

Revised PA Business Plan Stakeholder Review Plan

The Program Administrators (PAs) recently proposed to delay the schedule for submitting their Stage 3/4 Business Plans drafts to provide a more finished product. This request is in response to the level of critical feedback on the Stage 1 and 2 drafts, ongoing discussions with Commission Staff on sufficient level of detail and metrics, and the resource constraints caused by the Statewide/Third Party and EM&V rulings.

However, instead of just shifting back the schedule, this proposal aims to find a middle ground between the needs of the PAs and the needs of stakeholders and staff. This proposed approach aims to best balance key considerations, including:

- PA ability to produce draft BPs while allowing adequate time for Stakeholders to review and comment
- PA desire to produce quality drafts that generally satisfy ED/CPUC staff expectations
- Need for PA to have time to address potentially substantive CPUC proposed decisions on AB802, Statewide and 3rd Party Administration nominally expected in early August
- Need for adequate time for PAs to turn around final BPs that are responsive to Stakeholder input and CPUC policy guidance
- The assumption that the BP filings are due on November 1

The scope and timing of the new staged process is as follows:

1. **July 29**--each PA will produce a single, very robust/complete sector chapter of their Business Plan. Collectively almost all sector chapters will be represented in the July 29 submittals.
2. **August 9/10th**--the CC will meet as previously planned. Each draft sector chapter will be discussed in detail, treating it as a proxy for all PA's chapters. The discussions should be able to surface all substantive concerns about what should and shouldn't be in each sector chapter (rather than racing through the perceived flaws of seven different PA versions of the chapter).
3. **August 17**-- post-CC meeting written stakeholder comments would be due to the PAs. At that point, there would be a very clear record of what the parties, including ED, collectively expect from each of the sector chapters. This will allow PAs to laser-focus their efforts drafting their remaining chapters.
4. **Early to mid-August**--ideally, around the same time as stakeholder feedback is due, CPUC proposed decisions will have arrived, so that as each PA develops its remaining chapters, it can integrate the new policies and the feedback from the CAEECC review at the same time.
5. **September 7**--All PAs' Stage 4 (final review) BP draft is due to CAEECC.
6. **September 21**--In-person CC meeting OR perhaps one or more webinars to gather stakeholder feedback on the seven full plans.
7. **September 28**--Stakeholder written comments on complete PA BP drafts are due.
8. **November 1**--PAs file Business Plans with CPUC.

Figure 1 on the next page provides a visual illustration of this schedule. The BP filing date is shown as October 29 only as a graphical convenience. The actual filing date is November 1.

Figure 1: Stage 3 and Stage 4 PA Business Plan Review Schedule

Task Name	Start Date	End Date	Jun				Jul				Aug				Sep				Oct							
			May	Jun 5	Jun 12	Jun 19	Jun 26	Jul 3	Jul 10	Jul 17	Jul 24	Jul 31	Aug 7	Aug 14	Aug 21	Aug 28	Sep 4	Sep 11	Sep 18	Sep 25	Oct 2	Oct 9	Oct 16	Oct 23		
Stage 3 BP Chapter Drafts	06/30/16	08/17/16	Stage 3 BP Chapter Drafts																							
Create revised review plan for Stage 3	06/30/16	07/08/16	Create revised review plan for Stage 3																							
Post proposed plan on Website	07/11/16	07/11/16	Post proposed plan on Website																							
Approve revised review plan for Stage 3	07/13/16	07/13/16	Approve revised review plan for Stage 3																							
Stage 3 Chapter Drafts Due from PAs	07/29/16	07/29/16	Stage 3 Chapter Drafts Due from PAs																							
Stakeholder review of Stage 3 Drafts	07/29/16	08/16/16	Stakeholder review of Stage 3 Drafts																							
CC Meeting discussions of Stage 3 Drafts	08/09/16	08/10/16	CC Meeting discussions of Stage 3 Drafts																							
Written comments due on Stage 3 Drafts from stakeholders	08/17/16	08/17/16	Written comments due on Stage 3 Drafts from stakeholders																							
Stage 4 Final Review of BP	08/17/16	09/28/16	Stage 4 Final Review of BP																							
PAs developing complete BP final review drafts	08/17/16	09/06/16	PAs developing complete BP final review drafts																							
PAs submit final review draft BPs	09/07/16	09/07/16	PAs submit final review draft BPs																							
CC meeting or Webinar(s) to discuss Stage 4 BP drafts (actual day TBD)	09/21/16	09/21/16	CC meeting or Webinar(s) to discuss Stage 4 BP drafts (actual day TBD)																							
Final, written stakeholder comments due	09/28/16	09/28/16	Final, written stakeholder comments due																							
Final BP Filing	10/29/16	10/29/16	Final BP Filing																							
PAs submit final BP to CPUC	10/29/16	10/29/16	PAs submit final BP to CPUC																							

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