

## RTR Appendix

Southern California Gas Company (SoCalGas) 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 PY 2021 Statewide Third Party Programs Evaluation - Foodservice Instant Rebates*** (DNV, Calmac ID #CPU0359.01)

The RTR reports demonstrate SoCalGas' plans and activities to incorporate EM&V evaluation recommendations into programs to improve performance and operations, where applicable. SoCalGas' 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 SoCalGas 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), SoCalGas 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  
SCG Response**

**Study Title:** California Foodservice Instant Rebates Statewide Third-Party Program, PY 2021  
**Program:** SW\_FS  
**Author:** DNV GL  
**CALMAC ID:** CPU0359.01  
**ED WO:** Year 5 Group A  
**Link to Report:** [PY 2021 Statewide Third Party Programs Evaluation - Foodservice Instant Rebates FINAL.pdf](#)

MANAGEMENT APPROVAL AFTER REVIEW		
	Name	Date
SCG Programs	Darren Hanway	11/19/2024
SCG RP&R	Roy Christian	11/20/2024

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Disposition	Disposition Notes	SCG Proposed RTR Implementation				
						Next Steps:	Timeline:	Status:	Notes:	Impacted Programs:
				Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.  For each rejected recommendation, document the reason provided for rejection. Outline any potential follow-up actions or considerations for the future.	Set deadlines for the completion of each action. Include a start date and end date when possible.	Track the status of each action item (e.g., Not Started, In Progress, Completed).	Add notes for any additional information or updates.	Identify which programs (program IDs) would be impacted by the action items.
1		The program achieved an NTGR of 31%, which is below the NTGR of 60% to 85% (depending on the measure) that the PAs assumed for the program. Over half of the end users said that the distributor recommendations were only 'moderately influential' on their decision to purchase equipment, with roughly a third saying they are 'not influential at all.'	The program should continue to require that distributors include a line item for the rebate dollar amount on the invoice. The program should highlight this requirement in program communications and outreach directed at end users to increase end user awareness of program incentives.	Accepted	SoCalGas accepts this recommendation.	SoCalGas has already implemented this recommendation and plans to continue this requirement.		Completed		
2		The program collected the data needed to evaluate the program, and the vast majority of claims included end user addresses, although only 58% of the claims had end user contact information (either phone, email, or both).	Consider requiring distributors to collect end user phone numbers and email addresses for each claim to improve internal program verification efforts and increase evaluability of the program.	Accepted	SoCalGas accepts this recommendation.	SoCalGas has worked with the program implementer to integrate end user data collection in the program.	Q3 2022	Completed		
3		Satisfaction scores with various aspects of the program was high among distributors with average scores of 4.0 or higher. Distributors were most satisfied with their interactions with program staff, the pre-approval process for larger program sales, and the clarity of information about how to participate in the program. Distributors, while still satisfied, provided lower satisfaction ratings for the program incentive	Consider increasing incentive amounts to a minimum of 65% of the measure's incremental cost. The program should also update measure package cost assumptions as most of these assumptions reference studies that are at least five years old. Findings indicate that these actions could improve the program's influence on sales of effi-	Other	Rebate levels are set in order to maintain a cost-effective program. Some measures may need to have lower rebates relative to IMC due to low energy savings of the measures.  All costs in the measure package are being updated for measures with costs older than four years in the next update for 2026, in accordance with the guidelines on measure costs outlined in Resolution E-5221.	Measure Package cost assumptions were updated for PY2026 for any measure with cost data older than four years.	Q1 2024	Completed		

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Disposition	Disposition Notes	SCG Proposed RTR Implementation				
		amounts, the application process for reimbursement, and the types of equipment eligible for incentives.	cient equipment. We also recommend updating the base case and measure case cost assumptions to current market costs							
4		The program serves a large share of smaller restaurants with nearly half of the participants stating that their business had fewer than 10 employees. Additionally, more than a quarter of businesses stated that the majority of their employees speak a language other than English as their primary language.	The program should continue to focus on smaller restaurants, particularly those that have fewer than 10 employees, to ensure HTR businesses are benefiting. The program should also continue to offer program materials in Spanish, Chinese, Korean, and Vietnamese to ensure that businesses with employees who primarily speak a language other than English continue to benefit from the program.	Accepted	SoCalGas accepts this recommendation and will be targeting cash and carry retailers which smaller businesses use for equipment purchases. SoCalGas will continue to provide program materials in different languages.	SoCalGas will continue to provide program materials in different languages.		Completed		
5		Approximately half of end users who participated in the program were categorized as hard-to-reach customers.	The program should continue to focus on integrating equity and access into program design.	Accepted	SoCalGas accepts this recommendation.	SoCalGas will continue to focus on integrating equity and access into program design.		Completed		
6		Sourced Climate Zone (CZ) savings values found in CEDARS are sometimes inconsistent with the installation CZ. All UES values for the Ultra-Low Temperature Freezer (SWCR017-02) claims were sourced from the CZ 9 DEER savings permutation but the claimed zip codes span CZ 3, 7, 9, and 10. Four out of five Undercounter Dishwasher, Commercial (SWFS018-03) claims had a similar error.	Going forward, always collect and document the installation addresses for each claim. When validating claims, confirm the sourced savings is consistent with the climate zone of the installation address. Ensure that the values listed in CEDARS are accurate for each claim.	Accepted	SoCalGas has held discussions with the implementer to integrate our data collection and reporting systems to eliminate these types of data errors moving forward.	Starting PY2023, the energy savings reporting data flows directly from the eTRM permutation database into SoCalGas' reporting systems to eliminate data errors and discrepancies such as this one.	PY2023	Completed		
7		Claims in the CEDARS tracking datasets for all statewide programs are split into four subclaims to allow for the assignment of savings across each of the four participating IOUs. For anyone unfamiliar with the datasets, this makes it appear that there are four times as many claims than the actual number of claims for the program.	The CPUC should work together with PAs to modify the design of CEDARS so that the number of claims for statewide programs can be counted accurately. Creating a separate "number of claims" variable in statewide tracking datasets could provide a solution.	Other	SoCalGas does not have control over CEDARS as it is owned and updated by the CPUC and its consultants.  The four separate claims by IOU are split on the back end in CEDARS based on budget and savings shares and can be reattributed based on the claim ID.					