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# SUMMARY OF R.13-11-005 PHASE 3 AND A.17-01-013 ET AL. RULING AND SCOPING MEMOS



*April 2017*

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R.13-11-005

# Market Transformation (p.4)

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1. Review EM&V rules, baseline setting, and measure lifecycle benefits
2. Assess ESPI for market transformation efforts
3. Review the role of C&S, ET, and training regarding market transformation
4. Update definitions and policies, assess lessons learned, modify strategic planning goals, review budgets, address governance and administration

# Custom Projects for Industrial (p.6)

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1. Timing of review activities
2. Third party incentive structures
3. On-site generation savings accounting
4. Alignment of strategy energy management programs w/ custom projects
5. Realization rates and net-to-gross trends

# Ongoing Policy Issues (p.8)

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1. California Technical Forum matters
2. Updates to DEER, potential and goals, EM&V framework
3. ESPI mechanism, Cost-effectiveness, and Strategic Plan
4. Marketing, education, and outreach coordination
5. Ways to evaluate normalized metered energy consumption and/or dynamic baselines
6. Industry Standard Practice determinations.

# Remaining Issues (p.9)

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1. Financing programs and new proposals
2. REN review and LGP reform (if needed)
3. Locational targeting/sourcing EE
4. Measure-level baseline setting
5. Improvements to ex ante usability and transparency
6. Embedded EM&V techniques
7. HOPPs oversight
8. EE budget category limits
9. Issues related to the Business Plans

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A.17-01-013 et al.

# Overall (p.5)

1. Should the Commission adopt, modify, or deny the Business Plan (BP) applications?
2. Should the Commission adopt or modify the proposed budgets?
3. Are the costs and benefits of the proposed Business Plans reasonable and justifiable?
4. Do the BPs put the overall EE portfolio of the Commission on a path to contribute substantially to the goal of doubling the amount of EE in buildings by 2030?



# General (p.5-6)

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5. Conformance with guidance provided in D.16-08-019, including with respect to:
  - a. administration of statewide programs
  - b. third party programs
  - c. baseline policy
6. Relationship between Business Plans and implementation plans (including posting and review process for implementation plans)

# General Cont. (p.5-6)

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7. Relationship between Business Plan approval and annual budget advice letters
8. Reasonableness of priorities and strategies identified in the Business Plans to achieve energy efficiency savings goals
9. Reasonableness and sufficiency of sector-level targets and metrics
10. Cost-effectiveness threshold and showings (including applicability to RENs)

# General Cont. (p.5-6)

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11. Reasonableness of costs
12. Coordination between energy efficiency and demand response portfolios
13. Relationship to Commission's Distributed Energy Resource Action Plan
14. Reflection of disadvantaged communities mandates (including definition of "hard to reach")

# Specific policy and/or implementation issues (p.6)

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15. Third party solicitation process and timing, including whether or how to utilize procurement review group and/or independent evaluator structure, parties' eligibility for intervenor compensation, etc.
16. Workforce development, training, and inclusion issues
17. Finance program issues, including plans by several IOUs to modify on-bill financing eligibility or terms

# Specific policy and/or implementation issues (p.6)

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18. CCA proposals to utilize natural gas funding and create natural gas energy savings
19. Utility retention of selected portfolio functions (including justification for not bidding out to third parties & potential cost implications)
20. How to handle real or perceived overlap between CCA and REN proposals and IOU proposals
21. Safety matters

## Issues specific to individual PAs (p.6-7)

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22. PG&E: Relationship of BP proposals to Diablo Canyon replacement proposals for EE
23. SCE: Relationship of BP proposals to procurement of EE outside of BPs
24. RENs
25. LGSEC
26. MCE Single point of contact proposal
27. All aspects of filings are included in the scope even if not specifically listed above, with the exceptions discussed in the scoping memo

# Issues Outside Scope (p.8-9)

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1. MCE's request regarding rates
2. City of Lancaster's response to SCE
3. Conservation voltage reduction
4. Three-prong test for fuel substitution

# Parallel Activities for A.17-01-013 et al.

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1. Request for supplemental information;
  2. Sector-level metrics; and
  3. Third party solicitation process.
- Series of workshops (maybe hearings)
  - Additional commenting opportunities
  - Final Decision anticipated 11/2017



# Comment Schedule

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- **May 15, 2017** – PA responses to questions identified in Attachment A
- **June 5, 2017** – Anyone responds to the questions in Attachment B AND responses to PA supplemental information or anything else within scope
- **June 19, 2017** – Responses to party filings on 6/5/17
- Overarching estimated schedule pp.12-14

# Scope Questions for CAEECC

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1. Given the scope, schedule, use of workshops, etc. are there items that CAEECC should take on in 2017?
2. Are there other opportunities for CAEECC to organize parties to discuss matters outside of workshops (e.g., follow up if there are unresolved items)
3. Is there a role for subcommittees before the implementation planning stage?

# Schedule Questions for CAEECC

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1. Is there a need to have a formal CAEECC meeting before the forthcoming decision?
2. Are there ad hoc meetings to schedule that could inform items before a decision?
3. Other questions/considerations?

# Scoping Memos

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**R1311005 Phase 3  
Scoping Memo**



**A1701013 et al.  
Scoping Memo**