**CAEECC-Hosted sub-Working Group on Underserved Customers**

**Meeting with UCSB Public Sector Research Team**

**December 16, 2020 2-3pm**

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

**Meeting Summary[[1]](#footnote-1)**

# Attendees:

* *UC Santa Barbara Research team*: Ranjit Deshmukh (Principal Investigator, professor who runs Clean Energy Transformation Lab), Meas Meng (post-doc focused on energy issues), Michelle Le (undergraduate affiliated with CET Lab), Audrey Meiman, Nathaniel Villa, and Corey Grace
* *CAEECC members and other interested stakeholders*: Jenny Berg (BayREN), Chris Malotte (SCE), Laurel Rothschild (Energy Coalition), and Lou Jacobson (Local Government Sustainability Energy Coalition)
* *Facilitators*: Dr. Scott McCreary

# Introductions & Agenda Review – *Scott McCreary*

Scott noted that the purpose of this meeting is for the UCSB research team to outline the steps in their proposed analysis and discuss outstanding data needs (if any) with the CAEECC Underserved Working Group. UCSB anticipates finalizing their analysis in mid-2021. The full CAEECC Underserved Working Group will meet in early 2021 to review the workplan in depth.

Note that key next steps are highlighted in yellow to promote efficiency in followups.

# Present Public sector underserved workplan strawman – *Meas and Michelle*

UCSB students Meas and Michelle presented slides on “Identifying underserved public sector customers within energy efficiency programs”. Details can be found in the slides, posted to the meeting page. Highlights below:

* Research questions: are there gaps in program participation …
	+ by geographic areas
	+ by public agency criteria
	+ by socio-demographic indicators
* Data sources: CEDARS, Census Tract, CalEnviroScreen
* Indicators: participation, investment, energy savings
* Types of programs: Local Government Partnerships, State Institutions Partnerships, IOU Core/statewide programs, Third/local party programs, and REN/CCA programs – for a total of 330 unique programs (focusing on 167 key programs)
* Synthetic variables: % of cost covered, % of savings or depth of savings, incentive per unit of energy, and measure cost per unit of energy
	+ Research will focus on top 10 (for each of the variables above) compared to everything else – i.e. top 10% of projects with the highest savings compared to the other 90% of savings for all projects
* CalEnviroScreen: research team is interested in using socioeconomic indicators (linguistic isolation, poverty, and unemployment) to analyze program participation gaps

# Discussion and questions on workplan strawman – *CAEECC members*

**Questions on “Types of Programs” slide:**

Laurel: Laurel, Lou, and Chris have some familiarity with CEDARS data, so happy to help as needed. How can the researchers distinguish public agency type based on the CEDARS data provided?

* Research team: Focused exclusively on the Public sector, curious what input and advice members can share.
* Chris: The original goal was to provide UCSB more granular data (zip code level), but experiencing some data acquisition hurdles. NAICS code should help.
* Lou: Most public agencies have to report finances publicly; Dept of Finance may have list of public agencies that report, and perhaps your team can use that to compare addresses or other variables within CEDARS to determine type of agency.

Lou: What is the definition of “public”?

* Research team: Plan is to use CEDAR’s definition
* Laurel: Some program administrators (PAs) characterize private schools as Public (Chris confirmed this for SCE). There may be some customers that aren’t characterized as Public
* Chris: Agreed there may be gaps if analyzing by program based on CEDARS. Note that on the Program list slide, many are the same program – for example, there’s only 5 statewide programs. PG&E’s Public offerings are mostly unique though it has overlap on Kern, San Joaquin and San Luis Obispo. All SCE’s partnerships overlap with SoCalGas. In summary, many programs overlap across PAs– so it’s important to ensure the analysis doesn’t double count.
* Ranjit: We would like help classifying unique programs
* Chris: Offered to assist the UCSB team with applying classification to data

Laurel: Are there are school-specific programs not listed on the “Types of Programs” slide?

* Research team: School programs are not shown on this slide, but are characterized under Third/Local Party and State Institutional Partnership buckets.

Laurel: SoCal REN (SCR) will only have limited data for 2020. Would it make sense to remove them from the list?

* Chris: My goal in providing the program list was to provide an exhaustive program list, and the only REN I was aware of offering a public program in 2020 was SCR
* Jenny: Confirmed that Chris’ understanding was correct

Laurel: Is OnBill Financing (OBF) going to be included/captured in this analysis?

* Chris: SCE offers a popular 0% interest on-bill financing program, but it’s non-resource program (doesn’t claim direct savings for OBF, although other Public programs may claim savings). PG&E offers financing in lieu of incentives – not sure if it shows up as a Resource program. Recall highlighting OBF in yellow on program list sent to UCSB, to flag for analysis discussion.
* Laurel: We put in a special request to view those programs, so we can discuss with our data analysis team on a forthcoming call with UCSB.

Lou: In the absence of Prop 39, would schools have been served? Please keep this in mind in the analysis.

* Chris: there may be a flag for Prop 39 that can help with this analysis

**Questions on CEDARS data**

**UCSB questions are bulleted, with**

Research team: What is the difference between filings and claims? Which is reported at the zip code level?

* Lou and Laurel suggested claims
* Lou asked for clarification on whether filings are on the front side and claims are backside [filings broadly include PA’s efficiency applications for CPUC approval, while claims represent completed projects]. Chris confirmed that’s his understanding.
* Laurel recently did a data request to do a market study for financing programs; in the process of drafting the report. It could be helpful to have a call with their data analysis team; she offered to brief her team on this workplan and set up a call with the UCSB research team.

Research team: How do we classify and understand what some of the programs are (e.g. the various PUB-[location] Partnerships)?

* Chris offered to take a close look at classifications (once available from UCSB), and bring in other IOUs as needed (including SDG&E)
* Lou offered to look at PG&E’s classifications

Research team: Do any of these programs correspond to CEC programs?

* Lou: As a general rule, EE programs are funded by ratepayers through CPUC’s authorization. However, there may be intersections between CPUC and CEC programs in a few areas. First, school programs covered by Prop 39 (including AMBAG) correspond to CEC programs; ditto some of PG&E’s local government programs focused on schools. Second, there may be some intersection with EE Financing programs. Third, CEC’s EPIC program may come into play if there is value stacking through distributed energy resources.
* Chris: Yes, there are ties between CPUC and CEC programs, but the claims data is specific to what the Program Administrators can claim under CPUC rules (so no need to worry about double counting)

**Questions and feedback on sociodemographic indicators**

Lou: Can the analysis look at rural, urban-connected, urban, frontier?

* Ranjit: are you aware of any indicators we can use within the dataset?
* Chris: does Census have a rurality index?
* Lou: Brigette Waldorf (University of Perdue) developed a Relative Rurality Index that may be a useful reference. Recognize that every agency has a different definition of rural, so you have to pick your definition – focus on geographic correlation to services (i.e. is participation higher closer to urban locations)?
* Ranjit: The geographic bounds will vary by programs (i.e. schools may be analyzed by district not zip code). There will be a challenge associating entities with spatial boundaries.
* Laurel and Lou: Suggested sorting data by County boundaries if feasible.

**Questions and feedback on methodology**

Research team: how is agency size defined?

* Laurel: this varies by type of agency (school districts, cities and counties define boundaries differently)
* Lou: offered to look into a public-facing index for budgets

Research team: should there be aggregation of types of public agencies?

* Laurel: Cities/Counties (separate or together). K-12. Higher education (possibly separate community colleges vs. other higher ed). State and federal. Special districts (possibly separate water and wastewater districts). Tribes.
* Chris: SCE has a table in its Business Plan that breaks out segments and sub-segments of public agencies with a similar breakdown that may be useful.

# Next steps and timeline

Ranjit summarized the research next steps as follows

* Classify programs – send a spreadsheet to Chris and Lou for review
* Set up a meeting with Laurel’s team to discuss data and insights gleaned from Laurel’s team’s recent analysis work
* Connect with Chris and Lou to get suggestions on spatial analysis and classification of programs
* Start digging into data outside of CEDARS
* Prepare draft workplan in January (after conversations with Laurel, Lou, and Chris) – which will be a working document for review at the UWG

Scott summarized an additional next step as follows

* Full UWG meeting in early 2021 to review workplan (alongside status reports from the two other sectors)
1. Note this is an informal meeting summary, as the CAEECC process protocol does not require formal meeting summaries for sub-working group meetings. Name attribution is provided in some places to assist in research/analysis followups [↑](#footnote-ref-1)