

A.17-01-013, et al.
SDG&E 2018-2025 EE Rolling Portfolio Business Plan
ORA DATA REQUEST No. ORA-A1701013-SDGE001 Dated March 1, 2017
Question 1
Submitted: March 22, 2017

Business Plan Metrics

1. What analysis did you perform to determine that *metrics* provided for each sector of the business plan address problems and market barriers identified in those sectors? Please provide all documents and workpapers showing analysis performed in the development and selection of appropriate metrics for the following business plan chapters:

- a. Residential
- b. Commercial
- c. Public Sector
- d. Industrial
- e. Agricultural
- f. Cross-cutting

SDG&E Response:

Per D. 15-10-028, pp. 51-55, SDG&E's metrics are informed by experience in developing Program Performance Metrics (PPMs) and Market Transformation Indicators (MTIs), as presented in Resolution E-4385. The metrics are associated with goals and designed to be "SMART", that is, Specific, Measurable, Attainable, Realistic, and Timely. Over time it will be necessary to adjust targets allowing stakeholders to track sector progress towards goals in the short-, mid-, and long-term.

SDG&E's metrics were developed to address problems identified in the Stage 1 Market Assessments and Gap Analyses and Stage 2 Problem Statements, Interventions, Metrics & Partner Groups. SDG&E's metrics followed the Joint Program Administrators' (PAs) Metrics Framework, these documents were shared with the CAEECC for discussion and stakeholder comments, and are available on the CAEECC website. Per the Metrics Framework, the metrics and associated targets were designed to track progress towards a positive outcome, but are not to be interpreted as a goal in and of themselves. Rather they are designed as milestones to indicate that the business plan is making measurable progress towards the portfolio goals, and if not, programmatic or strategy changes can be made to realign strategies and implementation plans towards meeting the goals. For instance, if analysis demonstrates that participation is associated with increased savings, then the programs can adjust to increase participation.

The framework was collaboratively developed to draw clear linkages between sector problems, sector activities, and the desired outcomes for PA customers. Please note that the same outcome may be valid for a variety of problems, particularly for resource programs. SDG&E considers the ultimate goals for resource programs within each sector to be measured in terms of savings and cost effectiveness, per D. 15-10-028, p. 47. SDG&E's Business Plan chapters include the explanation that the savings and cost effectiveness metrics are *illustrative* until program implementers are selected.

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Relevant workpapers: None

Relevant documents (all publicly available thus not attached):

1. D.15-10-028
2. Resolution E-4385
3. Joint Program Administrators' Proposed Business Plan Metric Framework (cf. CAEECC website).