



# Full CAEECC Quarterly Meeting #43

Hosted by the California Energy Efficiency Coordinating Committee (CAEECC)

Meeting Date: 9/17/24

Locations: San Francisco CPUC office, Los Angeles CPUC office, and virtual

*Last updated 9/16/24*

00

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# Breakfast & Mingle

**For in-person participants**

CAEECC Meeting will begin promptly at 9:20am

Virtual attendees will be in the waiting room until 9:20am

# In-Person Attendees: Pre-order lunch delivery now!

Lunch break is only 45min

## A Few **Los Angeles** Options

*Order delivery to **320 W 4th Street** (Security will hold the food for you on the first floor)*

- A. Ghost Sando Shop (W)
- B. Knead Pasta (W)
- C. Guisados (D)
- D. Yuko Kitchen (U, W)
- E. Mighty Bowl (W)
- F. Mendocino Farms (D, U)

## A Few **San Francisco** Options

*Order delivery to **505 Van Ness Ave** (the CPUC Front Desk will hold the food for you)*

- A. Outta Sight Pizza (D, U)
- B. Dragoneats (W)
- C. The Bird (D, U)
- D. Papito Hayes (D, U)
- E. RT Rotisserie (D, W)
- F. Lers Ros Thai (D, U)

Available for pre-order delivery on: D (Doordash), U (Uber Eats), W (Website)

01

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# Welcome & Intros

Agenda

Meeting Goals

Housekeeping

# Welcome!

## Virtual Crew:

Suhaila Sikand to read out attendee list



## Los Angeles Crew:

Katie Abrams to read out attendee list



## San Francisco Crew:

Michelle Vigen Ralston to read out attendee list



# Welcome!

*View Details in Agenda Document*

00	9:00	Breakfast & Mingle for In-Person Attendees
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01	9:20	<b>Welcome &amp; Intros</b>
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02	9:30	<b>CAEECC Business Items</b>
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03	10:05	<b>Working Group Update</b>
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break .....

04	10:45	<b>Hot Topic Discussion</b>
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break .....

05	12:45	<b>Community Engagement Indicators</b>
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06	1:10	<b>Prospective Member Intros</b>
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07	1:20	<b>Main Assembly Wrap Up</b>
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08	1:45	<b>Adjournment</b>
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break .....

09	2:00	<b>Executive Session</b>
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# Meeting Goals

1

## **Discuss Hot Topic**

*Ensuring CPUC EE Policies Support Electrification*

2

## **Conduct Business Items**

*Including welcoming a new Program Administrator; Planning; and Groundrules*

3

## **Vote on New Interim Members**

*During Executive Session for Members only*

00: Introductions | Housekeeping

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# How to Participate

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# Dual Location How To

- A. 3 Emcees:
  - 1. **Virtual** (Suhaila Sikand); **SF** (Michelle Vigen Ralston); **LA** (Katie Abrams)
  - 2. We'll rotate which location speaks first
- B. Use chat only for meeting tech issues - not substantive comments
- C. To speak
  - 1. Raise your hand
  - 2. Introduce yourself before speaking (i.e. *I'm Suhaila Sikand representing Common Spark Consulting dialing in Virtually. My question is....*)
  - 3. In person - stand near a stationary mics (no handhelds)
- D. No side conversations – they will be heard online

# How the Public Can Participate

There are 3 dedicated Public input opportunities as indicated on the agenda:

1. CAEECC Business Items, **Options and Clarifying Questions for CAEECC-member Decision Making Process**, Slides 25-33
2. Working Group Updates, **Compensation Pilot Final Evaluation Report**, Slides 37-67
3. Main Assembly Wrap Up, **2025 Workplan**, Slide 96

During the dedicated Public Input times, the Public may participate by **1)** using the chat or **2)** raising their hand to speak



Public comments may be for up to 2min unless otherwise specified. A Zoom Timer will appear at the top right of your zoom window when this begins.

If you have technical issues, please chat Susan Rivo or email [Susan@raabassociates.org](mailto:Susan@raabassociates.org).

# Groundrules

- Attend all meetings (or send designated alternate)
- Do your homework (complete pre-and post-meeting work to ensure productive meetings and that a complete deliverable is finalized)
- Materials are posted 5 days before the meeting
- Propose alternatives if you can't agree with recommendations – proponents draft the description and rationale for alternative options/ recommendations

See the Prospectus (Appendix A) for the full list of Groundrules:

<https://www.caeecc.org/cdei-working-group>



# Proposed Meeting Norms

1. Make space, take space (share the mic).
2. Stories shared here stay here; what is learned here leaves here.
3. Share your unique perspective: share your unpopular opinion!
4. Generative thinking: "yes, and" instead of "yes, but".
5. Listen from the "We", speak from the "I".
6. Offer what you can; ask for what you need.
7. Be inquisitive.
8. Assume best intent.
9. Be empowered to share impact.

02

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# CAEECC Business Items

- A. Welcome New PA Members (SDREN)
- B. Planning for Semi-Annual Portfolio Performance Report Reviews
- C. \*Discuss 2025 Workplan (to be approved at q4 Full CAEECC mtg)
- D. \*Proposal and clarifying questions for voting rules (# members and sectors) (to be voted at a future CAEECC mtg)

*\*Public Input Opportunity*

01: CAEECC Business Items

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# **Welcome New Program Administrator Member, San Diego REN**

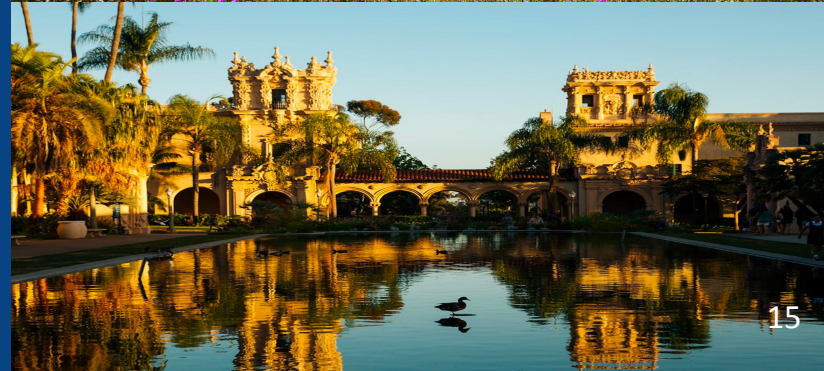
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# San Diego Regional Energy Network

Presentation to the California Energy  
Efficiency Coordinating Committee  
(CAEECC) and other stakeholders

Presented by San Diego Community Power

September 17, 2024

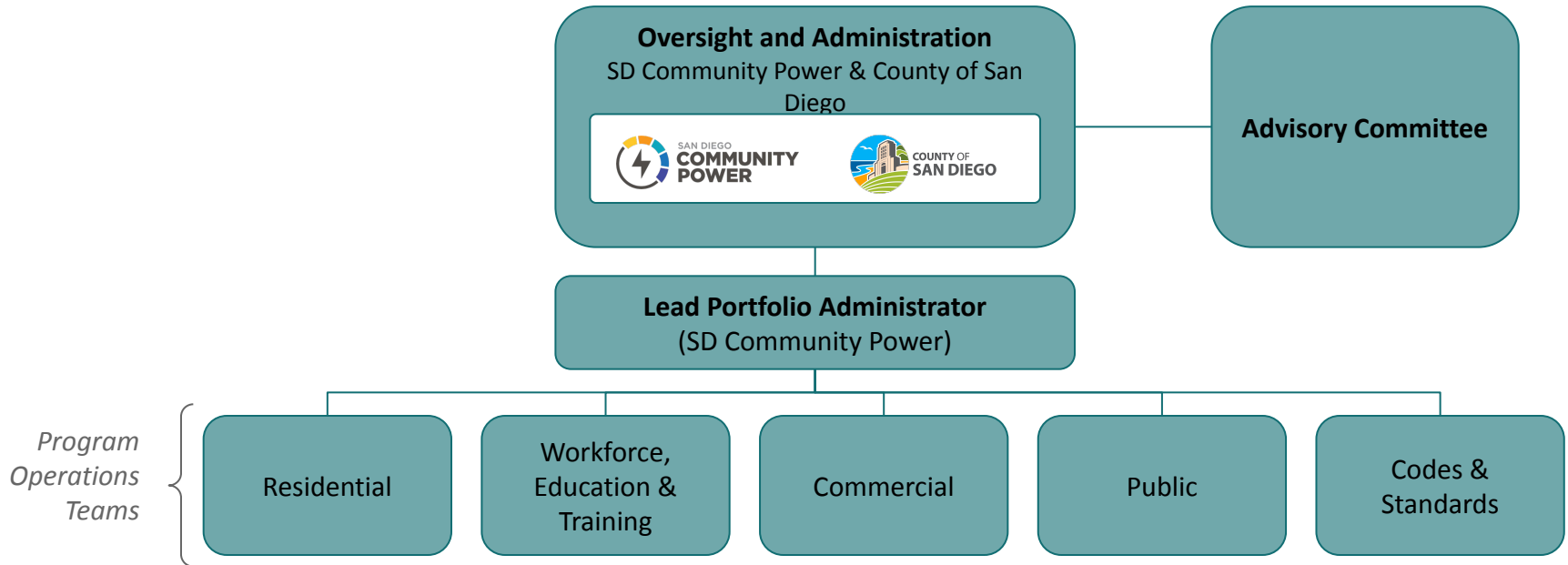


# Lead Agencies





# Governance Structure



# SDREN Service Territory: San Diego County

## San Diego County

- 3.3 million people
- 18 incorporated cities
- 18 federally recognized tribes
- 70-miles of coastline
- International border
- High concentration of small businesses



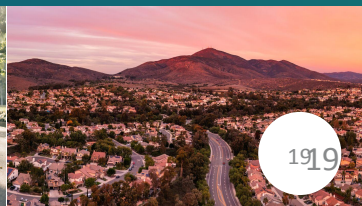
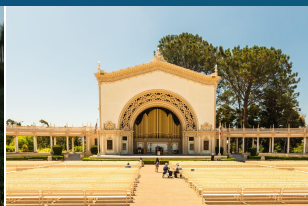
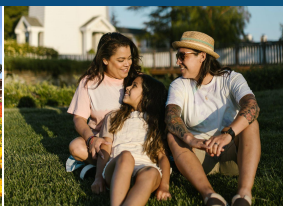
# SDREN Contacts and Resources

Sheena Tran  
San Diego Community Power  
Senior Program Manager  
[stran@sdcommunitypower.org](mailto:stran@sdcommunitypower.org)

Aisha Cissna  
San Diego Community Power  
Senior Policy Manager  
[acissna@sdcommunitypower.org](mailto:acissna@sdcommunitypower.org)

SDREN Application Materials:  
<https://sdcommunitypower.org/programs/ren/>

SDREN Presentation to CAEECC on 11/29/2023:  
[https://www.caecc.org/files/ugd/849f65\\_9c326650f3174915a972a6f86dad94c7.pdf](https://www.caecc.org/files/ugd/849f65_9c326650f3174915a972a6f86dad94c7.pdf)



## Facilitation Team

Birch Road Consulting;  
Common Spark Consulting; Raab Associates;  
Gemini Energy Solutions

## Advocates - 4

1. California Energy Efficiency + Demand Council
2. Natural Resources Defense Council
3. Sheet Metal Workers Local 104
4. Small Business Utility Advocates

## Implementers - 4

1. Center for Sustainable Energy
2. CodeCycle
3. San Joaquin Valley Clean Energy Organization
4. The Energy Coalition



## Co-Chairs

1 PA: SoCalREN  
1 Non-PA: NRDC

## Portfolio Administrators (PA) - 11

1. Community Choice Aggregators (2): MCE and RCEA
2. Investor-owned Utilities (4): PG&E, SCE, SDG&E, SoCalGas
3. Regional Energy Networks (5): 3CREN, BayREN, I-REN, SoCalREN, and SDREN

## Government - 2; Ex-officio - 3

1. City of SF Dept of Environment
2. Local Government Sustainable Energy Coalition
3. *California Air Resource Board*
4. *California Public Utilities Commission*
5. *California Energy Commission*

01: CAEECC Business Items

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# Planning for Semi-Annual Portfolio Performance Report Reviews

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# Semi-Annual PPRR Session - Overview

**10/28/2024 9:30 am - 1:30 pm**

*Fully virtual*

Overview:

- Energy Division presentation of progress on savings and budget
- PA presentations (10min each ~ 2hrs)
- Summary of key themes

# Semi-Annual PPRR Session - Proposed PA Template

The following is content proposed by Energy Division and Co-Chairs and subject to change. Please send input to Lujana Medina ([lmolina@isd.lacounty.gov](mailto:lmolina@isd.lacounty.gov)) and Courtney Owen ([Courtney.Owen@icf.com](mailto:Courtney.Owen@icf.com)) by 9/20. The facilitation team will send PAs a template by early October [note these instructions were updated 9/16/2024 after slides were posted]

- **Data Slides**
  - **Summary slide**
  - **Dollars spent towards contracts** compared to annual forecast
  - **# Equity customers** served by sector
- **Narrative slides**
  - **Anything new:** same thematic challenges? Anything new or different since May 2024 PPRR session?
  - **Segmentation justification:** template showing segmentation by program + indicators and metrics
- **Cross-cutting Anticipated Progress**
  - **Monthly progress towards goals:** Ideally graph with narrative bullet points
  - **Pipeline:** expectations for where things are headed + year end projections - include TSB, GHG, and relevant energy units (e.g., lifecycle, net, kWh, therms)

01: CAEECC Business Items

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# Options and Clarifying Questions for CAEECC-member Decision Making Process

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# Why We're Reviewing CAEECC-member Decision-Making

Inclusive decision-making requires balanced power distribution

The number of Program Administrators (PA) has tripled since CAEECC was established

The number of members in various categories varies greatly (e.g., PA, implementer, public interest)

# Current Categories of CAEECC-member Decision Making

CAEECC-member Decision Making through CAEECC voting (to be discussed today)

## 1. Major Process Issues

(e.g., Co-Chairs, Groundrule changes, etc.)

## 2. Discretionary Working Groups

(e.g., do we take on a working group or not)

## 3. New Members

CAEECC-member Decision Making without CAEECC voting (not being discussed today)

## Substantive Recommendations

(e.g., policy proposals)

## Secondary Process Issues

(e.g., meeting dates, agenda design, etc.)

# Current Decision Making - Structure & Criteria

<b>Weight of votes</b>	<i>All members have an equally weighted vote</i>
<b>Categories</b>	<b>Criteria</b>
<b>1. Major Process Issues</b> (e.g., Co-Chairs, Groundrule changes, etc.)	2/3 Members quorum (i.e., members present)
<b>2. Discretionary Working Groups</b> (e.g., do we take on a working group or not)	2/3 Members quorum plus 1/3 all Member organizations plan to participate
<b>3. New Members</b>	3/4 of all Member organizations

# CAEECC-member Decision Making Option #1

## SECTOR-WEIGHTED

### *Weight of votes*

- i. IOU PAs – 25%*
- ii. Non-IOU PAs– 25%*
- iii. Implementers – 25%*
- iv. Public Interest Groups– 25%*

### Categories

### Criteria

#### 1. Major Process Issues

(e.g., Co-Chairs, Groundrule changes, etc.)

2/3 **"sector-weighted"** Members quorum

#### 2. Discretionary Working Groups

(e.g., do we take on a working group or not)

2/3 **"sector-weighted"** Members quorum plus still 1/3 all Member organizations plan to participate

#### 3. New Members

3/4 of **"sector-weighted"** all Member Organizations

# CAEECC Membership Structure for CAEECC-member Decision Making Option 1

## Facilitation Team

### Co-Chairs

- 1 PA: SoCalREN
- 1 Non-PA: NRDC

## Public Interest Groups - 5

1. Government (2): City of SF Dept of Environment & Local Government Sustainable Energy Coalition
2. Advocates (3): Natural Resources Defense Council, Sheet Metal Workers Local 104, Small Business Utility Advocates

## Implementers/Industry - 5

1. California Energy Efficiency + Demand Council
2. Center for Sustainable Energy
3. CodeCycle
4. San Joaquin Valley Clean Energy Organization
5. The Energy Coalition

+

## Ex-officio

CPUC  
CARB  
CEC

## IOU Portfolio Administrators (PA) - 4

1. PG&E
2. SCE
3. SDGE
4. SoCalGas

## Non-IOU PAs - 7

1. Regional Energy Networks (6): 3CREN, BayREN, I-REN, RCEA, SoCalREN, and SDREN
2. Community Choice Aggregators (1): MCE

# CAEECC-member Decision Making Option #2

## PA'S NON-VOTING

<b>Weight of votes</b>	<ul style="list-style-type: none"> <li><i>i. PA Members have no vote</i></li> <li><i>ii. All voting members have an equally weighted vote</i></li> </ul>
Categories	Criteria
<b>1. Major Process Issues</b> (e.g., Co-Chairs, Groundrule changes, etc.)	2/3 Members quorum
<b>2. Discretionary Working Groups</b> (e.g., do we take on a working group or not)	2/3 Members quorum plus still 1/3 all Member organizations plan to participate
<b>3. New Members</b>	3/4 of all Member Organizations

# CAEECC Membership Structure for CAEECC-member Decision Making Option 2

## Facilitation Team

### Co-Chairs

1 PA

1 Non-PA

## Non-voting Members

- Government: CPUC, CARB, CEC
- IOU PAs: PG&E, SCE, SDG&E, SoCalGas
- REN PAs: 3CREN, BayREN, I-REN, RCEA, SoCalREN, and SDREN
- CCA PA: MCE

## Public Interest Groups - 5

1. Government (2): City of SF Dept of Environment & Local Government Sustainable Energy Coalition
2. Advocates (3): Natural Resources Defense Council, Sheet Metal Workers Local 104, Small Business Utility Advocates



## Implementers/Industry - 5

1. California Energy Efficiency + Demand Council
2. Center for Sustainable Energy
3. CodeCycle
4. San Joaquin Valley Clean Energy Organization
5. The Energy Coalition

# Next Steps

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# Member Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

# Public Input

*In-person: raise your hand*

*Virtual: raise your virtual hand*

03

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# Working Group Update

\*Compensation Pilot Final  
Report

*\*Public Input Opportunity*

02: Working Group Updates

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# Compensation Pilot Final Evaluation Report

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**The Compensation Pilot was a program to provide funding to eligible Grantees who are historically underrepresented in CAEECC. The Pilot applied only for participation in the Evolving CAEECC Working Group.**

# The Final Evaluation Report considers four key questions to evaluate the Pilot and develop recommendations.

1

Was the amount of funding enough?

2

What went well?

3

What were the challenges?

4

What should the Commission do differently moving forward?

*This presentation is not a comprehensive overview of the results of the Compensation Pilot. The full Final Evaluation Report is available on the Meeting Webpage.*

# Key Question #1: Was the amount of funding enough?

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**Overall, the Pilot supported Grantees to participate more than they otherwise would have and benefitted the Working Group. However, many Grantees indicated that funding was insufficient.**



# Grantees were able to participate because of compensation and felt somewhat supported.

**Table 11. Pilot Survey #2 & 3: Grantee Enablement by the Pilot**

		AVG	MED
Thus far, the Compensation Pilot <b>enabled</b> me to participate in the Evolving CAEECC Working Group.	Pilot Survey #2		
	Pilot Survey #3		
<i>AVG is the Average and MED is the Median.</i>			

**Table 12. Pilot Survey #2 & 3: Grantee Financial Support by the Pilot**

		AVG	MED
I <b>feel supported financially</b> by the Compensation Pilot for the Evolving CAEECC WG.	Pilot Survey #2		
	Pilot Survey #3		
<i>AVG is the Average and MED is the Median.</i>			

# Grantees noted the amount of funding was insufficient.



Not a family-supporting wage (\$150/hour)



Invoicing was too cumbersome to enable participation



Spent more hours on homework or onboarding than supported by the Pilot



Could have provided more value to the Working Group with more funding



Did not meet *all* financial need, but covered most



Did not provide benefits of full-time employment

# Budget Spend Summary

*Table 10. Amount and Percent of Compensation Budget Used as of September 3, 2024*

	<b><i>Budget Allocation</i></b>	<b><i>Actual Expenditure</i></b>	<b><i>Percent of <u>Total Actual Spend</u></i></b>	<b><i>Percent of <u>Total Pilot Budget</u></i></b>
<b>Pilot Administration</b>	<b><i>\$27,750.00</i></b>	<b><i>\$43,668.75</i></b>	<b><i>25.1%</i></b>	<b><i>23.6%</i></b>
<b>Total Grantee Payments</b>	<b><i>\$157,250.00</i></b>	<b><i>\$130,310.00</i></b>	<b><i>74.9%</i></b>	<b><i>70.4%</i></b>
Average Grantee Payment	<i>N/A</i>	<i>\$16,288.75</i>	<i>N/A</i>	<i>N/A</i>
Median Grantee Payment	<i>N/A</i>	<i>\$17,093.75</i>	<i>N/A</i>	<i>N/A</i>
Minimum Grantee Payment	<i>N/A</i>	<i>\$2,025.00</i>	<i>N/A</i>	<i>N/A</i>
Maximum Grantee Payment	<i>N/A</i>	<i>\$24,530.00</i>	<i>N/A</i>	<i>N/A</i>
<b>Total Actual Spend</b>	<b><i>\$185,000.00</i></b>	<b><i>\$173,978.75</i></b>	<b><i>100%</i></b>	<b><i>94.0%</i></b>
<b>Total Budget Remaining with SoCalREN</b>		<b><i>\$11,021.25</i></b>	<i>N/A</i>	<b><i>6.0%</i></b>

# Key Question #2: **What went well?**

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- The Pilot enabled many historically underrepresented voices to be heard and valued by many Grantees and non-Grantees of the Working Group and CAEECC largely.
- The Pilot lowered several barriers for participation in the Working Group for Grantees.
- The Pilot benefitted the Working Group.

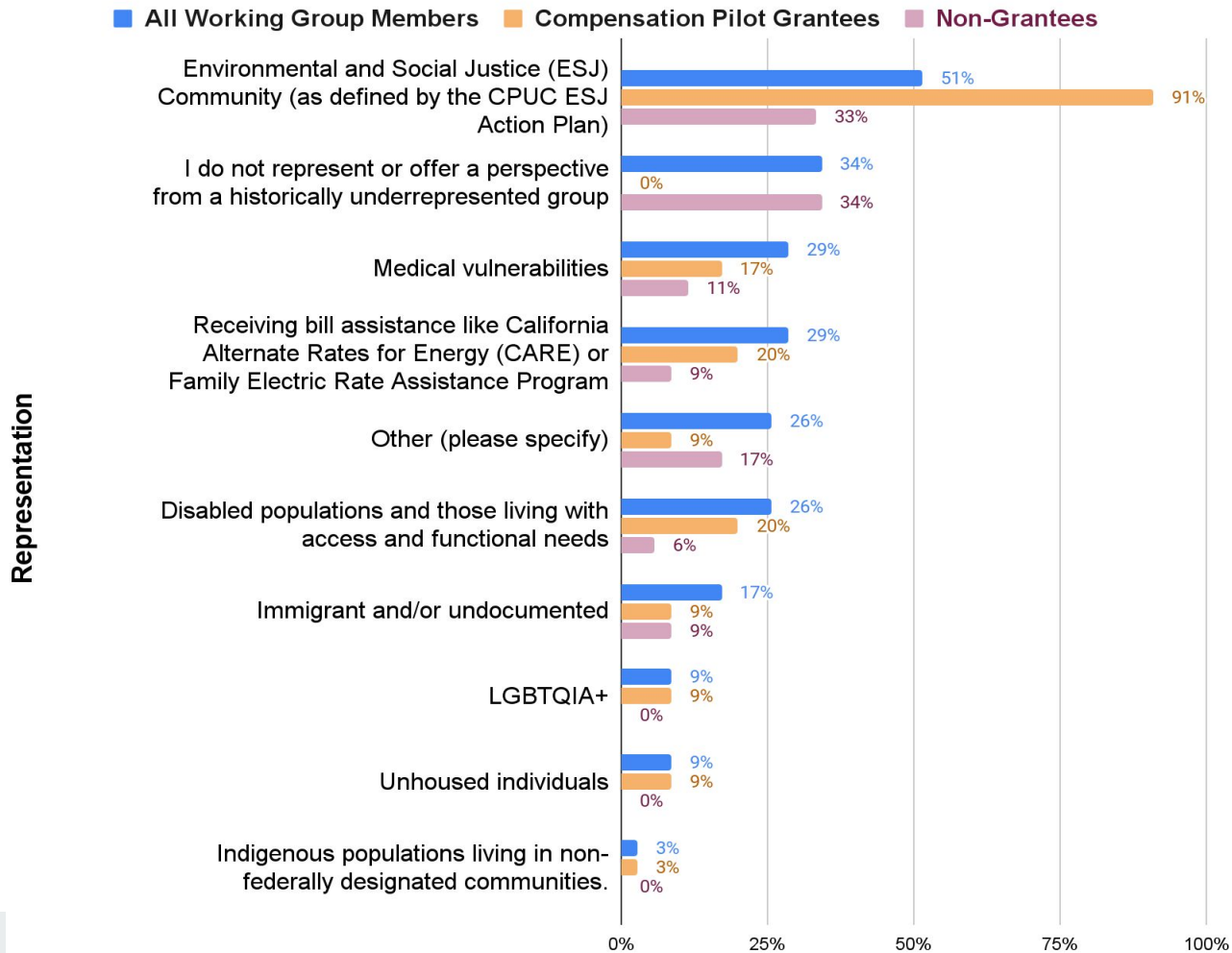


Figure 5. Percentage of Evolving CAEECC Working Group Members and Pilot Grantees Representing Historically Underserved Communities.

# Grantees were some of the most active Working Group Members.

*Table 8: Completed Assignments / Meeting Attendance from Active Evolving CAEECC Working Group Members and Grantees*

	All		Grantees	
	#	%	#	%
<b>Meeting #1</b>	23/34	68%	9/11	81%
<b>Meeting #2</b>	28/32	90%	10/11	91%
<b>Meeting #3</b>	25/31	81%	9/11	81%
<b>Huddle #1 (Optional)</b>	15/31	48%	7/10	70%
<b>Huddle #2 (Optional)</b>	11/31	35%	7/10	70%
<b>Meeting #4</b>	27/29	93%	9/9	100%
<b>Statement for Full CAEECC 11/29/23 (Optional)</b>	5/29	17%	4/9	40%
<b>Written Reflection due 4/12/24</b>	15/29	52%	7/9	78%
<b>5/15/24 Full CAEECC Meeting (Optional)</b>	14/29	48%	6/9	60%

# Many Grantees and Non-Grantees agreed that the Pilot benefitted the Working Group.

**Table 13. Pilot Survey #2 & 3: Benefit of the Compensation Pilot (asked to all Evolving CAEECC Working Group members, including Grantees)**

		All		Grantees	
		AVG	MED	AVG	MED
The Evolving CAEECC Working Group <b>benefited</b> from offering a Compensation Pilot.	Pilot Survey #2				
	Pilot Survey #3				
<i>AVG is the Average and MED is the Median.</i>					



# Key Question #3: **What were the challenges?**

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# The Pilot faced numerous challenges including (but not limited to):

- lack of clarity
- invoicing/verification
- payout timelines
- invoiceable activities
- additional requests for compensation
- changing Working Group scopes
- funding amount

# Lack of Clarity









Table 3: Pilot Survey Responses on Effectiveness and Accuracy of Outreach Communications

Pilot Survey Question	Pilot Survey #1				Pilot Survey #2				Pilot Survey #3			
	All		Grantees		All		Grantees		All		Grantees	
	AVG	MED	AVG	MED	AVG	MED	AVG	MED	AVG	MED	AVG	MED
The purpose/ intent of the <b>Evolving CAEECC Working Group</b> communicated through outreach prior to the launch of the working group matched the experienced purpose /intent.												
The purpose/ intent of the <b>Compensation Pilot</b> communicated through outreach prior to the launch of the Pilot matched the experienced purpose/ intent.												

AVG is the Average and MED is the Median.

# The invoicing process was burdensome and verification was time-consuming for Grantees and the Pilot Administrator (slide 1/2)

*Table 9. Pilot Survey #2 & #3: Grantee Payment Process for the Compensation Pilot*

		AVG	MED
Thus far, <b>invoicing</b> for compensation has been simple, easy, and clear.	Pilot Survey #2		
	Pilot Survey #3		
Thus far, <b>receiving</b> compensation has been simple and timely.	Pilot Survey #2		
	Pilot Survey #3		
<i>AVG is the Average and MED is the Median.</i>			

# The invoicing process was burdensome and verification was time-consuming for Grantees and the Pilot Administrator (slide 2/2)



**Invoicing was complicated** - Admin included remaining budgets, which took time to communicate.



**Invoices submitted by Grantees sometimes had incorrect math** - Admin triple-checked invoices when Grantee invoice summation was wrong



**Grantees felt that only a limited set of activities were approved** - Admin noted that compensation was only for ECWG only, not outside activities. Other activities needed pre-approval.



**The invoice form was counterintuitive** - Admin couldn't modify without using significant Admin resources



**Some Grantees wondered why invoicing was needed** - Pilot was designed to be hourly, not a stipend to invoice for prep work



**Some Grantees felt the payment & verification period was long** - Payments were issued within 17-19 days of approved invoice. Admin needed to batch review to optimize costs. Inconsistent Grantee invoices led to longer verification processes.



## **Additional Requests from Grantees strained Administrator.**

Grantees often invoiced for non-pre-approved activities, requiring a back-and-forth between the Pilot Administrator and the Grantee, sometimes even the Pilot Contractor. Each additional request led to much additional administration work.

The report documents all additional requests in detail.

# Key Question #4: **What should the Commission do differently moving forward?**

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While the considerations and recommendations (the next 10 slides) included in this report are based both on the Pilot Administrator and Grantee experience, **referencing Appendix A with Grantee statements is essential to hear directly from Grantees.**



1

**Continue a compensation program** for underrepresented voices in regulatory spaces.

2

**Increase the size of a compensation program** to support more eligible underrepresented voices.

3

**Be clear and concrete—using accessible language**—to describe the compensation program, its goals, approach, impact, and the roles involved.

4

**Allocate more time to conduct outreach** to explain the compensation program's expectations, rules, and parameters. Include helpful information about independent contracting such as tax liability and responsibilities of non-employment.

5

**Consider whether invoicing processes are necessary** or whether a stipend structure would be more feasible, approachable, and flexible. Take into account the time required for invoicing and verification.

6

**Consider who should administer** the compensation program. Take into account the perceived bias of compensation program administrators (Pilot Administrator) and the administrators (Facilitator) of activities the program may compensate.

7

**Host regular informational sessions** about the regulatory process, technical topic, historic context, impact, and engagement pathways.

8

**If evaluation is necessary, use third-party evaluators** and incorporate direct Grantee experiences through qualitative data.



1

## **Continue a compensation program for underrepresented voices in regulatory spaces.**

As demonstrated through this Pilot, the Pilot benefitted the Evolving CAEECC Working Group and increased access to the energy efficiency industry and participation in CAEECC broadly.



2

## **Increase the size of a compensation program to support more eligible underrepresented voices.**

Not all eligible applicants were approved under the Pilot due to the limitation of funding for the expected scope. Since the Pilot was a success in its goal to enable historically underrepresented voices to participate in CAEECC (and the California regulatory space), increase the size of compensation programs to support more candidates.

3

## **Be clear and concrete—using accessible language—to describe the compensation program, its goals, approach, impact, and the roles involved.**

Be clear upfront to avoid confusion around the structure of the compensation, including the goal of compensation, how compensation will be distributed (and for what), what the expected impact of the activity for compensation might be, and the roles of each person (Administrator, Grantee, Contractor, Evaluator, etc).

4

## **Allocate more time to conduct outreach to explain the compensation program's expectations, rules, and parameters. Include helpful information about independent contracting such as tax liability and responsibilities of non-employment.**

Spend more time onboarding prospective Grantees during outreach about what the rules of the compensation program are. Include any resources like a Handbook as well as what it means to be an independent contractor and how to navigate this role (such as tax liability, estimated tax payments, and responsibilities of non-employment).

5

**Consider whether invoicing processes are necessary or whether a stipend structure would be more feasible, approachable, and flexible. Take into account the time required for invoicing and verification.**

Weigh whether invoicing will be helpful, flexible, simple, and less burdensome or whether a stipend structure could suffice. Consider how much time invoicing and verification can take as well as what activities may be eligible for compensation.

6

**Consider who should administer the compensation program. Take into account the perceived bias of compensation program administrators (Pilot Administrator) and the administrators (Facilitator) of activities the program may compensate.**

Considering that the Facilitation Team and the Pilot Administrator of this Pilot were the same, evaluate whether these roles make sense for future compensation programs.



7

## **Host regular informational sessions about the regulatory process, technical topic, historic context, impact, and engagement pathways.**

The Commission should host regular informational sessions so that compensation programs do not have to build these onboarding sessions from scratch. This includes information about regulatory processes in California, technical topics (like energy efficiency or evaluation, measurement, and verification), historical context that provide key details for decision-makers and advocates, the anticipated impact of policy/programs/regulation, and engagement pathways.





8

## **If evaluation is necessary, use third-party evaluators and incorporate direct Grantee experiences through qualitative data.**

The Final Evaluation Report includes Appendix A with submitted Grantee reflections and statements about the Compensation Pilot. If evaluation of compensation programs is necessary, use third-party evaluators and include direct Grantee experiences to build a more thorough evaluation.

1

**Continue a compensation program** for underrepresented voices in regulatory spaces.

2

**Increase the size of a compensation program** to support more eligible underrepresented voices.

3

**Be clear and concrete—using accessible language**—to describe the compensation program, its goals, approach, impact, and the roles involved.

4

**Allocate more time to conduct outreach** to explain the compensation program's expectations, rules, and parameters. Include helpful information about independent contracting such as tax liability and responsibilities of non-employment.

5

**Consider whether invoicing processes are necessary** or whether a stipend structure would be more feasible, approachable, and flexible. Take into account the time required for invoicing and verification.

6

**Consider who should administer** the compensation program. Take into account the perceived bias of compensation program administrators (Pilot Administrator) and the administrators (Facilitator) of activities the program may compensate.

7

**Host regular informational sessions** about the regulatory process, technical topic, historic context, impact, and engagement pathways.

8

**If evaluation is necessary, use third-party evaluators** and incorporate direct Grantee experiences through qualitative data.

# Member Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

# Public Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

# Break (10 min)

*a view of what's next on the agenda*



04	10:45	Hot Topic Discussion
05	12:45	Community Engagement Indicators
06	1:10	Prospective Member Intros
07	1:20	Main Assembly Wrap Up
08	1:45	Adjournment
09	2:00	Executive Session

04

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**Hot Topic Discussion:**  
**Ensuring CPUC EE  
Policies Support  
Electrification**

**Session Goals:**

- 1) Level setting/provide context
- 2) Identify challenges and possible solutions - identify opportunities for policy changes
- 3) Discuss possible next steps for continued engagement

**Measure updates plus impacts  
on Total System Benefit (TSB)  
and electrification goals**

# Why/What's a "Hot Topic"?

One of CAEECC's purposes is to, through a Portfolio Performance Report Review, 1) identify challenges and opportunities in the EE portfolio, and 2) be a forum for problem solving

- *Source: CAEECC 2020 Consensus EE Filing Process Proposal Motion which was adopted in D.23-06-055*

Today, we've tee'd up a Hot Topic for CAEECC discussion, based on feedback from CAEECC members and in discussion with Co-Chairs and Energy Division.

## Hot Topic Discussion Format

- We'll have a **short presentation** that provides an overview of the topic/issue, provides an update, raises questions and challenges
- We'll **host a discussion** to ID any challenges and/or opportunities CAEECC thinks is right to take-up
- At the end, we'll **discuss any next steps** and opportunities to continue the discussion, deepen problem solving, etc.

# Background of Today's Hot Topic

In May 2024, CAEECC hosted Portfolio Performance Report Reviews, where each of the PAs provided a summary of their Annual Portfolio Performance Reports.

The Facilitation Team recorded a number of topics and themes that continued to come up throughout the session, one being **how the Total System Benefit (TSB) was impacting the ability to do electrification in the energy efficiency portfolio.**

Today, we welcome some speakers from our own membership to kick off the discussion with a short presentation:

- **Laurel Rothschild from The Energy Coalition**
  - With Tim Olsen and Code Bruder
- **Chris Malotte from Southern California Edison**
  - With Jessica Lau



# Overarching Decarbonization Drivers

We are here

## Programs need to prime the market for energy transition

- Educate contractors
- Build customer demand
- Work with manufacturers to enhance products
- Affordability is a key concern

## CARB/AQMD Zero Emission Appliance Rules Begin (2027-2032+)

- Equipment will need to transition to Zero Emission

## Programs need to transition to support equity customers in transition

### Programs need to transition from market rate incentives to supporting market adoption

- Make processes easier
- Ensure sufficiently trained workforce
- Technologies are readily available

2024

2025

2026

2027

2028

2029

2030

2031

2032+

## SCE Countdown to 2045 Analysis

### DECARBONIZE ELECTRICITY

100%  
RETAIL SALES  
100%\*



### ELECTRIFY TRANSPORTATION

90%  
OF VEHICLES  
75%\*



### ELECTRIFY BUILDINGS

95%  
OF BUILDINGS  
70%\*



### USE LOW-CARBON FUELS

48%  
NON-ELECTRIC  
ENERGY  
43%\*



### SINK REMAINING CARBON

75  
MMT  
CARBON  
SINK  
108  
MMT\*



CARBON NEUTRALITY  
BY 2045

# Background & Shift to TSB as PA Target

2024-2027











- Portfolios previously judged against net first year energy savings goals (kWh, kW, Therms)
- IOUs required to hit Total Resource Cost (TRC) threshold, previously for entire portfolio and now for Resource Acquisition segment
- Starting in 2024, goals and targets set based on Total System Benefit (TSB)
- Different factors impact how projects and measures contribute to TSB vs. TRC or energy savings
- Programs optimized for TSB promote a different measure mix than programs optimized for TRC or first year energy savings

## Total Resource Cost (TRC)

- Key metric in determining cost-effectiveness of programs, measures, and portfolios.
- Equals the sum of the overall benefits (avoided costs) divided by the sum of the utility's total costs and the participant's total costs (costs).

## vs. Total System Benefit (TSB)

- Replaces multiple metrics (GWh, MW, MMTherms) with 1 new metric for EE portfolios: Total System Benefit (\$).
- Equals the \$ avoided costs, as calculated by a cost effectiveness calculator used across all of the EE proceeding.

Key Factors			
Measure cost			
Program cost			
Annual net savings (kWh, therms)			
Load shape/ emissions			
Effective useful life			

# Measure Considerations - Reporting

## Resource Acquisition program drivers:

- TRC
- TSB (NEWer)
- *Outdated program driver: first-year kWh/kW/therms*



## What impacts these forecasts?

- Bi-annual Avoided Cost Calculator (ACC) updates
- Ongoing eTRM / work paper updates
- Costs (impacts TRC)
  - Program/incentives
  - Customer cost

# An Implementer's Perspective



## Relevant work

- Currently implementing market support, equity, and resource acquisition programs
- Public sector focus

**Not just resource acquisition programs are impacted by electrification measure TSB values!**

# Electrification Measures Offered

- Unitary heat pump water heaters\*
- Central heat pump water heaters
- Packaged heat pump HVACs\*
- Split-system heat pump HVACs\*
- Electric fryers
- Convection ovens
- Induction stoves
- Heat pump pool heaters

\* TEC has direct experience with this measure installed through EE program

# TSB & TRC Trends for Electrification Measures

## *Selected offerings - HPWH Detailed Results by CET AC version*

	2022 Avoided Cost Version			2024 Avoided Cost Version		
Measure Code	TSB	TRC	Therms	TSB	TRC	Therms
SWWH027-03	\$1,261	.43	954	\$5,482	.70	954
SWWH028-02	\$2,772	.14	980.2	\$7,486	.24	980.2

- No change in savings
- Up to 71% increase in TRC
- Up to 334% increase in TSB

# Bottom Line: Trending in Right Direction

Many Moving Pieces | Difficult to Navigate | Be Patient

- Electrification measure benefits are increasing
- TSB new and need to see how this plays out
- **Recommendation:** Run TSB early for 2024 to see new trend
- **Topic of interest:** Infrastructure costs & potential impacts to TRC
  - Panel optimization (breakers)
  - Full panel upgrades
  - Wiring



# The Time to Support Electrification is NOW

## Positive trend for TSB alongside policy drivers for decarbonization

Some important considerations for electrification moving forward:

- Stacking opportunities
- Panel capacity & electrical upgrades
- Operations and maintenance
- Contractors - workforce readiness
- Project timelines
- Controls & TOU

# Policy Considerations

EE Fuel Sub measures should be able to **incentivize beyond Incremental Measure Cost** without negative TRC Impact

- Current reporting allows for this, but it puts the project “upside-down” (i.e. negative participant costs instead of simply \$0)
- Fuel sub has more complexity than like-for-like replacement, therefore the amount that is incentivized should be the amount that helps move the market

EE Fuel Sub’s cost effectiveness does not factor in the **future cost of decarbonizing natural gas**

- ACC values the GHG reduction from avoiding a kWh of electricity usage as avoiding the future cost of procuring a kWh of zero-GHG solar and storage
- The gas side does not equally consider Therm reduction avoiding the cost of future decarbonized Therms (renewable natural gas / hydrogen)

**Gas EE incentives cannibalize** fuel sub measures

- Uncertainty on Viable Electric Alternative methodology and continued gas EE measures send market signal
- New-to-the-market EE Fuel Sub needs the support of EE programs more than mature gas tech

Uncertain impacts on EE Fuel Sub **NTG and TRC from integrating with outside funding sources** hinders stacking

- There is an opportunity to stack incentives to maximize EE Fuel Sub participation, but uncertain if possible NTG reduction
- Programs that need to be cost-effective will likely not take the risk of stacking incentives

Current rules prevent EE for **fuel switching** (i.e. unregulated fuel (wood, propane) to regulated fuel)

- D.19-08-009 notes that fuel switching is not covered in the decision, points to Building Decarb Rulemaking (R.19-01-011)
- Limits the ability to offer electrification measures where heating is done through wood/propane

# Member Q&A + Discussion

To facilitate discussion in 3 forums, we'll be asking a point person in each Meeting Location to capture a queue. We'll rotate through the Meeting Locations, perhaps multiple times as queues continue to fill.

1. **Los Angeles** (Lujana)
2. **Virtual** (Suhaila)
3. **San Francisco** (Lara/Michelle)

*We know this may make it difficult to dialogue and build upon one another's comments (**it is OK to refer back to a comment made a while ago**). We appreciate your patience.*

# Possible Next Steps

How do we want to continue this conversation?

- Additional discussion time at a future meeting?
- Subgroup or work group?
- Other action?
- Or, this discussion was great for now!



# Enjoy 45 minutes for Lunch!!

**Forgot to pre-order delivery?** Here's a few close-by options you can order ahead for pickup quickly

A Few Close **Los Angeles** Options

- A. DTLA Cheese Superette
- B. Ghost Sando Shop

A Few Close **San Francisco** Options

- A. Outta Sight Pizza (by the slice)
- B. Dragoneats

05

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# Community Engagement Indicators

Presentation on background  
and context

CAEECC Member Discussion

Vote on one of five approaches

## Background/Context

The Equity Metrics Working Group (2021) ended in deliberations of whether Community Engagement should be an indicator or a principle.

[D.23-06-055](#) requires PAs to include agreed-upon and widely supported **community engagement indicators** in their mid-cycle advice letters due 9/1/2025. The Commission suggested but **did not** require CAEECC takes on these issues.

At the [11/29/23 Full CAEECC Quarterly Meeting](#), **CAEECC Members voted to address Community Engagement Indicators (CEI) after the 2023-2024 Equity & Market Support Working Group (EMSWG) convened.** EMSWG declined to address this as part of their scope.

**At today's 9/17/2024 meeting we're asking CAEECC Members to vote on one of 5 options for how to proceed.**

## Reference Slide 1/2 - Decision Language (D.23-06-055) - slide 1 of 2

The Decision requests that CAEECC EMWG develop recommendations

- *CAEECC's involvement was not "ordered" in OP24, but gave CAEECC the discretion to take this task up or not. But if accepted, the body of the Decision includes expectations for CAEECC and PAs on a deliverable and how it will be used*

The Decision requires PAs include agreed-upon indicators in mid-cycle advice letters due Sept 1, 2025. Include non-consensus indicators that have widespread support.

- *PAs under OP24 "shall develop indicators to measure community engagement, and should include them in their Mid-Cycle advice letters in 2025."*



# Reference Slide 2/2 - Decision Language

## (D.23-06-055)

CPUC's expectations from [D.23-06-055](#)

- *Indicators are expected to be quantitative and qualitative*
- *Design should engage ESJ communities and CBOs directly*
- *Indicators should gauge the quantity and quality of engagement with the ESJ communities and CBOs + outreach activities, to ensure accountability of the equity segment of the portfolio*
- *Track activity and outcome-based results*
- *Quality and relevance of community engagements, not just quantity*
- *Not be oversimplified to allow summation across different engagement methods for different target audiences, since an indicator should provide context of who was engaged and how they were engaged.*

## What would further work on CEI be?

Work on this subject would **further develop the indicators and measurement approaches for community engagement included in the [2021 Equity Metrics WG \(EMWG\) Final Report](#) Appendix B.**

### **Expected Impact of the work:**

Consensus and widely supported items will be incorporated into PA mid-cycle advice letters. The measurements would be implemented by PAs to assess their current program outreach processes

# How does CAEECC want to proceed?

1

**CAEECC-hosted ESJ Panel only.** Panel includes ESJ/CBO reps to speak generally on program engagement.  
*Deliverable: meeting summary.*

2

**CAEECC Task Force only.** This would include ESJ/CBOs reps\* in membership. *Deliverable: recommendations.*



4

**Decline all options**

5

**Table discussion til Q4**

3

**CAEECC-hosted ESJ Panel + CAEECC Task Force\***

(Option 1 + 2 combo)



\* ESJ and CBO representatives would need familiarity with the equity indicators and role of indicators in the EE portfolio.



Fulfills CPUC's invitation for CAEECC recs in D.23-06-055

# Member Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

Because CAEECC has heard public input several times in prior CAEECC Meetings and due to time constraints, we will only be focusing on CAEECC Member input

06

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# Prospective Interim New Member Introductions

Please introduce yourselves and let us know **why** your organization would like to be a CAEECC Member

1. Wildan
2. Frontier Energy
3. Lifers Leaving a Legacy
4. Greenbank Associates

2min introduction + 1min questions from Members

07

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# Main Assembly Wrap Up

Brainstorm Q4 topics

\*Discuss 2025 Workplan

Meeting Evaluations

*\*Public Input Opportunity*

# Proposed Q4 Full CAEECC Meeting Topics

1. Welcome new interim CAEECC members
2. Discuss, finalize and approve 2025 Workplan
3. Discuss and aim to vote on decision making/voting changes
4. DEI training update, TBD
5. Co-Chair Vote (nominations due 11/6)
6. Hot topic for discussion
  - a. Demographic participation data (ED provides context; member discussion on data challenges, benefits, and where it is housed)
  - b. Goals (PA update on compliance w/ CPUC Decision; member and public input)
7. Optional Assembly Topics
  - a. Avoided Cost Calculator updates (ED presentation)
8. Other topics?

# 2025 Proposed Work Plan - High-Level

## Full CAEECC Meetings

Relevant & timely topics, may include:

- Working Group updates
- CAEECC approved ad hoc topics
- Annual and Semi Annual Portfolio Performance Report Review
- Consideration of ECWG recommendations
- Etc.

## Working Groups (WG)

**To Be Determined** based on

- 1) today's discussion on Community Engagement Indicators,
- 2) today's hot topic discussion,
- 3) possible topics stemming from semi-annual PPRR

**Other Activities: ??**



# Member Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

# Public Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

# Next Steps (tbd based on today's meeting)

- Semi-Annual Portfolio Performance Report Reviews: *tbd*
- CAEECC-Member Decision Making Process: *tbd*
- Hot Topic Discussion (Ensuring CPUC EE Policies Support Electrification): *tbd*
- Community Engagement Indicators: *tbd*
- Prospective Interim New Members: *vote results will be announced soon*
- Q4 meeting:
  - *co-chair nominations due 11/4*
  - *SF or SF+LA (and virtual of course)?*
- 2025 Workplan: *discussion and finalization at q4 mtg*
- *Other next steps?*

**PA Solicitations are included in the Appendix.** Please email the contacts provided for any questions regarding them.

# 05/15/2024 Meeting Evaluation Scores

Evaluation Question Summaries	Avg.
Objectives of the meeting were accomplished.	4.6
Presentations and background documents were clear and helpful.	4.4
This meeting was an inclusive and trusting environment.	4.2
The facilitators were effective in running the meeting.	4.3
Overall, the meeting format was smooth and effective.	4.8
Overall, this Full CAEECC meeting was successful.	4.3

*Scores are 1-6 scale, where 1 is "strongly disagree" and 6 is "strongly agree"; and 3.5 is mid-point of 1-6 scale*

*Scores based on responses from 12 members and 6 stakeholders*

*Facilitation Team and Co-Chairs reviewed and debriefed comments from respondents*

# This Meeting Evaluations

CAEECC Members are required by Groundrules to complete each Meeting Evaluation.

*Members of the Public are encouraged to complete the evaluations.*



Evaluations will be sent by  
CAEECC Facilitator



Complete evaluations **today** and  
latest by September 24, 2024 COB

# Meeting Goals

1

## **Discuss Hot Topic**

*Ensuring CPUC EE Policies Support Electrification*

2

## **Conduct Business Items**

*Including welcoming a new Program Administrator; Planning; and Groundrules*

3

## **Vote on New Interim Members**

*During Executive Session for Members only*

## Live Meeting Evaluation, *how'd we do?*

**Do you feel this was an inclusive and trusting (i/t) environment?**

Not at all i/t ..... Somewhat i/t ..... Very i/t

**Do you feel the meeting was effective?**

Not at all effective ..... Somewhat effective ..... Very effective

**What worked well? How can we improve?**



# THANK YOU!

The next **CAEECC Meeting is November 13, 2024** - in San Francisco and virtual (possibly also Los Angeles depending on today's experience)

The **Semi-Annual Portfolio Performance Report Review Session is October 28, 2024** - fully virtual

**CAEECC Members, please stay for the mandatory Executive Session starting at 2pm.**

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# Appendix

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# **Program Administrator Solicitation Updates**

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# PG&E 2023 – 2025 Solicitation Schedule

Year		2023												2024												2025			
Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2
Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Local	C&S Compliance Improvement	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Statewide	C&S Advocacy - Wave 1 Negotiations	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Statewide	C&S Advocacy – Wave 2 Negotiations	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local	C&S Code Readiness	AL	AL	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local	2024 Summer Reliability	AL	AL	AL	AL	RFP	RFP	RFP	RFP	RFP	RFP	RFP	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local Res & Comm	Zonal Electrification	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local Residential	Res. Electrification Equity	RFA	RFA	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	RFP	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local Commercial	Comm. Energy Mgmt. (SEM Expansion)	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local Residential	Res. Whole Home Load Management	RFA	RFA	RFA	RFA	RFP	RFP	RFP	RFP	RFP	RFP	RFP	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	
Local Residential	Res. Market Support (Single Point-of-Contact)	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	AL	

Legend:	
	RFA Prep
	RFA
	RFP Prep
	RFP
	Contract Negotiation
	AL (if applicable) + Approval + IP

- Recently Approved Advice Letters:**
- Codes & Standards - Wave 2
  - Codes & Standards Code Readiness
  - 2024 Summer Reliability
  - Zonal Electrification – Contract #1
- Advice Letters Under Review:**
- Zonal Electrification – Contract #2
  - Residential Electrification Equity

- In-flight Negotiations:**
- Residential Whole Home Load Management
  - Commercial Energy Management (SEM Expansion)

- Terminated Solicitations:**
- Residential Market Support (SPOC)

- Kicking-off Negotiations:**
- None

- In-flight Solicitations:**
- None

- Soon to Launch Solicitations:**
- TBD

# SCE Solicitation Timeline

Segment	Year		2024												2025											
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
RA	Local Customer Programs	Residential - Multifamily			Contracting				AL		IP															
RA	Local Customer Programs	Industrial - Large Customer, Comprehensive Projects				Contracting							AL		IP											
RA	Local Customer Programs	MAP - All Sectors	RFP			Contracting							AL		IP											
RA	Local Customer Programs	Comprehensive Commercial	Prep RFP						Contracting						AL		IP									
RA	Local Customer Programs	Residential	RFP Prep	RFP					Contracting						AL		IP									
TBD	Statewide Programs	Plug Load Appliances												RFP Prep	RFP						Contracting			AL		IP

Today

LEGEND:
RFA Prep
RFA
RFP Prep
RFP
Contract Negotiation
AL (if applicable) + Approval + IP

**In-flight Negotiations:**

- Market Access Program
- Comprehensive Commercial

**Kicking off Negotiations:**

- Residential

**AL & IP Development:**

- Residential – Multifamily
- Industrial

**Upcoming Solicitations:**

- Plug Load Appliances

# SCG 2024 Solicitation Schedule

IOU	Year		2024												2025								
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3		
	Month		Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
SoCalGas	Local - Commercial	SEM																					
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 1)																					
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 2)																					
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 3)																					
SoCalGas	Local - All Segments	Market Access Program (MAP)																					

Market Access Program for commercial and residential, a one-stage solicitation.

The IDEEA 365 is a recurring competitive procurement process. In 2024, SoCalGas plans to release the 3<sup>rd</sup> round of IDEEA solicitations, a one-stage solicitation.

For questions, please contact Portfolio Solicitation Lead, Emma Ponco  
[emponco@socalgas.com](mailto:emponco@socalgas.com)

LEGEND:
RFA Prep
RFA
RFP Prep
RFP
Contract Negotiation
AL (if applicable) + Approval + IP



# SDG&E 2023 – 2025 Solicitation Schedule\*



Year		2023												2024												2025			
Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1		Q2	
Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Local Commercial	Groceries, Restaurants, Food Storage						■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■				
Local Commercial	Private Institutions, Healthcare									■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■				
Local Commercial	Lodging										■	■	■	■	■	■	■	■	■	■	■	■	■	■	■				
Local Commercial	Retail, Offices and Wholesale					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■				

**Legend:**

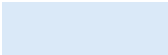

■	RFA Prep
■	RFA
■	RFP Prep
■	RFP
■	Contract Negotiation
■	AL (if applicable) + Approval + IP

For questions, please contact Laurie Porter, Laurie <LPorter@sdge.com>

\*Subject to change, pending any modifications and/or approvals from the Commission related to SDG&E's Energy Efficiency program administration.

# 3C-REN Solicitation Update

Year		2024						2025											
Quarter		Q3			Q4			Q1			Q2			Q3			Q4		
Month		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Residential	Single Family																		
	Multi Family																		
Commercial	HTR Business NMEC																		
Agriculture	Technical assistance				Develop RFI	RFI	Develop RFP	Develop RFP	RFP	Contract									
Workforce	Instructors																		

 Currently Under Contract  
 Continous Recruitment of Instructors

- The Vendor Information Portal (VIP) allows the public to review opportunities with the County of Ventura:
- Review competitive solicitations.
- Register to receive notices of upcoming events.
- Respond and present offers.
  - <https://www.ventura.org/general-services-agency/procurement-home/>

For questions contact  
[Alejandra.Tellez@ventura.org](mailto:Alejandra.Tellez@ventura.org)  
 or  
[Kelly.Cattanach@ventura.org](mailto:Kelly.Cattanach@ventura.org)