



# CAEECC Quarterly Meeting #38

June 21, 2023 | 9:30 AM - 1:30 PM PT

Hosted by California Energy Efficiency Coordinating Committee (CAEECC)

# Agenda

9:30	Welcome, Agenda, Introductions & Housekeeping
9:45	<b>Session 1: CAEECC Working Group Updates</b>
10:30	<b>Session 2: CPUC Proposed Decision on Business Plans</b>
11:45	<i>Stretch</i>
12:00	<b>Session 3: DEI Reflections &amp; Follow Up</b>
12:30	<b>Session 4: Wrapping Up Main Assembly</b>
12:45	<b>Session 5: Optional Assembly: Relevant Updates</b>
1:30	Adjourn

*We will be asking for Member input on the following:*

1. **Possible Impact to CAEECC of CPUC Business Plan Proposed Decision\*** (Session 2, slides 31-44)
2. **Reflections on Courageous Conversations Training** (Session 3, slides 48-52)

*Topics with an \* represent those that we will also open up for Public input.*

# Meeting Goals

1

Provide updates on CAEECC Working Groups

2

Discuss possible impact to CAEECC of CPUC Business Plan Proposed Decision

3

Reflect on the Courageous Conversation Training and applying forward thinking to CAEECC activities

4

Provide updates on other relevant proceedings and activities

# Introductions

If you were a plant,  
which would you  
be?

In the chat, please introduce yourself with your:

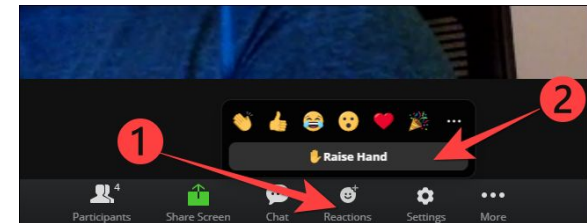
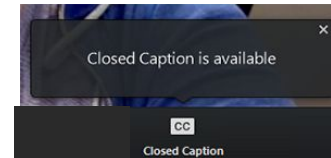
- Name and pronouns
- Organization
- Answer to the Icebreaker question
- *and/or Place-Name-Intention*

# Housekeeping

- Zoom etiquette
- Public Input
- Meeting Norms and Ground Rules

# Zoom Etiquette

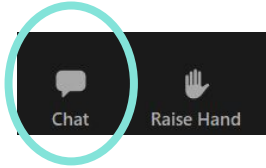
- Before meeting starts
  - Log on a few minutes **early**, if possible, to ensure your technical connection is working.
  - CAEECC **Members** will be promoted to panelists; all other **attendees will be in listen-only** mode but able to raise their hand to speak when invited.
  - **Rename** your Participant Name to include your Organization & Pronouns
  - Share your **video** if possible – this fosters engagement and helps mimic an in-person meeting setting (will only be available for panelists).
- Throughout meeting
  - **Mute** yourself when you're not speaking.
  - **Members: Raise your hand** to enter the queue to speak—then wait for the Facilitator to call on you.
  - **Closed captioning** available
- When to use the chat
  - Chat everyone: "+1", share resources, ask non-substantive questions,
  - Chat Suhaila: share anonymous concerns
  - CAEECC Members asked to raise their hand and speak if they have substantive input



# Public Input

## Welcome Members of the Public!

- You can participate by sharing feedback at any point in the meeting via the chat.



- Facilitators will elevate public feedback as and when appropriate.
  - One dedicated Public input opportunities as indicated on the agenda: *Session 2 Topic 4 Possible Impact to CAEECC of CPUC Business Plan Proposed Decision*
  - Email [Susan@raabassociates.org](mailto:Susan@raabassociates.org) with subject line “Public comment” before 11:30am so Susan can unmute you and add you to the queue

# CAEECC's Ground Rules

- Attend all meetings (or send designated alternate)
- Do your homework (complete pre-and post-meeting work to ensure productive meetings and that a complete deliverable is finalized)
- Facilitation team posts materials 5 days before the meeting
- If there are recommendations you don't agree with, propose alternatives or think creatively to try to bridge the gap

See Goals, Roles & Responsibilities for the full list of Ground Rules:

<https://www.caeec.org/caeec-info>



# Proposed Meeting Norms

- Make space, take space (share the mic).
- Stories shared here stay here; what is learned here leaves here.
- Share your unique perspective: share your unpopular opinion.
- Generative thinking: "yes, and" instead of "yes, but".
- Listen from the "We", speak from the "I".
- Offer what you can; ask for what you need.
- Be inquisitive.
- Assume best intent *and hold each other accountable*.
- Be empowered to share impact.

*Creating a space of inclusion and diversity*

# CAEECC Membership Update

- BayREN - new lead
- CEE/IBEW - no longer a member
- CEC - new lead

# Session 1: Working Group Updates

Goals: Provide updates to CAEECC about the progress of Working Groups

1. Evolving CAEECC WG
2. Compensation Pilot

# **Evolving CAEECC WG**

**(ECWG)**

# Why is CAEECC taking on this evolution process?

1

CAEECC was created in 2015 to establish a venue for stakeholders to engage on energy efficiency. **It was created with the assumption that those who engage would be well versed with extensive technical experience in energy efficiency.** However, much has shifted in terms of policies that impacts the scope of CAEECC.

2

CAEECC recognizes the importance of aligning this influential stakeholder venue to the **values upheld in the CPUC Environmental and Social Justice Action Plan.** And through that, be inclusive.

3

CAEECC currently does not include any language/guidance pertaining to justice, equity, diversity, or inclusion efforts in its purpose, scope, or structure. And as such, **recognizes that the current format of CAEECC may, in fact, hinder the goal of inclusion.** Additionally, CAEECC's scope doesn't reference the state's climate goals.

# CPUC ESJ Action Plan

The Environmental and Social Justice (ESJ) Action Plan (2.0) is to guide CPUC decisions and make sure its broad regulatory authority continues to advance equity throughout the state.



The CPUC is tasked with serving all Californians, and to do so effectively, it must acknowledge that some populations in California face higher barriers to access to clean, safe, and affordable utility services. To fulfill its mission, the **CPUC acknowledges it must focus on communities that have been underserved**, as this plan outlines. Additionally, as the CPUC fulfills the goals and objectives listed in this ESJ Action Plan and improves its ability to serve ESJ communities, the CPUC will become even more transparent, accessible, and effective for all the communities it serves.



# What led to the Evolving CAEECC WG?

## Composition, Diversity, Equity, & Inclusion (CDEI) WG

A working group from January - April 2022 that sketched out draft Prospectus for ECWG. Final recommendations are available at: [caeccc.org/cdei-working-group](https://caeccc.org/cdei-working-group)

## Compensation Task Force

A task force built off the CDEI WG that proposed a path to compensate future members of the Evolving CAEECC WG. Final recommendations available at: [caeccc.org/compensation-task-force](https://caeccc.org/compensation-task-force)

## Evolving CAEECC WG

This working group that will guide CAEECC's scope + purpose + objectives and suggest inclusionary CAEECC policies.

**The Evolving CAEECC Working Group will help align the CAEECC Purpose, Objectives, Structure, and Processes** as reflected in its governance policies, with CPUC and state goals around justice, equity, diversity, and inclusion, and evolving needs of the EE Portfolio.



# Setting up for Success

- Facilitation Team outlined an extensive application & recruitment process
- Named criteria for eligibility for both the ECWG and Compensation Pilot Application
- Developed outreach email templates for all recruiters
- Incorporated incumbent power mitigation techniques to reduce over-influence of CAEECC power holders (including the Facilitation Team)



# 25%

of the organizations the Recruitment Team *personally* reached out to applied to ECWG  
*(this is big).*

# 68%

of applicants (who aren't CAEECC members) applied without personal outreach

# 32

ECWG members total

# 71%

of members represent  
historically underrepresented  
groups in some capacity

# 45%

of members represent ESJ  
communities in some  
capacity

The membership breakdown of ECWG may look different than previous WGs, **this is due to the success of outreach efforts, the availability of compensation, and the nature of the charge.**

# Membership of ECWG

## CAEECC Members /

### Ex-Officio:

- ◆ Center for Sustainable Energy
- NRDC
- PG&E
- San Joaquin Valley Clean Energy Organization
- The Energy Coalition
- CPUC

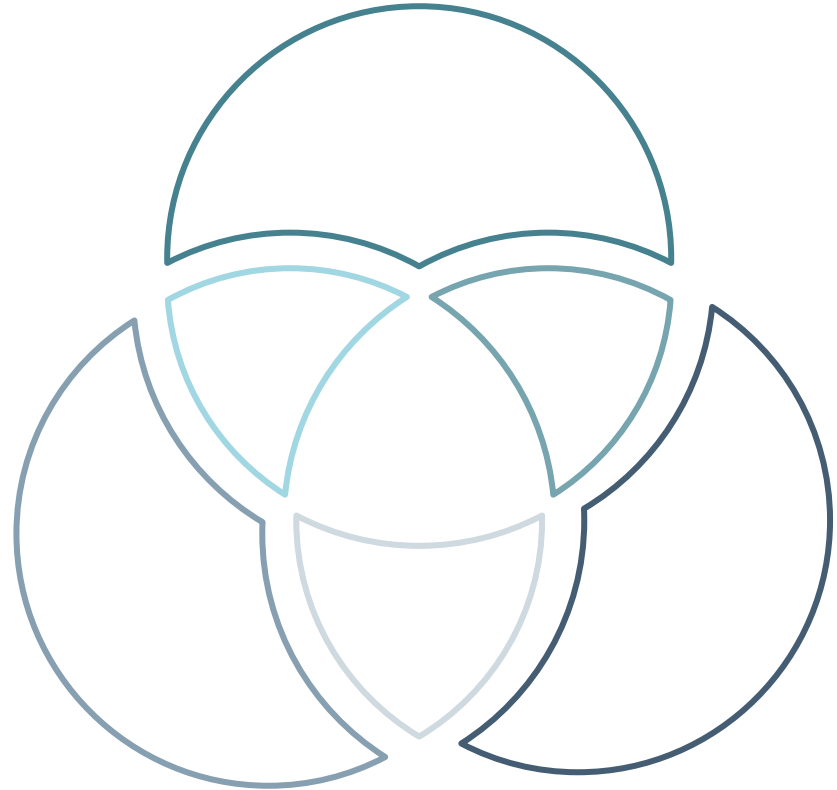
## Non-CAEECC Members

- Acterra
- Association of California Community & Energy Services
- Association of Monterey Bay Area Governments (AMBAG)
- Brightline Defense Project
- Center for Accessible Technology
- Circuit Rider Community Services
- Day One
- Efficiency First California
- Emerald Cities Collaborative
- ◆ Energy Solutions
- Gateway Cities Council of Governments
- Individuals (6)
- ◆ Individual (1)
- MAAC Project
- Marie Harrison Community Foundation for Social and Environmental Justice
- MCR Performance Solutions
- Nevada County Energy Action Plan Committee
- San Diego Urban Sustainability Coalition
- The Greenlining Institute
- Valley Clean Air Now
- Willdan

# What will members work on?

## *Draft Prospectus Phase 1*

- **Purpose, Objectives, Scope of CAEECC**
  - Any changes related evolving needs of the EE Portfolio.
  - Any justice, equity, diversity, and/or inclusion matter relevant to CAEECC's purpose.



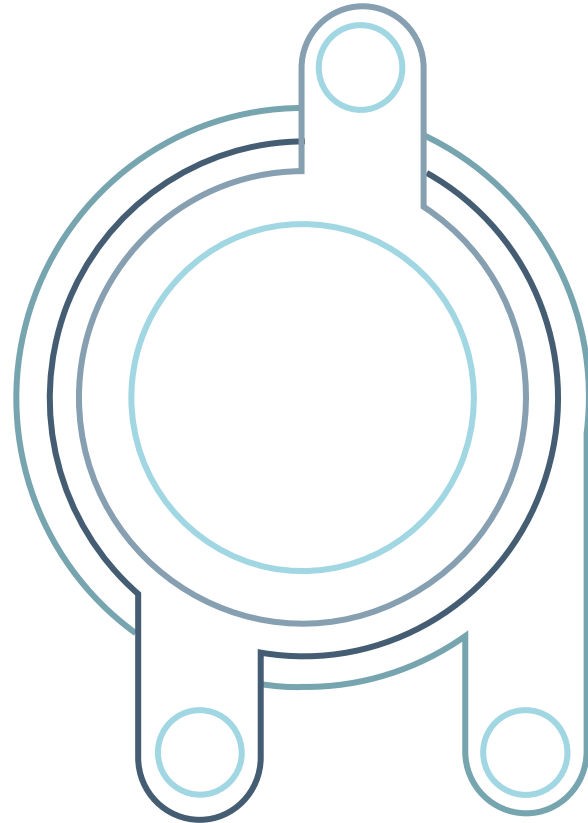
# What will members work on? *Draft Prospectus Phase 2*

- **Composition/Representation and Eligibility (CAEECC and WGs)**
  - Consider recommendations in Section 6 of the Final CDEI WG Report, including eligibility for CAEECC members and subsequent Working Group members, application processes, and conflict of interest.
  - Consider how CAEECC can best engage communities not engaged/represented as a CAEECC member in addition to ensuring authentic representation of impacted communities in CAEECC.
- **Compensation**
  - Consider the outcomes of the [Compensation Task Force](#) and inform the Compensation Pilot as recommended, along with outstanding recommendations from Section 2 of the Final CDEI WG Report, which recommend Compensation for eligible participants for certain CAEECC activities (to be determined).
- **Competency Building**
  - Consider recommendations in Section 3 of the Final CDEI WG Report.
- **Recruitment & Retention**
  - Consider recommendations in Section 4 of the Final CDEI WG Report.

# What will members work on?

## *Draft Prospectus Phase 3*

- **Facilitation**
  - Consider the initial thinking from the Final CDEI WG in Section 5 of the CDEI WG Report.
- **Accountability & Reporting**
  - Consider how to evaluate progress and effectiveness of the implementation of this WG's recommendations.
- **Additional topics**
  - Think holistically about intersectional ideas across the CDEI Working Group and CDEI mini team recommendations.





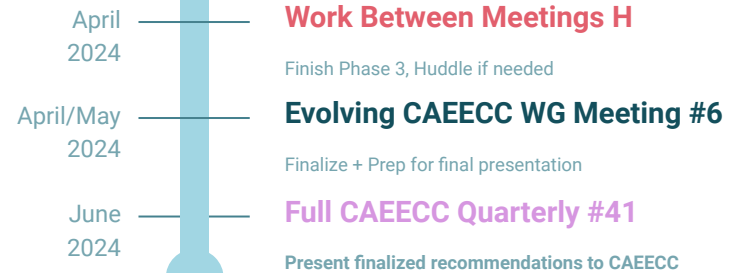
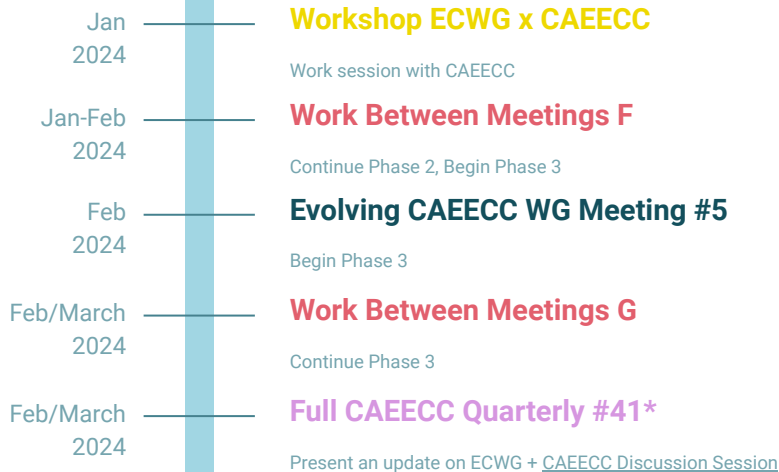
# **Evolving CAEECC WG Meeting #1**

The first ECWG Meeting was held on 6/15. It was an opportunity for members to learn more about ECWG and its context within CAEECC, meet other members, review the expected flow of the process, and suggest productive collaboration techniques.

# What's the timeline of the Evolving CAEECC WG?



# What's the timeline of the Evolving CAEECC WG?



# Compensation Pilot

# It's official.

The Compensation Pilot is underway! 44% of ECWG applicants noted interest in and/or applied for the Compensation Pilot.

**Compensation was awarded to 65% of said applicants; they will be compensated through a straightforward process as intended by the Compensation Task Force.**

*Compensation was declined to the remaining applicants due to eligibility criteria and/or lack of available funds.*

# Session 2: CPUC Proposed Decision on Business Plans

Goal: Discuss possible impact to CAEECC of CPUC Business Plan PD

1. Energy Division update on Proposed Decision regarding Business Plans and Applications
2. Members' clarifying questions on ED presentation
3. Facilitator and co-chair presentation and Member discussion on PD
4. \*Public Input on #1 and 3 above

*\*Public input opportunity*

# **Energy Division update on Proposed Decision regarding Business Plans and Applications**

Ely Jacobsohn, CPUC

# CAEECC activities within 2024-2027 EE Business Plan Proposed Decision

CAEECC Quarterly Meeting - June 21, 2023



California Public  
Utilities Commission



# Agenda

- Setting the stage: CAEECC's Recent Policy Achievements
- CAEECC's Role in Continued Regulatory Progress
- Timeline in Proposed Decision (PD) for CAEECC Activities
- Important Considerations - Stakeholders
- Next Steps

# CAEECC's Recent Policy Achievements

CAEECC and its Working Groups are instrumental to regulatory progress. As a result of stakeholder participation in past CAEECC activities, the following policy mechanisms are now in place or in this PD:

- Business plan applications now 4-year budget approval, no ABALs
- Equity Segment Objectives & Indicators
- Market Support Segment Objectives and Indicators
- Updated Definition of Underserved

# CAEECC is Instrumental to Continued Regulatory Progress

## Proposed in Next Cycle:

*Continued from CAEECC efforts leading into BP applications*

- Clarify Market Support and Equity Indicators adopted in Decision (P30)
- Identify Common Metrics that should be modified, suspended, or removed (P30)
- Develop Plan for Awareness, Knowledge, Attitude, Behavior (AKAB) Surveys (P69)
- Develop Community Engagement Indicators (P66)
- Develop Market Support and Equity Goals (P66)
- Develop Methods to measure Demographic Participation(P63)

*New*

- With Energy Division (ED), facilitate establishment of Portfolio Oversight Group (P26)

## Additional proposed tasks depending on need and capacity

- Support for ED Staff to engage stakeholders on development of Non-Energy Benefit indicators (P35)

# Anticipated Timeline for CAEECC Activities

CAEECC  
Re-Engages &  
Updates MS&E  
WGs

- Clarify **MS&E Indicators** and Suggest Modifications to **Common Metrics** - T2AL **May 1 2024**
- Develop Plan for **AKAB Surveys** – T2AL **Aug 1 2024**

Develop  
Options for  
MS&E Goals

- 2-3 **Goal Construct Options** per segment
- T3AL by **March 1 2025**

Develop  
Methods to  
Measure  
Demographic  
Participation

- Reporting PCG and CAEECC MS&E WGs **deliver report** responding to questions with **Mid-Cycle AL Sept 1 2025**

Work with ED to  
Establish POG

- Develop **Membership, Governance, Scope, Schedule** - **Q4-Q1 2024**
- Begin **Regular Meetings** to Assess Progress – **Q2-Q3 2024**

Develop  
Indicators for  
Community  
Engagement

- **Mid-Cycle AL Sept 1, 2025**
- PAs report starting in **Annual Report** due in **May 2026**

Possible  
Activities for  
CAEECC

- NEBs **Stakeholder Engagement** for development of indicators to be reported in **2028**

Activities and dates subject to change in final decision

# Remember: Stakeholders are People

## Ideas to Prevent CAEECC Stakeholder Fatigue

- Limit size of stakeholder groups to be more manageable – utilize sub-working groups
- Cross-pollination is good but limit individuals to certain number of groups
- Increase number and diversity of individuals and organizations engaged in CAEECC – Recruit, Recruit, Recruit!
- Plan with goals and desired outcomes at the forefront
- Focus groups' meetings on achievable outputs leading to prioritized outcomes
- Hydrate, hydrate, hydrate
- Other ideas welcome!



# Next Steps

- Reply Comments due 6/22
- Aiming for Commission vote on Final Business Plan Decision at 6/29 Commission meeting
- Potential & Goals Decision to be mailed in Summer
- True-Up Advice Letter due 60 days after P&G Decision



# California Public Utilities Commission

Thank you!

[Ely.Jacobsohn@cpuc.ca.gov](mailto:Ely.Jacobsohn@cpuc.ca.gov)

# CAEECC Member Clarifying Questions

*Note there will be able time for discussion in a moment - for now, clarifying questions only!*



# **Facilitator and Co-chair presentation and Member discussion on PD**

Lara Ettenson (NRDC), CAEECC Co-Chair  
Lucy Morris (PG&E), CAEECC Co-Chair  
Katie Abrams, CAEECC Facilitation Team

# Why are we discussing this?

- **Discussion topics**
  - Reasonableness, timeline and capacity, priorities, aligning various CAEECC activities, governance...
- **Process/next steps (i.e., for reply comments)**

# Scope - possible impact to CAEECC based on PD

## Explicitly directed

- **Develop a Portfolio Oversight Group (POG)**
- **Reengage Equity & Market Support Metrics Working Groups** in some form/capacity for the following tasks:
  - Clarify Market Support and Equity **Indicators** adopted in Decision (P30)
  - Identify **Common Metrics** that should be modified, suspended, or removed (P30)
  - Develop Plan for Awareness, Knowledge, Attitude, Behavior (**AKAB**) Surveys (P69)
  - Develop **Community Engagement Indicators** (P66)
  - Develop Market Support and Equity **Goals** (P66)
  - Develop Methods to measure **Demographic Participation** (P63)

## Possible activities

1. Non-energy benefits (NEBs)
2. Others?

# Discussion Questions

1. Overall input and reaction on PD?
2. Input on topics and scope?
3. Questions/concerns on timeline and member capacity? Will the same people serve on POG and WG's?
4. Questions/concerns on how will this work would align with ECWG and CAEECC's DEI journey?
5. Questions/considerations for whether/how to design POG in relationship to ECWG?
6. Other questions or input?

# Public Input

*Public input on the following*

- 1) **Energy Division update on Proposed Decision regarding Business Plans and Applications** - including new topics/scope for CAEECC, past CAEECC recommendations in PD, and process & next steps timeline
- 2) **Facilitator and Co-chair presentation and Member discussion on PD** - including scope, timeline, and other questions

# Session 3: DEI Reflections

Goals: Reflect on the Courageous Conversation Training and applying forward thinking to CAEECC activities

1. Reflections on Courageous Conversation Training
2. Growing Together

# Courageous Conversation

On May 1, CAEECC Members and Invited Stakeholders participated in a training to learn protocol on deepening interracial dialogue.

In attendance were over 40 participants who engaged in 4.5 hours of training.

*Note, due to proprietary information, we are not authorized to speak into the specifics of this training.*

## WHAT IS COURAGEOUS CONVERSATION®?

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COURAGEOUS CONVERSATION® is our award-winning protocol for effectively engaging, sustaining and deepening interracial dialogue. Through our Framework for Systemic Racial Equity Transformation, we help individuals and organizations address persistent racial disparities intentionally, explicitly, and comprehensively.

## **Why did CAEECC do this training?**

Because race matters. We learned about how to engage in dialogue both inter- and intra-racially and how to approach conversations openly.

*Inter-racial: between or involving different racial or ethnic groups.*

*Intra-racial: within or involving the same racial or ethnic groups.*



Think about your lessons learned  
from the training.

**Rhetorically: How might you bring  
these growth opportunities into the  
CAEECC community?**

**Reflecting on the CC training, what do you see as your role, positionality, and responsibility in carrying forward courageous conversations within the CAEECC community?**

CAEECC Members, you will receive a slido link in the chat, please answer the question. All others, please refrain from answering this question, additional questions will be open to the public.

**slido**



**Reflecting on the CC training, what do you see as your role, positionality, and responsibility in carrying forward courageous conversations within the CAEECC community? (anonymous)**

slido



**How might CAEECC better  
foster justice, diversity,  
equity, and inclusion?  
(anonymous)**

# Growing Together

**Frequent  
Facilitator  
Convos on  
inclusion**

**Check in at  
9/20 Q3  
Meeting**

**Continue DEI  
Training Plan**

# Session 4: Wrapping Up Main Assembly

Goal: Evals and next steps

- 1) Hybrid Meeting Details
- 2) Q1 '23 Mtg Evaluation Results
- 3) Q2 '23 Mtg Evaluation Link
- 4) Live Meeting Evaluation

# CAEECC Hybrid Meeting Details

Suhaila Sikand, CAEECC Facilitation Team

# The state of hybrid meetings

## What does hybrid mean?

CAEECC would have the option to meet **in person with an online video conferencing option** for Full CAEECC Quarterly Meetings.

*WG Meetings and other workshops will remain virtual-only for now.*

As we mentioned in February, the Facilitators put together a proposal given the then-current environment.

Since the last meeting, Gavin Newsom lifted the State of Emergency for Covid-19.

**As such, the facilitator's present new guidelines for the in-person portions of hybrid meetings**



# Guidelines for Q3 Full CAEECC Quarterly Hybrid Meeting

**On 9/20/23 at 10am PT, the Full CAEECC Quarterly Q3 Meeting will be held virtually with an optional in-person meeting option for CAEECC Leads and Ex-officio only.**

The following verifications/procedures will occur for in-person participants:

- Location meeting room will be well ventilated and/or has open windows
- Attendee has COVID Proof of Vaccination (at least 2 shots of Pfizer/Moderna; 1 shot of J&J)
- Masks are encouraged, but not required

*Note, the venue we will be meeting in has a strict go-home policy for folks not feeling well or exhibiting any symptoms of illness including seasonal allergies.*

## Proposed Q3 Mtg Topics

- ECWG: Updates + CAEECC Discussion
- Update on CPUC Final Decision on Business Plans
- Other topics?

## Next Steps

- Meeting summary will be posted in 5 business days
- Members to complete evaluation by 6/28
- Reply comments on CPUC Proposed Decision on Business Plans due TOMORROW

# 2/22/23 Full CAEECC Meeting #37 Evaluation Survey Results

Question	Avg. Score
Objectives of the meeting were accomplished	5.2
Presentations and background documents were clear and helpful	5.2
Do you feel this meeting was an inclusive and trusting environment?	5.6
The facilitators were effective in running the meeting (e.g., fostering a constructive and efficient forum, being impartial, and making sure no one dominated discussions)	5.3
Overall, the online meeting format (Zoom) was smooth and effective	5.3
Overall, this Full CAEECC meeting was successful	5.0

- 1) Scores are 1-6 scale, where 1 is "strongly disagree" and 6 is "strongly agree" ; and 3.5 is mid-point of 1-6 scale
- 2) Scores based on responses from 17 members and 4 stakeholders
- 3) Facilitation Team and Co-Chairs reviewed and debriefed comments from respondents

# 2/22/23 Full CAEECC Meeting Evaluation



Evals will be sent by Katie Abrams  
([katie@birchroadconsulting.com](mailto:katie@birchroadconsulting.com))



Complete evals **today**, latest by  
June 28, 2023 COB

# Meeting Goals - Recap

1

Provide updates on CAEECC Working Groups

2

Discuss possible impact to CAEECC of CPUC Business Plan Proposed Decision

3

Reflect on the Courageous Conversation Training and applying forward thinking to CAEECC activities

4

Provide updates on other relevant proceedings and activities



# Live Meeting Evaluation

**Do you feel this was an inclusive and trusting environment?**

Not at all safe ..... Somewhat safe ..... Very safe

**Do you feel the meeting was effective?**

Not at all effective ..... Somewhat effective ..... Very effective

**What worked well? How can we improve?**

# Optional Assembly: Relevant Updates

Goal: updates on PA and CalMTA solicitations; updates on relevant proceedings

- 1) Program Administrator Solicitations
- 2) Market Transformation Administration Update
- 3) Update on other relevant proceedings: Decision on Reducing Natural Gas Incentives D.23-04-035
- 4) Live evaluation of Optional Assembly

# Program Administrator Solicitations

Stacie Risley, SDG&E



# SDG&E Solicitation Timeline



Year		2022										2023										2024												
Quarter		Q2			Q3			Q4				Q1			Q2				Q3				Q4											
Month		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Local Cross Cutting	Non-Residential Behavior																																	
Local Cross Cutting	Workforce Education & Training (WE&T) / Integrated Energy Education Training (IIEET) 2.0																																	
Residential	Residential Equity (SF & MF)																																	
Local Commercial	Small Business Outreach																																	
Local Commercial	Groceries, Restaurants, Food Storage																																	
Local Commercial	Private Institutions, Healthcare																																	
Local Commercial	Lodging																																	
Local Commercial	Retail, Offices and Wholesale																																	
Local Residential	Multi-Family																																	
Local Residential	Residential Fuel-sub																																	

**LEGEND:**

RFA Prep
RFA
RFP Prep
RFP
Contract Negotiation
AL (if applicable) + Approval + IP

# SCE Solicitation Timeline



Energy Efficiency Solicitation Schedule																										
Schedule as of 06/12/2023 (Schedule may be subject to change at SCE's discretion)																										
Sector - solicitations approach	2023												2024								2025					
	Q2			Q3			Q4			Q1		Q2		Q3		Q4		Q1			Q2					
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	
Commercial - Whole building	Green	Green	Green	Green	Green	Green	Blue	Blue	Blue	Blue	Blue	Grey	Grey	Grey												
Industrial - Whole building	Green	Green	Green	Green	Green	Green	Blue	Blue	Blue	Blue	Blue	Grey	Grey	Grey												
Residential - Large Multi-Family				Green	Green	Green	Green	Green	Blue	Blue	Blue	Blue	Blue	Blue	Grey	Grey	Grey									
Commercial - Midsize customers all segments				Green	Green	Green	Green	Green	Blue	Blue	Blue	Blue	Blue	Blue	Grey	Grey	Grey									
Residential - Single, Small Multi-family, Manufactured homes								Green	Green	Green	Green	Green	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Grey	Grey	Grey	Grey			

**LEGEND:**

RFP Prep (document prep)
RFP Launches
Contract Negotiation
AL (if applicable) + Approval + IP

# PG&E Solicitation Timeline



IOU	Year		2022												2023												2024											
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4														
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
PG&E	Local	Micro and Small Business Equity Program																																				
PG&E	Local	Summer Reliability RFP																																				
PG&E	Local	C&S Compliance Improvement																																				
PG&E	Statewide	C&S Advocacy Solicitation - Wave 1 Negotiations																																				
PG&E	Statewide	C&S Advocacy Solicitation - Wave 2 Negotiations																																				
PG&E	Local	Residential Electrification Equity Program																																				
PG&E	Local	Zonal Electrification (Residential & Commercial)																																				
PG&E	Local	Residential Whole Home Load Management RFP																																				
PG&E	Local	C&S Code Readiness																																				
PG&E	Local	2024 Summer Reliability Platform Administrator RFP																																				
PG&E	Local	Commercial Energy Management (SEM) Expansion																																				
PG&E	Local	Residential Market Support (Single Point-of-Contact) RFP																																				

**LEGEND:**

RFA Prep
RFA
RFP Prep
RFP
Contract Negotiation
AL (if applicable) + Approval + IP



# Market Transformation Administrator Update

Margie Gardner, CalMTA



# Seeking Ideas for MT Initiatives

Presentation to  
CAEECC  
June 21, 2023

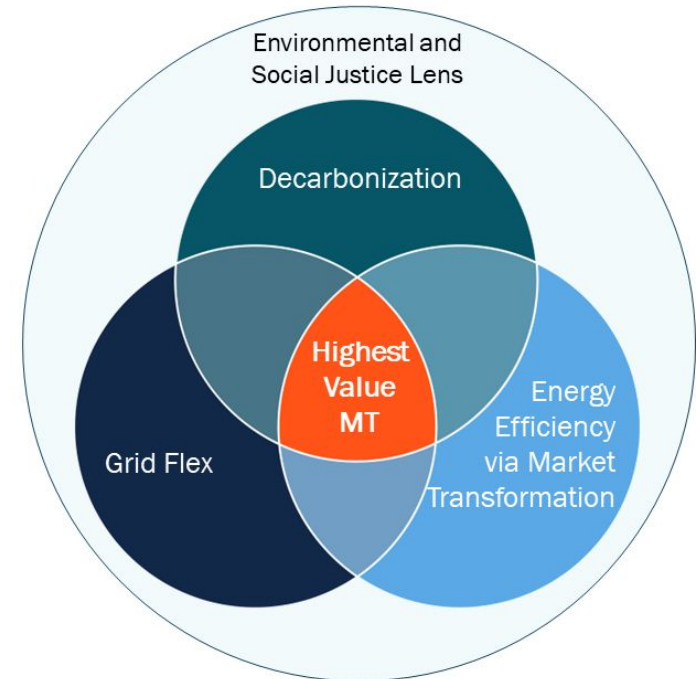


- Created by CPUC's Market Transformation Framework (D.19-12-021)
- Resource Innovations named Administrator
  - Supported by other expert firms
  - Eventually transfers to new nonprofit
- CalMTA develops & manages MT initiatives (MTIs)
  - With MT Advisory Board input

# How we work



- Ensure selected initiatives meet MT criteria
- Collaborate with existing EE efforts
  - Avoid duplication
  - Faster scale
- Advance other state goals:
  - GHG reduction
  - Workforce Education & Training
  - Environmental and social justice (ESJ)
  - Grid health





# Market Transformation Advisory Board (MTAB)



- Current MTAB members approved by the CPUC in May 2023
- Members provide expertise and unbiased, non-binding recommendations to CalMTA and the CPUC during the design and implementation of MTIs
- Intended to represent diverse backgrounds and alignment with CalMTA mission
- Meetings are open to the public:

Meeting Date	Format	Key Topic
<b>Fri. June 30</b>	Two-hour virtual	Final ABAL and Recommendations Report
<b>Fri. Sept. 8</b>	Two-hour virtual	Initial summary of RFI ideas
<b>Thurs. Nov 30 &amp; Fri. Dec. 1</b>	In-person	Draft RFI Disposition Report Draft Advancement Plans for "front runners"
<b>Thurs. Jan 25</b>	In-person	Final RFI Disposition Report Additional Advancement Plans

# MTAB Members



Category Represented	MTAB Member
CCAs/RENs	Lujuana Medina, SoCal REN
IOUs	Randall Higa, Southern California Edison
Ratepayer Advocacy/Protection	Hayley Goodson, The Utility Reform Network (TURN)
Ratepayer Advocacy/Protection	Ky-Ann Tran, Cal Advocates
Evaluation Professional	Fred Gordon, The Energy Trust of Oregon
Environmental Advocacy	Peter Miller, Natural Resources Defense Council (NRDC)
Workforce and/or Labor	Cyane Dandridge, Strategic Energy Initiatives
National/Regional EE Policy Professional	Jeff Harris, Northwest Energy Efficiency Alliance (NEEA)
CPUC Representative	Christie Torok

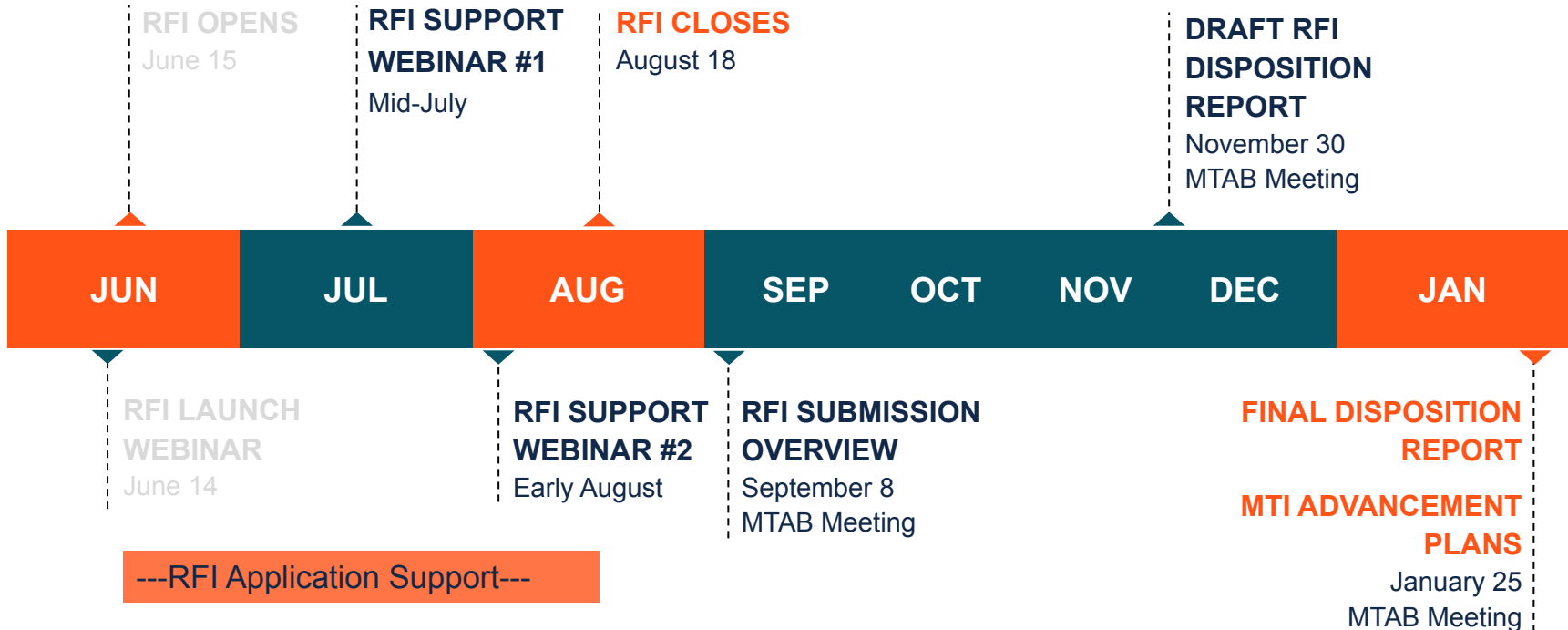


# Help create MT in California



- Use our “Request for Ideas” portal
  - Opens June 15; Closes August 18
  - In 2024, will review submissions quarterly
- Seeking Ideas that can be shaped into MT
  - 13 question submission form
  - ~250-word limit per question
- CalMTA staff with Advisory Board input will develop ideas into fully-fledged MT Plans
  - MT Plans are approved by CPUC
  - Once approved, implementation will be bid out

# Request for Ideas (RFI) Timeline



# Transformative Energy Solutions for the public good

Market transformation is a proven approach that works to remove market barriers so that energy efficient, equitable, and climate-friendly approaches become the new standard practice for all Californians. Learn more and sign up for updates at: [calmta.org](https://calmta.org)

Questions? [Info@CalMTA.org](mailto:Info@CalMTA.org)

**Update on Other Relevant Proceedings:  
Decision on Reducing Natural Gas Incentives  
D.23-04-035**

Travis Holtby, CPUC

## D.23-04-035 – EE Natural Gas Incentives Policy

- No EE incentives for non-cost effective new construction gas appliances starting in 2024
  - For the residential and commercial sectors in the resource acquisition and market support portfolio segments
- Defines “exempt” – measures that save therms but don’t burn gas (insulation, building envelope, etc.)
  - Update EUL for exempt measures up to 30 years, if justified
  - Develop new exempt Measure Packages (doors, windows, etc.)
- Provides for research and stakeholder groups to examine and recommend technical guidance for identifying a viable electric alternative (VEA) for a given gas measure to create a VEA Technical Guidance Document
  - 2 working groups – 1) eTRM, and 2) fuel substitution infrastructure fractional attribution
- Directs IOUs to fund 3 studies at not more than \$200k each
  - 1 and 2) Impact of incentives of fuel substitution (1x market rate, 1x low-income), 3) market study on infrastructure upgrades for fuel substitution in low-income segment



# Optional Assembly Evaluation

**Was the Optional Assembly valuable to you/your organization?**

Not valuable.....Somewhat valuable.....Very valuable

**How likely are you to join the Optional Assembly in future Full CAEECC Meetings?**

Not likely.....Somewhat likely.....Very likely

**What worked well? How can this Assembly improve?**



# THANK YOU.

**Next Meeting 9/20/23!**

Fully vaccinated CAEECC Members (leads and ex-officio only) are invited to join us at NRDC SF with an RSVP for in-person attendance. More details will be provided via email.