Generally Supported Ideas from C&S/MTI Savings Attribution Sub-group

Draft 10/16/2020

1. Group supports “close cooperation and collaboration between the MT portfolio and the existing rolling portfolio”[[1]](#footnote-1), including the C&S team.
2. MTA and C&S are individually responsible to their own regulatory requirements, oversight and process rules.
3. The MTA (at the administrator level) will have performance criteria in addition to attributed savings.
4. The MTA will create an initial forecast[[2]](#footnote-2) of total MTI/C&S savings for planning purposes in collaboration with C&S Program Administrator. Savings are incremental to a naturally occurring baseline.
   1. The MTA will also forecast initial savings for individual MTIs separate from C&S for planning purposes. This will be done in collaboration with C&S Program Administrator and will de facto result in relative forecasted shares
   2. The MTA will also forecast initial savings for the MTI separate that are unrelated (non-overlapping) with any anticipated C&S adoption outcomes, if applicable.
5. There will be one or more mid-course updates[[3]](#footnote-3) (joint between C&S Program Administrator and MTA) to re-evaluate forecasted savings and update baselines as necessary
6. There will be an ex-post evaluation to determine total savings and attribution of savings to C&S and MTA when C&S are included in individual MTI logic models.
   1. Assuming a Delphi process used during the ex-post evaluation, the scope of the Delphi will include all rate-payer funded activities that were intentionally targeted toward a C&S adoption.
   2. MTI logic models, MTI program interventions, MTI 3P market progress evaluation reports would all be part of the Delphi panel materials along with code change theory reports, CASE reports, and other documentation of influence
   3. MTI activities would be reviewed from the beginning of Phase II through C&S adoption.

1. CPUC decision, finding of fact 27 [↑](#footnote-ref-1)
2. CPUC decision, page 159, 4rd bullet. [↑](#footnote-ref-2)
3. CPUC decision, page 158, 11th bullet. [↑](#footnote-ref-3)