



# Full CAEECC Quarterly Meeting #44

Hosted by the California Energy Efficiency Coordinating Committee (CAEECC)

Meeting Date: 11/13/2024

*Last updated November 12, 2024*

*Redline changes made during q4 meeting in purple (slides 67 and 71)*

# In-Person Attendees: Pre-order lunch delivery

**now!** Lunch break is approx 60min

A Few **San Francisco** Options

*Order delivery to **649 Golden Gate Ave** (use the door next to the ATM & place inside on the table)*

- 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)

00

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# Welcome & Background

Introductions + Agenda

How to Participate

Membership Updates

00: Introductions

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# Introductions & Agenda

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# Welcome!

## Virtual Crew:

Suhaila Sikand to read out attendee list



## San Francisco Crew:

Michelle Vigen Ralston to read out attendee list



# Welcome!

*View Details in Agenda Document*

A	9:30	Breakfast & Mingle for In-Person Attendees
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00	10:00	<b>Welcome &amp; Background</b>
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01	10:20	<b>Discussion Topics</b>
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lunch .....

02	12:50	<b>Presentation + Action Items</b>
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03	2:00	<b>2025 CAEECC Workplan</b>
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break .....

04	2:45	<b>CAEECC Business Items</b>
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05	3:05	<b>Main Assembly Wrap Up</b>
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06	3:10	<b>Optional Assembly</b>
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B	4:15	<b>Happy Hour</b>
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# Meeting Goals

1

Discuss priority solutions for energy efficiency/ electrification

2

Discuss updates on the Equity and Market Support goal setting process

3

Discuss and decide on Community Engagement Indicators next steps

4

Revisit and decide on Equity Recommendations for the near term

5

Discuss and decide on the 2025 Work Plan

6

Hear relevant presentations on topics during Optional Assembly

00: Introductions

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# How to Participate

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# Dual Venue How To

- A. Emcees:
  - 1. **Virtual** (Suhaila Sikand); **SF** (Michelle Vigen Ralston and Katie Abrams)
  - 2. We'll rotate which venue speaks first
- B. Use chat only for meeting tech issues - not substantive comments
- C. To speak
  - 1. Raise your hand (virtual via Reactions > Raise Hand) (SF via flipping tent card)
  - 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

# We're joining from ONLINE and IN-PERSON



**SF Emcee:**  
Michelle

**Virtual Emcee:**  
Suhaila

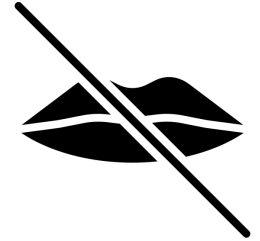


Chat is only for technical issues.  
No substantive comments.



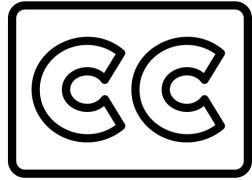
**Virtual:**  
Reactions +  
Raise Hand

**SF:** tilt your tent card

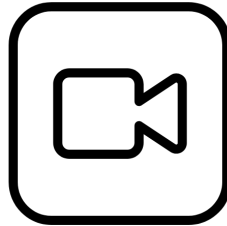


**SF:** No side conversations!

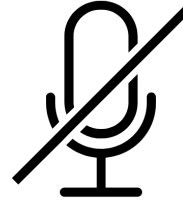
# Virtual Participants



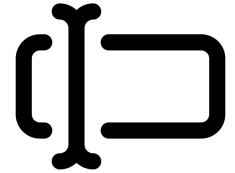
**Closed captioning** is available



Share your **video** if possible



**Mute** yourself when you're not speaking.



**Rename** yourself with your Representation & Pronouns

# How the Public Can Participate

These are the dedicated Public input opportunities, as indicated on the agenda:

- Session 1: Priority Solutions for EE/Electrification
- Session 2: Equity Recommendations for the Near Term
- Session 4: Q1 Full CAEECC Meeting Proposed Topics
- Session 6: Lighting Control Certification; Update on CalMTA; and Avoided Cost Calculator Updates



2min

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.

# Groundrules



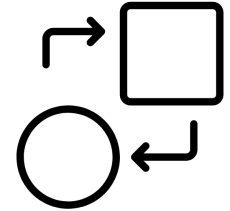
Attend all meetings



Do your homework



Materials are posted 5 days in advance



Propose alternatives



# 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.

00: Introductions

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# Membership Updates

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## 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. **Frontier Energy**
4. San Joaquin Valley Clean Energy Organization
5. The Energy Coalition



## Co-Chairs

1 PA: SoCalREN  
1 Non-PA: NRDC

## Portfolio Administrators (PA) - 13

1. Community Choice Aggregators (2): MCE and RCEA
2. Investor-owned Utilities (4): PG&E, SCE, SDG&E, SoCalGas
3. Regional Energy Networks (7): 3CREN, BayREN, **CCRREN**, I-REN, **RuralREN North**, 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*



# RuralREN North



## NORTHERN CALIFORNIA RURAL REGIONAL ENERGY NETWORK

PATRICIA TERRY, SENIOR PORTFOLIO MANAGER  
NOVEMBER 13, 2024 CAEECC MEETING

# RuralREN North Partners

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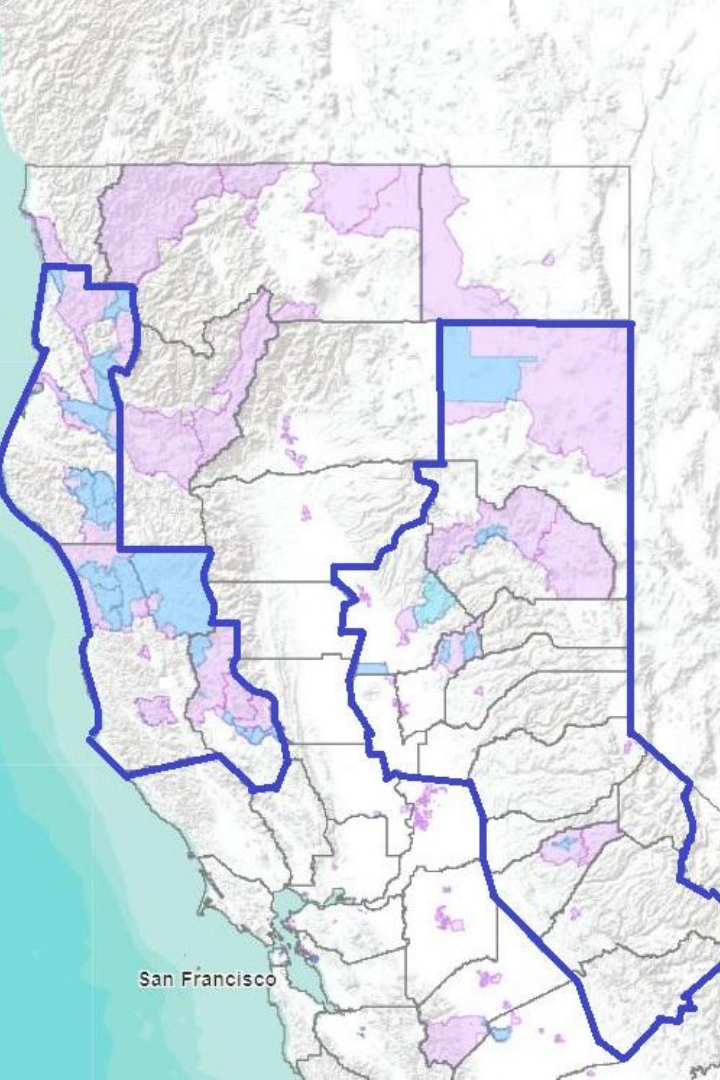
**Redwood Coast Energy Authority** is a joint powers authority and Community Choice Aggregator, which has implemented energy efficiency programs in Humboldt County since 2003.

**Sierra Business Council** is a non-profit organization whose purpose is to pioneer and demonstrate innovative approaches and solutions to increase community vitality, economic prosperity, environmental quality, and social fairness in the Sierra Nevada and experienced energy program implementer for over 15 years.

**Mendocino Council of Governments** is a joint powers authority founded in 1992 whose purpose is to assist local governments in planning to address common needs, cooperating for mutual benefit, and coordinating for sound regional, community, and intercommunity development

**Lake Area Planning Council** is a joint powers authority created to plan for and suggest solutions to common problems of its member agencies.





## RuralREN North Territory

Seventeen rural counties throughout the North Coast and Sierra Nevada regions

RuralREN North region not served by any other REN and has experienced significant challenges in being served by IOU programs

High percentage of low income, disadvantaged, hard-to-reach counties as well as tribal communities.



# RuralREN North Programs

Residential  
Resource

Finance

Non-Residenti  
al Resource

Residential  
Equity

Workforce  
Education &  
Training

Public Equity

Codes &  
Standards

# RuralREN North Strategic Plan

## Outcomes

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**Outcome 1:** Hard to reach and underserved rural customers are provided the same level of services and support of CPUC energy programs as their counterparts in or near metropolitan areas.

**Outcome 2:** Energy consumption, energy cost, and GHG emissions are reduced across the rural regions, contributing to California's decarbonization and energy efficiency goals.

**Outcome 3:** Hard-to-reach and underserved communities have access to incentives and financing tailored to their needs to encourage adoption of energy efficiency and electrification projects.

# Central California Rural REN (CCR-REN)

PRESENTATION TO CAEECC

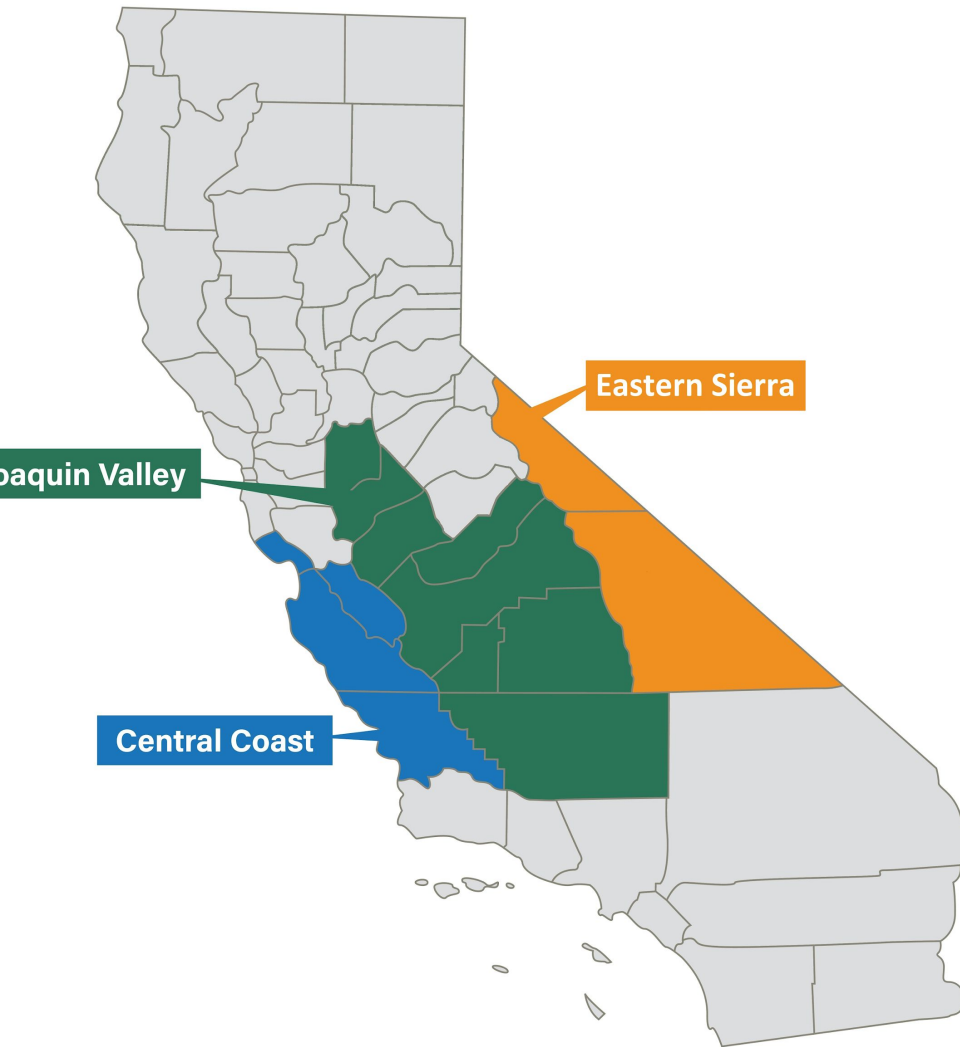
NOVEMBER 13, 2024

TREVOR KEITH, DIRECTOR DEPARTMENT OF PLANNING & BUILDING

COUNTY OF SAN LUIS OBISPO

# Who We Are

23



CCR-REN is comprised of local government and non-profit organizations that provides energy efficiency programs to three regions of California: The Central Coast, the Eastern Sierra, and the San Joaquin Valley. The combined CCR-REN service territory has a population of 5.4 million people, representing approximately 14% of California's total population, with a land area of 50,200 square miles serving 14 counties.

# Organization





# Vision

The Central California Rural Regional Energy Network (CCR-REN) will support an equitable and affordable clean energy transition for underserved communities. By leveraging regional collaboration, trusted local relationships, and promoting pragmatic responses to community needs, the CCR-REN will support communities that have historically not participated in energy efficiency programs.

# Program Portfolio

Programs approved in D.23-06-055; Business Plan will be updated via Advice Letter detailing changes and modifications (goals, forecasts, IPs), per D.24-09-031.

## Approved Portfolio:

- ❖ Workforce Education and Training\*
- ❖ Residential\*
- ❖ Codes & Standards
- ❖ Commercial\*
- ❖ Finance
- ❖ Public

# Get in touch!

Trevor Keith – [tkeith@co.slo.ca.us](mailto:tkeith@co.slo.ca.us)

Jordan Garbayo – [jgarbayo@co.slo.ca.us](mailto:jgarbayo@co.slo.ca.us)



01

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# Discussion Topics

Governor's [Executive Order  
N-5-24](#)

CalTF Presentation

Discussion

## Governor's Executive Order N-5-24

The California Public Utilities Commission is requested to **examine the benefits and costs to electric ratepayers of programs** it oversees and rules and orders it has promulgated pursuant to statutory mandates that may be unduly adding to electric rates, or whose funding might more appropriately come from a source other than ratepayers. The commission is requested to report to me by **January 1, 2025**, the results of its analysis and its **recommendations for modifying or repealing any statute that would reduce costs to electric ratepayers without compromising public health and safety, electric grid reliability**, or the achievement of the State's 2045 clean electricity goal and the State's 2045 economy-wide carbon neutrality goal. (Issued 10/30/2024)

## Governor Executive Order N-5-24 cont.

The California Public Utilities Commission is requested to take **immediate action** under existing authorities to **modify or sunset any underperforming or underutilized programs or orders** whose costs exceed the value and benefits to electric ratepayers. The commission is requested to return any unused funds collected from ratepayers for underperforming programs and utility investments in the form of a bill credit, if it identifies such funds. (Issued 10/30/2024)

01: Discussion Topics

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# CalTF “Priority Solutions” for EE/Electrification

Presentation available on Meeting Webpage labeled: *11-13-2024 CalTF  
Presentation on Priority Solutions for EE and Electrification (posted  
11-6-2024)*

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# CalTF Presentation

See slides posted to CAEECC meeting page:

<https://www.caeec.org/11-13-2024-full-caeccc-mtg>



## Member and Public Discussion:

When you think of the largest threats facing EE in California, what **EE policy changes or levers** could help mitigate or address those challenges?

How could CAEECC be a venue to develop and advance those policy changes?

# Lunch (60 min)

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



## Forgot to pre-order delivery?

Here's a few close-by options you can order ahead for pickup quickly

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

02	12:50	Presentation + Action Items
03	2:00	2025 CAEECC Workplan
break		
04	2:45	CAEECC Business Items
05	3:05	Main Assembly Wrap Up
06	3:15	Optional Assembly
B	4:15	Happy Hour

02

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# **Presentations + Action Items**

Update on Equity and Market  
Support Goal Setting

Community Engagement  
Indicators

Evolving CAEECC WG  
Recommendations for the Near  
Term

02: Presentations + Action Items

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# Update on Equity and Market Support Goal Setting

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# Update on Equity and Market Support Goal Construct Development (OP 25)

CAEECC Meeting (Q4, 2024)  
November 13, 2024



Together, Building  
a Better California

Selected PA (PG&E) to lead a joint PA filing of a Tier 3 AL by March 1, 2025 that defines:

- A. The process for proposing and adopting long-term E+MS goals;
- B. 2-3 goal construct options for each segment (**not actual goals**), where a construct describes how to recognize success; and
- C. what study/studies process may be necessary to quantify goals and an associated budget for the study/studies (from the \$1M in EM&V funds directed in the Decision).
  - The Tier 3 AL is **not** intended to include actual E+MS goals.
  - Actual goals are expected to follow whichever goal constructs and processes that the Commission adopts in its Resolution in response to the Tier 3 AL, and are expected to follow a timeline that aligns goal adoption to the next portfolio cycle beginning in 2028
  - This effort is separate from the OP 25 AKAB work filed on August 1, 2024.

# Progress to-date and upcoming timeline



- **PG&E engaged Laguna Creek, LLC** (Principal: Halley Fitzpatrick) to support development of the T3 AL deliverables, including facilitation of meetings and engagements with all PAs on deliverable development
- Tier 3 ALs require the Commission to issue a Resolution, therefore **public engagement (including CAEECC members) can occur via comment periods** for Tier 3 AL and the Commission Resolution

# Reference Slides



Together, Building  
a Better California



*The portfolio administrators (PAs) shall set aside at least \$1 million from their collective evaluation, measurement, and verification (EM&V) budgets and shall select one PA from among them to hire a vendor or vendors to conduct a study to set goals for the market support and equity segment indicators. By no later than March 1, 2025, the PAs must submit a joint Tier 3 advice letter that:*

- (a) Defines the process for proposing and adopting long-term market support and equity goals;*
- (b) Defines options for two or three goal constructs each for market support and equity segments, where a construct describes how to recognize success by:
  - i. Demonstrating alignment with objectives;*
  - ii. Identifying which metric(s) or indicator(s) should be used for goals;*
  - iii. Whether goals should be set statewide, by territory, or by portfolio administrator;*
  - iv. Anticipated timeline for goal achievement; and*
  - v. Necessary baseline information.**
- (c) Defines what study or studies process is necessary to quantify goals, and propose a budget for each study from the funding set aside from the EM&V budgets, as directed above.*

OP 25 (b) defines options for two or three goal constructs each for market support and equity segments, where a construct describes how to recognize success by:

- i. Demonstrating alignment with objectives
- ii. Identifying which metric(s) or indicator(s) should be used for goals;
- iii. Whether goals should be set statewide, by territory, or by portfolio administrator;
- iv. Anticipated timeline for goal achievement; and
- v. Necessary baseline information.

Page 71, Goals should have the following general characteristics:

- Include a medium to long term (i.e., 12-24 years) timeframe, and be broken into four-year increments;
- Be based on known baselines;
- Be *high priority metric(s), a score or ratio, or single monetary value (or equivalent)*;
- Count total progress toward market support and equity goals from all programs in the portfolio, irrespective of which segment the program is within; and
- Facilitate setting targets for metrics demonstrating incremental progress toward meeting goals.

# Decision Guidance: “Be high priority metric(s), a score or ratio, or single monetary value (or equivalent)”

## Interpretation and examples

High Priority Metric(s)	A Score or Ratio	Single Monetary value (or equivalent)
<p>One or more of the current segment indicators become a metric for goals</p> <p><b>Examples &lt;not suggestions!&gt;</b></p> <ul style="list-style-type: none"> <li>• E1: Count of equity-target participants</li> <li>• MS14: Number of unique participants that complete training</li> </ul>	<p>Data from one or more indicators/metrics are used in a calculation</p> <p><b>Examples &lt;not suggestions!&gt;</b></p> <ul style="list-style-type: none"> <li>• The ESPI EAR Score</li> <li>• E11: Percent of hard-to-reach customer participants in portfolio</li> <li>• MS17: Ratio of ratepayer funds expended to private capital leveraged</li> <li>• CE tests: e.g. PAC or PCT ratio</li> </ul>	<p>A sum of estimated financial impacts (or equivalent)</p> <p><b>Examples &lt;not suggestions!&gt;</b></p> <ul style="list-style-type: none"> <li>• Total System Benefit</li> <li>• Net Benefits</li> <li>• E2: Sum of equity target participants’ expected first-year bill savings</li> <li>• Sum of loan funds distributed</li> </ul>

Table note: E1 means Equity Indicator #1, MS14 measure Market Support Indicator #14, etc. The full list of adopted indicators is available in D.23-06-055 (p.60-63) with 13 Equity (E) and 25 Market Support (MS).

# Questions?



Together, Building  
a Better California

# Member Questions & Input

*In-person: raise your hand*

*Virtual: raise your hand in the virtual room*

02: Presentations + Action Items

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# Community Engagement Indicators

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### 2021 - Report

Equity Metrics WG non-consensus of whether Community Engagement metrics should be indicators or principles.



### 2023 (Jun) - Decision

CPUC Decision ([D.23-06-055](#)) names Community Engagement metrics as indicators and **leaves opportunities for CAEECC to continue discussion on how to develop the metrics.**



### 2025 (Sep) - Deadline

D.23-06-055 requires PAs to develop the metrics for Community Engagement Indicators, but does not require PAs to file jointly or work together.

**PAs do not plan to work together (expect 12 different sets of indicators).**

## **In the body of the Decision....**

*(summarized)*

We [CPUC] will allow more time for the EMWG to discuss and come to consensus. (Page 68)

Expects:

- Quantitative and qualitative
- Track activity and outcome-based results
- Track the quality and relevance of community engagements, and not only quantity.

Offers the additional guidance:

- Designed by engaging ESJ communities and CBOs directly
- Designed to gauge the quantity and quality of engagement with the ESJ communities and CBOs, as well as outreach activities

Finally, [indicators] should 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 engaged



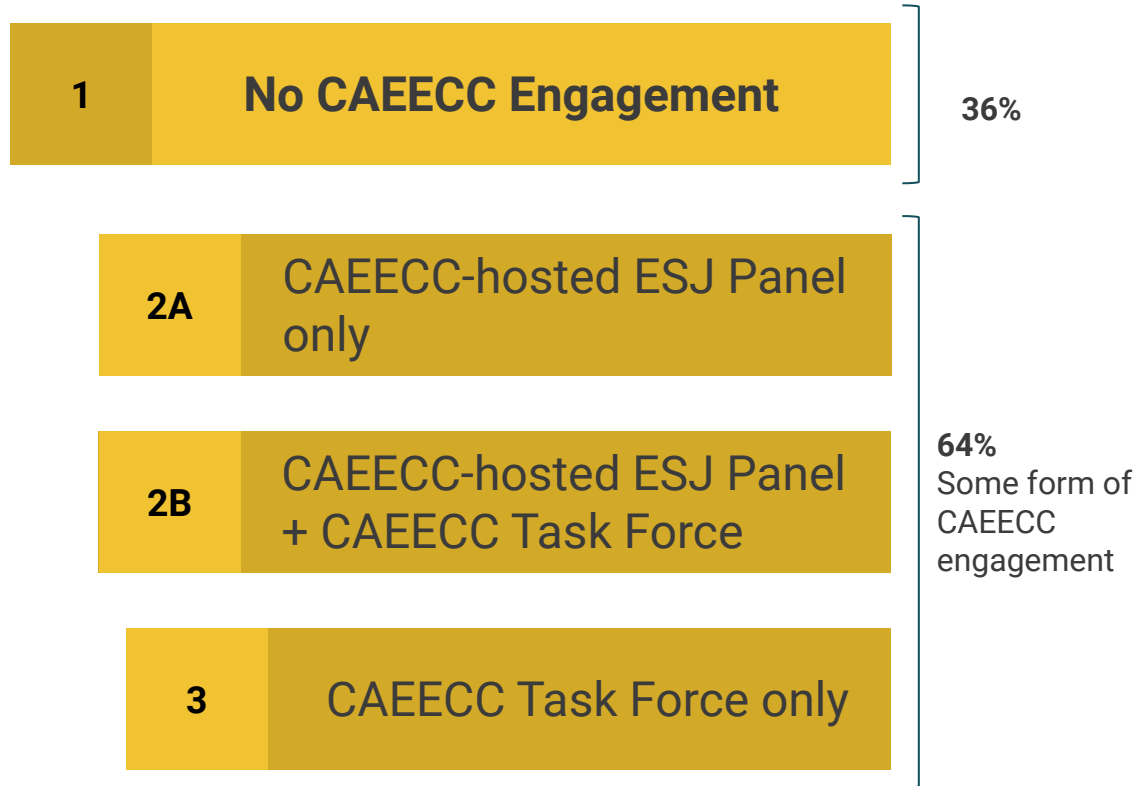
## **Body (continued)**

With this guidance in mind, and once recommendations are developed through the CAEECC metrics working group, we will require that the PAs include agreed-upon community engagement indicators in their mid-cycle advice letters due September 1, 2025. (Page 68)

## **Ordering Paragraph 24**

24. Portfolio administrators shall develop indicators to measure community engagement, and should include them in their Mid-Cycle advice letters in 2025. After the advice letters are addressed by the Commission, the portfolio administrators shall report on the adopted community engagement indicators in their annual reports. (Page 126)

Member survey results on what CAEECC engagement, if any, to take





Because the survey results were inconclusive, the Facilitation Team proposes & seeks approval to **host an ESJ Panel to share the Panel's experiences with equity segment program implementation and outreach at a CAEECC Meeting.**

*A stipend/honorarium is being explored as a new outreach and education budget item for 2025.*

02: Presentations + Action Items

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# Equity Recommendations for the Near Term

Based on the recommendations of the Composition, Diversity, Equity, and Inclusion (CDEI) WG and the Evolving CAEECC Working Group (ECWG)

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The Facilitation Team reviewed all the Evolving CAEECC Working Group near-term recommendations and combined them with NRDC's 5-15-24 evaluation (vetted by CAEECC Members and ED) of what measures are within CAEECC's purview.

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Today, based on CAEECC Member input, we will **discuss next steps for a few recommendations** (see next slide).

Overall, there was **broad interest in most** of the selected near-term recommendations for discussion today.

# Equity Recommendation (Rec) Implementation Proposal

Rec #	1	2	3	4	5
<b>Rec Shorthand</b> (full text on slide 55)	<b>Invite CPUC ESJ staff, DACAG, and LIOB as ex-officio members</b>	<b>CAEECC &amp; non-CAEECC Member dialogue</b>	<b>Update Groundrules for biennial diversification</b>	<b>PA Equity-focused practices &amp; standards</b>	<b>Create an Equity Advisory Committee</b>
<b>Lead to Implement</b>	Facilitation Team (FT) to send invites to these bodies	FT to adopt in future meeting structures	FT to mockup a proposal	FT to coordinate at select CAEECC Quarterly Meetings	FT to create a preliminary draft
<b>Other Interaction</b>			CAEECC Members review draft	Select PAs to present	CAEECC Members + Public share feedback
<b>Proposed Timeline</b>	Invites sent by Dec 31, 2025.	Implemented for Quarterly Meetings in 2025 & beyond	Draft: Q2 2025	Implement for Quarterly Meetings in 2025 & beyond	Initial CAEECC Feedback: Jan-Feb 2025 Draft: Q1 2025

# Equity Recommendation Text

1

Invite CPUC ESJ staff, [DACAG](#), and [LIOB](#) as **ex-officio members**

2

Include in the quarterly meeting structure more opportunities for CAEECC **member dialogue with non-CAEECC members**, such as inviting more public comment, inviting the public to make announcements, and other changes to support more meaningful public engagement.

3

Update groundrules to **evaluate and diversify (biennially) CAEECC's composition** to include: PAs, Implementers, Equity-centered stakeholders representing Communities of Concern, Public Sector & Nonprofit Organizations

4

Include at upcoming meetings presentations and **sharing from PAs on their equity-focused programming practices and standards.**

5

Create a CAEECC Equity Advisory Committee (EAC) to provide guidance and recommendations on EE Portfolio policies, programs, and implementation.



**Discussion Questions Recommendations 1-4 only (CAEECC Members first then Public):**

1. Any concerns with these recommendations?
2. If so, what would you suggest changing?

Rec #	1	2	3	4
<b>Rec Shorthand</b>	Invite CPUC ESJ staff, DACAG, and LIOB as ex-officio members	CAEECC & non-CAEECC Member dialogue	Update Groundrules for biennial diversification	PA Equity-focused practices & standards
<b>Lead to Implement</b>	Facilitation Team (FT) to send invites to these bodies	FT to adopt in future meeting structures	FT to mockup a proposal	FT to incorporate throughout CAEECC Quarterly Meetings
<b>Other Interaction</b>			CAEECC Members review draft	Select PAs to present
<b>Proposed Timeline</b>	Invites sent by Dec 31, 2025.	Implemented for Quarterly Meetings in 2025 & beyond	Draft: Q2 2025	Implemented for Quarterly Meetings in 2025 & beyond



# Let's discuss Recommendation 5 in more depth:

Recommendation 5 - Create a CAEECC Equity Advisory Committee (EAC) to provide guidance and recommendations on EE Portfolio policies, programs, and implementation.

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## Where did this recommendation come from?

**The Evolving CAEECC Working Group (ECWG) reflections.**

Some Members recommended an Equity Advisory Committee (and later on a long-term Board) to provide program best practices, initiate outreach, and stem collaborative processes.



# Equity Advisory Committee

## Straw Purpose:

advise CAEECC on its procedures, discussion topics, and structure.

## Straw Objectives:

- provide guidance on ESJ and JEDI principles for CAEECC
- collaborate with PAs to develop equity best practices
- collaborate with the Facilitation Team for equity-centered meeting facilitation
- serve as a liaison to bring more collaboration between DACAG, LIOB, and similar bodies

*Proposal above elaborates upon ECWG & CDEI recommendations & similar relevant bodies like the CalMTA Equity Sounding Board*

## Proposed Implementation Approach:


1 - The Facilitation Team will send a draft proposal and survey to CAEECC Members in January, gather feedback and gauge preliminary level of support.

2 - CAEECC Members will discuss the revised proposal & discuss any alternatives at the Q1 2025 Meeting.

3 - CAEECC members seek consensus at Q1 or table for Q2 2025

Rec #	5
<b>Rec Shorthand</b> (full text on slide 56)	<b>Create an Equity Advisory Committee</b>
<b>Lead to Implement</b>	FT to create a preliminary draft
<b>Other Interaction</b>	CAEECC Members + Public share feedback
<b>Proposed Timeline</b>	Initial CAEECC Feedback: Jan-Feb 2025 Draft: Q1 2025

## Discussion Questions (CAEECC Members first then Public):

1. Which of the Equity Advisory Committee's (EAC) objectives are a **priority** to current CAEECC goals and initiatives?
2. How might CAEECC put processes in place to ensure the EAC feels **heard and valued** as an advisory body?
3. Does CAEECC need to **revisit** its own purpose & priorities to start an EAC? Or should/could the EAC help define this?
-  4. Any concerns with the proposed **implementation** approach?

Rec #	5
<b>Objectives Shorthand</b>	guidance on ESJ and JEDI principles; develop equity best practices; equity-centered meeting facilitation; liaison
<b>Lead to Implement</b>	FT to create a preliminary draft
<b>Other Interaction</b>	CAEECC Members + Public share feedback
<b>Proposed Timeline</b>	Initial CAEECC Feedback: Jan-Feb 2025 Draft: Q1 2025

03

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# 2025 CAEECC Workplan

Discuss and decide 2025  
Workplan

# 2025 Proposed High-Level Work Plan as Presented @ Q3 2024

## 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: ??**



# Ranked CAEECC Member Survey Results: 2025 Substantive Priorities

tie	1A	<b>Decarbonization / Electrification</b>	e.g., technical look at challenges and success; policy levers for greater adoption vs impact on rates
	1B	<b>Affordability</b>	e.g., rates & EE, financing options, leveraging EE funding with non-ratepayer funds, improving EE access
	3	<b>Equity Programs</b>	e.g., challenges, lessons learned, measurement issues, greater alignment with CPUC ESJ Action Plan, etc.
	4	<b>Long term strategic planning issues</b>	topics to inform future filings
	5	<b>Performance / Metrics</b>	e.g., ensuring meaningful and realistic metrics
tie	6A	<b>Cost-Effectiveness</b>	e.g., is current CE policy aligned with policy goals and approaches?
	6B	<b>Integration of EE w/ Other Resources</b>	e.g., Integrated Demand Side Management improvement, Distributed Energy Resources, Demand Response integration w/ EE, storage options, etc.
	8	<b>Competitive Bidding</b>	e.g., solicitation challenges, process improvements, etc.

# Other Substantive Topic Ideas

## **Proposed by Members in recent survey:**

- Customer data issues and data sharing issues
- Governor's Executive Order: cost-effectiveness, affordability and performance
- Fuel switching from unregulated fuels
- Outdated compliance requirements
- Workforce Standard compliance

## **Leadership Team input:**

- Groundrules/Decision Making Changes ie voting thresholds (process topic not substantive)
- Coordination with CalTF
- Outreach and education
- Training on community engagement and procedural justice



<b>Dates</b> (subject to change)	<b>Content</b> (subject to change based on Governor's Executive Order N-5-24, direction from Energy Division, and by vote of CAEECC Members)
2/11, 5/8, 8/13, 12/9	<b>Quarterly Full CAEECC Meetings</b> Prep for 2026 filing; Working Group updates; Consideration of Equity Recommendations; CAEECC approved ad hoc topics; <a href="#">Prep for 2025 mid-Cycle Advice and 2026 Filing</a>
6/24, 11/6	<b>Biannual Performance Report Review Sessions</b> Focused discussion on PA report filings for 2024 Annual and 2025 Semi-Annual performance
TBD	<b>Workshops / Working Groups / Task Forces</b> Focused on topics on slides 65-66 (i.e., affordability, cost-effectiveness, decarbonization, etc)
Q1 2025	<b>DEI Training Phase 3 Session 3A &amp; 3B</b> Trainings on procedural justice and community engagement practices
TBD	<b>Outreach + Education</b> ESJ Panel to share experiences with equity segment program implementation and outreach

# Proposed 2025 Work Plan

04

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# **CAEECC Business Items**

**Co-chair Nominations**

**Facilitation Solicitation**

**Q1 mtg topics**



# The following CAEECC Members have been nominated for Co-Chair in 2025

● Non-PA seat ● PA seat



**Laurel Rothschild**  
The Energy Coalition



**Stacie Risley**  
SDGE

**The CAEECC Facilitation Team  
solicitation is expected soon**

# Discussion on Proposed Q1 2025 Full CAEECC Meeting Topics

## CAEECC Members first, then Members of the Public

### 1. Discussion topics

- a. 2025 Mid Cycle + 2026 Business Plan prep (including a template, and any related CAEECC work) + SDG&E Off-Cycle briefing
- b. Discuss implications of Governor's Executive Order N-5-2024, and any resulting workplan changes

### ~~2. Presentations (DELETE)~~

- ~~a. PA Equity focused practices & standards (for a select few PAs)~~

### 3. Business Items - TBD (follow up on Near Term Equity items/survey)

- a. Review Facilitation Team proposal for an Equity Advisory Committee (based on ECWG, CalMTA, CDEI and other relevant sources)

### 4. Optional Assembly Topics

- a. Non Energy Benefits
- b. DACAG equity framework

### 5. Other topics?

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# Break (10 min)

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



04	2:45	<b>CAEECC Business Items</b>
05	3:05	<b>Main Assembly Wrap Up</b>
06	3:15	<b>Optional Assembly</b>
B	4:15	<b>Happy Hour</b>



05

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# Main Assembly Wrap Up

Evaluations

Reminders

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



**~January 2025**

CAEECC Member-only  
Phase 3 DEI Training  
Plan

**Q1**

**February 11, 2025**

Full CAEECC Quarterly  
Meeting #45

**Q2**

**May 8, 2025**

Full CAEECC Quarterly  
Meeting #46



**June 24, 2025**

*Annual* 2024 Portfolio  
Performance Report  
Review

**Q3**

**August 13, 2025**

Full CAEECC Quarterly  
Meeting #47



**November 6, 2025**

*Semi Annual* 2025  
Portfolio Performance  
Report Review

**Q4**

**December 9, 2025**

Full CAEECC Quarterly  
Meeting #48

# 2025 Meeting Dates

# 9/17/24 Meeting Evaluation Scores

Evaluation Question Summaries	Avg.
Objectives of the meeting were accomplished.	5.3
Presentations and background documents were clear and helpful.	5.4
This meeting was an inclusive and trusting environment.	5.1
The facilitators were effective in running the meeting.	5.2
Overall, the meeting format was smooth and effective.	5.1
Overall, this Full CAEECC meeting was successful.	5.2

*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 17 members and 1 stakeholder*

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

# This Meeting's Evaluation

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 Nov 20, 2024 COB

# Meeting Goals

1

Discuss priority solutions for energy efficiency/ electrification

2

Discuss updates on the Equity and Market Support goal setting process

3

Discuss and decide on Community Engagement Indicators next steps

4

Revisit and decide on Equity Recommendations for the near term

5

Discuss and decide on the 2025 Work Plan

6

Hear relevant presentations on topics during Optional Assembly

07

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# Lighting Controls Certification

Presentation by Angela McDonald, PG&E

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# PG&E Presentation

See slides posted to CAEECC meeting page:

<https://www.caeec.org/11-13-2024-full-caeccc-mtg>



07

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# CalMTA Update

Presentation by Nils Strindberg, CalMTA

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Nov. 13, 2024

# Overview of CalMTA's Application

CalMTA is a program of the  
California Public Utilities  
Commission and is administered  
by Resource Innovations



# CalMTA background



- SB 350 directed the CPUC to review policies to facilitate the doubling of EE by 2030, resulting in a **Market Transformation (MT) Framework** (D.19-12-021)
- Selected an **independent MT administrator**: Resource Innovations, supported by other expert firms
- CalMTA develops & manages MT initiatives (MTIs) with guidance from a **nine-member MT Advisory Board**
- Authorized budget:
  - <\$20 million annual start-up budget to develop the initial MTI Plans and request approval in an application
  - \$250 million for five years after application approval

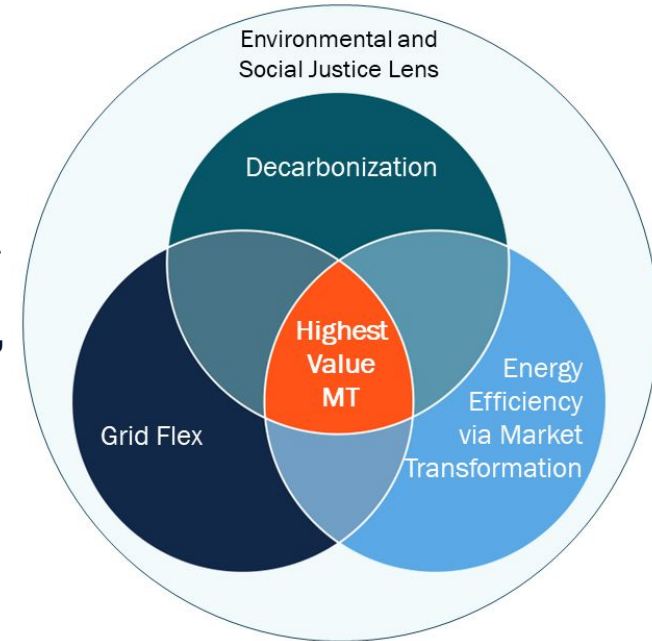
CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations

# Goals and objectives



CalMTA is directed to:

- Drive **incremental savings**
- **Manage MTIs cost-effectively** and be reasonable for ratepayers to fund
  - *Note: no C/E threshold or savings goals imposed for MTIs*
- Support the Commission's **equity, workforce development, EE, and GHG reduction goals**
- Follow **CPUC-adopted process for MTI development and deployment**
- **Coordinate extensively with the EE PAs** before proposing MTIs



# MT: A key solution for CA's climate goals



**Long-term investment creates structural changes in the market that deliver large, lasting, and cost-effective benefits**



Accelerate adoption of energy-saving technologies and practices



Catalyze market growth that can eventually be self-sustaining



Complement the many EE programs already active in the state by filling identified gaps



Supports statewide equity goals through strategies that make EE more accessible

# Two MTI Plans: Room Heat Pumps and Induction Cooking

**Market characterization  
and research**

**Complete program logic  
and MT theory**

**Updated market  
adoption curves, TSB,  
and C/E estimates**





# Room Heat Pump MTI



- Target market: existing multifamily and small-scale single-family residences (including renters)
- Units can be installed without a contractor, lowering the cost of adoption
- 120V products eliminate panel capacity concerns
- Support for technology enhancements (air filtration capabilities, use of natural refrigerants, etc.)
- CalMTA market research identified significant barriers and areas for product enhancement



# Induction Cooking MTI



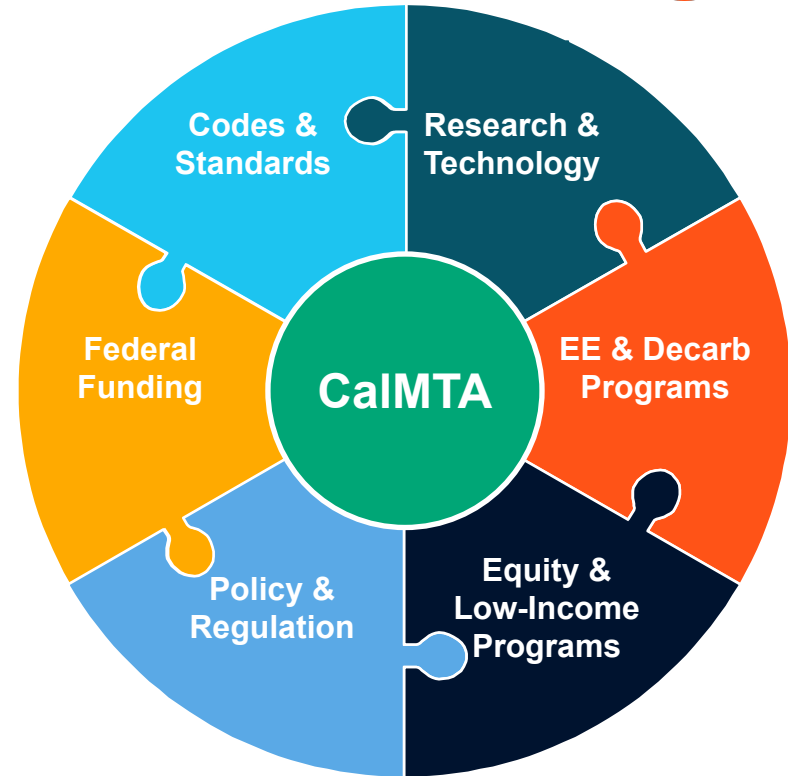
- Target market: existing single-family and multifamily residences, residential new construction
- Induction provides a quality cooking experience that is needed to facilitate California's transition to full decarbonization
- 120V induction products with battery storage have the potential to fill a significant technology gap
- Market research identified critical barriers on both the supply and demand side



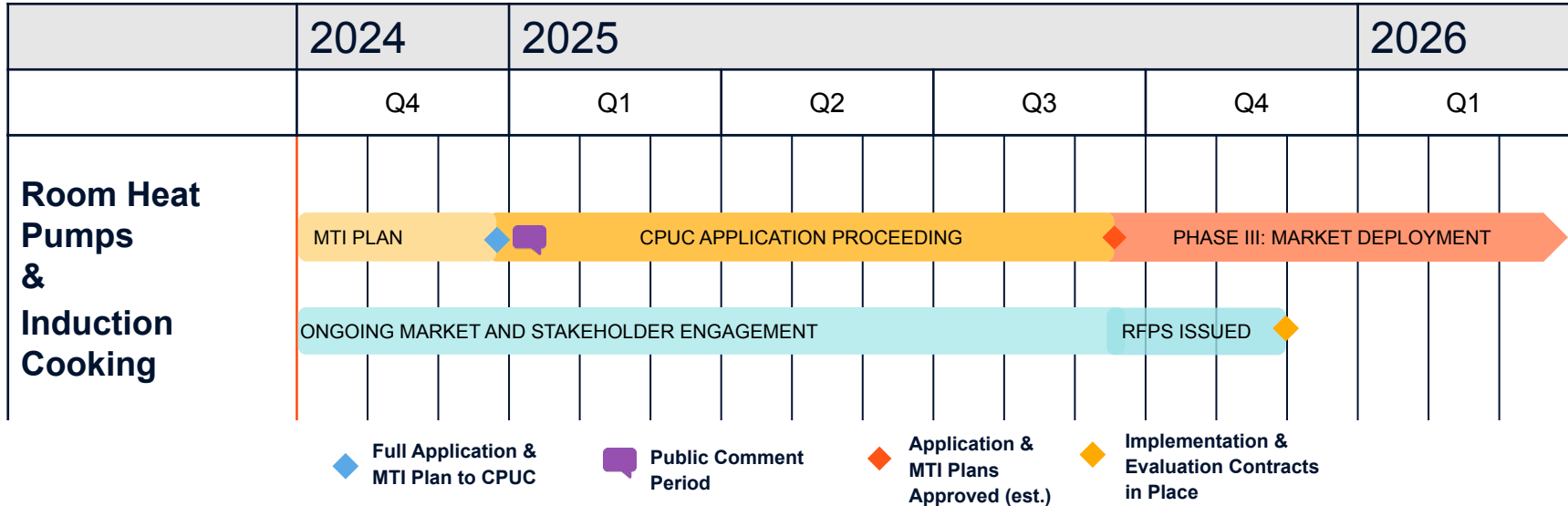
# Aligning with other market activities



- Collaborate with existing EE efforts
  - Leverage complementary work
  - Avoid duplication and double-counting of benefits
  - Achieve results at faster scale



# Market deployment timeline





# Transformative Energy Solutions for the public good

Market transformation is a proven approach that works to remove market barriers so that energy efficient, equitable, and climate-friendly approaches become the new standard practice for all Californians.

Sign up for updates at: [calmta.org/contact/](https://calmta.org/contact/)

Questions? Email [info@calmta.org](mailto:info@calmta.org)

Follow us at [linkedin.com/showcase/calmta/](https://www.linkedin.com/showcase/calmta/)

CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations

07

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# Avoided Cost Calculator Updates

Presentation by Chris Westling

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# 2024 Avoided Cost Calculator Update Briefing

*California Energy Efficiency Coordinating Committee (CAEECC)*

Chris Westling, Energy Division

November 13, 2024



**California Public  
Utilities Commission**

# Overview

- Discuss the changes from the 2022 to 2024 ACC
  - Slides provided by E3
- Discuss the Societal Cost Test (SCT) and its implementation
- To access the tool, visit the [DER Cost-Effectiveness Webpage](#)
  - 2024 ACC Update Decision: [D.24-08-007](#)
  - SCT Decision: [D.24-07-015](#)

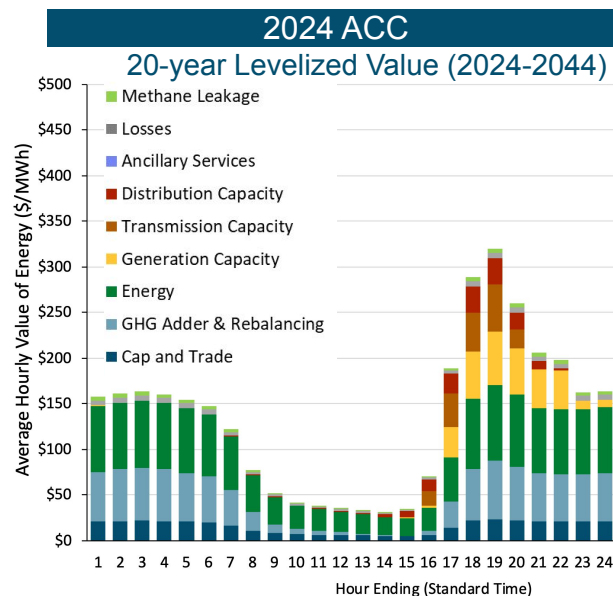
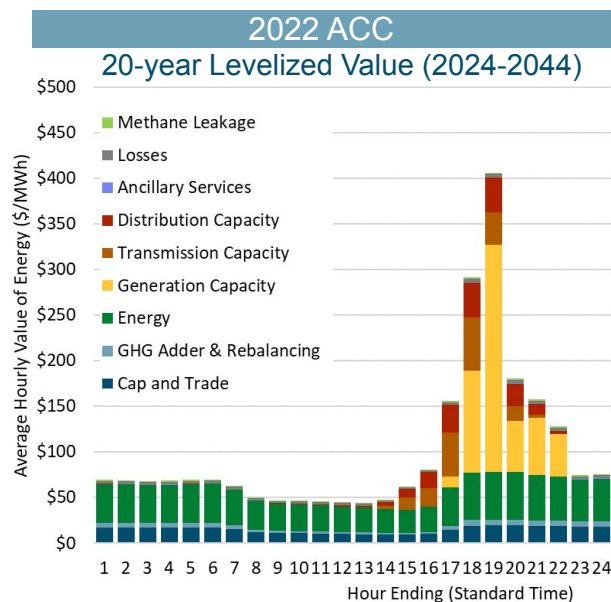
# 2024 ACC Update Overview

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- **Key methodology changes for the 2024 ACC Electric Model were reviewed in detail in the 2024 ACC Staff Proposal and in the Proposed Decision Adopting Changes to the Avoided Cost Calculator mailed June 26, 2024 (R.22-11-013). These updates include:**
  - Change in baseline portfolio of resources from No New DER portfolio to the IRP's latest adopted system plan (this year, the **2023 Preferred System Plan (PSP)**)
  - Calculation of Generation Capacity and GHG avoided cost using an **integrated calculation** instead of calculating values independently
  - **Updated storage dispatch algorithm** in SERVM for calculating hourly allocation factors for Generation Capacity to better capture the flexibility of energy storage. This provides a more comprehensive picture of critical periods when additional generation could improve reliability
  - Additional calibration and benchmarking of SERVM production cost modelling results
  - Moving the Refrigerant Avoided Cost Calculator to the DEER proceeding
- **Transmission and Distribution avoided costs were updated based on the latest utility filings and demand forecasts while maintaining the same transmission and 2019 T&D White Paper methodology**
- **The 2024 ACC also includes a **Societal Cost Test (SCT)** option in response to the Decision Adopting the Societal Cost Test mailed May 24, 2024 (R.22-11-013)**
  - The standard ACC is now referred to as the Total Resource Cost (TRC) version

# Energy, generation capacity and GHG avoided costs have changed the most between 2022 and 2024 ACC

- Energy value is more time-dependent (lower in midday and higher overnight and early morning)
- Higher GHG value that concentrates in evenings and early mornings
- Lower annual Generation Capacity value which is also spread-out over more hours
- Slightly lower Distribution value due to significantly lower near-term value but unchanged long-term value



Lower Capacity Value

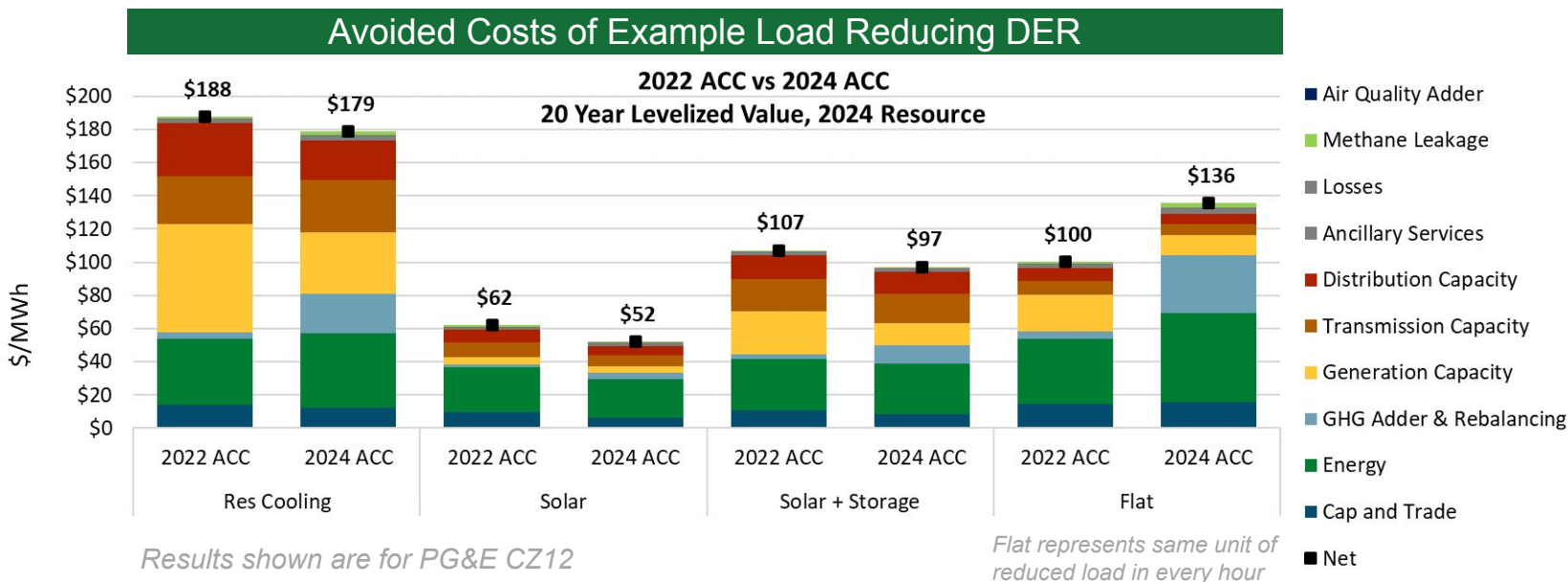
Energy Value More Time-dependent

Higher GHG Value



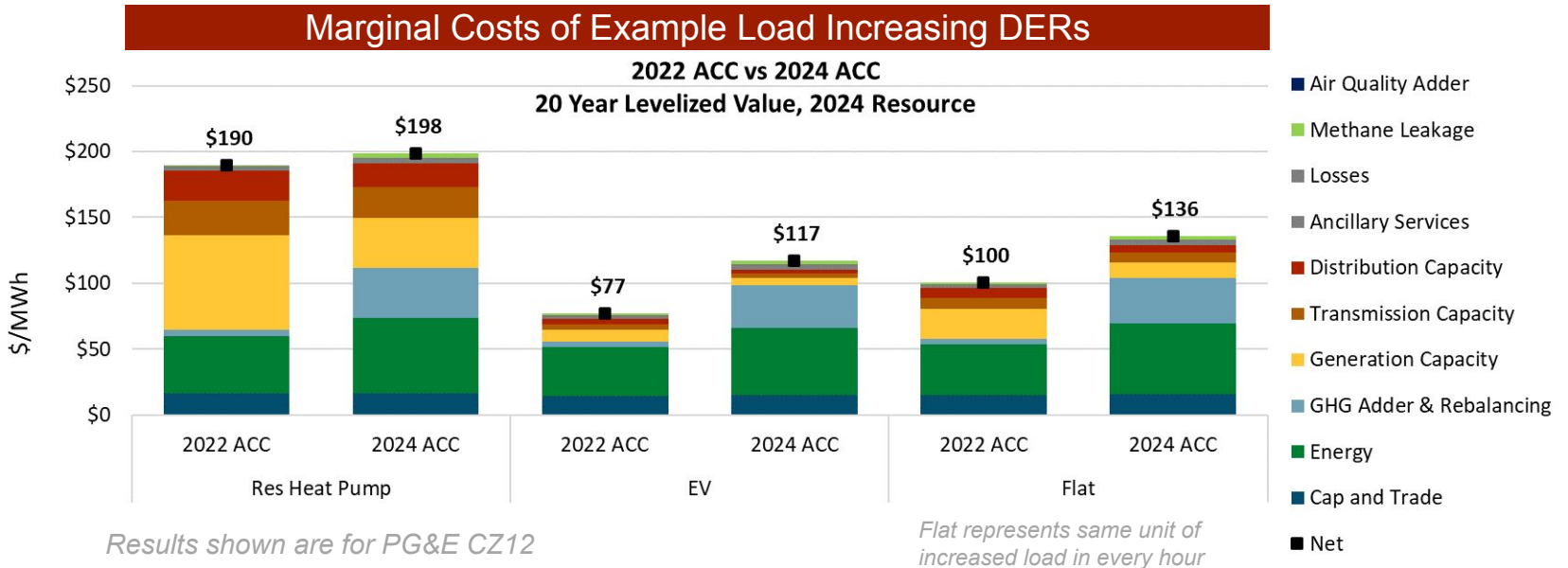
# While flat avoided costs have increased, midday avoided costs have decreased compared to 2022 for load reducing DERs

- Flat avoided costs have increased but avoided costs during middle of the day have decreased
- Across end uses, GHG value increases while Generation Capacity value decreases compared to 2022 ACC



# Costs of electrification end uses have increased relative to 2022 ACC

- Residential heating electrification has slightly higher costs due to high Energy and GHG Adder values in winter months - mitigated by low costs during the middle of the day for cooling load
- EVs have higher costs due to higher Energy and GHG Adder value in overnight and early morning hours

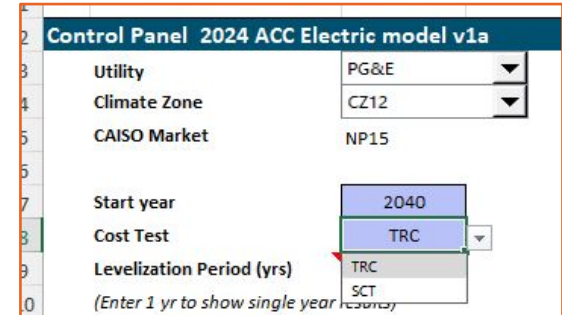


# Societal Cost Test

- The 2024 ACC includes a Societal Cost Test (SCT) option for both Electric and Gas models
- In the ACC itself, you can now toggle between the base ACC (referred to as Total Resource Cost Test (TRC) option) and the SCT

	ACC TRC	ACC SCT
<b>GHG Avoided Costs</b>	Cap-and-trade allowance prices	Social cost of carbon (base and high)
<b>Discount Rate</b>	7.3% (IOU WACC)	3%
<b>Air Quality Adder</b>	NO	YES
<b>Methane Leakage Rate</b>	0.6%	2.3%

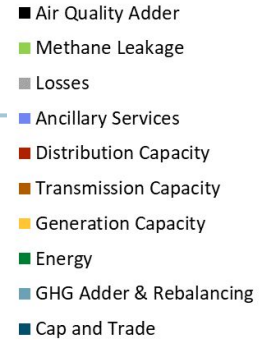
*SCT included as a toggle in 2024 ACC*



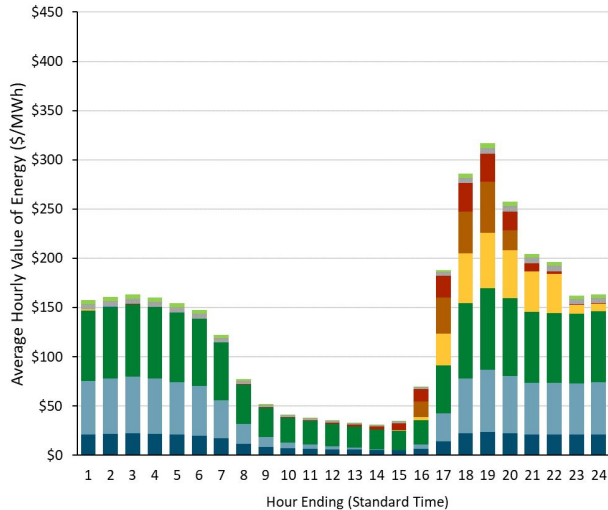
# Hourly Average Avoided Costs – TRC vs. SCT

## 20-year Levelized Value for 2024 Resource

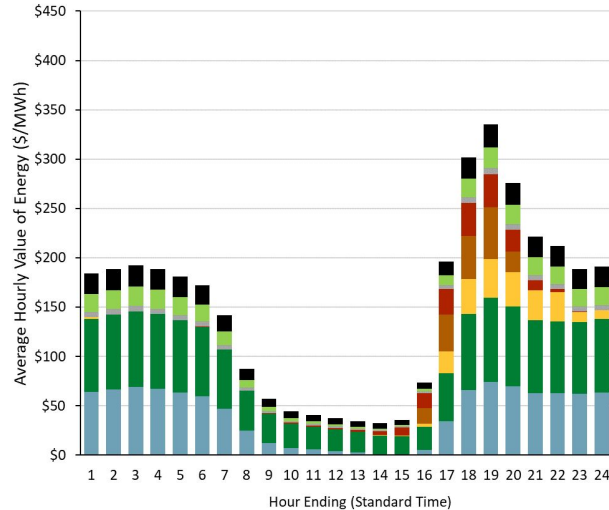
- **SCT has higher GHG Adder and lower Generation Capacity value**
- **Increased Methane Leakage and Air Quality Adders have most significant impact on overall avoided costs**



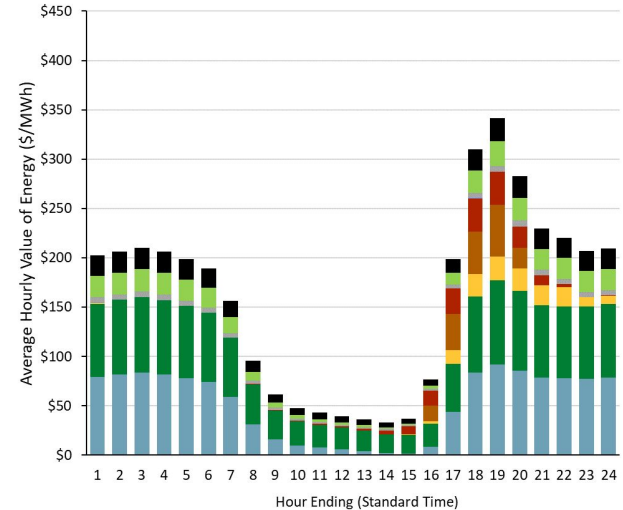
2024 ACC - TRC



2024 ACC – SCT with SCC Base



2024 ACC – SCT with SCC High





# Appendix

PA Solicitation Updates

Appendix B

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# Program Administrator Solicitation Updates

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# 2024 Solicitation Schedule - SoCalGas

IOU	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
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, in negotiation phase.

The IDEEA 365 is a recurring competitive procurement process. SoCalGas RFO release date for the 3<sup>rd</sup> round of IDEEA solicitations, scheduled for 11/15.

**LEGEND:**







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





# 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																												
Statewide	C&S Advocacy - Wave 1 Negotiations																												
Statewide	C&S Advocacy – Wave 2 Negotiations																												
Local	C&S Code Readiness																												
Local	2024 Summer Reliability																												
Local Res & Comm	Zonal Electrification – Pilot 1																												
Local Res & Comm	Zonal Electrification – Pilot 2																												
Local Residential	Res. Electrification Equity																												
Local Commercial	Comm. Energy Mgmt. (SEM Expansion)																												
Local Residential	Res. Whole Home Load Management																												
Local Residential	Res. Market Support (Single Point-of-Contact)																												

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

- Recently Launched Programs:**
- 2024 Summer Reliability
  - Zonal Electrification – Contracts #1&2
  - Residential Electrification Equity
- Advice Letters Under Review:**
- None

- Contract Execution:**
- Residential Whole Home Load Management
  - Commercial Energy Management (SEM Expansion)
- Terminated Solicitations:**
- Residential Market Support (SPOC)

- Kicking-off Negotiations:**
- None
- In-flight Solicitations:**
- None
- Upcoming in 2025:**
- SW WE&T Career & Workforce Readiness ;
  - SW HVAC ;
- Solicitation Contact:** [PMOESolicitations@pge.com](mailto:PMOESolicitations@pge.com)

# 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										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																								

Today

**LEGEND:**

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

**In-flight Negotiations:**

- Industrial
- Market Access Program
- Comprehensive Commercial
- Residential

**AL & IP Development:**

- Residential – Multifamily

**Upcoming Solicitations:**

- Plug Load Appliances