

## RTR Appendix

Southern California Edison, Pacific Gas and Electric, Southern California Gas, and San Diego Gas and Electric (“Joint Utilities” or “Joint IOUs”) developed Responses to Recommendations (RTR) contained in the evaluation studies of the 2013-2015 Energy Efficiency Program Cycle and beyond. This Appendix contains the Responses to Recommendations in the report:

***RTR for the Final Report: PY 2016-2018 Appliance Standards Evaluation Vol. 1***  
**(Opinion Dynamics, Calmac ID #CPU0235.01)**

The RTR reports demonstrate the Joint Utilities’ plans and activities to incorporate EM&V evaluation recommendations into programs to improve performance and operations, where applicable. The Joint IOUs’ approach is consistent with the CPUC Decision (D.) 07-09-043<sup>1</sup> and the Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan<sup>2</sup> for 2013 and beyond.

Individual RTR reports consist of a spreadsheet for each evaluation study. Recommendations were copied verbatim from each evaluation’s “Recommendations” section.<sup>3</sup> In cases where reports do not contain a section for recommendations, the Joint IOUs attempted to identify recommendations contained within the evaluation. Responses to the recommendations were made on a statewide basis when possible, and when that was not appropriate (e.g., due to utility-specific recommendations), the Joint IOUs responded individually and clearly indicated the authorship of the response.

The Joint IOUs are proud of this opportunity to publicly demonstrate how programs are taking advantage of evaluation recommendations, while providing transparency to stakeholders on the “positive feedback loop” between program design, implementation, and evaluation. This feedback loop can also provide guidance to the evaluation community on the types and structure of recommendations that are most relevant and helpful to program managers. The Joint IOUs believe this feedback will help improve both programs and future evaluation reports.

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<sup>1</sup> Attachment 7, page 4, “Within 60 days of public release, program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings as they relate to potential changes to the programs. Energy Division can choose to extend the 60 day limit if the administrator presents a compelling case that more time is needed and the delay will not cause any problems in the implementation schedule, and may shorten the time on a case-by-case basis if necessary to avoid delays in the schedule.”

<sup>2</sup> Page 336, “Within 60 days of public release of a final report, the program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings. The IOU responses will be posted on the public document website.” The Plan is available at <http://www.energydataweb.com/cpuc>.

<sup>3</sup> Recommendations may have also been made to the CPUC, the CEC, and evaluators. Responses to these recommendations will be made by Energy Division at a later time and posted separately.

**Response to Recommendations (RTR) in Impact, Process, and Market Assessment Studies**

**Study Title:** Final Report: PY 2016-2018 Appliance Standards Evaluation Vol. 1  
**Program:** C&S  
**Author:** Opinion Dynamics  
**Calmac ID:** CPU0235.01  
**Link to Report:** [http://calmac.org/publications/Del13B\\_CS\\_Report\\_Appl-Stds\\_FINAL\\_2021-06-30.pdf](http://calmac.org/publications/Del13B_CS_Report_Appl-Stds_FINAL_2021-06-30.pdf)

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	PG&E (if applicable)		SCE (if applicable)		SCG (if applicable)		SDG&E (if applicable)	
					Disposition	Disposition Notes	Disposition	Disposition Notes	Disposition	Disposition Notes	Disposition	Disposition Notes
				If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.
1	8-9	The CCSRs support the savings claims (similar to workpapers). This documentation is expensive to produce and historically, the type of information to include is ambiguous. The evaluators identified several types of information or practices to include as the most informative for evaluation purposes.	Items to include: 1. Rulemaking history and timelines. 2. List of key stakeholders and contact information. 3. Activities sorted by attribution factors. 4. Summary tables of ISSM inputs. 5. Standardized spreadsheet layouts (as much as practical). 6. Collection of related documents.	PA	Accepted	The noted items shall be included in all subsequent CCSRs.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.
2	8-9	The CCSRs support the savings claims (similar to workpapers). This documentation is expensive to produce and historically, the type of information to include is ambiguous. The evaluators identified several types of information or practices to exclude since they provide little insight for evaluation purposes.	Items to exclude: 1. Logic models and theory of change. These can be included in Business plans or other documents, as necessary. 2. Communication logs.	PA	Accepted	The noted items shall be excluded from all subsequent CCSRs.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.
3	8-9	There are two areas where the CCSR could improve by including better information.	1. The connection from CCSR assumptions to claimed savings should be clear. 2. Supporting files should be indexed and described or have standard-	PA	Accepted	The CCSR Impact Analysis Excel template associated with each new code/standard shall include a "CPUC_inputs" tab that links the CCSR assumptions to required CEDARS data fields. Any changes to	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.

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					Disposition	Disposition Notes	Disposition	Disposition Notes	Disposition	Disposition Notes	Disposition	Disposition Notes
			ized naming conventions that provide topic information.				CEDARS assumptions relative to CCSR data shall be noted on the "CPUC_inputs" tab.					
4	8-9	Better quality control. The program administrator should verify the basics of reporting to CPUC. For example, we found standards reported as codes across.	Develop protocols for each IOU for consistent reporting of program categories, measure names, and savings per unit.	PA	Accepted	Implementation of the Energy Division policy to have the Statewide administrator make CEDARS submissions for all IOUs will ensure consistent reporting.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.
5	8-9	Many parameters for C&S do not exist in traditional program. As a result, CEDARS does not provide fields to report and maintain these values.	Data needs for non-CEDARS parameters need to be articulated and standardized so they can be submitted by program administrator with standard claim data.	CPUC, evaluators, and PA	Accepted	The Statewide administrator will work with Energy Division staff to determine specific data needs and will provide data for non-CEDARS parameters in a format acceptable to Energy Division.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.	Other	We defer to PG&E since they are the Statewide lead.
6	8-9	The CEDARS system treats C&S differently from other EE programs. One example is that gross savings are overwritten with net savings. There may be other data handling differences we did not identify.	Review and document policies on how C&S data are treated in CEDARS. Where treatment does not follow standard practice, document and either explain what is happening and why or change the data handling procedures. This will increase transparency for all parties.	CPUC								
7	8-9	Some product manufacturers do not provide technical details of their products. In cases where this occurs, the evaluation could test products to improve the overall sample precision.	Consider allocating a contingent budget specifically for testing products that contribute significantly to savings, but do not have sufficient technical documentation for evaluation.	CPUC								