

# Q1 2026 CAEECC Meeting #49 Summary

March 12, 2026, 9:00am–12:45pm, Zoom

The California Energy Efficiency Coordinating Committee (CAEECC) met for its forty-ninth annual meeting on March 12, 2026 online via Zoom. There were 75 attendees, including representatives from 20 CAEECC Member organizations and 12 attendees from three CAEECC Ex-Officio agencies as well as 43 Members of the Public. This meeting was facilitated by Katie Abrams (Abrams) of Birch Road Consulting; Michelle Vigen Ralston (Ralston) of Common Spark Consulting; and supported by Susan Rivo of Raab Associates and Natalie Lucas of Common Spark Consulting.

Meeting attendees and presenters are available in *Appendix A*. Common acronyms are available in *Appendix B*. Supporting meeting materials are available at: <https://www.caeec.org/3-12-2026-full-caeccc-mtg>

## Meeting Takeaways

- Energy Division provided updates on recent EE work, CEDARS updates, and information on the Business Plan Application timeline
- CAEECC Members and the Public heard updates on CARB’s zero-emission space and water heater standards, and discussed how CARB’s appliance standards may impact EE portfolios
- CAEECC Members approved a workshop on workforce standards, to take place spring-summer 2026
- The Facilitation Team provided an update on the Equity Advisory Committee
- During the Optional Assembly, CalMTA and CalTF provided updates
- Suggested edits to this meeting summary are due on March 26, 2026.

## Overview

The Meeting Summary is divided into the following sections:

1. [Energy Division Updates](#) - Slides 18-24 - [Appendix C](#)
2. [Process Considerations and CARB Update on the Zero Emission Space and Water Heating Standards](#) - Slides 28-53 - [Appendix D](#)
3. [CAEECC Business Items](#) - Slides 58-90
4. [Optional Assembly](#) (CalMTA and CalTF Updates) - Slides 88-111- [Appendix E](#)

This meeting summary is intended to capture the overarching discussion of ideas, concerns, alternative options for proposals and consensus, and as such, substantive agenda items are included. *For more detailed discussion, review the Appendices or reach out to the [Facilitation Team](#).*

# Energy Division Updates

Pam Rittelmeyer (CPUC) presented Energy Division (ED) Updates including recent ED Energy Efficiency Work, CEDARS updates, and Business Plan Application Timeline (slides 18-24).

## Summary of Discussion on Energy Division Updates

- A CAEECC Member disclosed that since the rules say 30 days to respond or protest to applications, they (a Party to the Applications Proceeding) will be seeking an extension given the high number of applications.
- A CAEECC Member asked if the Uniform Net-to-Gross (NTG) Ratio will be applied to Hard-to-Reach (HTR). ED responded that Hard-to-reach projects have their own adopted net-to-gross (NTG) ratio. The .60 NTG applies to all custom projects where the customer types previously had a .55 NTG applied.
- A CAEECC Member asked when the measure-level data will be available on the CEDARS Dashboard. ED responded that it is nearly ready to go and should be published soon. ED also offered information on the new Impact Profile Tool.

*Additional detail is available in [Appendix C](#).*

# Process Considerations and California Air Resources Board's (CARB's) Update on the Zero Emission Space and Water Heating Standards

## Background Presentations

Maggie Seay (CARB) presented an overview of CARB's zero-emission space and water heater standards (current proposal and next steps) (slides 31-39). Jenn Green (MCE) and Eric Rodriguez (SVCE) co-presented about Community Choice Aggregate (CCA) and Bay Area Air District (BAAD) coordination in advance of local appliance standards (slides 42-53).

## Summary of Discussion on CARB Appliance Standards

- A CAEECC member asked how rollback of federal policies may impact CARB appliance standards. CARB responded that with the political climate regarding affordability, they seek a proposal that will be stable and ensure emission reductions going forward. While there is always risk of legal pushback, there is nothing specific from the federal government curtailing their efforts.
- A CAEECC member asked if there are concerns about gaming the system? CARB responded that this issue was raised in manufacturer public comments and

CARB is working to eliminate this concern; are in conversations with regulated entities to work out the details.

- ED asked if the standards are like the CAFE (corporate average fuel economy) standards? And if CARB receives manufacturers' sales data, or if that will be new. CARB responded that it may be similar to a standard based on fleet MPG, but it's not a perfect comparison. Rather, the proposed standard looks at the manufacturers' total sales and caps the % of the total sales that can be emissive sales. And that to achieve compliance, manufacturers can purchase or sell credits. Also, CARB is not currently getting manufacturer sales data, but the CEC is working on a similar initiative related to HVAC and water heating equipment.

### **Summary of Discussion on MCE and SVCE Update on BAAD Appliance Standards**

- A CAEECC member raised concerns about declining tax credits for heat pump water heaters, particularly for lower-income customers. MCE responded that they are continuing incentives, including a kicker incentive to close the incremental cost gap before ruling takes effect. Also that incentives alone won't close the gap, but financing offerings will be important too.

*Additional detail is available in [Appendix D](#).*

## **Breakout Group Discussions & Key Takeaways**

Following the presentations and Member questions, there were discussions in breakout groups on the potential impacts to portfolio and ideas for consideration during the EE Business Plan Application process. The following is a facilitator synthesis of breakout room takeaways. *Additional detail is available in [Appendix D](#) and in the [Interactive Breakout Slides](#).*

### **Breakout Group Key Takeaways**

- **Timing and regulatory coordination:** CAEECC members raised the uncertainty of the CARB rulemaking and elevated the True Up Advice Letter (TUAL) process in 2027 and the Mid-Cycle Advice Letter (MCAL) in 2029 as opportunities for PAs to integrate impacts of the CARB standards in Business Plans. CAEECC members suggested the idea of using the "bus stop" concept to help plan for and manage adjustments.
- **Communication and coordination between CARB, CPUC, and PAs:** CAEECC members raised the need for there to be regular communication and coordination, perhaps in its own unique venue or at CAEECC, or PA coordination groups (like CalCCA).
- **Uncertainty about scope, market, policy, and programmatic impacts:** Bay Area PAs MCE and SVCE reported already aligning their Business Plans more closely with regional appliance standard efforts. ED and other CAEECC members recognized the cascading impacts the CARB appliance standards could have, raising implications on portfolio measure selection, program structure,

cost-effectiveness requirements, and outreach and education needs. Some CAEECC members raised the potential need to explore statewide approach, pathways to direct funds to PAs for compliance, education, and other services.

- **Equity and customer cost impacts:** CAEECC members raised questions about potential equity implications, the impact of appliance standard on disadvantaged communities, and impacts to additionality and therefore cost-effectiveness calculations.

See [Appendix D](#) for additional details and screenshots of breakout slides/report outs.

## CAEECC Business Items

### HVAC and Lighting Workforce Standards Proposal

Katie Abrams presented a proposal from a handful of CAEECC Members (Chris Ruch, SMW Local 104; Lara Ettenson, NRDC; Laurel Rothchild, TEC; Audrey Bragg, SoCalREN) on a workforce standards workshop (slide 61).

#### CAEECC Member Discussion

- A CAEECC Member emphasized this should be important to CAEECC. Installations are not achieving their design intent. This is both a workforce and implementation issue. Broader policy context includes SB 350 which adopted a *process to establish* Responsible Contractor Policy, and CPUC D.18-10-008 which initiated limited HVAC workforce standards and directed CAEECC to convene a stakeholder process to assess experience and potential expansion.
- A CAEECC Member noted that CAEECC hosting a workshop is not the same as CAEECC engaging in solving the issue of workforce standards; it could be a first step to test if it makes sense. Not sure CAEECC should get involved in solving this until we learn more from the workshop.

#### Input from Members of the Public

- **Jeremy Zeedyk** *via chat* - The Western States Council of SMART highly encourages this discussion and supports the workshop idea.

In short, there were no objections; the workshop was approved.

## Equity Advisory Committee Update

Michelle Ralston presented Equity Advisory Committee updates (slides 64-73).

### Summary of Discussion on the Equity Advisory Committee Update

- A CAEECC member asked if the EAC had received feedback from PAs, especially regarding viability. Another CAEECC member and PA responded that a few PAs had attended a recent EAC meeting and provided feedback; appreciated the robust discussion on the recommendations.

## Q2 Meeting Topics

Katie Abrams presented the proposed topics listed on slide 75.

### Summary of Discussion on Q2 Meeting Topics

- A CAEECC member asked what would be covered under the first bullet topic (generally, Energy Division Updates on the BPAs), and if anyone was developing summaries of the 13 Business Plan Applications that they could share with CAEECC. ED responded that each application has an Executive Summary but that otherwise CPUC analysis won't be available for public consumption. ED noted they expect to have updated data in the CEDARS dashboard and other updates on the process.
  - The Facilitation Team further noted that if there are key themes or topics or policy recommendations that come out of the Business Plans, the topic could also be a chance to identify topics ED would like to hear more from CAEECC about.
- A CAEECC member mentioned that if the agenda was light, the Workforce Standards Workshop could possibly happen on that date.
- A CAEECC Member proposed the following topics for a subsequent meeting: IDSM, Flex Load, VEAs, Cost Effectiveness issues, the state Auditor's report (due March 2026) and how the CPUC is responding, and NEB and NEI (which CPUC will be revisiting soon).
- The Facilitation Team shared an update on the CAEECC website refresh, congratulating Lara Ettenson for her work initially to set up the website.
- The Facilitation Team checked in with CAEECC members about the updated Groundrules requiring only 3 days to review materials. There were no concerns raised.

## Optional Assembly

### CalMTA

Lynette Curthoys presented about CalMTA's portfolio progress: the MTIs approved in 2025; the MTIs they are preparing for submission in 2026; and MTIs in development for 2027 (slides 90-99).

### Summary of Discussion on CalMTA

- A CAEECC member inquired about the cost-effectiveness modeling and requirements of CalMTA's Market Transformation Initiatives. CalMTA responded

that in their 2019 Decision, they are required to look at TRC and PAC, and also began to record SCT. But they do not require a TRC level, only that CalMTA manage the portfolio towards cost-effectiveness, and cited the initial MTIs had high cost-effectiveness.

- A CAEECC member asked for clarification of the secondary window measure. CalMTA provided additional information and that they were currently conducting a field study at an elementary school.

## CalTF

Arlis Reynolds presented about CalTF's planned activities to advance work around Key Custom Initiative Documents/Tools, Technical Position Papers and White Papers, and eTRM updates. CalTF is also launching a "Deemed Initiative" (slides 101-110).

### Summary of Discussion on CalTF

- A CAEECC member asked for additional details on the TRM Roadmap, the intent and the timeline. CalTF provided a link to more details ([eTRM ROADMAP – CalTF](#)) and offered to connect them with a CalTF staff member.

See [Appendix E](#) for additional details from the Optional Assembly.

# Appendix A: Attendees

## Presenters

- **Energy Division Updates:** Pam Rittelmeyer (**CPUC Energy Division**);
- **CARB Appliance Standards:** Maggie Seays (**CARB**)
- **MCE, SVCE and BAAD Appliance Standards:** Jennifer Green (**MCE**) and Eric Rodriguez (**SVCE**)
- **CAEECC Business Items:** Katie Abrams (**Birch Road Consulting**); Michelle Vigen Ralston (**Common Spark Consulting**);
- **Optional Assembly:** Lynette Curthoys (**CalMTA/Resource Innovations**); Arlis Reynolds (**Future Energy Enterprises**)

## CAEECC Members

- **3C-REN** - Alejandra Tellez
- **BayREN** - Jane Elias
- **CCRREN** - Trevor Keith
- **CodeCycle** - Dan Suyeyasu
- **CSE** - Rocky Fernandez
- **Frontier Energy** - Nancy Barba
- **I-REN** - Benjamin Druyon
- **MCE** - Alice Havenar-Daughton (Co-Chair)
- **NRDC** - Lara Ettenson
- **NREN** - Patricia Terry
- **PG&E** - Lisa Hunter
- **SBUA** - Ted Howard
- **SCE** - Jessica Lau
- **SDG&E** - Stacie Risley
- **SDREN** - Sheena Tran
- **SJVCEO** - Courtney Blore
- **SMW Local 104** - Chris Ruch
- **SoCalGas** - Sandra Gonzalez
- **SoCalREN** - Audrey Bragg
- **The Energy Coalition** - Laurel Rothschild (Co-Chair)

## Ex-officio CAEECC Members

- **CARB** - Julia Branco, Lynette Curthoys, Kathy Jaw, Maggie Seays, Melanie Stutler, Melanie Zauscher
- **CEC** - Kristina Dulonglo, Cynthia Rogers
- **CPUC** - Ely Jacobsohn, Pamela Rittelmeyer, Coby Rudolph, Jessie Levine

## Members of the Public

- **Brandt Strategies** - Melissa Brandt
- **CABEC** - Susan Davison
- **CA DGS** - Dan Burgoyne
- **CalMTA** - Smita Gupta
- **CalMTA** - Rachel Good
- **CCRREN** - Jordan Garbayo
- **CPUC** - Peter Biermeyer
- **CPUC** - Ilona Mantachian
- **CPUC** - Savannah McLaughlin
- **CPUC** - Emily Pelstring
- **CPUC** - Amy Reardon
- **CPUC** - Nancy Ta
- **CPUC** - Christie Torok
- **CPUC** - Ana Zapata
- **Energy Solutions** - Michael Greco

- **Esource** - Emily Morris
- **Frontier Energy** - Margaret Marchant
- **Future Energy Enterprises** - Arlis Reynolds
- **ICF** - Nora Lovrien Buehler
- **Lincus** - Sabarish Vinod
- **MCE** - Jennifer Green
- **MWC** - Mark Wallenrod
- **Opower / Oracle** - Serj Berelson
- **Peninsula Clean Energy** - Matthew Rutherford
- **PG&E** - Sebastien Csapo
- **SCE** Melodee Black
- **SCE** - Mara Portlock
- **SCE** - Larry Tabizon
- **SDREN** - Aisha Cervantes-Cissna
- **SoCalGas** - Roy Christian
- **SoCalGas** - Art Montoya
- **SoCalREN** - Tessa Charnofsky
- **SoCalREN** - Fernanda Craig
- **SoCalREN** - Sulma Hernandez
- **SoCalREN** - Shelley Osborn
- **Solano County** - Luke Wonzen
- **Stay Cool** - Amos H
- **SVCE** - Eric Rodriguez
- **The Energy Coalition** - Natalie Espinoza
- **The Energy Coalition** - Christina Vanciu
- **Western States SMART** - Jeremy Zeedyk
- **Willdan** - Jeanne Huntsman
- **Willdan** - Rosie Kang

## Appendix B: Common Acronyms

Common acronyms used in this document include:

- California Energy Efficiency Coordinating Committee (CAEECC)
- California Public Utilities Commission (CPUC)
- Energy Division (ED)
- California Energy Commission (CEC)
- California Air Resources Board (CARB)
- Energy efficiency (EE)
- Working group (WG)
- Disadvantaged communities (DAC)
- Hard-to-reach (HTR) communities
- Justice equity diversity and inclusion (JEDI)
- CPUC's Environmental and Social Justice Action Plan (ESJ Action Plan)
- Portfolio Administrator (PA)
- Investor-owned utilities (IOU)
- Regional Energy Network (REN)
- Community-based organization (CBO)
- Market transformation (MT)
- Equity Metrics Working Group (EMWG)
- Market Support Metrics Working Group (MSMWG)
- Evaluation measurement and verification (EM&V)
- Ordering Paragraph (OP)
- Disadvantaged Communities Advisory Group (DACAG)
- Low-Income Oversight Board (LIOB)
- Evolving CAEECC Working Group (ECWG)
- Compensation Task Force (Compensation TF)
- Mid-Cycle Advice Letters (MCALs)
- Order Instituting Ruling (OIR)
- Non-Energy Impacts (NEIs)
- Non-Energy Benefits (NEBs)
- Integrated Demand Side Management (IDSM)

# Appendix C: Energy Division Updates - Additional Discussion

## CAEECC Member Discussion

- **Lara Ettenson, NRDC** *via chat* - Full disclosure, since the rules say 30 days to respond or protest to applications, NRDC will be seeking an extension given the high number of applications. (On transit so chatting instead of speaking)
- **Aisha Cervantes-Cissna** *verbally* - Will the Uniform NTG ratio be applied to HTR?
  - **Amy Reardon, ED** *via chat* - In response to Aisha's question during the ED updates: Hard-to-reach projects have their own adopted net-to-gross (NTG) ratio. The .60 NTG applies to all custom projects where the customer types previously had a .55 NTG applied.
- **Laurel Rothschild, TEC** *verbally* - Question re: the CEDARS Dashboard - when will the measure-level data be available? And will it be historical or only forward looking?
  - **Amy Reardon, ED** *verbally* - Graphics are ready to go, just going through final testing. Expecting release soon.
  - **Amy Reardon, ED** *via chat* - I wanted to mention something a bit deeper in the weeds in CEDARS updates: ED is working towards more accurate impact profiles for use in the CET. We just released an Impact Profile tool that enables users to input a loadshape and generate a unique impact profile for use in the CET. This is especially useful for NMEC, and the upcoming release of the Deemed impact tool will be available for measure developers in April.

## Input from Members of the Public

- **Melanie Stutler** *via chat* - Request for link to Customer Electrification Estimator Tool

# Appendix D: Process Considerations and California Air Resources Board's (CARB's) Update on the Zero Emission Space and Water Heating Standards - Additional Discussion

## CAEECC Member Questions on CARB Presentation

- **Ted Howard, SBUA verbally** - Considering federal policies tamping down/eliminating EPA and other policies, is there a concern about that throwing a wrench in this whole process?
  - **Maggie Seay, CARB verbally** - There's definitely a political climate regarding affordability; we need a proposal that will be stable and ensure emission reductions going forward. There's always a risk of legal pushback (like in South Coast AQMD) but CARB is still moving forward and wants to push standards forward. So nothing specific from federal government curtailing efforts.
- **Ted Howard, SBUA verbally** - Are there concerns about gaming the system?
  - **Maggie Seay, CARB verbally** - Whether there's any concerns about gaming the system, and any efforts to try to block any kind of gaming of the system, which seems like it's just a possibility, but I don't know to what extent. It came up, or was alluded to, in some public comment letters from manufacturers. CARB is in conversations to refine the details around reporting and to try to eliminate that to the greatest extent possible. We're in conversation with regulated entities to try to work out those details.
- **Ely Jacobsohn, CPUC verbally** - I'm trying to think about what you are proposing. It sounds like the emissive limits concept is a bit like the CAFE standard equivalent. Can you elaborate on that, it might be helpful. I was also curious. Do you already get the sales data from the manufacturers or is that something new that you will need to obtain?
  - **Maggie Seay, CARB verbally** - We wish we had the data right now. We do not have that data and we know the CEC is similarly working on a proceeding around reporting for HVAC and water heating equipment as well. I think that is in the early stages, but the short answer is no. This was something that came up in many of the public comment letters around reporting. To your question about the CAFE standards, I think what you're getting at is that this is similar to a fleet average around MPG so it's not exactly the same, but there is some inspiration from that. Rather than doing 100% appliance standards with exemptions, we are looking at a manufacturer's total portfolio of equipment in the same way we might look at a manufacturer's total portfolio of vehicles and some kind of

average there. So we are looking at the total portfolio and then capping the percent of that portfolio that can be sold as emissive equipment. So if a manufacturer is selling 50% of their portfolio of water heating equipment is emissive, and the limit is 40%, they will need to either pay penalties or do something else to earn credits like donating money through an equity building decarbonization program in order to be compliant.

- **Ely Jacobsohn, CPUC** *verbally* - You are only looking at California sales, right?
  - **Maggie Seay, CARB** *verbally* - Yes, we are only looking at in-state. Those details are being hammered out now, such as instead of requiring contractors to report everything being installed, we're looking to manufacturers and distributors doing the reporting.

### **CAEECC Member Questions on MCE and SVCE Presentation**

- **Ted Howard, SBUA** *verbally* - I recently installed a HPWH; it was going to be \$6-8k but with credits it came down to \$1k. How can we make up for those credits so there's still a strong financial incentive especially for lower income
  - **Jennifer Green, MCE** *verbally* - We'll continue our incentives including kicker incentives to close the incremental cost gap before the ruling takes effect. Also the financing offerings I spoke to. Incentives alone won't close the gap - need to look at all options

### **Slides/Report Outs from Breakout Groups**

CAEECC Members and the Public were put into 6 pre-assigned groups (5 for Members; 1 for the Public) and asked to reflect on a series of questions (see slides for prompts). After the Breakouts, there was an opportunity for shareouts from each group. See below for details. Note breakout groups 4-5 were combined so there is no slide 4 below.

**1. Share your initial thoughts about how CARB's update may impact Business Plans and the EE Portfolio**

**Bay Area heavy group.** Not seeing a shift in Business Plans at this time because of timing. Business Plan is due now, CARB still in process. BayREN: there is response to BAAD policies now. Reasonable confidence in where BAAD is heading, so incentives focused on heat pumps. Similar with Bay Area CCAs because BAAD out in front of CARB.

**Public input** to CARB would be useful in program design for those in the Bay Area moving more rapidly (two supporting, if not more).

More joint agency coordination workshops would be helpful. A different mix than CAEECC, as some useful contributors not in CAEECC. Smaller coordination workshops can also be helpful – e.g. CEO level alone.

Unknown if you can or cannot even buy certain types of equipment in certain regions in the future. There will likely still be a gray market, as is seen in other regulated materials.

**2. What recommendations and process considerations should the CPUC and PAs think through given the proposed CARB standards? (e.g., inclusion of gas appliances in EE portfolio, budget true-up, amendments to business plans)**

**3. If CARB adopts standards much like the proposal, how should the EE portfolio complement and support the success of those standards?**

- a. How can the EE portfolio help address affordability and equity concerns that accompany these standards?
- b. What would be the most effective way for PAs and CARB to collaborate?

Target EE program support for the more advanced technologies that CARB identifies. "Anything on CARB Schedule B receives \$XX" to drive uptake. Get in front of double-counting concerns in some way? Explicitly authorize overlap and layering of drivers.

How does equity donation as CARB compliance flow through PAs, if possible?

Should it be a statewide program at least as default, even if some local programs as well?

Breakout Room #1 - CAEECC Members

Name of Notetaker/Reporter: \_Suyeyasu\_\_\_\_\_

**1. Share your initial thoughts about how CARB's update may impact Business Plans and the EE Portfolio**

- Several PAs are anticipating that these standards will lower their budget caps.
- Knowing that standards can change, however, a PA might not want to change budget based on these standards.
- There are ongoing concerns about affordability of transition to zero emissions.
- Another concern is resilience - i.e., backup equipment.
- Too early to say how this will directly impact portfolios

**2. What recommendations and process considerations should the CPUC and PAs think through given the proposed CARB standards? (e.g., inclusion of gas appliances in EE portfolio, budget true-up, amendments to business plans)**

- EM&V studies (including customer polling) could address this
- Looking at affordability and resilience and finding ways to support customers
- Customers need all the help they can get. They need alternatives. Look at possibility of non-rate payer funds to incentivize.
- Continuing to consider equity. Continuing to train workforce.
- MCALs could be the place to get into the details.
- IDSM can allow us to address some of these issues for now.

**3. If CARB adopts standards much like the proposal, how should the EE portfolio complement and support the success of those standards?**

- a. How can the EE portfolio help address affordability and equity concerns that accompany these standards?
- b. What would be the most effective way for PAs and CARB to collaborate?
  - PAs can promote other PAs' programs that fill their own gaps
  - CARB has a couple of decarb programs that PAs could leverage, which is already happening to some extent
  - It might be helpful to have regular updates from CARB for PAs. Would the best place be a CAEECC meeting, CAEECC website, or something else? The best place might not be CAEECC but rather a regular meeting with CARB and PAs.
  - CARB communicates with CEC and CPUC to ensure information is updated on their websites

Breakout Room #2 - CAEECC Members

Name of Notetaker/Reporter: \_\_\_\_Pam Rittelmeyer\_\_\_\_\_

**1. Share your initial thoughts about how CARB's update may impact Business Plans and the EE Portfolio**

- Timing related to business plan development and the application proceeding is unclear. When will CARB's rule be formalized? What should we consider re time possible legislative, legal, or other challenges to the new rule?
- Could use TUAL and MCAL for changes to the portfolio.
- Different PAs may address CARB's rule at different speeds.
- How will CARB's new rules impact IOU's and CCA's ability to comply with CPUC rules and goals? Especially related to cost effectiveness reqs and TSB goals?
- May not impact all PAs equally depending on whether they are subject to CPUC rules and whether they offer gas measures.
- What impact should the P&G have related to CARB's rule? What could be learned from the P&G about potential impact?
- How is CARB engaging with ENERGY STAR on getting the data?
- Statewide Water Heater program may become less cost effective which impacts all the IOUs.
- TSB favors gas-to-gas upgrades so it could become problematic to meet goal in the future (impact on BPs)

**2. What recommendations and process considerations should the CPUC and PAs think through given the proposed CARB standards? (e.g., inclusion of gas appliances in EE portfolio, budget true-up, amendments to business plans)**

*your notes here!*

**3. If CARB adopts standards much like the proposal, how should the EE portfolio complement and support the success of those standards?**

- a. **How can the EE portfolio help address affordability and equity concerns that accompany these standards?**
- BayArea Air District created carveouts for small systems and used self-attentions of low-income to make process easier
- b. **What would be the most effective way for PAs and CARB to collaborate?**

*Add your notes here!*

**Breakout Room #3 - CAEECC Members**

**Name of Notetaker/Reporter:** \_\_\_\_\_

**1. Share your initial thoughts about how CARB's update may impact Business Plans and the EE Portfolio**

*Didn't account for it in this BPA as the regulation hasn't been adopted; hard to discern near-term impact.*

*Curiosity about how credit system will work and be administered - could dollars from that go toward helping HTR sectors electrify?*

**2. What recommendations and process considerations should the CPUC and PAs think through given the proposed CARB standards? (e.g., inclusion of gas appliances in EE portfolio, budget true-up, amendments to business plans)**

*Account for ZEAS in Potential and Goal Studies when there is certainty around the regulation. Use funding from non-resource areas (e.g., market support) to support moving the market to be in compliance.*

**3. If CARB adopts standards much like the proposal, how should the EE portfolio complement and support the success of those standards?**

- a. **How can the EE portfolio help address affordability and equity concerns that accompany these standards?**
- b. **What would be the most effective way for PAs and CARB to collaborate?**

*Credits could be used for education, TA, and PA incentives could stack on top of any that independently come from ZEAS credits. Furthermore, to help address affordability and equity concerns, PAs can do education to ensure they're aware of the ZEAS and associated programs.*

*Most effective way for PAs and CARB to collaborate: ongoing one-on-one meetings b/w CARB staff and PA staff, potentially have joint PA (e.g., CalREN) and CARB meetings to keep each other apprised of complementary developments. Have CARB attend PA events to share information with communities.*

**Breakout Room #5 - CAEECC Members**

**Name of Notetaker/Reporter:** \_\_\_\_\_

1. Share your initial thoughts about how CARB's update may impact Business Plans and the EE Portfolio

*Timing is tough for BP but the TUAL could have proposed changes*

2. What recommendations and process considerations should the CPUC and PAs think through given the proposed CARB standards? (e.g., inclusion of gas appliances in EE portfolio, budget true-up, amendments to business plans)

*Would want to wait until there is more assurance that these are going to be adopted before making big changes; take lessons learned from SCAQMD process*

*Would ask to be kept as up to date as possible on the latest information from CARB to then make those changes in line with CARB*

3. If CARB adopts standards much like the proposal, how should the EE portfolio complement and support the success of those standards?

a. How can the EE portfolio help address affordability and equity concerns that accompany these standards?

b. What would be the most effective way for PAs and CARB to collaborate?

a. *From RENs perspective - continuing the work that they do now should support the success of the standards. Much of their work is focused on equity and decarbonization.*

b. *Engagement with everybody, across the board - continuing to participate in CAEECC and additional forums with most parties participating such as EE, and Application proceedings*

Breakout Room #6 - CAEECC Members

Name of Notetaker/Reporter: \_Notetaker: Natalie; Reporter: Margaret\_\_\_\_\_

1. Share your initial thoughts about how CARB's update may impact Business Plans and the EE Portfolio

- *CARB hold meetings with manufacturers to understand how the standard will affect the market before the rules take effect and understand how compliance costs will be passed on to customers*
- *Additionality concerns: will incentives for non-emissive equipment result simply in reducing compliance costs for manufacturers through the credit trading mechanism? E.g., an incentive generates a credit that a manufacturer could sell to another manufacturer to be used for compliance and allow addition emissive appliance sales*

2. What recommendations and process considerations should the CPUC and PAs think through given the proposed CARB standards? (e.g., inclusion of gas appliances in EE portfolio, budget true-up, amendments to business plans)

- *Consider how the regulation will impact DAC/LI/HTR customers? Is this a blindspot? Perhaps tracking OEM sales to distributors that lead to installations in DACs?*

3. If CARB adopts standards much like the proposal, how should the EE portfolio complement and support the success of those standards?

a. How can the EE portfolio help address affordability and equity concerns that accompany these standards?

b. What would be the most effective way for PAs and CARB to collaborate?

- *Consider a working group session to further hash out logistics of implementing the regulation while taking in manufacturer input.*

Breakout Room - Public

Name of Notetaker/Reporter: \_\_\_\_Matthew Rutherford (PenCleanEnergy)\_\_\_\_

## Cross-cutting Discussion

- **Maggie Seay, CARB via chat** - I am hearing a lot on timing and the need for better communication / coordination. Since the Plans are getting submitted now and that if our proposed reg moves forward that the implementation would happen in

2030 -- what is a good deadline/timing for me to have in the back of my mind re: changes / processes re: the EE portfolio?

- **Alice Havenar-Daughton, MCE** *verbally* - Would be great to see more CARB-PA engagement; PAs may very well have solutions to share with CARB. 2027 TUAL and 2029 MCAL are clear opportunities to revise portfolios - need to coordinate well in advance of those deadlines.
- **Nancy Barba, Frontier Energy** *verbally* - there used to be a bus stop schedule, which could be helpful for a refresh of Business Plans.
- **Laurel Rotchhild, TEC** *verbally* - these notes will be available and can be leveraged during the Public Comment period of the BPAs.

# Appendix E: Optional Assembly - Additional Discussion

## CalMTA

### CAEECC Member Discussion

- **Ted Howard, SBUA** *verbally* - I understand there are criteria by which MTIs are evaluated and then considered for cost-effectiveness. What CE modeling do you use? TRC? Societal Cost? PAC?
  - **Lynette Curthoys, CalMTA** *verbally* - we are required to look at TRC and PAC based on the CalMTA 2019 Decision. We've also begun to record SCT. But we are not required to achieve a certain TRC level, only that CalMTA manage the portfolio towards cost-effectiveness; the initial MTIs had high cost-effectiveness.
- **Tessa Charnofsky, SoCalREN** *verbally* - I'd like to better understand the window measure, where the idea is to provide incentives to a 2nd layer to an existing window. Can you explain the installation?
  - **Lynette Curthoys, CalMTA** *verbally* - CalMTA is focusing on commercial secondary windows. It gets installed in the existing frame, built custom on site and installed on the interior and exterior. It's much less expensive than window replacement. We're currently doing a field study at an elementary school.

## CalTF

### CAEECC Member Discussion

- **Ted Howard, SBUA** *verbally* - In your eTRM Roadmap, you're trying to understand and map the data in the EE data ecosystem? Any further details on that and timeline?
  - **Arlis Reynolds, CalTF** *verbally* - Responded by sharing a link to more details and offered to connect to a CalTF staff member. [eTRM ROADMAP – Cal TF](#)