

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:

<i>RTR for the Bottom-Up Statewide Energy Efficiency Program Composition Review</i> (Evergreen Economics, Calmac ID #PGE0435.01)

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.) 07-09-043¹ and the Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan² 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.³ 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.

¹ 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.”

² 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>.

³ 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: Bottom-Up Statewide Energy Efficiency Program Composition Review
Program: Multiple
Author: Evergreen Economics
Calmac ID: PGE0435.01
ED WO: 2212
Link to Report: http://calmac.org/publications/Portfolio_Review_Report_-_Final_060319.pdf

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	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.
1	71	Based on the program characterization and interviews that identified potential benefits and drawbacks of statewide administration, Evergreen developed recommendations for program categories and subprograms that should be administered statewide. The recommendations are consistent with the CPUC's required list of statewide programs in Decision 18-05-041.	We recommend that the IOUs administer the following categories of programs statewide, consistent with the current CPUC definition. This list is consistent with the current list of programs required to be statewide by the CPUC. <ul style="list-style-type: none"> • Midstream Plug Load and Appliance • HVAC • New Construction (Residential and Commercial) • New Finance Offerings • Codes and Standards—Advocacy • Lighting • Emerging Technologies • Workforce Education and Training—Career Connections (K-12) • Institutional Partnerships • Foodservice Point of Sale Program • Midstream Commercial Water Heating • HVAC Quality Installation/Quality Maintenance • Career and Workforce Readiness 	All IOUs	Accepted	The IOUs are complying with D 18-05-041. These programs are currently on track to be implemented statewide by end of 2021. The current solicitations schedule is posted on the CAEECC website: https://www.caecc.org/third-party-solicitation-process .
2	72	The research identified several issues that the IOUs will need to work through as they transition to greater third-party implementation and fully compliant statewide programs. These issues include developing data sharing protocols across IOUs, determining the priority of serving hard-to-reach customers, and ensuring local needs are addressed and local resources are effectively tapped across the state. If these transition issues are resolved, three more categories of programs could potentially be recom-	The IOUs should reexamine programs that fall under the categories of Energy Advisor, Direct Install, and Downstream Rebates approximately one year after the transition to fully compliant statewide program administration and the third-party programs have been awarded (such as in 2021). Keeping the identified transition issues in mind, the programs should be examined to determine if they would be most effective if they were administered statewide or regionally.	All IOUs	Accepted	The IOUs will re-examine Energy Advisor, Direct Install, and Downstream Rebate programs approximately one year after the transition to fully compliant statewide program administration, to determine if these programs would be more effective if administered statewide or regionally.

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		mended for statewide administration. These program areas are categorized as “provisional” at this time regarding statewide administration: Energy Advisor (Audits), Direct Install and Downstream Rebates.				
3	76	The IOUs are revising their portfolios as they award third-party programs and seek to simplify and reduce the number of programs. There are opportunities for the IOUs to more explicitly coordinate these efforts so their portfolios are consistent.	The IOUs should take advantage of ongoing changes to their portfolios to coordinate their efforts statewide to reorganize and simplify their portfolios. Consistent IOU portfolios would make it easier for trade allies and customers that span IOU service territories, and also would allow for easier oversight and evaluation.	All IOUs	Accepted (PG&E and SDG&E)	The IOUs will continue to coordinate on program offerings and look for opportunities to improve the customer experience.
					Rejected (SoCalGas and SCE)	SoCalGas and SCE do not believe that consistent, statewide portfolios fit every program type. For example, downstream programs are tailored to the customer as these programs experience direct contact with customers. Consistent with Decision 16-08-019, the “utilities have an ongoing ability and responsibility to determine the needs to serve their customers....” The Decision goes on to further specify that the statewide requirements are not intended to diminish the IOUs responsibility to meet local needs. Each IOU program administrator has committed to work together in order to leverage resources and take advantage of efficiencies wherever/whenever possible to ensure greater statewide consistency. However, as emphasized by the Commission, each IOU is also committed to implementing programs locally whenever doing so is best to meet the unique needs of customers within its service territory and when synergies to leverage on a statewide basis do not exist or make sense. SoCalGas and SCE will continue to deliver innovative customer assistance and energy efficiency programs that are valued by its customers and make a difference in the communities it serves.