**Metrics and Indicators from PD Attachment A**

Note: Yellow highlights indicate new metrics and indicators that have not been publicly discussed. Blue text shows indicators. Red text shows items filed by PAs as indicators but turned into metrics in the PD. Green cells indicate the new metrics for discussion at CAEECC June 6th Meeting

|  | **Portfolio Level – All Sectors** | **Residential** | **Residential Sector – Multi-family** | **Commercial Sector** | **Public Sector** | **Industrial** | **Agricultural** |
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| **Common Problem** | **Common Metric** | **Common Metric** | **Common Metric** | **Common Metric** | **Common Metric** | **Common Metric** | **Common Metric** |
| C-1: Capturing energy savings | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in‐unit, common area, and master metered accounts) | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs | First year annualized and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) in industrial sector | First year and lifecycle ex ante (pre‐evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net |
| Capturing energy savings **As percent of overall sectoral use** |  |  |  | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage |  |  |  |
| D1: Depth of interventions **Per participant** |  | Average savings per participant in both opt‐in and opt‐out programs (broken down by downstream, midstream and upstream, as feasible) | Energy savings (kWh, kw, therms) per project (building) |  |  |  |  |
| D2: Depth of interventions **Per project** |  |  | Average savings per participant Savings per project (property) | Energy savings (gross kWh, therms) as a fraction of total project consumption. | [Indicator] Average percent energy savings (kWh, kw, therms) per project building or facility |  |  |
| D3: Depth of interventions **Per square foot** |  |  | Energy savings (kWh, kw, therms) per square foot |  | [Indicator] Average annual energy savings (kWh, kw, therms) per project building floor plan area |  |  |
| P1: Penetration of energy efficiency programs in the eligible market**Percent of Participation** |  | Percent of participation relative to eligible population | Percent of participation relative to eligible population (by unit, and property) | Percent of participation relative to eligible population for small, medium, and large customers | Percent of Public Sector accounts participating in programs | Percent of participation relative to eligible population for small, medium and large customers | Percent of participation relative to eligible population for small, medium and large customers |
| P2: Penetration of energy efficiency programs in the eligible market **Percent of square feet of eligible population** |  |  | Percent of square feet of eligible population participating (by property) | Percent of square feet of eligible population | [Indicator] Percent of estimated floorplan area (i.e., ft2) of all Public Sector buildings participating in building projects—estimate within +/‐15% of sector‐wide building area, +/‐5% of project building area |  |  |
| P3: Penetration of energy efficiency programs in the eligible market **Disadvantaged communities** |  | Percent of participation in disadvantaged communities | Percent of participation in disadvantaged communities |  |  |  |  |
| P4: Penetration of energy efficiency programs in the eligible market **Hard to reach** |  | Percent of participation by customers defined as “hard‐to‐reach” | Percent of participation by customers defined as “hard‐to‐reach” | Percent of participation by customers defined as “hard‐to‐reach” |  |  |  |
| Cost per unit saved | Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) | Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) | Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) | Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) | Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) | Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC) | Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) |
| Energy intensity |  | (Indicator) Average energy use intensity of single family homes (average usage per household – not adjusted) | [Indicator] Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted  [Indicator] and Average energy use intensity of multifamily units. including in‐unit accounts) |  | Average energy use intensity of all Public Sector buildings |  |  |
| Energy intensity (Benchmarking) |  |  | Percent of benchmarked multi‐family properties relative to the eligible population  Percent of benchmarking by properties defined as “hard‐to‐reach” | Percent of benchmarked square feet of eligible population  Percent of benchmarked customers relative to eligible population for small, medium, and large customers  Percent of benchmarking by customers defined as “hard‐to‐reach” | Percent of Public Sector buildings with current benchmark  [Indicator] Percent of floorplan area of all Public Sector buildings with current benchmark |  |  |
| Investment in energy efficiency |  |  |  | [Indicator] Fraction of total investments made by ratepayers and private capital | [Indicator] Total program‐backed financing distributed to Public Sector customers requiring repayment (i.e., loans, OBF) |  |  |
| Disadvantaged communities | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities |  |  |  |  |  |  |
| Hard to reach markets | First year annual and lifecycle ex‐ante (pre‐evaluation) gas, electric, and demand savings (gross and net) in hard‐to‐reach markets |  |  |  |  |  |  |
| New participation |  |  |  |  |  | [Indicator] Percent of customers participating that have not received an incentive for the past three years, annually, by small, medium and large customer categories |  |
| GHG |  | Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis | Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis | Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis | Greenhouse gasses (MT CO2eq) based on net lifecycle kWh and Therms savings, reported on an annual basis, incorporating average fuel/technology mix | Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis | Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis |
| New |  |  |  | [Indicator] Fraction of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings |  |  |  |
| New |  |  |  | [Indicator] Fraction of total savings (gross kWh and therm) derived from NMEC analysis |  |  |  |
| New |  |  |  | [Indicator] Improvement in customer satisfaction |  |  |  |
| New |  |  |  | [Indicator] Improvement in trade ally satisfaction |  |  |  |
| New |  |  |  |  | [Indicator] Average annual energy savings (kWh, kW therms) per annual flow through project water/wastewater facilities |  |  |
| New |  |  |  |  | [Indicator] Percent of Public Sector water/wastewater flow (i.e., annual average Million Gallons per Day) enrolled in non‐building water/wastewater programs— estimate within +/‐20% of flow through eligible facilities (treatment facilities pumping stations), +/‐10% of flow through project facilities |  |  |
| New |  |  |  |  |  | Reduction in consumption (proposed by SCE and SDG&E) |  |

**Workforce Education and Training**

| **Common Problem** | **Final Common Metric or Indicator** |
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| Expanding WE&T Reach via Collaborations | Number of partnerships by sector (complete “partnership” defined by curriculum developed jointly + agreement) |
| Penetration of  training | Number of participants by sector |
|  | Percent of participation relative to eligible target population for curriculum |
| Diversity of participants | Percent of disadvantaged participants trained (ID by zip code) |
|  | Percent of incentive dollars spent on measures verified to have been installed by contractors with a demonstrated commitment to provide career pathways to disadvantaged workers  [Indicator] Number of energy efficiency projects related to the WE&T training on which a participant has been employed for 12 months after receiving the training |

**Codes and Standards (C&S)**

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| **Common Problem** |  |
| Capturing energy savings | Net Energy Savings: GWH, M Therms and MW (demand) |
| Activity in advocating for building codes (T-24) tied to adoption in CA | Number of measures supported by CASE studies in rulemaking cycle (current work)  Number of measures adopted by CEC in rulemaking cycle (indicator of past work) |
| Activity in advocating for appliance, lighting and equipment standards tied to adoption in CA | Number of T-20 measures supported by CASE studies in rulemaking cycle (current work) |
|  | Number of measures adopted by CEC in current year |
| Local government participation and success in adoption of reach codes | The number of local government Reach Codes implemented (this is a joint IOU and REN effort |
| Activity in advocating for codes and standards tied to adoption at the federal level | Number of federal standards adopted for which a utility advocated (IOUs to list advocated activities) |
|  | Percent of federal standards adopted for which a utility advocated (# IOU supported/ # DOE adopted) |
| Compliance Improvement (For IOUs) | Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g., building officials, builders, architects, etc.) and the total size (number) of the target audience by sector.  Increase in code compliance knowledge pre/post training. |
| Compliance Improvement (for RENs) | For the RENs:  The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions  [Indicator] Also for RENs:  Number and percent of jurisdictions with staff participating in an Energy Policy Forum  [Indicator] Number and percent of jurisdictions receiving Energy Policy technical assistance.  [Indicator] Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators |

**Emerging Technologies (ET) Program**

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| **Common Problem** |  |
| Need to track Technology Priority  Map (TPM) development | ETP-M1: 6\* TPMs (gas and electric combined) initiated within the first 3 years (including 1 Technology-focused Pilot TPM identifying market barriers for a diverse range of high-impact technologies through studies, and subsequently breaking down identified barriers via cooperative projects initiated in coordination with WE&T, ME&O, and other relevant IOU programs)  \* This number will be updated once all third party contracts have been awarded. |
| Need to track TPM  updating activity | ETP-M2: 3 TPMs updated within the first 3 years |
| Need to project activity [sic] | ETP-M3: 183\* projects initiated within the first 3 years  \*This averages 61 projects per year; this number will be updated once all third party contracts have been awarded. |
| Need to track event activity | ETP-M4: Host 15 outreach events with technology developers with products <1 year from commercialization within the first 3 years, including new technology vendors, manufacturers, and entrepreneurs. |
| Need to track event activity | ETP-M5: Host 6 outreach events with technology developers with products <5 years from commercialization within the first 3 years, including new technology vendors, manufacturers, and entrepreneurs. |
| Need to track Technology-focused Pilot (TFP) TPM efforts | ETP-M7: 3\* Technology-focused Pilots initiated as part of the TFP TPM within the first 3 years  \*This number may be updated according to the results of the TPM development working group process |
| ETP is not utilizing other programs to confront barriers to market penetration | ETP-M6: 2\* projects initiated with cooperation from other internal IOU programs associated with each Technology-focused Pilot  \*This number may be updated according to the results of the TPM development working group process |
| Savings are not being tracked  [NOTE: INDICATORS WERE CHANGED TO METRICS. After collaborative discussion with ED, the “ETP-Tx” items were designated as Tracking Indicators and filed as such, but they were changed to Metrics in the PD, requiring energy savings goals for a non-resource program. | ETP-T1: Prior year: % of new measures added to the portfolio that were previously ETP technologies |
|  | ETP-T2: Prior Year: # of new measures added to the portfolio that were previously ETP technologies |
|  | ETP-T3: Prior year: % of new codes or standards that were previously ETP technologies |
|  | ETP-T4: Prior Year: # of new codes and standards that were previously ETP technologies |
|  | ETP-T5: Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available |
| Input from other groups is not being tracked | • ETP-T6: Number of ETCC project ideas submitted outside of TPM process by source. [Note: Categories of sources (e.g. PA, national lab, manufacturer, technology incubator, etc.) will be developed collaboratively with ED, and self-reported by submitter.] Project source also labeled in the ETP database. |
|  | • ETP-T7: Number of TPM project ideas by source, if available [Note: Categories of sources (e.g. PA, national lab, manufacturer, technology incubator, etc.) will be developed collaboratively, and attributed by ETP based on ETP’s expert judgment.] Project source also labeled in the ETP database. |
| Output from ET is not explicitly aligned with long- term goals | ETP-T8: Mapping of ETP projects and technologies aligned with specific statewide goals, with specificity as to what aspect of each goal it is fulfilling. For example: “4 ETP projects are aligned with statewide ZNE-readiness” in addition to “a list of ETP projects aligned with ZNE-readiness are as follows:” Goals will also be labeled in the ETP database. A list of eligible goals will be developed collaboratively with ED. |