**CAEECC-hosted sub-WG on Underserved customers**

**Meeting with UC Davis Residential Research Team**

**November 5, 2020 1-2 pm**

**Facilitators: Dr. Scott McCreary & Katie Abrams, CONCUR Inc.**

**Meeting Summary**

Note: this meeting was an informal sub-WG meeting; notes are accordingly informal. The meeting purpose was to provide early feedback on the analysis approach and discuss outstanding questions on data availability, framing, problem statement, and next steps.

**Participants:**

* *CAEECC Facilitators and Working Group members*: Scott McCreary, Lara Ettenson, Jenny Berg, Anthony Kinslow, Ed Novy, Anthony Segura, Julie Tan, Hal Nelson,
* *UC Davis representatives*: Professor Alissa Kendall, Corey Grace, Mark Lozano, Leslie Nelson, Tobiah Steckel, Jessica Dunn, Kristen Bush, and Sadia Gul

**Presentation by UC Davis Students:**

* *Problem definition –* Leslie Nelson
  + Replace “utility” with “program administrator”; look at statewide definitions of hard-to-reach; there is no universal formally accepted definition of “hard-to-reach”
    - Leslie: propose recommending a definition as part of the analysis
  + Recast problem statement as a question since we are testing a hypothesis
  + Tony Reames from University of Michigan calls this the “doughnut hole”. Suggest explicit inclusion of race.
  + Can the scope address “services” and not just “programs”?
  + Need to define what it means to be “served”; suggest definition of delivered program benefits not simply contacted (reflects the idea a “journey” through the process)
* *Approach to problem evaluation* – Kristen Bush
  + Summary: conduct literature review to inform data analysis approach
* *Miscellaneous discussion*
  + In contrast to the USC analysis, this research will include additional variables to better quantify participation gap: gross incentive, net savings, measure cost, end user rebate, number of units, etc.
  + Can you measure non-resource data?
    - Research team: not seeing many non-resource claims in CEDARS. Jenny and Leslie to follow up
  + Julie: SoCalREN has a multifamily program: only report on property owner data, which excludes tenants
    - Leslie: Available data does not connect claim to person; makes it hard to conduct statistical analysis to understand connections
  + Lara: request to keep track of data challenges so CAEECC can provide recommendations for enhancing CEDARS
  + Ed: check out NREL’s Slope data: <https://gds.nrel.gov/slope>
* Analytical methods – Jessica Dunn
  + Summary of proposed analytical techniques: multivariate regression modelling, multivariate categorical modelling, spatial analysis
  + Alissa: mismatch between CalEnviroScreen and CEDARS data
* Timeline
  + Deliver final product December 14th; could present preliminary results early December to Sub-WG

**Next Steps**

* Leslie (researcher) and Jenny Berg to discuss non-resource claims
* Research team to revise problem definition per feedback received during meeting
* Ed Novy to share CEC data with Alissa (UC Davis research lead), Scott and Katie by 11/16
* Facilitators to use a Doodle Poll to schedule an early December meeting for research team to present preliminary results
* Facilitators to request permission to post UC Davis slides