Full Quarterly CAEECC Meeting #45 Summary

Date: Tuesday February 11, 2025
Time: 11:30am - 3:45pm PT

On February 11, 2025, the California Energy Efficiency Coordinating Committee met for its forty-fifth quarterly meeting. The meeting was hosted both in-person (in San Francisco and Los Angeles) as well as online via Zoom. There were 87 attendees, including representatives from 22 CAEECC Member organizations and 1 CAEECC Ex-Officio agency as well as 62 interested stakeholders *(see [Appendix A](#) for a full list of meeting attendees)*. The facilitation team included Katie Abrams (Abrams) of Birch Road Consulting, Michelle Vigen Ralston (Ralston), Suhaila Sikand (Sikand), and Mahal Miles (Miles) of Common Spark Consulting, and Susan Rivo (Rivo) of Raab Associates. Additional presenters included Coby Rudolph (Rudolph) and Ely Jacobsohn (Jacobsohn) of CPUC Energy Division; Stacie Risley (Risley) and Kelvin Valenzuela (Valenzuela) of SDG&E.

Supporting meeting materials are available at: https://www.caeecc.org/2-11-2025-full-caeecc-mtg. Relevant materials include the Agenda and Slide Deck.

Overview

Key Meeting Takeaways:

- CPUC Energy Division provided an update on the Governor's Executive Order N-4-24, as well as the closing of CPUC Energy Efficiency Proceeding R.13-11-005 and the process for opening a new proceeding.
- SDG&E provided an update on the Mid-Cycle Advice Letter (MCAL) process and timeline.
- CAEECC members and the public engaged in breakout discussions around the 2026 Business Plan Application template and opportunities to streamline the application drafting process.
- SDG&E presented an overview of their pending Off-Cycle Business Plan Application which includes a significant change to their current portfolio of regional programs. CAEECC members had the opportunity to ask questions and discuss.

High-Level Summary of Next Steps:

- Meeting attendees are invited to provide substantive feedback to Energy Division for the 2026 Business Plan Applications via email (Ely.Jacobsohn@cpuc.ca.gov) ideally by March 3rd, 2025.
- A Community Engagement Panel focused on energy program community engagement best practices will be hosted April 9, 2025 (date confirmed shortly after the meeting), for PAs to gather insights in the development of their community engagement indicators to be included in their upcoming MCALs.

This meeting summary is intended to capture the overarching discussion of ideas, concerns, alternative options for proposals and consensus; it is a high-level summary and not a transcript. For more detailed discussion, please reach out to the [Facilitation Team](#).

Key acronyms used in this document include California Energy Efficiency Coordinating Committee (CAEECC), California Public Utilities Commission (CPUC), Energy Division (ED), California Energy Commission (CEC), California Air Resources Board (CARB), energy efficiency (EE), working group (WG), disadvantaged communities (DAC) and hard-to-reach (HTR) communities, justice equity diversity and inclusion (JEDI), CPUC's Environmental and Social Justice Action Plan (ESJ Action Plan), Portfolio Administrator (PA), Investor-owned utilities (IOU), Regional Energy Network (REN), community-based organization (CBO), Equity Metrics Working Group (EMWG), Market Support Metrics Working Group (MSMWG), evaluation measurement and verification (EM&V), Disadvantaged Communities Advisory Group (DACAG), Low-Income Oversight Board (LIOB), Evolving CAEECC Working Group (ECWG), , and Mid-Cycle Advice Letters (MCALs).

Welcome and Background
Slides 4 - 19

Ralston welcomed new CAEECC Co-Chairs Laurel Rothschild (The Energy Coalition) and Stacie Risley (SDG&E).

Abrams mentioned that CEDMC has regretfully resigned its CAEECC Membership due to resource constraints.

Sikand shared a summary of the CAEECC DEI Training Sessions and requested attendees' reflections on their training experience.

CAEECC Member Discussion on CAEECC DEI Training Sessions

- A Member expressed appreciation for the DEI Training Sessions, referencing how the Procedural Justice Training Session encouraged thinking as a collective about how learnings can be integrated into early stages of EE and programs.
- A Member recommended replacing the term DEI with Pluralism, Equity, and Belonging (PEB) to foster more engagement and sense of involvement.

Policy & Regulatory Updates & Discussion
Slides 20 - 28

Update on Governor's Executive Order (EO) N-5-24 regarding affordability of customer energy bills
Slide 21

Coby Rudolph (CPUC Energy Division) provided an overview of the [Governor's Executive Order (EO) N-5-24](#), in reference to the affordability of customer energy bills.

CAEECC Member Discussion on Governor's Executive Order N-5-24

- Members asked questions relating to the process of the submission from the CPUC in response to the Governor's EO. Rudolph clarified that they used the terms "report" and "letter" interchangeably in reference to the CPUC response to the EO. Rudolph could not share nuances about the development process of the report, nor any general analyses or recommendations that were included. Rudolph noted that it was to his understanding the response was delivered to the Governor's Office by December 31, 2024.
- Members voiced concerns relating to the confidentiality of the submission from the CPUC in response to the Governor's EO. Rudolph shared that there are no current plans to make the response public, and noted that any Commission policy change resulting from the Governor's EO would go through normal Commission policymaking processes, including public comment opportunities.Rudolph acknowledged that PAs have to justify their requests for confidentiality when they submit sensitive information, while the CPUC did not do so with their response to the Governor's EO.
- Rudolph highlighted that the Governor's Executive Order CPUC response development process exposed the limitations of current tools for identifying the impact of programs on rates; improved resources are necessary to fulfill this task effectively.
  - *A Member of the Public, Jim Dodenhoff, shared the following via Zoom Chat: Cody has referenced the need to "better understand the impact of EE programs on rates". I'm not sure I understand this. It is my understanding that EE is funded from the Public Goods Charge and that Public Goods Charge is a "known entity". So I'm not clear what is unclear.*
- A Member questioned the relevance of the EO N-5-24 discussion to CAEECC's role and function, citing that broad dialogue around affordability are not helpful for CAEECC purposes. The Facilitation Team noted that discussions around the EO will continue in the future, specifically relating to CAEECC's purpose.

Update & Discussion Regarding Closing of EE Proceeding (R.13-11-005)
Slides 23-25

Coby Rudolph (CPUC Energy Division) shared updates on the closing of EE Proceeding [R.13-11-005](#).

CAEECC Member Discussion on Closing of EE Proceeding (R.13-11-005)

- Rudolph noted that the CPUC response to the Governor's Office was not a form of policymaking in of itself, and that in order for the CPUC to take action, a proceeding would need to host the development of a record, stakeholder input, and decision-making. Rudolph further clarified that if the EO resulted in a recommended EE policy change, any resulting action would be taken in an EE (or other relevant) proceeding.

Progress Update & Discussion on Mid-Cycle Advice Letters (MCAL)
Slides 26-28

Stacie Risley (SD&GE) shared an update to the MCAL template development and a possible need to change the MCAL filing date due to dependencies on guidance that requires an open EE proceeding to be issued.

CAEECC Member Discussion on Progress Update & Discussion on MCAL

- The Facilitation Team requested clarification on whether the anticipated Natural Gas Phase Out Decision will also be part of the new EE proceeding or may be part of a different existing proceeding. Risley shared that the last Natural Gas Phase Out was in the applications, and did not know whether Energy Division would continue to issue decisions in the application proceeding, in the Order Instituting Ruling, or in an altogether different proceeding.
- Risley noted that PAs could start on the Response to Recommendation portion of their MCAL if Energy Division could identify which studies PAs ought to focus on, but could not start on other components until the Potential & Goals Decision (and perhaps the Natural Gas Phase Out Decision) are established. SDG&E requested from Energy Division a timeline on when the requested Response to Recommendation studies be shared with PAs; a Member of Energy Division did not have an immediate answer, but sent an email with the inquiry to a colleague in evaluation at Energy Division.
  - Energy Division response: The CPUC is in the process of reviewing Response to Recommendations protocols. As such, the CPUC is not requesting specific programs to highlight in upcoming mid-cycle advice letters.
- A Member noted that there has been a delay with Integrated Demand Side Management (IDSM) Decision approval, and asked whether it would impact MCAL approval for PAs, clarifying that it may impact budget allocations. A Member of Energy Division could not provide a definitive response. Risley agreed that there may be potential for the IDSM Decision to impact MCALs, but that money could be set aside. The Facilitation Team synthesized that the IDSM

budget, as part of the broader EE budget, impacts the EE portfolio, hence the impact to finalizing an MCAL without the IDSM Decision.

CAEECC Equity Actions
Slides 29-32

Update on Equity Recommendations for the Near Term
Slides 30-32

Katie Abrams shared updates on the CAEECC Equity Recommendations for the Near Term, including 76% CAEECC Member vote to establish a CAEECC Equity Advisory Committee.

2026 Business Plan Applications
Slides 34-42

Ely Jacobsohn (Energy Division) shared context on the filing and timeline for feedback for the 2026 Business Plan Applications template. Meeting participants, including CAEECC Members and Members of the Public, were divided into three breakout rooms — virtual, San Francisco, and Los Angeles — to discuss feedback for Energy Division. After 30 minutes, the meeting participants reconvened to share key themes from their discussions.

Breakout room discussion high-level themes are captured below. See Appendix B for detailed notes from each of the breakout sessions.

Questions on the 2026 Business Plan Applications Feedback Process

- Jacobsohn confirmed that Energy Division would like structure in the templates to visualize, compare, and contrast PA data.
- The Facilitation Team acknowledged that the discussions surrounding the 2026 Business Plan Applications involve detailed nuance and requested that the templates be shared with participants. Jacobsohn directed participants to the CAEECC website to view relevant materials from the past application cycle.
- Jacobsohn confirmed that each time an application is filed, it is for an eight-year plan: and in this case, for 2028-2035.
- Members requested time to bring the template to their teams to seek more substantive feedback for Energy Division; Jacobsohn welcomed feedback via email (Ely.Jacobsohn@cpuc.ca.gov) ideally by March 3rd, 2025.

Virtual Breakout Themes from 2026 Business Plan Applications Discussion

- The spreadsheet template asking for data across 15 tabs was only finalized days before the deadline – need templates several months in advance. Created delays in populating

- Templates are duplicative, not prescriptive
- Feelings of needing to provide voluminous content to justify existence
- Energy Division wants ability to query across all PAs, regions, etc. to find comparisons, while also being able to look specifically at a single PA in-depth

SF Breakout Themes from 2026 Business Plan Applications Discussion

- Duplication: be purposeful
- Thinking about future strategy is hard
- Program detail cards: lots of discussion, ultimately a recommendation to make this a searchable database
- Formatting: consistency, accessible, main narrative, condensing links, table of contents, consistent language, clarification on categorization, etc.
- Policy recommendations: some of these need to be at the proceeding level
- More time needed with the template (10 month minimum)
- Training needed on zero-based budgeting

LA Breakout Themes from 2026 Business Plan Applications Discussion

- Repetition / Duplication: reduce duplication and make documentation more robust, remove redundancy with Excel tables, remove unnecessary narrative requirements.
- Use CEDARS to streamline data
- Content Changes: ensure that portfolio strategies are relevant, review technical inputs, ensure an application pathway for new PA entrants, consider future of CAEECC
- Template changes: do not overhaul template too much, as PAs might want to carryover content from previous years, consider examples of visualization
- Reflections from Energy Division staff: review process, finding data and information, relevance of repetition

SDG&E Strategic & Business Plan Off-Cycle Application
Slides 43-54

Update and Q&A for SDG&E's Application

Stacie Risley and Kelvin Valenzuela (SDG&E) provided updates on SDG&E's Off-Cycle Business Plan Application.

CAEECC Member Discussion on SDG&E Strategic & Business Plan Off-Cycle Application

- SDG&E shared that its portfolio exceeded the 60% third-party mark, at around 70% of its portfolio bid out to third-party implementers. SDG&E confirmed that it

has not re-solicited underperforming programs (those below cost effectiveness threshold of 1.0).

- SDG&E confirmed that they would not receive a Decision on the current off-cycle application before needing to file the Business Plan application for 2028-2025. SDG&E mentioned that they hoped the CPUC could expedite the Decision on their off-cycle application, which would help shape the next portfolio application. SDG&E elaborated that they are submitting a refiling of the applications, as allowed per D.15-10-028, which states that a PA can propose an update to their business plan without requiring a Petition for Modification (PFM).
- A Member questioned whether this SDG&E off-cycle application would create an inequity for ratepayers in San Diego County broadly, particularly for customers who would not be reached by SDREN. SDG&E explained that SDREN has 10 programs and would not absorb an IOU's entire portfolio, and any additions to SDREN's portfolio would be a result of market studies or similar justifications. SDG&E shared that through their request to close regional programs, they are saving $300 million over 6 years, which is an overall benefit to ratepayers, as affordability is a priority. SDREN further clarified that they are not "taking" any of SDG&E's programs, and are focused on launching their authorized programs – SDREN is looking forward to the direction and decisions from the CPUC before identifying next steps.
- SDG&E encouraged transparency and communication around this process by welcoming one-on-one meetings to address concerns.

Main Assembly Wrap Up
Slides 55 - 60

Reminders and Evaluations

Sikand provided reminders on 2025 meeting dates and shared the Q2 Full CAEECC Meeting Proposed Topics.

CAEECC Member Discussion on the Q2 Full CAEECC Meeting Proposed Topics

- A Member referenced a discussion point from a 2024 Q3 Full CAEECC Meeting around decision-making options for CAEECC, questioning if it should be addressed in upcoming CAEECC meetings. The Facilitation Team confirmed that the conversation included weighted voting proposals to ensure that CAEECC did not become a solely PA-dominated decision-making entity. A previous CAEECC Co-Chair confirmed that at the time of the 2024 discussion, meeting participants did not want to discuss voting processes until CAEECC's purpose was confirmed and more certainty in the future was established.
- A Member of Energy Division shared a reminder that the Third-Party Stakeholder Forum hosted by Energy Division will take place on Thursday, March 6th, 2025.

More info available here:
https://www.caeecc.org/cpuc-third-party-public-meetings

Sikand shared a planning update on the upcoming CAEECC ESJ Panel.

Miles provided a summary of the Evaluation Survey from the 11/13/24 Full Quarterly CAEECC Meeting. In general, participants felt the 11/13/24 meeting was overall successful, with most agreeing that the objectives of the meeting were accomplished, presentations and background documents were clear and helpful, and the meeting facilitators were effective in running the meeting.

Miles reiterated the Q1 Full CAEECC Meeting Goals and reminded CAEECC Members of the required Meeting Evaluation due on February 18, 2025.

Meeting Wrap Up

Abrams, Sikand, and Ralston concluded the meeting with words of gratitude for Member and Public participation.

Appendix A: Attendees

Organization	Name
CAEECC Members	
3C-REN	Alejandra Tellez
BayREN	Jane Elias
CCRREN	Trevor Keith
Code Cycle	Dan Suyeyasu
CSE	Rocky Fernandez
Frontier Energy	Nancy Barba
IREN/WRCOG	Benjamin Druyon
LGSEC	Amaury Berteaud
MCE	Alice Havenar-Daughton
NRDC	Lara Ettenson
PG&E	Lisa Hunter
RuralREN North	Stephen Kullmann
SCE	Jessica Lau
SDG&E	Stacie Risley
SDREN	Sheena Tran
SF Department of the Environment	Lowell Chu
SJVCEO	Courtney Blore
Small Business Utility Advocates	Ted Howard
SMW Local 104	David Vincent
SoCalGas	Roy Christian
SoCalREN	Fernanda Craig
The Energy Coalition	Laurel Rothschild
Ex-Officio	
CPUC Energy Division	Ely Jacobsohn
CPUC Energy Division	Pamela Rittelmeyer
CPUC Energy Division	Coby Rudolph
Other Interested Stakeholders	
Erica Helson	3C-REN
Karen Kristiansson	BayREN
Melissa Brandt	Brandt Energy Strategies
Jane Park	California Energy Commission
Emily Lange	Cascade Energy
Siva Sethuraman	Cascade Energy
Jordan Garbayo	CCRREN
Brenda Garcia Millan	County of San Diego

Jessie Levine	CPUC
Savannah McLaughlin	CPUC
Jon Taffel	CPUC
Christina Torok	CPUC
Gillian Weaver	CPUC
Rocky Fernandez	CSE
Don Arambula	DAC
Lore James	Ecology Action
Renwick Paige	Energy Infrastructure Partners
Johna Roth	ETCC
Margaret Marchant	Frontier Energy
Bill Heberger	GoGreen Financing - CA STO
Neil Podkowsky	Guidehouse
Gabriel Stelmack	Guidehouse
Pam Bold	High Sierra Energy Foundation
Alyza Khan	Lincus
Mark Wallenrod	Mark Wallenrod Consulting
Wade Stano	MCE
Grey Staples	Mendota Group, LLC
Matthew Rutherford	Peninsula Clean Energy
Jana Kopyciok-Lande	Peninsula Clean Energy
Shelby Bush	Peninsula Clean Energy
Ginella Rivkin	PG&E
Sebastien Csapo	PG&E
Lindsey Tillisch	PG&E
Andy Zhang	Public Advocates Office
James Ahlstedt	Public Advocates Office
Andrew Terenzio	Recurve
Nils Strindberg	Resource Innovations
Melanie Stutler	Resource Innovations
Chris Pilek	Resource Innovations
Patricia Terry	RuralREN North
Aisha Cissna	SDREN
Amy Whitehouse	SDREN
Jen Palombo	SDG&E
De De Henry	SDG&E
Kelvin Valenzuela	SDG&E
Alton Kwok	SDG&E
John Zwick	SDG&E

Lily Backer	SDG&E
Wendy Olmstead	SEI
Nik Kaestner	SF Department of the Environment
James Dodenhoff	Silent Running LLC
Carlo Gavina	SocalGas
Christopher Malotte	SCE
John McCarson	SCE
Elizabeth Gomez	SCE
Myron Graessle	SCE
Desiree Villalobos	SCE
Code Bruder	The Energy Coalition
Natalie Espinoza	The Energy Coalition
Jeanne Huntsman	Willdan
Rosie Kang	Willdan
Carol Yin	Yinsight

Appendix B: Breakout Room Notes from the 2026 Business Plan Applications Feedback Discussions

The Facilitation Team organized three breakout rooms to gather participant feedback on the 2026 Business Plan Applications. Breakout room participants made notes of their discussions in an interactive Breakout Slides for 2-11-25 Q1 Full CAEECC Meeting #45 slide deck.

Prompts for Breakout Discussion of the 2026 Business Plan Applications

 The breakout room discussions addressed the following questions:

1. What are major pain points of the application development process that, if feasible and adjusted, would yield substantial PA time and/or resource savings?
2. For reviewers, what is missing and/or difficult to evaluate from the applications?
3. What recommendations do you have to improve or otherwise streamline the application development, submission, and/or review processes?
4. Are there models of applications used elsewhere that we should consider replicating in part or in whole?

Virtual Breakout Session Notes from 2026 Business Plan Applications Discussion

Q1. What are major pain points of the application development process that, if feasible and adjusted, would yield substantial PA time and/or resource savings?

1. Spreadsheet template came out too close to deadline.
2. *Much (80%) of spreadsheet duplicates data for CEDARS.
3. No guidance on # of pages or amount of detail required.
4. Uncertain timing of Potential & Goals report is a problem because P&G often comes out later than expected.
5. Describing sectors and segments requires strategies and this is redundant.
6. Program cards are duplicative, which is understandable, but could they be located in a different section or somehow refined? Currently, they are in an exhibit part of the application. Put them in the main section.

Q2. For reviewers, what is missing and/or difficult to evaluate from the applications?

1. Being able to see everything side by side, like EE Stats, would be useful for review. Being about to query, look by PA, region, etc. so that you can see gaps.

Q3. What recommendations do you have to improve or otherwise streamline the application development, submission, and/or review processes?

1. Template was late last time, and it was unclear if it was had to be followed exactly or was it just guidance.
2. Involve new PAs who haven't done this before early on.
3. Have template ready 10 months before submission.
4. Maybe leave it as is because PAs know what to expect.
5. Spreadsheet is useful for metrics, admin costs.

Details

1. Placemat with 15 tabs; finalized days to weeks before – creates delays in populating; 80% overlap with CEDARS; based on legacy submissions; great opportunity to streamline
2. Recommendation that the template comes out 10 months before the Application is due
3. Feels like need to provide voluminous content to justify; no page guidelines
4. Duplicative – same stuff goes in multiple places
5. Delay/uncertain timing of P&G b/c technical details underlying portfolio planning impacted
6. Duplicative – reqs for descriptions for sectors and segments; requires strategies for each areas; different impacts and focus – also around program cards which require restating information; despite goal of streamlining and transparency … having the program cards in featured earlier in the application, not stuck in the end in an exhibit. That way some of the info in the program cards can be referred to later in the document because as it is, it is duplicative
7. What is a shining example of ED's fav submission - and which components/ certain graph or chart
8. Useful part of applications is being able to see side by side: ee stats had a query by PA and region; now we're lacking ability to compare
9. Template wasn't prescriptive
10. If outline remains the same then done deal; some PAs might prefer that; might be repetitive; but at least we know what it's asking… if outline for narrative changes some PAs will be frustrated b/c it's a change but others will welcome the change

SF Breakout Session Notes from 2026 Business Plan Applications Discussion

1. Depends on the perspective of the stakeholder
2. Duplication - summarize strategies at segment/sector level sometimes no difference. Had to write sections for segment strategies and sector strategies. Programs can be in a segment and several sectors so the same info is repeated many times. Perhaps more purposeful duplication is okay (i.e. using the same paragraph vs changing language (synonyms) every time) by providing the objective of the section in the template.

3. Reduce duplication of b/w cedars inputs and spreadsheets
4. 8 year biz plan and 4 year application - 8 year is very detailed and then repeated in application
5. Hard to imagine strategy for future - e.g. 2 years after approval and then 6 years from now on, can't imagine that
6. But budget exercise makes sense
7. Program detail cards - is it useful? Takes lots of time to develop from PAs + is a long PDF, is a PDF helpful or on a website better? Don't make it longer, where should the info best be located. Helpful b/ shorthand. Some of this info gets put on cedars. These are embedded as an addendum in Biz Apps - any attachment over 250 pages is unwieldy. Should this be in a database that's searchable (implementation plans have this capability). +++
8. Formatting: Have a main narrative in the Biz apps and then have a bunch of supporting docs where folks can look into what they are interested in vs a very very long doc.
9. Make sure order supports the narrative and can refer back instead of repeating text
10. Difficulty in finding information, docket isn't great place to host, maybe PA websites? Biz Apps are on caeecc website + links (but also need TOC available on CAEECC website). Tableau resource from ED for last time, trying to expand on this.
11. Policy recommendations: unless it's super tied to the application, it makes more sense in the Application proceeding → sometimes the policy recs (general policy) need to be "unlocked" in the rulemaking proceeding reraise this in new OIR prehearing conference so staff/judges can address
12. What is appropriate to put in the Biz Apps?
13. Access - should be a searchable PDF , table of contents that's linked, consistent format
14. Is there a new template? Y. Are portfolio strategies relevant? Can we add IDSM? Likely.
15. Ensure consistent language - portfolio strategy outline matches language in portfolio section
16. Add clarification - where should c&S be located?
17. Net to gross ratios to limit costs with freeriders.
18. Zero based budgeting - training needed. What is this strategy? When appropriate? This was a CalPA request and the decision didn't discuss it well
19. Supplemental budget narrative. That's filed as is, maybe should be brought into the application or nixed if not needed
20. More time - would be great to have 10 months with the template (PAs have to write before the template comes out but then have to rewrite once the template comes out)
21. Who creates/how? ED can't direct / order

LA Breakout Session Notes from 2026 Business Plan Applications Discussion

Repetition/Duplication

1. Strip out the duplication like "Portfolio Management Strategies," so it's more robust of a document, but then it's only in 1 location.
2. EM&V section is in both sections, so suggest elimination in 8-year plan.
3. Key metrics and outcomes: Recommend to not have a summary of these and just leave it in the tables. Or the template can ask PAs to refer to the approved key metrics and outcomes, rather than repeat.
4. Removing and making sure the language/prompts are the same - Exhibit 1 and Exhibit 2 - make sure the language is consistent.
5. Codes & Standards was both listed as a segment and a sector, so PAs had to describe that C&S work twice. So ED staff to decide to whether it should be a group as sector or segment.
6. Cost of putting together the Business Plan Application - $135,000 (not including staff time), such as putting a document in InDesign (with graphics rigor)
7. Repetition between 8year and 4year sections.
8. Redundancy if there is still the requirement for excel tables. If done on CEDARS, it there could be done in an automated way so that you can toggle (such as with C&S or without C&S for instance.)
9. Supportive of less redundancy, if made 1 change 1 place, so had to make sure that that change was adjusted in another place.
10. What is asked for in placemat, you are also asking for it in the portfolio application.
11. Not necessary: Eliminate the narrative as to why the PA categorizes programs as RA, MS, and E or different sectors. The last iteration asked for why funds are distributed to different sectors or segments.

Opportunity to use CEDARS to streamline data

1. The placemat, instead of being an excel sheet - can CEDARS be modified for those purposes? Instead of copying and pasting, there could be a place that PAs upload documents, that ED staff can download or copy from there.

Content Changes

1. Strategy section is asking for a lot of detail, such as low GWP refrigerant. This is something that PAs will have to comply with anyway, so may not need such depth of information in the applications.
2. Portfolio Strategies: ED to please make sure that those are relevant (such as IDSM).
3. Valuable of the tables requesting in the narrative, matches what you want in an excel - so match those formats.

4. Technical inputs - have been changes since this template was made - unique metrics for RENs.
5. Reducing duplication between CEDARS spreadsheets and spreadsheets in the annual report— like PowerBI for annual reports
6. Would recommend that you have an application pathway for new PA entrants, versus existing ones, so new PA entrant. The current template has a level of sophistication, of having a historical portfolio.
7. Future of CAEECC - There is a checklist to submit a new application. Should there be a change in CAEECC's scope or membership in the checklist? Existing PAs organized their own webinars.

Template Changes

1. Does ED prefer simplicity of testimony format or another format?
2. Recommend that ED does not overhaul the template too much, as PAs might want to carryover the content from past years.
3. PAs liked the program template card. But revisit is that what you want to know about each of the programs, but not overhaul that template.
4. Give PAs instructions - such as no more than 3 paragraphs, or 1-2 pages on this.
5. Time spent on this application process, is time that the PAs cannot deliver services.
6. Request for something new: Opportunity for a section to talk about what compliance requirements are not necessary anymore. Opportunity to clean up the stuff that is necessary. This is a way we can more efficient and save ratepayer dollars. This could be a place in the rulemaking to do this. Can propose policy changes in the application, so there is a space already for this.
7. Consider the Implementation Plans and Program Cards - How many iterations are required? There are costs.
8. ED should present a table or a chart or visualization of what you want to see. Such as a table, so it's easy to compare across 12 PAs.

Reflections from ED Staff

1. Recommendations for new EE policy. What is appropriate for PAs to put in there? For instance, what could be adopted in the application decision, versus in the rulemaking OIR scoping memo. Suggestion to revisit how it's worded in the template.
2. What are the top 2 things you are glad it is there? What are your fav pages? Ely - what is the actual rate impact from this application to the customers in this territory? With the mix of RENs, CCAs and IOUs, it gets super complicated to understand. Per SDGE, look at the IOU table and that will show you the rate impact. (Ely and Stacie to chat offline.) Per Ely the following tabs were helpful: Program table (tab 4), tab 7 with the budgets is helpful during the proceeding budgets, tab 6 SW budgets useful.
3. At least 2 ED staff reviewed every part of the application.

4. Finding the data and information ED staff is looking for is very hard. Some PAs make it harder than others. There is a template that makes some of the content consistent, but that is not always enough.
5. Repetition - Sometimes it is relevant. Sometimes it's useful because it adds contents, but other times it add fluff (less useful).
6. It would be helpful for PAs if ED staff issue guidance to PAs on topics such as to have a searchable PDF, have a table of contents and go down into that section for consistency. Determine if ED is looking for a testimony format or not. For the Business Plan, do not call it a summary, please do not include a summary in the Business Plan.