

Workplan For Completion of Tier 2 Advice Letter for OP 11 due on May 1st, 2024

Regulatory Requirements:

OP 11 specifies that, “[t]he portfolio administrators shall jointly submit a Tier 2 advice letter by no later than May 1, 2024 clarifying all of the indicators adopted in this decision, including any modifications from metrics and indicators adopted in Decision 18-05-041, and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines.”

Within this Tier 2 Advice Letter these next sections need to be clarified:

1. Clarify D.23.06-055 Indicators and Baselines

An indicator is a measures of progress that is tracked, measured, and reported but does not have a target. The CAEECC working group (insert history based of of EMWG working group). Attachment A provides indicators adopted in the Decision and clarified in this Advice Letter.

1a. Baselines

- a. Information that can be used as a baseline
- b. Methodologies that has indicator information that can be used as a baseline.

2. Clean up work on common metrics/ indicators:

Modification of indicators/common metrics or removal, suspension, modification from D. 18-05-041

D.18-05-041 stated that generally, a metric is a measure of progress towards achieving desired market effect(s) and includes a baseline and a target or targets (short, medium, or long term). An indicator does not include baselines or targets, but progress is still tracked.¹

From D.18-05-041 common metrics were adopted? D.23-06-055 requires “[t]he advice letter [to] also include recommendations for metric removal, suspension, or modification from those included in D.18-05-041.”²

Attachment B provides removal, suspension, and modification as agreed by Program Administrators.

¹ D.18-05-041 at 23.

² D.23-06-055 at 30.

Workstream #1 Indicators and Baselines D.23-06-055

	<i>Task</i>	<i>Due Date</i>	<i>Responsible Party</i>
1.	Recruitment for CAEECC WG	Oct- Nov 1st	CAEECC
2.	Huddle #1: <ul style="list-style-type: none"> ● Present PA proposal and workstream ● Review excel file ● Receive general feedback on Prospectus 	November 1st	SDG&E /CAEECC
3.	All PAs complete Homework #1, fill out Equity Indicators/ Metrics for CAEECC WG #1 Note: SDG&E will package all PAs excel sheet and send to CAEECC facilitator.	Nov 3 rd	All PAs
4.	Working Group Meeting #1: <ul style="list-style-type: none"> ● Confirm and finalize Prospectus ● Begin Equity indicators/ Metrics using Homework #1 	November 7 th	CAEECC
5.	All PAs complete Homework #2, fill Market Support Indicators/ Metrics Note: SDG&E will package all PAs excel sheet and send to CAEECC facilitator.	December 1 st	All PAs
6.	Working Group Meeting #2: <ul style="list-style-type: none"> ● Finalize Equity Indicators/ Metrics ● Begin Market Support Indicators/ Metrics from Homework #2 	Early December	CAEECC
7.	Working Group Meeting #3: <ul style="list-style-type: none"> ● Finalize Market Support Indicators/ Metrics 	Early December	CAEECC

8.	Huddle # 2 (3 hours): <ul style="list-style-type: none"> ● Complete any Equity or MS Indicators / Metrics (if necessary) ● Discuss Optional Activities <ul style="list-style-type: none"> ○ Develop set of recommendations to bring to Working Group 	Mid December	CAEECC
9.	Huddle #3 (3 hours)	Early January	CAEECC
10.	Working Group Meeting #4 (4 hours): <ul style="list-style-type: none"> ● Facilitation Team presents back full set of Indicators work for review, discussion, refinement. ● Review of Proposal for Optional Activities + Discussion and Refinement 	Early January	CAEECC
11.	Report Draft: Facilitation Team consolidates Indicators work and any Optional Activities into a report - Send to WG to review	Late January	CAEECC
12.	Working Group Meeting #5: - Report review, discussion, and seek approval	Early February	CAEECC
13.	Final Report: - Convey final report to PAs and ED	End February	CAEECC
14.	Begin Drafting Tier 2 AL	February – March 31 st	SDG&E/ All PAs
15.	PA internal review and approval	April	All PAs
16.	Submit AL	May 1 st 2024	SDG&E