your comments. We expect them to indicate that they either included or did not. Some have already provided appendix. Then stakeholders get 30 days after BPs are submitted to provide written comments.

Comment:

- We talked about this in the morning. I started thinking about how it is in the interest of everyone to have a vibrant market. Part of a vibrant market is having a lot of suppliers. There will be a lot of RFOs and more competition. The solicitation schedule is part of this. The thinking of why you put this sector first and that sector next (your reasons and rationale) is so important because it gives us an opportunity to provide meaningful input.
- Lower cost: to the extent transactions in this solicitation (p.63) are embedded in commercial sector of SDG&E, I really liked that. These should be put forward in commercial sector, not just in public sector.
- I'd like to see a clear schedule of solicitation strategy.
- Please make sure information about trends and data is available.
- I'd like to see coordination with other PAs.
- I'd like to see common language and methods for dialogues with implementers, and maybe even some trainings.
- This may also be important for discussion about independent evaluator. I'm looking forward to those sections on next draft.

Question: What do you mean by "common terms" and "potential trainings"?

Co-Chair: In 2006-2008, PAs were preparing for solicitations. There was a statewide RFP consistent across all PAs at the time so that if you were an implementer, you only had one RFP to fill out. There was one consistent RFP with 5 different innovating terms that were consistent across all PAs at the time.

Comment: I hear from implementers that the procurement process is holding things up. Implementers need a schedule too. Maybe there can be some training around helping implementers know what is expected and what needs to be filled out. The more participation you get in the market, the better the market will be.

Co-Chair: Supply Management does workshops and PEPMA ... We need more “training” in how you transition the market. I’m worried that this will cut out little guys. We need to make sure we can transition the market.

Facilitator: In 2015, PG&E had a series of workshops for upcoming socializations along the lines being discussed, but the overall process didn’t go anywhere for other reasons.

Comment: It seems to me there are a whole bunch of companies who do data analytics for utilities. That data exists at utilities. To what extent can that information be part of the bidding process? It would be helpful for PAs to include in BPs the kinds of information that PAs will share with bidders. What information will be really valuable for implementers to know.

Co-Chair: Can we make a note in IP proposal? Can we add that to our IP discussion proposal?

Facilitator: Yes.

Comment: A lot of CEEIC input will be across the board. How do we get those to all PAs? Most of our comments will be overarching.

Facilitator: We have a comment template for this cycle. If it is overarching, just say it is for all sectors or all PAs.

Comment (from PA): We are also looking into cleaning up issues so we are only responding to those that are material.

Co-Chair: I have gone through the tracker and cleaned up those issues that are resolved or closed. We are also looking at adding another filter – overarching organizational comments – to make it clearer.

Facilitator: We can do the other part in the next few days. Things often end up twice in the input tracker because when something is said in meeting, it usually is also included in written comments. So we are just going to rely on written comments going forward.

Question: Are you taking comments to BPs and adding to master tracker?

Co-Chair: Yes!

Comment: That seems like double work. PAs don't need to see input comments template twice – on comments template and then in tracker.

Facilitator: Comments can address multiple PAs. We are trying to make this easier for everyone.

Comment: It is fine to wait for comments. Eliminating duplicates would be helpful.

Co-Chair: We will err on the side of caution in terms of categorizing input items. We will join PA call to discuss further.

Comment (from PA): As we talk about comments, the most important thing to know is whether we are on the right path with our strategies. If we agree, then we can talk about what else we need to do to address those strategies. We really want feedback on whether our strategies are on the right path. Please look at content around strategies and whether we on the right path.

Comment: Stakeholders can use examples of what they like, and say, “here's where yours is lacking ...” Be as specific as possible.

Facilitator: Make it easy for PAs to react to your input. Make your input specific and actionable.

Co-Chair: For those having side conversations on these issues, please report back on November 16. Meeting with Carmelita. Margie meeting re SEM. As for time of next CC meeting in San Diego, phase 3 scoping memo came out while we were sitting here. Meeting will go 9:30-5:00, with an extra long lunch period.

Addendum (from poster paper)

Overarching issues (by order discussed)

- Budget info for 2015-2016 programs as baseline vs. BP
- Timing of “missing pieces” – late Nov. TBD
- Date for SCE draft BP comments: December 1
- Solicitation information along lines of SDG&E Time line for Third-Party description helpful
- Need to be able to regulate based on what is in the BP
- More detail on outsourcing – show you considered option and opportunities
- More on market characterization like PG&E did
- Metrics should relate to market analysis
- More in sector chapters on integration with Cross-Cutting and other DERs
- Solicitation – identify exceptions that are not going out to bid
- Metrics should relate directly to barrier

- Metrics, especially res, not connected – “Success/failure” language in Decision is often untethered. Metrics should measure strategy success
- Consolidation of tables – PG&E most comprehensive; statement – barriers – metrics in one place
- Language that LGPs can help with the activities – include LGP as vendors
- Use levelized cost as metric – broad category
- More documentation for assertions of new strategies
- Substantiate discussion of barriers (justify, document, etc)
- Reference to contiguous pathway for ET and C&S via WE&T and implementation – there are policy barriers that need consideration
- Incorporation of more financing references in the sector chapters
- REN/MCE solicitation strategy still coming
- Overlaps between MCE, BayREN and PG&E
- To maintain vibrant market ... schedule is key and sharing thinking behind decision process is also key. Keep opportunities for small implementer. Trainings and using common terms is important
- Solicitations to share kinds of AMI data, etc.