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From: "Conley, Kimberly" <K2C0@pge.com>

To: "hazlyn.fortune@cpuc.ca.gov" <hazlyn.fortune@cpuc.ca.gov>, "Peter Franzese (peter.franzese@cpuc.ca.gov)" <peter.franzese@cpuc.ca.gov>, "Norris, Susan" <SFN1@pge.com>

CC: "Dewey, Meghan" <MKDC@pge.com>, "Karen Ehrhardt-Martinez (Karen.Ehrhardt.Martinez@Navigant.com)" <Karen.Ehrhardt.Martinez@Navigant.com>

Subject: CA Behavior definition next steps

Thread-Topic: CA Behavior definition next steps

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Hazlyn and Peter,

Thanks for your time on Thursday our meeting helped clarify the ED vision for behavior programs and PG&E s role in supporting and implementation. Below are key takeaways/meeting notes, but if I missed anything please let me know. I ll be back in touch after developing a plan with Meghan and Karen.

Key takeaways:

1. IOUs need guidance for what is considered a behavior program to encourage innovative and viable program development to support reaching CA doubling goals.
2. The current framework and outstanding Summit questions will be addressed by small working groups that include ED leads in each functional expertise area.

3. Once the guidance framework is finalized by the working groups, a public workshop will be sponsored by the Energy Division to share it and solicit any other feedback. The final guidelines do not require a decision.

4. PG&E will lead development of an implementation approach that addresses key program criteria (savings, bill impact, scaling/cross over from non- to resourced, etc. per notes below).

Thanks,

Kimberly

Statewide Behavior Program Approach Meeting Notes

Hazlyn Fortune, Peter Franzese, Susan Norris and Kimberly Conley

2/9/2017

Objective was to clarify next steps for establishing a statewide approach to behavior programs following the Summit hosted by PG&E with statewide stakeholders in September 2016.

Background

The prior behavior program definition expired in January 2016, and statewide stakeholders are unclear about how to develop/design behavior programs.

Behavior is now considered a platform in the business plan (i.e. roots level), meaning it is how PG&E measures, pays for and claims energy savings.

Notes

PG&E proposed working groups with Summit stakeholders to address outstanding questions and finalize the framework.

Hazlyn agreed, and suggested engaging the other ED leads at the dirt

level (per business plan diagram) i.e. policy, analytics, marketing, EM&V to get input/buy in: Katie Wu, Rory Cox, Carmen Best and Hal Kane (Metered Energy Efficiency and Emerging Programs MEEEP for how to use meter data to help with EM&V. Behavior is an emerging program).

Agreed next steps:

1. Establish small working groups (IOU + ED + include MCE) to address outstanding questions and get buy in on finalized framework.
 - a. Hazlyn to discuss ED participation with Robert Straus.
2. Present at an ED-sponsored workshop (rather than CAEECC) to get additional feedback/buy in.
 - a. These result in workshop reports, which can be attached to a ruling.
 - i. All agreed not to pursue a decision. A ruling could result in an expedited decision if the judge deems it necessary.
 - b. Socialize with the CEC.
3. Develop implementation plan (similar to pilot implementation punchlist/decision tree Karen/Kimberly discussed) that PAs and implementers can use as a step-by-step guide for developing/designing/incorporating behavior into programs.

Behavior Pilots/Programs need to:

- ∑ Define what success for a behavior pilot looks like.
- ∑ Demonstrate persistence, and develop a process for how pilots can cross over from non-resource into estimated savings – Hazlyn referenced a need to show the cross walk or walk the calculation that occurs between (or from) non-resourced to resourced (to distinguish between the marketing stuff (non-resourced) and the treatment stuff that causes the effect). She suggested ESAP does this.
- ∑ Develop a simple process to reliably demonstrate:
 - o How much energy savings are expected.

o Impact to customer bill how much will they save.

Σ Have a process for scaling from pilot to program.

Hazlyn suggested social science partners + grad students to support process.

PG&E shared behavior pilot ideas TOU, schools.

Hazlyn said they are agnostic to where the savings come from (i.e. DR, EE, etc.) any which way you can get or demonstrate savings should be fair game using the behavior guidelines. We need to put the pedal to the metal if we re going to double (SB 350).

If the legislature challenges us, we can point to our process and approach.

Kimberly Conley

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O: 415.973.1688 | C: 415.519.4367 | <mailto:k2co@pge.com>
k2co@pge.com