

# CPUC Metrics Workshop Summary

Date: Thursday September 15, 2022

Time: 9:30am - 2:30pm PT

On September 1, 2022, the CAEECC facilitated, at the request of CPUC Energy Division, a public workshop via Zoom. There were 133 members of the public (see [Appendix A](#) for a full list of meeting attendees). This meeting was facilitated by Michelle Vigen Ralston (Ralston) of Common Spark Consulting and supported by Katie Abrams (Abrams) of Birch Road Consulting, Suhaila Sikand (Sikand) of Common Spark Consulting and Susan Rivo (Rivo) of Raab Associates.

Supporting meeting materials are available at:

[www.caeccc.org/9-15-22-cpuc-metrics-workshop](http://www.caeccc.org/9-15-22-cpuc-metrics-workshop). Relevant materials include:

- Agenda (*CPUC Metrics Workshop Agenda (posted 9.7.22, updated 9.14.22)*),
- Slide Deck (*Integrated Slides – CPUC Metrics Workshop (posted 9.8.22, updated 9.14.22)*), and
- ED Categorization Analysis (*CPUC’s Draft Categorization Analysis of Metrics & Indicators - Spreadsheet (9.7.22)*)
- Huddle Redlines of ED Categorization Analysis (*Redlined CPUC Draft Categorization Analysis of Metrics & Indicators from EMWG & MSMWG*)

## Overview

Key Meeting Takeaways:

- Participants indicated that clarification is needed on many definitions and key terms used throughout the metrics space
- Three proposals on Target Setting were presented and discussed at length. Additional conversations, collaborations, or ideas are welcomed by presenters.
- Participants indicated their desire to have a continued stakeholder engagement process to address clarification on definitions, key terms, and to achieve greater specificity on the methodology of data collection and roles and responsibilities., either through a continuation of the Market Support Metrics Working Group and the Equity Metrics Working Group or through a similar process.

This meeting summary is intended to capture this workshop’s discussion of ideas, concerns, and alternative options for proposals; it is a high-level summary and not a transcript. This summary will be used to inform subsequent work by the CPUC related to the [Scoping Memo \(A.22-02-005\)](#).

In preparation for this Metrics Workshop, CAEECC reconvened the Equity Metrics and Market Support Working Groups for brief “Huddles” in late August/early September. The

series of stakeholder engagement efforts, across the two Huddles and this Workshop will result in a combination of documents capturing stakeholder input for the consideration of the CPUC.

Key acronyms used in this document include California Energy Efficiency Coordinating Committee (CAEECC), California Public Utilities Commission (CPUC), Market Support Metrics Working Group (MSMWG), energy efficiency (EE), disadvantaged communities (DAC) and hard-to-reach (HTR) communities, Program Administrator (PA), Investor-owned utilities (IOU), Regional Energy Network (REN), Resource Acquisition (RA), Awareness, Knowledge, Attitude, and Behavior (AKAB), Emerging Technologies Program (ETP), Energy Division (ED), Marketing Education & Outreach (ME&O), Market Support (MS), Workforce Education and Training (WE&T), Unique Value Metrics (UVM), Equity Metrics Working Group (EMWG), justice equity diversity and inclusion (JEDI), CPUC's Environmental and Social Justice Action Plan (ESJ Action Plan), Household (HH), Multifamily (MF), Single family (SF), and Disadvantaged Communities Advisory Group (DACAG).

## Introductions and Background

*Slides 2 - 60*

### Agenda and Housekeeping

Ralston provided general reminders, zoom etiquette, and meeting norms. To encourage a space of inclusion and diversity, participants were asked to agree to the meeting norms (see [Appendix B](#) for the full list), which participants accepted.

To achieve meeting objectives, the facilitation team developed the following agenda:

- Introduction and Background
- Topic 1: Metrics Categorization
- Topic 2: Specificity and Approach
- Topic 3: REN Performance Metrics and Associated Targets
- Wrap up and Next Steps

Participants were asked to introduce themselves through the chat.

### Discussion on Agenda and Housekeeping

*No participants raised questions, concerns, or thoughts about the objectives or agenda.*

### Objectives

The purpose of this workshop was to continue the discussion around the Metrics, Indicators, and Targets for the Equity and Market Support segments of PA energy efficiency portfolios, as well as discuss performance metrics and associated targets for

Regional Energy Networks (RENs). Specifically, the objectives of this meeting were to discuss:

- Categorization of indicators and metrics, and identification of which metrics might be ripe for targets and when
- Framework for adding specificity to proposed targets, metrics, indicators, methodologies, and baselines
- Higher priority metric(s) or goal(s) that focus on RENs' overall value to ratepayers
- Optimal/preferred regulatory approaches and timing for consideration and approval of topics above

## **CPUC Introductory Remarks**

On behalf of the CPUC Energy Division (ED), Ely Jacobsohn, Peng Gong, and Alison LaBonte gave a short presentation and opening remarks. They noted the elements that led up to this workshop, including D.21-05-031 that set a new framework for EE Portfolio Applications and the associated Scoping Memo (22-02-005) issues, as well as their hopes for the workshop and the effort at large for EE Business Plan Applications. ED provided an overview of Common Metrics (a set of metrics shared by all PAs) and the development process of these metrics from CAEECC workshops in 2017. ED learned, from reviewing past and the latest Business Plan Applications, that some Common Metrics have not been reported over the past five years (2017-2022), which equates to twenty one percent of the metrics that went unreported. ED clarified that some of the programs did not exist at that point, including the Career and Workforce Readiness (CWR) program.

ED underscored the importance of adding specificity to Market Support and Equity metrics. Specificity is important because ED found several ways that PAs are interpreting the same metric within Business Applications. Therefore, there's a discrepancy in the methodologies (or formulas) PAs are using, resulting in inconsistent results, thus the reporting of metrics makes it difficult to analyze information across PAs. ED highlighted the particular elements of useful, meaningful, and consistent specificity they request throughout this process.

Moreover, ED provided an outline of public engagement touchpoints to assist in the development of metrics, indicators, and targets as well as the regulatory pathways to adopt metrics, indicators, and targets.

## **Discussion on CPUC Remarks**

A comment arose that was out of the scope of this Workshop, more broadly related to the role of energy efficiency in electrification. The CPUC kindly requested that comments be related to the four meeting objectives.

## **Background and Context**

Ralston provided an overview of the key terms for the purposes of the discussion. In particular, Ralston distinguished the difference between Indicators, Metrics, Targets, and Progress Trackers as:

- Indicators are progress trackers that do not typically have targets associated with them.
- Metrics are progress trackers that do or are expected to have targets associated with them.
- Targets are forecasted achievements against which to track progress.
- Progress Trackers refers to all three terms above.

Abrams and Ralston recapped the MSMWG and EMWG to remind participants about activities to date as well as how the working groups fit into the Metrics Workshop and CPUC Scoping Memo. This overview included:

- Principles of each WG, both consensus and non-consensus principles (*slides 26-34*)
- an overview of MSMWG from conception to the workshop (*slides 35 - 50*)
- an overview of EMWG from conception to the workshop (*slides 51 - 60*)

*For additional information, please refer to the Market Support Metrics Working Group Huddle Summary and the Equity Metrics Working Group Huddle Summary hosted on the Workshop webpage.*

## Discussion on Background and Context

Participants of the Workshop asked about the number of voting members for each Working Group. The Facilitators noted that the Equity Metrics WG had 24 “voting” members and 4 ex-officio members and the Market Support Metrics WG had 21 “voting” members and 2 ex-officio members.

## Topic 1: Metrics Categorization

*Slides 61-81*

### Metrics Categorization

Ralston dove into a discussion around Metrics, specifically asking the following questions: *How do we turn CPUC’s categorization spreadsheet Category 3 (Unclear Indicator of Metric without Target) items into Category 2 (Clear indicator, or metric without target) items? How do we turn Category 2 items into Category 1 (Clear Metric with Target) items?* Ralston noted the Key Themes from the Huddles, specifically the proposals for categorization that sprouted from the Huddles.

Ralston provided a visual walk through of the spreadsheet reflecting ED's analysis and comments from the Equity and Market Support Huddles. Participants mostly asked clarifying questions, however, a couple additional comments were made (see below).

## Discussion on Metrics Categorization

- Clarification on breakdown of some Equity metrics by 'All', 'HTR', 'DAC', and 'Underserved' and how that breakdown could be double- or triple-counting customers. Suggestion to focus on other metrics/indicators.
- Suggestion to expand scope of metrics to include and specify impacts in manufactured homes

## Target Setting

Ralston introduced the two non-consensus elements of the EMWG and MSMWG which cover target setting. Ralston then introduced DACAG, California Public Advocates (CalPA), and Southern California Edison (SCE) to discuss their respective proposals on target-setting. All three proposals are focused on Equity segment targets. *Each proposal is available on the CAEECC Metrics Workshop webpage.*

## DACAG Proposal

Ralston invited representatives Roger Lin (Center for Biological Diversity) and Elena Krieger (PSE for Healthy Energy) to discuss DACAG's proposal letter submitted on August 19, 2022. *Note DACAG's letter was submitted to the CPUC, and reposted to the CAEECC website for reference.*

Lin expressed a need to increase the budget cap for the Equity Segment, as a 30% cap is too low for the amount of the population within these communities. Moreover, Lin noted that budget distribution should reflect historic underinvestment and not be proportional to population, but rather add more funds to equity populations. Lin also expressed a need for a floor, stating that the IOU applications provide insufficient allocations to Equity communities.

Lin highlighted a recent UCLA report that discusses non-energy benefits for building electrification, "if we rightly acknowledge that the residents of disadvantaged communities and vulnerable communities have been disproportionately burdened by historical developments and operations of the energy system then we can only accept that this can be undone by disproportionate investments." Lin summarized that more resources are needed for these communities to combat historical underinvestment.

Lin shifted to focus on non-energy benefits (NEBs), highlighting that the Senate Bill 350 (SB350) Barriers study acknowledges the need for consideration of NEBs everywhere. He emphasized the need to consider benefits systematically across all programs. Lin

acknowledged the frameworks for costs and benefits of certain efforts and questioned whose cost and whose benefits these are taking into account. The DACAG letter recommends considering participant benefits in addition to participant costs and emphasized that NEB have to be everywhere otherwise determinations will be skewed, specifically highlighting that the decision-making and evaluation frameworks cannot separate EE and NEB. The letter notes that the Commission has been aware of this since 2015; the first ESJ Action Plan identified it as an action item and that this is an outstanding need since 2018. Lin described [someone living in a hot climate zone](#) who needs to put ice out during the day to cool their homes. He questioned how to capture a level of EE that will alleviate the need for cooling via ice. In conclusion, Lin announced that the House of Representatives introduced a resolution that access to utilities is a basic human right and called for the collection of data to understand NEBs and collaborate across proceedings and tracking of the inclusion of NEBs.

Elena Krieger (PSE for Healthy Energy) representing DACAG noted that in order to achieve climate targets, California must meet aggressive targets, moreover that in order to alleviate energy cost burdens and alleviate burdens, California needs to set metrics to enable that such a goal can be achieved and measured. The DACAG letter recommends the following additional progress trackers, evaluation proposal, and other related proposals in their August 2022 letter to the CPUC:

- The percentage of eligible customers reached for each customer class (in addition to total number of customers reached).
- The average kWh, kW, and therm savings per customer, by customer class (in addition to the total savings for the program).
- The average annual bill savings for participating customers, both first year and annually.
- The average energy cost burdens, and reduction in energy cost burdens, for residential customers.
- The number and percentage of CARE or other bill-assistance customers (and eligible customers) who receive efficiency upgrades, as well as the energy savings and bill savings for these customers. Specifically, the data should enable us to determine whether energy cost burdens have fallen for these customers, by how much, and the bill assistance savings that have been achieved through energy efficiency investments.
- Appropriate metrics to track workforce development, job quality and job placement, as well as access to training and employment for disadvantaged populations.
- The estimated reduction of criteria air pollutant (tons), both in-home and from the electric grid, in addition to GHG reductions.
- Average disconnection and arrears rates for homes pre- and post-treatment.
- An evaluation of how many/much of the indicators, including other NEBs, programs meet. NEBs should be an indicator for all Energy Efficiency Programs.
- Gas appliance investments be excluded from Business Plans to avoid stranded assets.

## CalPA Proposal

Ralston prefaced CalPA's presentation with what a typical CAEECC working group process looks like, and how this workshop discussion represents a departure from it. She noted how the consensus recommendations from the two working groups (MSMWG and EMWG) were never formally adopted or ruled on by the CPUC. As such, the implementation of consensus and non-consensus recommendations has neither been directed nor clarified.

Mike Campbell (CalPA) thanked everyone for WG Members' participation over the past year. Campbell clarified that during the 2021 EMWG process, CalPA supported certain progress trackers being classified as indicators. However, Campbell explained that once CalPA reviewed the PAs' Business Plan Applications, CalPA revisited which progress trackers they felt should have targets, in light of the CPUC's lack of a formal decision on metrics, indicators and targets and the absence of targets proposed by PAs.

Campbell noted that the gold standard for EE has historically been savings, including bill savings. Campbell expressed that once CalPA evolved their view on which Equity progress trackers should have targets, they came to believe that certain progress trackers (energy savings and GHG savings, listed as indicators in the EMWG report) should be reconsidered and re-evaluated for having associated targets (which would require those sets of indicators to be reclassified as metrics under the EMWG distinction of a metrics vs indicator). Campbell outlined that CalPA is preparing testimony regarding this issue, but also felt it was important to bring up the proposal in this forum, which he considers a stakeholder process. He noted the EMWG report included language for revisiting metrics and indicators in a TBD stakeholder process.

James Ahlsedt thanked participants for the discussion and stakeholder feedback. Ahlsedt outlined the goal to develop achievable metrics with targets and described the purpose of equity programs and segments. Ahlsedt proposed principles for target-setting used to craft goals for targets and underscored that the principles are not meant to replace CAEECC EMWG principles, but evolve from Principle #6 (a non-consensus issue) Option #2 from EMWG. Ahlsedt later clarified the proposal is not to add restrictions to prevent ESA customers from participating in the EE programs.

CalPA's Proposed Equity Target-setting Principles:

- A. Equity customers should be "served" at the same level as non-equity customers for similar EE programs.
  - a. i.e., Equity customers should achieve proportionally equivalent energy savings, bill savings, customers served, etc.
- B. Segment targets should align with authorized budget while balancing the Decision's Equity objectives.
- C. Programs outside of the Equity segment should track the number of Equity customers served.

CalPA's Proposed Targets (and explanations, in sub-bullets):

- 15% Increase over baseline by December 2027
  - The Equity segment should provide increased access to EE for Equity customers.
  - In PA Applications and Testimony, some Equity programs had goals of increasing access by 20% or more.
  - 15% target is an achievable proxy to encourage growth.
- Parity with DAC/HTR population in PA service territory by 2031
  - Provide service (with the same benefits of non-Equity programs) to the same proportion of Equity customers as non-Equity customers.
  - E.g. If 75% of non-equity customers were served by EE programs, 75% of Equity customers should be served.

Ahlstedt highlighted key questions raised since the EMWG Huddle and CalPA's initial proposal in late August 2022, including determination of equity customers, where targets fit in, exclusion of ESA customers in the calculation, and secondarily accounting for Health Comfort and Safety non-energy benefits. Shelly Lyser, CalPA, clarified that the proposal is not excluding customers getting EE benefits through the ESA program, and not excluding CARE customers, but rather that data from ESA would not be included in these Equity metrics. Ahlstedt noted that existing baseline data from PAs includes the current number of certain equity customers served by several EE programs although it's not disaggregated by PAs.

## IOU Proposal on Equity Targets

Ralston introduced Christopher Malotte of SCE. Malotte noted the newness of the Equity and Market Support segment as they in their first year of programs as well as the nature of overlapping program populations.

IOU Proposal:

- 2023 Portfolio True Up Advice Letter – Set targets based on expected activity from segment (i.e., # of participants by sector, savings, TSB, etc.)
- 2025 Mid-Cycle Review Advice Letter – Adjust targets based on percent of population using PY2022-PY2025 participation rates of Equity segment to inform

## Discussion on Proposals

- DACAG:
  - Support for NEBs
  - Suggestion to align equity programs and efforts across the EE portfolio
- CalPA

- Questions raised on the underlying mathematics, reasoning for parity and exclusion of NEBs, definitions of DAC/HTR/Underserved/Equity Customers, Households vs. Customers
- Caution against metric evaluation by individual PA
- Suggestions for additional data and information, perhaps by using Energy Efficiency Potential and Goals Study
- IOU
  - Remaining questions raised about timing and budget allocations
  - Suggestion for applicability to Market Support Metrics
    - Malotte clarified that while the proposal was developed for the Equity segment, he could give thought to whether it might be able to apply to the Market Support segment
  - Suggestion to have a separate effort to aggregate across segment-level and RA-program level to understand broader equity-related achievements

## Topic 2: Specificity and Approach

*Slides 83-87*

Ralston invited discussion on adding specificity to how progress tracker data might be collected and an approach (or process) for developing and setting targets, specifically discussing the development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines.

Ralston outlined key questions to think about to add specificity and the approach to do so, including questions on timeline, methodology, annual reporting, additional studies, segment level reporting, and more generally, what is important to stakeholders.

Ralston also introduced a sample framework (adapted from SoCalREN's Business Application) that could support consistency throughout metric development. Ralston also provided an overview of the Huddle discussions on this framework, including the removal of the Core Value row, an additional row for Baseline, an additional row for Timeline of target development or data collection, specification of Roles (e.g., Energy Division, IOUs, Statewide Admin vs by PA) in the methodology row, and an additional row for Segment (Equity vs Market Support).

Ralston then asked participants to review and add to slide 86 "Additional Outstanding Questions Related to Specificity". Additional questions and process ideas were added via live editing, see slide 86 in the updated Live Edits Slide Deck for details (summarized below).

### Discussion on Specificity and Approach

- Suggestion to elevate the timing of target-setting and work on this as soon as possible.

- Suggestions to clarify Market Support Metric definitions, Market Effects, and definitions of Equity customers, specifically DAC, underserved, and HTR.
- Suggestions to elaborate on the process for PAs, provide explanation for the development metrics, and use of Equity Customers versus Equity Segment
- Suggestion to involve evaluators into the conversations
- Suggestion to incorporate rate of change elements
- Suggestions for regulatory approaches include:
  - Seeking an Order from the CPUC
  - Stakeholder process: ED hosted, CAEECC initiated WG, or CPUC-ordered CAEECC work

Ralston invited a verbal poll on whether participants were in support of some variation of a CAEECC WG or forum to prioritize metrics for targets and other issues. Some participants indicated support for on-going work in such a forum, but the group had no definitive position on next steps. This feedback and options for next steps will be shared with the CPUC and CAEECC to determine if such a process should be conducted, and if/how it should be initiated.

### **Topic 3: Regional Energy Network (REN) Performance Metrics & Associated Targets**

*Slides 89-103*

Ralston invited Nils Strindberg, CPUC, to kickoff Topic 3 with a presentation (*slides 90 - 93*) by ED that highlighted the CPUC's effort to set performance metrics and targets for RENs. Specifically, Strindberg highlighted the differences in portfolio rules for Business Application in the upcoming application cycle. The CPUC also discussed likely roles for reporting metrics by PA.

*No participants had questions, concerns, or thoughts about the CPUC's presentation on REN Performance Metrics and Associated Targets.*

Ralston then introduced BayREN, represented by Mary Sutter of Grounded Research, to present (*slides 94 - 102*) their background on metrics and reporting requirements and criteria for reporting. Sutter recognized some of the Unique Value Metrics initially developed by a few PAs, including BayREN and SoCalREN, have evolved from the 2019 Unique Value Metrics Decision.

#### **Discussion on REN Performance Metrics and Associated Targets**

- Suggestion to utilize core values and identify how to comply with D.12-11-015 and avoid non-duplicative nature of core values
- Clarified that some UVMs have since been adopted as Equity Metrics and are thus no longer unique, but are providing value.
- Clarified that some RENs might have fewer UVMs because they are newly established.

- Clarification that with the formation of the Equity segment and Market Support segment, what RENS have been doing is now being mapped into those two new segments.
- Elevated the new equated innovations for cost effectiveness, and BayREN’s new ‘testing innovative solutions’
- Clarification that the RENS were developed to provide unique needs to the region they serve.

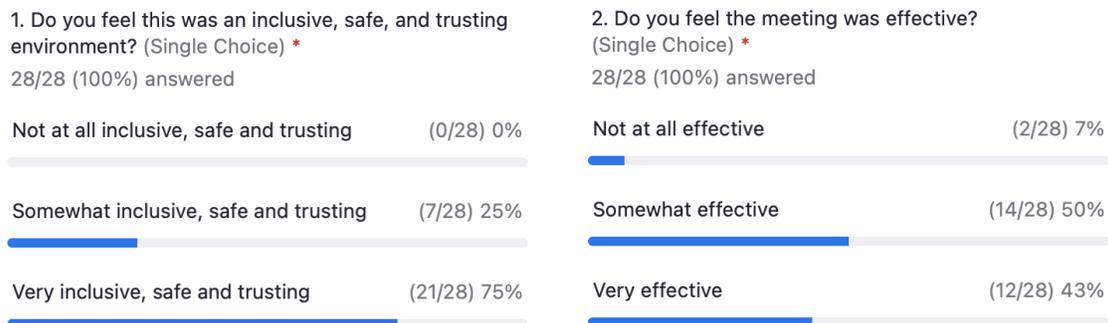
## Wrap Up and Next Steps

Slides 105-107

### Meeting Evaluation

Ralston summed up the meeting, noting work on the categorization of indicators and metrics (Objective #1), a framework for adding specificity (Objective #2), prioritizing metric(s) or goal(s) that focus on RENS’ overall value to ratepayers (Objective #3), and discussing the optimal/preferred regulatory approaches and timing (Objective #4). Participants generally agreed that the meeting goals were reached.

Through a zoom poll at the end of the meeting, participants noted that the meeting was safe and effective.



### Next Steps

Ralston summarized the next steps, which include:

- Facilitation team will post notes from the workshop discussion on the CAEECC website
- Participants are invited to submit additional thoughts/comments via the facilitation team
- The Facilitation Team will share with the CPUC and CAEECC Members & stakeholders the desire some participants expressed for a CAEECC WG forum for continued stakeholder engagement on this subject

## Appendix A: Attendees

Organization	Name
3C-REN	Alejandra Tellez
AMBAG Energy Watch	Amaury Berteaud
BayREN	Jennifer Berg
Better Climate Research	James McMahon
Bidgely	Jordana Temlock
CalPA	James Ahlstedt
CalPA	Michael Campbell
California Energy Commission	Noemi Gallardo
California Energy Commission	Hilary Poore
California Energy Commission	Brian Samuelson
CARB	Emma Tome
CEDMC	Clark McIsaac
CEE	Alex Lantsberg
Center for Biological Diversity	Roger Lin
CFRE	Martin Homec
Clearesult	Joanne O'Neill
Code Cycle	Dan Suyeyasu
Community Action Partnership Riverside	Charles Clinton
Community Housing Opportunities Corp	Anna Solorio
CPUC	Sagit Betser
CPUC	Adam Buchholz
CPUC	Kevin Feizi
CPUC	Peter Franzese
CPUC	Justin Galle
CPUC	Peng Gong
CPUC	Mia Hart
CPUC	Ely Jacobsohn
CPUC	Jen Kalafut
CPUC	Valerie Kao
CPUC	Alison LaBonte
CPUC	Jessica Levine
CPUC	Shelly Lyser
CPUC	Rashid Mir
CPUC	Nils Strindberg
CPUC	Jason Symonds
CPUC	Christina Torok

CPUC	Philip Voris
CPUC	Daisy Yee
DNV	Lindsay Keane
Don Arambula Consulting	Don Arambula
East Bay Community Energy	Allison Lopez
EDF Counsel	Beth Kelly
Encycle	Brad Rittler
Enervee	Chris Healey
Franklin Energy	Brett Bishop
Franklin Energy	Leonel Campoy
Franklin Energy	Isai Reyes
Frontier Energy	Nancy Barba
Frontier Energy	Casey Connorton
Frontier Energy	Margaret Marchant
Frontier Energy	Conor Moar
Frontier Energy	Katie Nash
FS Consulting	Frank Spasaro
Grounded Research on behalf of BayREN	Jennifer Mitchell-Jackson
Grounded Research on behalf of BayREN	Mary Sutter
HHEA	Susan Davison
High Sierra	Pam Bold
ICF	Cody Coeckelenbergh
ICF	Dany Kahumoku
ICF	Benjamin Lyon
Inland Empire REN (IREN)	Benjamin Druyon
LA Department of Water & Power	Sean Lim
Laguna Creek Consulting	Halley Fitzpatrick
Lincus	Hob Issa
M.Cubed	Steven Moss
Maalka	John Teeter
MCE	Alice Havenar-Daughton
MCE	Mad Stano
MCE	Qua Vallery
Mendota Group	Grey Staples
MW Consulting	Mark Wallenrod
NRDC	Julia de Lamare
OC Power	Susan Davison
Okapia Architecture	David Holly
Okapia Architecture	Ying Wang

Opinion Dynamics	Megan Campbell
Opinion Dynamics	Aaiysha Khursheed
Pacific Corp	Kimberly Alejandro
Pacific Corp	Nancy Goddard
Pacific Corps	Jackie Wetzsteon
PG&E	Conrad Asper
PG&E	Rob Bohn
PG&E	Ben Brown
PG&E	Mananya Chansanchai
PG&E	Caroline Francis
PG&E	Moses Gastelum
PG&E	Robert Marcial
PG&E	Angela McDonald
PG&E	Lucy Morris
PG&E	Jane Oliveira
PG&E	Roopa Reddy
PG&E	Jake Richardson
PG&E	Rachel Sackman
PG&E	Lindsey Tillisch
PSE Healthy Energy	Elena Krieger
Recurve	Shonika Vohra
Redwood Energy	Aisha Cissna
Redwood Energy	Stephen Kullmann
Resource Innovations	Jeff Mitchell
Resource Innovations	Chris Pilek
Rising Sun Opportunities	Julia Hatton
SBUA	Ted Howard
SCE	Kellvin Anaya
SCE	Carol Edwards
SCE	Tony Frontino
SCE	Edwin Hornquist
SCE	Fabiola Lao
SCE	Christopher Malotte
SCE	Cassie Rauss
SCE	Larry Tabizon
SDG&E	Elaine Allyn
SDG&E	Stacie Atkinson
SDG&E	Genevieve Bucsit
SDG&E	Vanessa Garcia

SDG&E	DeDe Henry
SDG&E	Lonnie Mansi
SDG&E	Jen Palombo
SDG&E	Marianne Sy
SDG&E	Jen Taylor
SDG&E	Paola Trzebiatowski
SDG&E	Kelvin Valenzuela
Silent Running	James Dodenboff
SJVCEO	Courtney Kalashian
SoCalGas	Allison Dourigan
SoCalGas	Kevin Ehsani
SoCalGas	Sebastian Garza
SoCalGas	Carlo Gavina
SoCalGas	Rosalinda Magana
SoCalREN	Frederick Chung
SoCalREN	Lujuana Medina
The Energy Coalition	Marc Costa
The Energy Coalition	Rebecca Hausheer
The Energy Coalition	Tim Olsen
The Energy Coalition	Craig Perkins
The Energy Coalition	Laurel Rothschild
Tierra Resource Consultants	Nicholas Snyder
TRC Companies	Catherine Chappell
TRC Companies	Nic Dunfee
TRC Companies	Angela Gordon
TRC Companies	Jared Spang
University of San Diego	Danchen Xiao
Unknown	Gary Arcega
Unknown	Lynn Huidekoper
Utility Advocates	Luke May
Willdan	Jeanne Huntsman
Willdan Group	Kyle Kriete
Willdan Group	Spencer Lipp
Willdan Group	Drew Thompson
Willdan Group	Eric Woychik
WRCOG	Tyler Masters
Yinsight	Carol Yin

## Appendix B: Meeting Norms

### Meeting Norms

To encourage a space of inclusion and diversity, workshop participants were asked to agree upon the following 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*