

Emerging Recommendations Survey for Equity Indicators - CAEECC Equity and Market Support Working Group

This survey identifies emerging recommendations from the December 5 and 6 discussions in the Equity and Market Support Working Group.

Unless stated otherwise, the following recommendations are mostly structured as statements to which you will be asked to choose whether you (1) agree, (2) disagree, (3) have no opinion or preference, (4) are undecided, or (5) have an alternative statement in response to the statement in question. These responses will help inform the final report as well as the agenda for the January 31 meeting.

Each Working Group member is asked to respond as one organization rather than individually. Please complete the survey by January 15, 2024. If you have any clarifying questions or concerns, please email katie@common-spark.com and sooji@common-spark.com. Thank you!

*** 1. Responding Organization**

*** 2. Organization Point of Contact** (email address)

Email address

The following 3 questions refer to *Reporting Equity Indicators*

** 3. Please choose all that apply.*

Information reported in Equity Indicators will support:

- Understanding the impact of Equity segment programs across PAs
- Ensuring accountability for dollars spent in the Equity segment
- Ensuring PAs make adjustments to Equity segment programs based on Indicator data
- Development of goals for the Equity segment
- Other (please specify in the next question)

4. If you checked "other" in the previous question, please specify your response.

* 5. Please select the option that best represents how you feel about this statement:

It is critical that program-specific data (e.g., objectives, descriptions, and logic model/theory of change) be provided along with the Indicators to support accurate comparisons across PAs and consistent interpretation among readers.

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

The following 3 questions refer to *Equity-related Definitions*

* 6. Please select the option that best represents how you feel about this definition:

"Equity target participant" is defined as a program participant that meets CPUC-adopted criteria for being hard-to-reach, located in a disadvantaged community, OR underserved. The participant can be in an Equity, Market Support, or Resource Acquisition segment program.

Relatedly: An equity segment participant does NOT have to be hard-to-reach, located in a disadvantaged community, or underserved but must be a participant in an Equity segment program. An equity market participant is hard-to-reach, located in a disadvantaged community, and/or is underserved AND is a participant in an Equity segment program. Therefore, an equity target participant in an Equity Segment program is also considered an equity market participant.

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 7. Please select the option that best represents how you feel about this statement:

The Commission should provide PAs further guidance on what data needs to be collected and reported in relation to all three equity definitions (**hard-to-reach, disadvantaged community, and underserved**) and their application in the Equity Indicators.

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 8. Please select the option that best represents how you feel about this statement:

The Commission should provide PAs further guidance on **how to report** on the Equity Indicators including: (1) What platform(s) to use (e.g., CEDARS, Annual EM&V Report), and (2) Whether all Indicators should be reported in the same document.

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

The following 2 questions refer to *Statewide Programs*

9. Please choose all that apply.

To report Indicator information for statewide programs, PAs should:

- Provide a single aggregated statewide value or count that is not separated by PA;
- Leverage annual reports and impact evaluations to ensure that benefits are distributed across the state;
- Consider how reporting aggregated values for statewide programs would impact goal development and accountability for statewide program goals.
- None of the above. Further discussion is needed in the EMSWG to clarify Indicators applied to statewide programs
- Other (please specify in the next question)

10. If you checked "other" in the previous question, please specify your response.

The following 8 questions refer to *Equity Indicators #5-9*

Sum of all equity segment participants' _____ in equity segment.

- *Equity Indicator #5: greenhouse gas reductions (in tons of carbon dioxide equivalent)*
- *Equity Indicator #6: kilowatt hour (kWh) savings*
- *Equity Indicator #7: kW savings*
- *Equity Indicator #8: Therm savings*
- *Equity Indicator #9: TSB*

* 11. Please select the option that best represents how you feel about this statement:

Equity Indicators #5-9 should only report first-year and lifecycle gross savings and benefits values available in CEDARS.

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 12. Please select the option that best represents how you feel about this statement:

Equity Indicators #5-9 should only report first-year and lifecycle net savings and benefits values available in CEDARS

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 13. Please select the option that best represents how you feel about this statement:

Both gross and net savings and benefits values available in CEDARS should be reported for Equity Indicators #5-9

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

14. Please choose all that apply.

The selected value(s) should be reported via:

- CEDARS only
- PAs' Annual EM&V Report only
- Both CEDARS and the PAs' Annual EM&V Report
- Other (please specify in the next question)

15. If you checked "other" in the previous question, please specify your response.

* 16. Please select the option that best represents how you feel about this statement:

The calculation of Equity Indicators #5-9 should include participants' non-claimable savings

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 17. Please select the option that best represents how you feel about this statement:

Non-claimable savings should be reported separately from Equity Indicators #5-9 for information purposes only and should continue to be non-claimable

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 18. Please select the option that best represents how you feel about this statement:

For any Equity segment programs that are not intended to directly result in energy savings, it is not necessary to include those programs in the calculation of Equity Indicators #5-9

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

The following 7 questions refer to *Equity Indicator #2*

Equity Indicator #2: Sum of equity target participants' expected first-year bill savings in equity segment, by sector

19. Please choose all that apply.

Equity Indicator #2 should be calculated using:

- Forecasted (i.e., ex ante) first-year gross energy savings values
- Forecasted first-year net energy savings values
- Evaluated (i.e., ex post) first-year gross energy savings values
- Evaluated first-year net energy savings values
- Other (please specify in the next question)

20. If you checked "other" in the previous question, please specify your response.

* 21. Please select the option that best represents how you feel about this statement:

"Negative" bill savings (i.e., bill increases), if they occur, should be included in the calculation of Equity Indicator #2

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 22. Please select the option that best represents how you feel about this statement:

A sector-specific electric or gas rate averaged across PAs should be used to calculate customer bill savings. This means that all PAs would use the same sector-specific electric or gas rate to calculate Indicator #2.

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 23. Please select the option that best represents how you feel about this statement:

A PA-specific, sector-specific electric or gas rate should be used to calculate customer bill savings

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 24. Please select the option that best represents how you feel about this statement:

Equity Indicator #2 should be calculated using Bill Reduction Electric and Bill Reduction Gas variables available in CEDARS

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 25. Please select the option that best represents how you feel about this statement:

For any Equity segment programs that are not intended to directly result in energy savings, it is not necessary to calculate or report Equity Indicator #2

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

The following 7 questions refer to *Equity Indicators #11-12*

Equity Indicator #11 = Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector

Equity Indicator #12 = Percent of disadvantaged community customer participants in portfolio, by residential single-family / multifamily and commercial sector

* 26. Please select the option that best represents how you feel about this statement:

Equity Indicators #11-12 should be reported as only one statewide value considering the entire energy efficiency portfolio, rather than reporting the Indicators by PA

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 27. Please choose one answer.

The denominator used to calculate Equity Indicator #11 should be:

- Total population of hard-to-reach customers
- Total number of program participants at the sector level (i.e., single-family residential, multi-family residential, commercial)
- Total number of customers in a service territory
- No opinion/preference
- Undecided
- Other (please specify)

* 28. Please choose one answer.

The denominator used to calculate Equity Indicator #12 should be:

- Total DAC population
- Total number of program participants at the sector level (i.e., single-family residential, multi-family residential, commercial)
- Total number of customers in a service territory
- No opinion/preference
- Undecided
- Other (please specify)

* 29. Please select the option that best represents how you feel about this statement:

During Meeting #3, someone noted that 67% of DAC households are located in Southern California and 33% are in Northern California. **Because Equity Indicator #12 is calculated as a percentage, this would not impact a reader's ability to interpret and understand the reported Indicator data.**

- Agree
- Disagree
- No opinion/preference
- Undecided
- Other (please specify)

* 30. *Please choose one answer.*

Participants in the multi-family residential sector should be counted as:

- Individual participating units
- Whole multi-family buildings, regardless of the number of participating units. Note that this would include common areas within a multi-family building
- Both
- No opinion/preference
- Undecided
- Other (please specify)

You made it!

That was long, thanks for answering! One last question,

31. Any comments, thoughts, suggestions, or concerns?