Bottom-up Program Analysis: High-level Scope of Work

PA Proposal for Discussion Purposes Only

December 7th, 2016

Agenda

- Background from D.16-08-019
- Bottom-up Analysis
  - Phase 1 Scope and Deliverables
  - Phases 2 & 3 Scope and Deliverables
- Questions/Feedback/Discussion

Background from D.16-08-019

- Program administrators are encouraged to conduct a bottom-up review of the program and subprogram structures in order to rationalize and optimize program activities into the most effective and cost-effective possible configurations. (page 66)

- Additional program and subprograms should be designated as statewide after a thorough bottom-up review of the portfolios by program administrators prior to the business plan filings. (OP 45)

Bottom-up Analysis – Phase 1

- **Proposed Scope:**

1. Identify sources of program data
2. Catalog all programs and their key characteristics (e.g. intervention strategy, tactics, measures, delivery channels, etc.) across all PAs consistent with the Business Plans.
3. Do a comparison between all programs across the state looking for efficiencies in delivery and best practices (e.g. $/kWh, etc.).
4. Define additional midstream and upstream programs that should be Statewide Administered under the new definition.
5. Timeframe for analysis: 2016 and ongoing

- **Proposed Deliverables:**

1. Database of programs, best practices, and standardized key characteristics.
2. List of midstream and upstream programs for Statewide Program Administration.
3. Action Plan to implement best practices.

Bottom-up Analysis – Phases 2 & 3

Phase 2

- **Proposed Scope:**

1. Compare current portfolio of programs across PAs against recent market potential studies.
2. Identify untapped opportunities that can be addressed through expanded or new programs

- **Proposed Deliverables:**

1. A report cataloging the untapped opportunities that can be incorporated into solicitations.

- **Phase 3 -** Periodic database updates, including data gathering and entry

- **Resourcing TBD –** current vendor, solicitation, other?

Questions/Feedback/Discussion