

# Proposal for Quarterly Reporting to CAEECC and Subcommittees

## I. Purpose:

To ensure transparency, provide metric progress, assess budget, and understand how programs are being administered/implemented as well as discuss potential modifications if needed after observing responses from the market among other external influences on the Business Plan implementation.

## II. Approach:

All reporting should minimize duplicative and avoid unnecessary reporting (e.g., remove those items that no one will be analyzing). Reports should rely on current data reporting as much as possible, with updates to EEstats tableau options or supplements as needed either via CAEECC discussions or CPUC guidance (e.g., annual advice letter, annual reporting, etc.). The data reporting will follow the current CPUC timeline, which results in Q1 data being reported at the Q2 meeting. CAEECC also needs to determine whether all data is reported at every quarter or whether only some information is regularly reported while some “deep dive” data is provided less frequently.

\* the following is primarily derived from eestats tableau – pictures in Appendix A\*<sup>1</sup>

## III. Quarterly reporting at CAEECC meetings:

Proposal for quarterly CAEECC meetings with the following reports:

1. *Overall portfolio progress*
  - a. Energy savings
  - b. Emissions reductions
  - c. Expenditures (with breakdown)
  - d. Cost-effectiveness
  - e. Provided in total bar chart and with geographical location map
  - f. Overall chapter metrics from approved Business Plans
  
2. *Sector specific high-level data* **[will need to add Public to EEstats]**
  - a. Energy savings
  - b. Emissions reductions
  - c. Expenditures (with breakdown)
  - d. Cost-effectiveness
  - e. Provided in total bar chart and with geographical location map
  - f. Sector metrics from approved Business Plans

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<sup>1</sup> All of the data suggested is currently being reported to the CPUC. There will need to be added refinements for subsectors presented in the Program Administrators (PAs) Business Plans (BPs).

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3. *Examination of PA achievements regarding non-sector specific metrics*  
*[likely to be defined as part of supplemental information]*
  - a. Implementation of bidding requirements including progress on solicitation strategy *[assuming supplemental information on PA solicitation strategy; would need to determine how to measure this given the dependence of progress on the market and other external factors]*
  - b. Identification of additional needed programs/RFPs, and modifications to existing programs/contracts
  - c. **Pending clarification from Commission** regarding Tier 2 Advice Letter and Annual Reporting requirement modifications (if any), review of scheduled submissions of PA activities to assess [e.g., April for Annual Report and July/August for Annual Advice Letter]
  - d. PA proposed amendments to Business Plans, implementation plans, budgets or programs as needed either as a result of reporting or other timely modifications pending observations in the market
4. *Summary of subcommittee subsector findings, discussions, and next steps. This is **TBD** pending conversations but some possible report outs could include:*
  - a. Trends observed over the past quarter regarding particular subsectors (e.g., progressing as expected vs. much lower/higher than anticipated)
  - b. Discussion that occurred at the subcommittee (e.g., what main issues were raised and how were they resolved or follow-ups)
  - c. Next steps (e.g., what modifications – if any - are anticipated for the following quarter given these observations and discussions)

### IV. Subcommittee quarterly reporting at CAEECC subcommittee meetings:

Proposal is to have quarterly subcommittee meetings (once up and running). Either rotating which subsectors are reporting or doing all subsectors every quarter (TBD). The following would be reported at the CAEECC subcommittee meetings.

1. *Overall sector information*
  - a. Energy savings
  - b. Emissions reductions
  - c. Expenditures (with breakdown)
  - d. Cost-effectiveness
  - e. Provided in total bar chart and with geographical location map
  - f. Sector metrics from approved Business Plans
  - g. Program metrics (TBD)

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## 2. Subsector detailed information (should match PA BPs subsectors)

- a. End uses
  - i. Energy savings
  - ii. Emissions reductions
  - iii. Expenditures (with breakdown)
  - iv. Cost-effectiveness
  - v. Provided in total bar chart and with geographical location map

- b. Building Types
  - i. Energy savings
  - ii. Emissions reductions
  - iii. Expenditures (with breakdown)
  - iv. Cost-effectiveness
  - v. Provided in total bar chart and with geographical location map

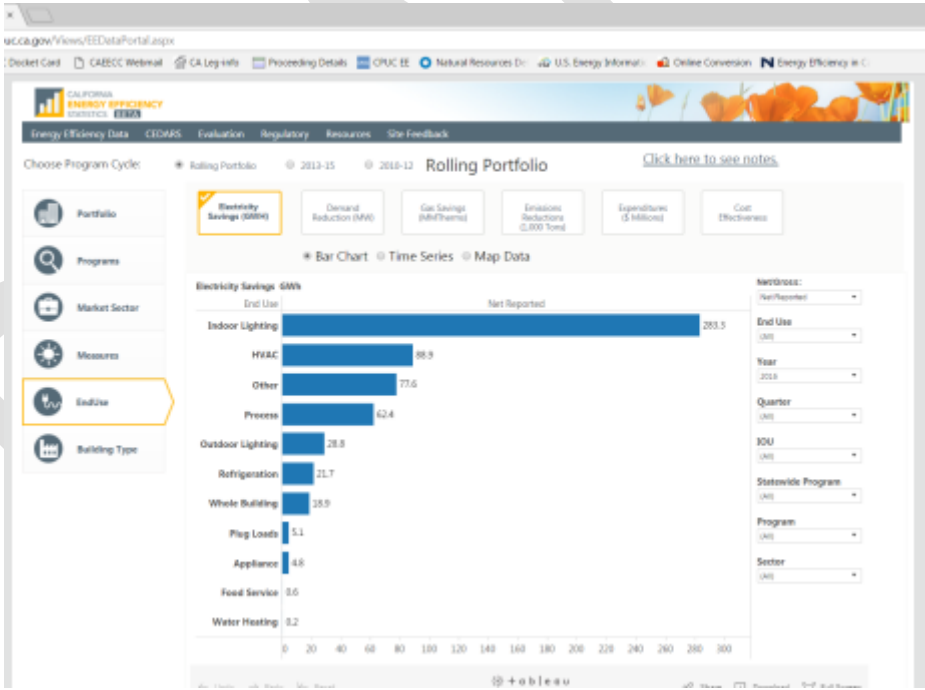
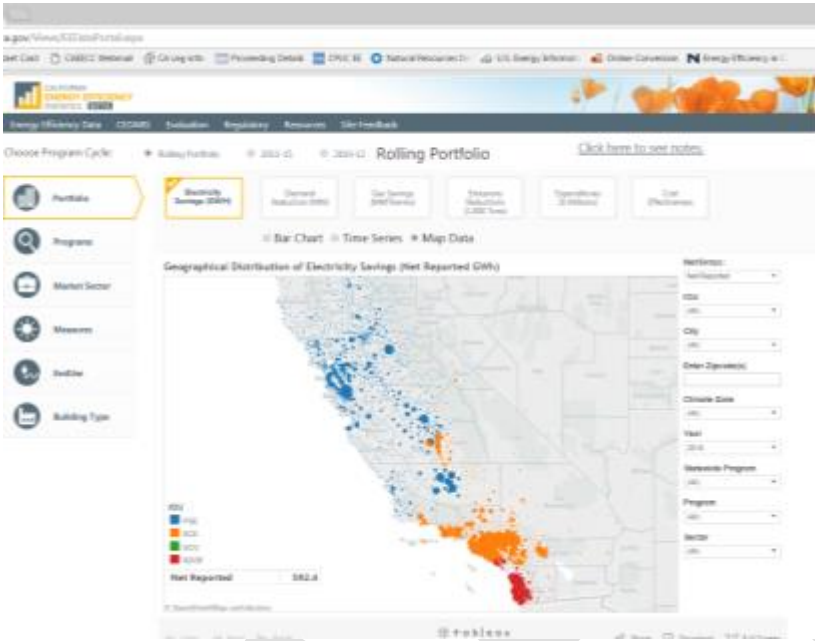
- c. Programs
  - i. Energy savings
  - ii. Emissions reductions
  - iii. Expenditures (with breakdown)
  - iv. Cost-effectiveness
  - v. Provided in total bar chart and with geographical location map

## 3. Trends

- a. Provide commentary on trends (e.g., why X is not getting savings, why PDQ is doing well, what's missing now that we see data, etc.)
- b. Plans for next quarter (e.g., RFPs, advice letters, pilots, fund shifting, etc.)

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## Appendix A: EESTATS EXAMPLES





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