



# Equity and Market Support Working Group (EMSWG) Meeting #4

January 17, 2024 | 9:00 AM - 12:00 PM PT

Hosted by California Energy Efficiency Coordinating Committee (CAEECC)

# Introductions



In the **chat**, please introduce yourself with your:

- Name and pronouns
- Organization

# Meeting Goals

**1**

**Participants clarify  
definitions for terms  
used in Market  
Support Indicators  
#1, 10, 13, 18, and 20**

**2**

**Participants discuss  
other priority Market  
Support Indicators**

# Agenda

<b>Time</b>	<b>Topic</b>
9:00	<b>Welcome</b>
9:10	<b>Topic 1: Partnerships</b>
9:30	<b>Topic 2: Partners</b>
9:50	<b>Topic 3: Collaborations</b>
10:10	<b>Topic 4: Type &amp; Purpose</b>
10:30	<b>Break</b>
10:40	<b>Topic 5: Other Priority Market Support Indicators</b>
11:50	<b>Wrap Up and Next Steps</b>
12:00	<b>Adjourn</b>

# Topic 1: Partnerships

# Suggested Definitions for "Partnerships"

## Related Market Support (MS) Indicators

<b>MS #2</b>	Dollar value of non-ratepayer in-kind funds/contributions utilized via <b>partnerships</b> (A, P)
<b>MS #20</b>	Assessed value of the <b>partnership</b> by partners (A, P)

1. **3C-REN:** The type of support partners offer to PA programs (e.g., outreach partnership, instructional partnership, venue partnership, event partnership)
2. **BayREN:**
  - a. Option A: A relationship resembling a legal partnership and usually involving close cooperation between parties having specified and joint rights and responsibilities ([Source](#))
  - b. Option B: Agreement between organizations, people, etc. to work together ([Source](#))
  - c. Option C: One previous MSWG member defined Partnerships as a non-PA organization that has a contract or MOU with a PA to perform a service
3. **I-REN:** The type of support partners offer to PA programs (e.g., outreach partnership, instructional partnership, venue partnership, event partnership)
4. **PG&E:** Contracted engagements with partners to support delivery and/or funding efficiencies for energy efficiency products and/or services
5. **SDG&E:** Includes consumers, governments, advocates, contractors, suppliers, manufacturers, community based organizations and/or other entities. (Final Report of CAECC's Market Support Working Group)
6. **SoCalREN:** Agreement between organizations, people, etc. to work together.

## Discussion Questions:

1. Is it important/required that PAs use the same agreed-upon definition? (this question applies for all terms)
2. Should "partnerships" be defined as formal, contracted relationships?
3. MS #20: Assessed value of the partnership by partners (A, P) - What methods are available to assess the value of a partnership? Should PAs all use the same method to report on this Indicator?

## Live-edit Notes:

- Yes, important to have the same definitions (+4); (don't necessary need perfectly aligned definitions) ; supports consistent gathering and interpretation of information and applies to apples comparison across PAs
- Unaware of an existing definitions document but there is an EE Policy Manual that definitions could be added to (but it doesn't get updated very often (Pam will find out more about the update process) so create a separate document first (e.g., Appendix to the WG Report))
- Partnerships should not be limited to contracted relationships (contracts may be unnecessarily burdensome for nonprofits or CBOs); but **there should be an agreement that there is a partnership and working relationship where something is gained by both parties** (e.g., MOU, photos, emails)
- Example: Work with Trade Schools and instructors to add EE content to their curriculum; difficult to get instructor attention so signing an agreement may be too much
- PG&E has a strict definition of partnership that requires it to be contracted
- IOU WE&T teams have a statement of collaboration document (not legally binding) for partners (different than agreement with vendor)
- MS Segment has a sub-objective on Partnerships
- On value of a partnership - would be determined after the fact perhaps by survey or interview; PAs could lead on how to determine; guidelines on how to collected/assess would be appreciated
  - Need more discussion on what is meant by "value" and whether it is cumulative or individual, a monetary amount, or qualitative value
- Partnerships are likely to be multi-year so expect to report value in each year

# Topic 2: Partners



# Suggested Definitions for "Partners"

## Related Market Support (MS) Indicators

<b>MS #1</b>	Number of <b>partners</b> by type and purposes (Q, P)
<b>MS #18</b>	Percentage of <b>partners</b> that have taken action supporting energy efficiency by type (Q, P)
<b>MS #20</b>	Assessed value of the partnership by <b>partners</b> (A, P)

1. **3C-REN:** Entities and stakeholders, both paid and unpaid, that support PA programs in planning and/or implementation (e.g., for workforce programs partners could include instructor organizations, organizations that support outreach, or organizations that co-host events)
2. **BayREN:** The previous MSWG did not define this term. Suggest that we define this term after defining "Partnership".
3. **I-REN:** Entities and stakeholders, both paid and unpaid, that support PA programs in planning, implementation, and operation (e.g., for workforce programs partners could include instructor organizations, organizations that support outreach, organizations that co-host events)
4. **PG&E:** Market actors with which a formal partnership is formed to support energy efficiency in the market (e.g., governments, advocacy groups, suppliers, community-based organizations, etc.)
5. **SDG&E:** Includes consumers, governments, advocates, contractors, suppliers, manufacturers, community based organizations and/or other entities. (from Final Report on MS WG)
6. **SoCalREN:** Organizations, people, etc. that work with a PA implementer

## Discussion Questions:

1. Is it important to distinguish paid and unpaid partners (for example, via "type")?
2. For MS Indicator #18, Percentage of partners that have taken action supporting energy efficiency by type (Q, P):
  - a. How should "action taken" be defined in the context of partner support of energy efficiency; insight needed into the specific criteria needed to measure and evaluate these 'actions'
  - b. What is the appropriate denominator for the percentage calculation? Considering that partners in the program are expected to have a baseline awareness, how can we accurately measure awareness while acknowledging their pre-existing involvement?

## Live-edit Notes:

- Should distinguish paid and unpaid but these are not the only types (see Topic 4)
- "Type" might be the type of entity or it could refer to the characteristics of the relationship
- In previous WG, "partnerships" was brought in as a subobjective to understand who is supporting delivery of EE
- "Action taken" would be the basis of the partnership - what did the entities agree to do together?
- Providing examples would be helpful but don't want to limit the "actions" (e.g., incorporating EE into marketing, offering a workshop or training, something else/"other")
- "By type" refers to type of partner
- Denominator would be universe of partners, but that is not fixed over time
- SDG&E interprets MS#18 as a whole number
- Less important if it's 67 vs 75, but is important if it's 10 vs 90
- Example of partners that might not take action = contractors
- MS 18 intended to capture the quality of partnership - are partners doing what they said they would?

**Break**  
**(10 min)**

**Next Topic: Topic 3 -  
Collaborations**

# Topic 3: Collaborations

## Suggested Definitions for "Collaborations"

### Related Market Support (MS) Indicators

<b>MS #13</b>	Number of <b>collaborations</b> , with a contextual description, by business plan sector to jointly develop or share training materials or resources (A, P)
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1. **3C-REN:** Leveraged resources/relationships with partners to achieve common goals; defined by things like who benefits from the collaboration, length of the collaboration, type of product/result from the collaboration, structure of the collaboration, etc.
2. **BayREN:** Sharing mutually beneficial resources such as training materials, expertise, and marketing/outreach tactics that help achieve WE&T goals and outcomes and that support the collaborating organizations' goals and objectives (WE&T Common metrics - Index 302)
  - a. Also included collaborations with community groups and local governments to sustain or increase EE products/services. (Previous MSWG Notes)
3. **I-REN:** leveraged resources/relationships with independent partners to achieve common goals; defined by the recipient (who are they for), length of service/contract, type of product/result, and structure or relationships.
4. **PG&E:** Non-contracted engagements to coordinate with other entities delivering incentive and education programs
5. **SDG&E:** Collaborating with education providers interested in developing energy efficiency education and training materials to expand access and reach. (WE&T program)
6. **SoCalREN:** Sharing mutually beneficial resources such as training materials, expertise, and marketing/outreach tactics that help achieve WE&T goals and outcomes and that support the collaborating organizations' goals and objectives (WE&T Common Metrics - Index 302; previous MSWG notes)
  - a. Also include collaborations with community groups and local governments to sustain or increase EE products/services.

# "Collaboration" Definitions in other CPUC Documents

In the [2023 CPUC Workforce Education and Training Program , Partnerships with Training Institutions Evaluation Report](#) the evaluation team (Opinion Dynamics) defined "Collaboration" as:

*An arrangement, working relationship, or set of agreements between two or more organizations involved in a joint endeavor in which all organizations willingly participate to further mutual interests. All parties involved consider themselves as part of a team, where member organizations contribute toward shared outcomes through specific roles and responsibilities that have been defined and agreed upon by all participating organizations. The relationship between collaborators should be fundamentally nonhierarchical and decision-making should be shared based on knowledge and expertise.*

## Discussion Questions:

1. How do "collaborations" differ from "partnerships," if at all? Is there any reason that "partnerships" and "collaborations" should not be defined in the same way? Should "collaborations" and "partnerships" be mutually exclusive?
2. How should the 2023 CPUC WE&T Program Partnerships with Training Institutions Evaluation Report be used to define "collaboration," if at all?
3. What are the mechanics of providing contextual descriptions with numerical information including expected key information and level of detail?

## Live-edit Notes:

- Part of "Supply" indicator for Partnership sub-objective - MS 13 used to be specific to WE&T, specific to sharing training resources (Indicator would still be reported for WE&T)
- PG&E aligns "partnerships" with contracts; "collaborations" are less formal
- SDG&E, 3C-REN, and SoCalREN look at partnerships and collaborations the same; collaborations are not necessarily contractual relationships but have evidence of agreement to work together also
- If partnerships and collaborations are the same, what is the difference between MS 1 and MS 13?
- Should this Indicator be limited to WE&T (as it is currently applied)? [3C-REN says yes]
- Collaboration example - community college that wants to expand its EE curriculum and receives a curriculum update from a vendor paid by the PA
- 11 of 77 MS programs are targeting WE&T (\$115M/\$725M over the next four years)
- New construction programs (also statewide QI/QM) also have a training element - should that be folded into MS13?

# Topic 4: Type & Purpose



## Related Market Support (MS) Indicators

<b>MS #1</b>	Number of partners by <b>type</b> and purposes (Q, P)
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### Suggested Definitions - Type

1. **3C-REN:** Defined by sector (inclusive of CPUC defined sectors), involvement (contract length), etc.
2. **BayREN:** Examples could be non-profit, government agency, SMB, fortune-500 companies. (previous MSWG notes). We should include a list of potential partner types and decide whether the type is the type of business with whom the EE program is partnering with or the type of Partnership (e.g., contractual, MOU, informal)
3. **I-REN:** defined by sector, involvement, length of term (etc.)
4. **PG&E:** Specific partner like contractor or builder as a type
5. **SDG&E:** Type of partner (from Final MSWG Report)
  - a. Community based organization
  - b. Customer
  - c. Contractor
  - d. Government
  - e. Advocate
  - f. Supplier
  - g. Manufacturer
6. **SoCalREN:** Examples could include and not be limited to: non-profit, government agency, SMB, fortune-500 companies. Lending agency; Community based organization; contractor; Educational institution; unions; associations, Councils of Government; non-profit, CCA, workforce investment boards
  - a. SoCalREN suggestion: The threshold to “support EE” could be delivering EE related services e.g. benchmarking, education & outreach etc.?

## Suggested Definitions - Purpose

### Related Market Support (MS) Indicators

<b>MS #1</b>	Number of partners by type and purposes (Q, P)
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1. **3C-REN:** End goal that the Partnership/Collaboration is trying to achieve (e.g. an outreach partnership is for the purpose of increasing participation in the PA program)
2. **BayREN:** What the partnership seeks to do; While not defined by the previous MSWG, the MSWG indicated ideas like partnerships formed to obtain delivery and/or funding efficiencies for EE projects, products, and/or services
3. **I-REN:** End goal that the Partnership/Collaboration is trying to achieve (e.g. an outreach partnership is for the purpose of increasing participation in the PA program)
4. **PG&E:** Specific partner contribution - supply, demand, market innovation
5. **SDG&E:** The functional role, intention or aim (of the partner).
6. **SoCalREN:** What the partnership seeks to accomplish.
  - a. Purpose examples include but is not limited to: funding (lending agency); lead trainings and workshops (educational institution, CBO, COG, non-profit); contractor support (unions, associations); ME&O (CCA, COG, CBO), outreach and enrollment

## Discussion Questions:

1. What else, if anything, needs to be done to facilitate consistent reporting by PAs on "type" and "purpose" for MS Indicator #1?

## Live-edit Notes:

- How would the information be presented? CEDARS is not currently set up to report on Common Metrics or Indicators (nor would it be ready in the near future). But CEDARS has a document repository. Common Metrics are currently reported in a workbook that is an attachment to the Annual Report that is submitted to CEDARS
- Indicator reporting should not be overly cumbersome; what would work for PAs?
- Quarterly reporting of some indicators would lead to a slightly different reporting process
- Follow up - is "type" about the partner or about the characteristics of the relationship?

# **Other Priority Market Support Indicators**

# Additional Suggested Market Support Indicators for Discussion

MS #5	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training (A, S)
MS #6 - 10	<ul style="list-style-type: none"> <li>● <b>MS 6:</b> Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P)</li> <li>● <b>MS 7:</b> Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P)</li> <li>● <b>MS 8:</b> Prior year percentage of new codes or standards that were previously ETP technologies (A, P)</li> <li>● <b>MS 9:</b> Prior year number of new codes and standards that were previously ETP technologies (A, P)</li> <li>● <b>MS 10:</b> Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available (A, P)</li> </ul>
MS #22	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P)
MS #23	Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P)

## Live-edit Notes:

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### MS #5

Number of career and workforce readiness participants who have been employed for 12 months after receiving the training (A, S)

*From SoCalREN: SCR has concerns on how the indicator is described and how it will be tracked. SCR's WE&T team notes that 12 months of continuous employment after training is difficult for most people, especially for the population that SCR serves.*



## MS #6 - 10

- **MS 6:** Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P)
- **MS 7:** Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P)
- **MS 8:** Prior year percentage of new codes or standards that were previously ETP technologies (A, P)
- **MS 9:** Prior year number of new codes and standards that were previously ETP technologies (A, P)
- **MS 10:** Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available (A, P)

*From SoCalREN: What is the general purpose of the ETP indicators? Is there a common ETP measure list that all PAs can use?*

## MS #22

Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P)

*From 3C-REN:*

- *Clarity on parameters for defining 'awareness' regarding emerging/under-utilized or existing energy efficiency products or services*
- *Clarify the methodology for measuring and verifying awareness of energy efficiency products or services among market participant*
- *Define the denominator for the percentage calculation. Considering that partners in the program are expected to have a baseline awareness, how can we accurately measure awareness while acknowledging their pre-existing involvement?*

## Live-edit Notes:

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## MS #23

Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P)

*From 3C-REN: Criteria for accessing aggregated confidence level as well as if this pertains solely to the program itself or encompasses the performance of partners as well.*

## Live-edit Notes:

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# Wrap Up & Next Steps

# Recap of the day

## Meeting Objectives:

1. Participants clarify definitions for terms used in Market Support Indicators #1, 10, 13, 18, and 20
2. Participants discuss other priority Market Support Indicators

## What to expect next

- We will be meeting on **January 24 from 9am - 12pm PT** to continue working on the Market Support Indicators.
  - *Please be on the lookout for any potential Homework between now and then.*
- Meeting #4 Summary will be posted by January 24.

*If you have any questions, please contact [sooji@common-spark.com](mailto:sooji@common-spark.com).*

**THANK YOU.**

Next Meeting: January 24 at 9am