

Equity Metrics Working Group Huddle Meeting Summary

Date: Tuesday August 30, 2022

Time: 10:00am - 12:00pm PT

On August 30, 2022, the CAEECC facilitated, at the request of CPUC Energy Division, a reconvening (“Huddle”) of the Equity Metrics Working Group (EMWG) virtually via Zoom. There were fifty three participants including representatives from 25 EMWG member and ex-officio organizations and 16 members of the public (see [Appendix A](#) for a full list of meeting attendees). This meeting was facilitated by Katie Abrams (Abrams) of SESC and supported by Suhaila Sikand (Sikand) of Common Spark Consulting and Susan Rivo (Rivo) of Raab Associates.

Supporting meeting materials are available at:

www.caeec.org/equity-metrics-wg-huddle. Relevant materials include:

- Agenda (*Equity Metrics Working Group Huddle Agenda*),
- Slide Deck (*Equity Metrics Working Group Huddle Draft Slides*), and
- ED Categorization Analysis (*CPUC ED's Draft Categorization Analysis of Metrics and Indicators*).

Overview

Key Meeting Takeaways:

- Several proposals were put forth outlining how to modify the categorization the CPUC put forth in their analysis.
- CalPA presented a proposal on Equity targets; members requested clarification on many elements and expressed some concern about misalignment with the EMWG and current definitions; and many members requested to meet with CalPA before the 9/15 workshop
- High-level input on approaches to adding specificity was provided, and many members supported the proposed metrics framework table intended to provide consistency across PAs

This meeting summary is intended to capture this meeting’s discussion of ideas, concerns, and alternative options for proposals. This summary will be used to inform the upcoming Metrics Workshop and subsequent work by the CPUC related to the [Scoping Memo \(A.22-02-005\)](#). The series (two Huddles and one 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), Equity Metrics Working Group (EMWG), energy efficiency (EE), disadvantaged communities (DAC) and hard-to-reach (HTR) communities, Program Administrator (PA), justice equity diversity and inclusion (JEDI), Investor-owned utilities (IOU), CPUC's Environmental and Social Justice Action Plan (ESJ Action Plan), Household (HH), Market Support (MS), Multifamily (MF), Regional Energy Network (REN), Resource Acquisition (RA), Single family (SF).

Agenda & Housekeeping

Slides 2 - 5

Abrams introduced the following agenda and provided general reminders, zoom etiquette.

- Welcome, Agenda, Introductions & Background
- Topic 1: Metrics Categorization
- Topic 2: Methodology and Approach
- Topic 3: Scope of REN Topic at 9/15 Workshop
- Wrap up and Homework

The purpose of this meeting was to reconvene the EMWG for a brief catch-up and discussion to tee up a workshop around the Metrics, Indicators, and Targets. Specifically, the objectives of this meeting were:

- Gather input on ED categorization analysis, and note any areas of disagreement and next steps
- Gather ideas for further work on methodology + data
- Tee up conversation on whether RENs need additional metrics and if so, what new metrics
- Inform the Metrics Workshop planning process based on conversations at this meeting

Huddle Discussion on the Agenda and Objectives

No Huddle members raised questions, concerns, or thoughts about the objectives or agenda.

Introduction and Background

Slides 6-27

Ely Jacobsohn (Jacobsohn), CPUC Energy Division, made a few introductory remarks on behalf of the CPUC. Jacobsohn specified that the entire Metrics Workshop and Huddle process is seeking input on the regulatory approach for developing and setting metrics for the Business Plan Applications for 2023 versus in the future. Jacobsohn specified

that the CPUC seeks stakeholder proposals on a framework for collecting data for the metrics and indicators to make sure they are useful, meaningful, and consistent so they can be used to assess PA progress internally, across PAs statewide, and PAs nationally. The CPUC is seeking clear and consistent information, not necessarily more information. In addition, Jacobsohn framed the question about RENs and whether or not there should be higher level goals. Lastly, Jacobsohn emphasized the CPUC's sincere interest in hearing from stakeholders rather than making proposals without their input. Abrams then explained how the Huddles fit into the larger Metrics Workshop and CPUC Scoping Memo effort.

Abrams provided a high level summary of the EMWG as well as an overview of the key terms used in this effort. In particular, Abrams 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 provided an overview of the EMWG to remind participants about activities to date as well as how the working group fits into the Metrics Workshop and CPUC Scoping Memo. This overview included (slides 12-27):

- EMWG key outcomes summary
- 2024-2031 EE Application Attachment Tables relevance
- ED Categorization Analysis overview

Based on the ED Categorization Analysis, Abrams distinguished ED's high level summary of the Equity metrics:

- The main metrics proposed are counts of total Equity Segment Program participants by sector.
- The one additional metric proposed is first-year bill savings for participants in Equity Segment programs.
- The indicators are split between well-defined energy savings and TSB indicators, and non-energy benefits categories that have no established methodology defined. There is a non-consensus indicator regarding community engagement tracking as well.

In addition, Abrams walked through the ED Categorization Analysis, showcasing the differences between the Working Group Final Report and the ED Spreadsheet (*see slides 23-26 for more information*).

Huddle Discussion on EMWG Recap

Below is a summary of the discussion:

- Jim Dodehoff, Silent Running: Noted that in the EMWG that convened in Fall 2021, some felt that there should be targets immediately and put in business plan applications while others thought there wasn't enough data to do that and that there couldn't be actual targets.
- Fabi Lao, Center for Sustainable Energy: Asked for clarification about why expected first year bill savings is a metric, not a post billing analysis
 - Lucy Morris, PG&E: Responded that one reality of working with DAC/HTR/LI customers is that if they originally had a broken system and through a program received a working system, there aren't bill savings, but rather a more comfortable physical living setting.
 - Elaine Allyn, SDG&E: Added that there was, at EMWG, a discussion on the transiency of this population and that a first year indicator might be best to view the immediate results
 - Lucy Morris, PG&E: There is a fair bit of documentation on this issue for DAC/Equity customers and why you can have a successful program but not see first year savings.

Topic 1: Metrics Categorization

Slides 28-32

Abrams dove into a discussion around the 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?*

Huddle Discussion on Equity Metrics Categorization

Below is a high-level summary of the discussion (see [Appendix B](#) for the full discussion and attribution).

- Proposals from Huddle participants, some of which are conflicting, but are all included here for the record's sake.
 - Metrics/indicators to move from Category 3 to Category 2
 - Equity_23-25 (metric on total # of contractors/workers served by Equity Segment Programs and supporting indicators)
 - Equity_43-45 (community engagement indicators)
 - Metrics/indicators to move from Category 2 to Category 3
 - Equity_46 (energy and climate benefits indicator)
 - Suggestion to prioritize target for Equity_23 (metric for total # of contractors/workers served by Equity Segment Programs)
- High-level questions, comments, and suggestions for future discussion:

- Requested clarification on how Category 3 was determined. The CPUC clarified that Category 3 was derived by the CPUC going through each of the metrics and indicators and PA applications, and noted that there was not agreement on every aspect of each progress tracker to be consistent.
- Suggestion to discuss methodology for Equity_26 (metric for expected first-year bill savings in total \$ for equity-targeted program participants)
- Suggestion to consider rewording indicators that include language “resource acquisition and market support” (Equity_2-5, Equity_7-8; Equity_10-13; Equity_15-16; Equity_18-19; Equity_21-22)
- How should the non-consensus issue of defining “underserved” be determined?

CalPA Proposal Presentation

James Ahlsedt, CalPA, introduced the CalPA proposal for the Equity Targets. Ahlsedt put forth three guiding principles:

- Equity Customers should be “served” at the same level as non-equity customers for similar EE programs.
- Segment Targets should align with budget increases while balancing the Decision’s Equity objectives
- Programs outside Equity segment should track the number of Equity customers served

CalPA’s proposal includes targets for 8 metrics and 4 indicators, specifically calling for a 15% increase over the baseline by 2027 and parity with DAC/HTR populations in PA service territory by 2031.

Discussion on CalPA Proposal

Below is a high-level summary of the discussion (see [Appendix B](#) for the full discussion and attribution).

- Requested clarification on Principles A-C, as well as meaning of “parity” and “served” within the context of this proposal
- Concerns that the proposal is missing or inconsistent with the EMWG, for instance the proposal focuses on energy savings and not non-energy benefits, proposes a definition of underserved which was non-consensus in the EMWG
- Noted the proposal has outdated DAC and HTR definitions
- Questioned the basis for the 15% target (based on half of the 30% cap on Equity and Market Support segment budgets), considering the 30% budget was not a 30% increase over the budget, but rather that up to 30% of a PA’s total budget can be allocated to MS and Equity
- Questions about whether targets would be PA-specific, across an IOU-territory, or statewide

Next Steps on Topic 1: Metrics Categorization

Abrams noted the challenge of the broad scope for this huddle, which necessitated focusing on WG members flagging questions and concerns but didn't allow for CalPA to respond or for WG members to dialogue. She invited thoughts on how to move the proposal or alternate proposals forward prior to the Sept 15 workshop. Jacobsohn echoed that collaboration sooner will ensure a more cohesive process in the future.

Jim Dodenhoff, Silent Running, raised concern for the timing of these meetings. Requested a forum for follow-up with the EMWG after Metrics Workshop for better engagement with the group. Abrams acknowledged that the facilitation team will be unable to host those conversations due to time constraints. She suggested that there may be an opportunity after the workshop. Kevin Ehsani, SoCalGas, requested an informal meeting with CalPA to discuss the proposal.

Many WG members expressed interest in meeting with CalPA before the workshop. [After the huddle, the CAEECC facilitation team sent a doodle poll to the members who expressed interest in attending, and CalPA facilitated a meeting on Tuesday September 6th to answer the questions posed at the huddle]

Topic 2: Methodology and Approach

Slides 33 -37

Abrams opened the room to a discussion on the methodology and approach of developing and setting Metrics, specifically discussing the development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines.

Huddle Discussion on Methodology and Approach

Below is a high-level summary of the discussion (see [Appendix C](#) for the full discussion organized by key question).

- Suggestion that methodology details need to be coordinated with all PAs and it will take time and perhaps will need facilitation.
- Suggestion to focus on category 3 metrics ahead of category 3 indicators
- Appendix C has many other details on input regarding the CPUC's key questions
- General support for the proposed framework table (slide 35, adapted from SoCalREN's ABAL), with the suggestion to remove the "core metrics" row, use the table for metrics not indicators, and use an appendix for definitions and other clarifications

Next Steps on Topic 2: Methodology and Approach

- Facilitation team to post notes from the discussion, and incorporate into the workshop planning
- WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th

Topic 3: Regional Energy Network (REN) Performance Requirements

Slides 38-40

Abrams briefly provided an overview of the REN performance requirements as compared to IOUs and CCAs, which will be covered in greater depth at the Metrics Workshop. Key reporting differences currently include:

- RENs forecast their own energy savings and TSB in the BBALs
- RENs have no TRC threshold
- RENs aren't subject to the 30% cap on the amount of budget to be spent on Equity and Market Support segments

For the next round of applications (2024 - 2027), key changes include how the RENs may update their energy savings and TSB Targets. Abrams noted that the key question for Metrics Workshop is: *are there corollary metrics that would focus on the equivalent for RENs on TSB and cost effectiveness and how might or might not they relate to the unit value metrics?*

Huddle Discussion on REN Performance Requirements

- Jim Dodenhoff, Silent Running: Asked for clarification on an "apply-to-administer" CCA?
 - Alison LaBonte, CPUC: Responded that opposed to "elect-to-administer" CCAs that do not have to file an application to serve EE programs in their territory, only a tier 3 AL, but the scope and budget limits are much tighter for elect to administer CCAs than ATA CCA
- Laurel Rothschild, The Energy Coalition: MCE is the only apply-to-administer CCA. Thus they submitted a business plan.

Next Steps on Topic 3: REN Performance Requirements

- Facilitation team to post notes from today's discussion, and incorporate into the workshop planning
- WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th

Wrap Up

Slides 41-45

Abrams welcomed the participants to submit comments and thoughts before the Metrics Workshop on September 15, 2022.

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

1. Do you feel this was an inclusive and trusting environment? (Single Choice) *

15/15 (100%) answered

Not at all inclusive and trusting (0/15) 0%

Somewhat inclusive and trusting (3/15) 20%

Very inclusive and trusting (12/15) 80%

2. Do you feel the meeting was effective? (Single Choice) *

15/15 (100%) answered

Not at all effective (0/15) 0%

Somewhat effective (11/15) 73%

Very Effective (4/15) 27%

Next Steps

Abrams summarized the next steps, which include:

- **The Metrics Workshop is September 15 from 9:30am - 2:30pm.** Meeting objectives include:
 - Continue to discuss categorization of indicators and metrics, and what might be ripe for targets
 - Map out development of proposal(s) for improved definitions, granularity and methodologies in testimony
 - Build understanding around metrics to assure RENS' budgets achieve just outcomes for ratepayers

[Note the CPUC updated the workshop objectives after the huddle; the revised workshop objectives can be found on the CPUC Metrics Workshop Agenda posted to the CAEECC website here: <https://www.caeecc.org/9-15-22-cpuc-metrics-workshop>]

Appendix A: Attendees

Appendix A: Attendance	
8.30.22 Equity Metrics Working Group Huddle	
Working Group Members & Alternates	
Organization	Name
3C-REN	Alejandra Tellez
3C-REN	Erica Helson
BayREN	Jennifer Mitchell-Jackson
CalPA	James Ahlstedt
CalPA	Sophie Babka
CodeCycle	Dan Suyeyasu
CSE	Fabi Lao
I-REN	Margaret Marchant
MCE	Qua Vallery
NRDC	Julia de Lamare
PG&E	Lucy Morris
PG&E	Lindsey Tillisch
RCEA	Aisha Cissna
RCEA	Stephen Kullmann
SBUA	Ted Howard
SCE	Christopher Malotte
SCE	Carol Edwards

SDGE	Elaine Allyn
SoCalGas	Kevin Ehsani
SoCalGas	Sebastian Garza
SoCalREN	Lujuana Medina
SoCalREN	Fernanda Craig
The Energy Coalition	Laurel Rothschild
Energy Efficiency Council (EEC)	Ron Garcia
High Sierra Energy Foundation	Pam Bold
Resource Innovations	Chris Pilek
Rising Sun Center for Opportunity	Alejandro Castelan
Silent Running LLC	James Dodenhoff
Viridis	Mabell Garcia Paine
Viridis	Don Arambula
Ex-Officio	
CEC	Brian Samuelson
CPUC Energy Division	Ely Jacobsohn
CPUC	Moses Gastelum
CPUC	Mia Hart
CPUC	Alison LaBonte
CPUC	Jason Symonds
CPUC	Christie Torok
Other Interested Stakeholders	

EAJ Energy Advisors	Steve McCarty
Frontier Energy	Nancy Barba
Frontier Energy	Katie Nash
Greenbank Associates	Alice Sung
ICF	Cody Coeckelenbergh
Lincus	Patrick Ngo
PacificCorp	Nancy Goddard
PG&E	Angela McDonald
PG&E	Robert Marcial
SoCalGas	Alison Dourigan
SoCalGas	Art Montoya
SoCalREN	Sheena Tran
Tierra Resources Consulting	Nick Snyder
Tierra Resources Consulting	Matthew Joyce
Unlisted	Aleecia Gutierrez
Yinsights	Carol Yin

NOTE: the SCE alternate for the Equity and Market Support segment working groups should be Kellvin Anaya.

Appendix B: Topic 1 (Metrics Categorization) Discussion

Huddle Discussion on Equity Metrics Categorization

The following discussion is organized by each progress tracker (via CPUC Metric/Indicator ID Number) and a General Comment section.

- General Comments
 - Lujana Medina, SoCal REN: Asked for clarification on how Category 3 was determined and if it was developed from PA non-consensus.
 - Jacobsohn: Clarified that Category 3 derived by the CPUC going through each of the metrics and indicators and PA applications, where CPUC noted that there was not agreement on every aspect of the progress tracker to be consistent. Noted that there were a number of elements of each progress tracker that seemed to have disagreements.
 - Kevin Ehsani, SoCal Gas: Clarified if the topic for discussion included turning progress trackers from Category 2 to Category 3, noting how some of the progress trackers are unclear how PAs could benefit from that information requested.
 - Fabi Lao, Center for Sustainable Energy: Clarified that the categories are based on ED's assessment of the PA applications and their interpretation.
 - Lujana Medina, SoCal REN: Noted that SoCal REN doesn't oppose any progress tracker, besides C1. However, Medina offered that there are ways to measure it.
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- Equity 38, Equity 42
 - Elaine Allyn, SDG&E: Identified these as needing specificity of a definition of 'underserved'.
- Equity 43, Equity 44, Equity 45
 - Fabi Lao, Center for Sustainable Energy: Proposed moving from Category 3 to Category 2 because they can include 'counts and types of activities', which adds specificity.
 - Elaine Allyn, SDG&E: Clarified that the confusion is about the association to 'energy and cost savings' bucket. Noted the lack of clarity around how community engagement works into that bucket
 - Jim Dodehoff, Silent Running: Agreed with Fabi. Noted that PAs provide very granular detail and community outreach activity tracking in other areas, such as the Wildfire Mitigation Plan activities.
 - Fabi Lao, Center for Sustainable Energy: Noted confusion about the groupings and suggested 'holistic benefits'
 - Aisha Cissna, RCEA: Asked how Community Engagement Indicators might interface with the Ruling questions issued on 8/26.
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- Equity 46

- Elaine Allyn, SDG&E: Proposed moving from Category 2 to Category 3. Hard to understand and quantify measurement
- Lujana Medina, SoCal REN: On behalf of SoCAL REN, proposed moving from Category 2 to Category 3.
- Lucy Morris, PG&E: Believed the intent was to simply use the TSB and asked for confirmation. Noted that Equity 46 is the one that was expected to be calculated using the TSB and not another test.
 - Elaine Allyn, SDG&E: Noted a similar confusion of how to use TSB unless actually installing equipment. Noted that other benefits such as "holistic" ones in the equity segment do not have TSB within the CET.
- Equity 15, 16, 18, 19, 21, 22
 - Elaine Allyn, SDG&E: Noted confusion of meaning of 'Equity Market Support' and 'Equity Resource Acquisition'
 - Lucy Morris, PG&E: Clarified that its determining the amount of people receiving the type of activity, for example, whether its equipment installation or information and awareness raising.
 - Elaine Allyn, SDG&E: Noted confusion because there are Market Support and Resource Acquisition segments
 - Jenn Mitchell Jackson, BayREN: Noted that this conversation came up at one conversation at a subgroup meeting and not fully talked about at the EMWG and therefore might not be appropriate to include. Provided an example from BayREN: listed folks who did and did not contribute to energy savings. Direct energy savings or indirect energy savings.
 - Elaine Allyn, SDG&E: Proposed to clarify verbiage.
 - Lujana Medina, SoCal REN: Continued efforts to complicate metrics requires more resources. As a REN, can only imagine IOU portfolios trying to distinguish all these activities. Would be time consuming and may lead to inaccuracies. Propose coming up with easy and well-defined metrics and pulling from the CRM.
- Equity 23
 - Laurel Rothschild, The Energy Coalition: Suggested prioritizing this metric to move from Category 3 to Category 2 because it should take precedence over indicators in Category 3.
 - Kevin Ehsani, SoCalGas: Proposed moving metric from Category 3 to Category 2.
 -
- Equity 26
 - Laurel Rothschild, The Energy Coalition: Suggested prioritizing this metric to move from Category 3 to Category 2 because it should take precedence over indicators in Category 3.
 - Laurel Rothschild, The Energy Coalition: Asked for clarification on Equity 26 from PAs based on their preferred methodology.

- Lujana Medina, SoCal REN: Noted the possibility to track this, but also its complicated nature. Acknowledged that disaggregating specific tasks can be very difficult for a large portfolio.
- Jim Dodenhoff, Silent Running: Stated confusion about having a metric designated in Category 3. Recognizing the challenges of estimating or measuring first year bill savings if we are to include this it seems to me that this item should be in Category 2.
- Kevin Ehsani, SoCalGas: Proposed moving metric from Category 3 to Category 2.
- Equity 24:
 - Laurel Rothschild, The Energy Coalition: Speculated that this metric is in Category 3 because one of the issues from EMWG was that the metric did not call out contractors or workers as equity served contractors or workers. Noted that clarifying why this metric was in Category 3 can help prioritize its move to Category 2.
 - Lujana Medina, SoCal REN: Noted that this metric is not an issue and that all PAs can pull the required information. Clarified that the questions at large about this metric include how to group or disaggregate the data: by sector, type of work, admin, etc. Proposed that populating these should be fairly easy.
 - Lucy Morris, PG&E: Reminded the Huddle that the WG proposed the following clarification: "contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs"
- Equity 28 - Equity 42
 - Laurel Rothschild, The Energy Coalition: Commented that these as they are all related and can be tackled together. Noted that there is some double counting as the definitions of HTR, DAC, and Underserved can overlap. Suggested that a hesitation from PAs could be whether or not to include funneling equity programs with non-direct resource options into the counting and evaluation of these metrics.
 - Lucy Morris, PG&E: Noted that the overlap is the reason that PG&E and a few other PAs did not propose to break out the counts by DAC, HTR and Underserved.

Discussion on CalPA Proposal

The following discussion is organized by proposal element

- Principle A, Sub Bullet
 - Lucy Morris, PG&E: Proposed that focusing on achieving equivalent "benefits" would be more appropriate since conversations are focused on equity and the importance of energy and non-energy benefits. Noted that it feels like a lot of the conversation from the EMWG is missing from the

- proposal, specifically that ‘comfort, health, and safety’ is just as important to customers as ‘energy savings’. Believed this wasn’t encompassing the value of EMWG discussions. Suggested that only looking at ‘energy savings’ would not take into account the bigger picture.
- Elaine Allyn, SDG&E: Requested clarification on Sub Bullet A and how the segment was initially set up to not require energy savings.
 - Kevin Ehsani, SoCalGas: Requested clarification on Sub Bullet A.
 - Laurel Rothschild, The Energy Coalition: Expressed concern for Sub Bullet A, noting it doesn’t have the measurement attached.
- Principle B
 - Elaine Allyn, SDG&E: Requested clarification on Principle B. Noted that a lot of statewide programs are supported by these budget segments and that PAs cannot assess the impacts to their communities of these statewide programs.
 - Principle C
 - Kevin Ehsani, SoCalGas: Requested clarification on Principle C.
 - Laurel Rothschild, The Energy Coalition: Expressed concern for Principle C, noting that it technically wouldn’t work towards the equity targets and requested clarification on how it folds into where targets are set.
 - Fabi Lao, Center for Sustainable Energy: Requested clarification on Principle C and if it’s about resource acquisition.
 - “Parity” discussion
 - Lucy Morris, PG&E: Noted there’s a lot to unpack in Parity and requested clarification.
 - Lujana Medina, SoCal REN: SoCalREN agrees - equity customer facilities/buildings or even "projects able to implement" typically differ and would be inherently unfair to the equity segment
 - DAC and HTR definitions
 - Fabi Lao, Center for Sustainable Energy: DACs has an updated definition that goes beyond the top 25% of CES 4.0. Link: <https://calepa.ca.gov/envjustice/ghginvest/>
 - Lucy Morris, PG&E: FYI, recent update to the definition of DAC: 1. Census tracts receiving the highest 25 percent of overall scores in CalEnviroScreen 4.0 (1,984 tracts). 2. Census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps, but receiving the highest 5 percent of CalEnviroScreen 4.0 cumulative pollution burden scores (19 tracts). 3. Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in CalEnviroScreen 4.0 (307 tracts). 4. Lands under the control of federally recognized Tribes. For purposes of this designation, a Tribe may establish that a particular area of land is under its control even if not represented as such on CalEPA’s DAC map and therefore should be considered a DAC by requesting a consultation with the CalEPA Deputy Secretary for Environmental Justice, Tribal Affairs and Border Relations at TribalAffairs@calepa.ca.gov. Visit

- CalEPA for more resources and the most recent maps of DAC communities
 - Howard (from chat): HTR definition, per D. 18-05-041, includes small businesses too, but they are not listed in the PAO categorization
- Target: 15%
 - Elaine Allyn, SDG&E: Clarified that the 30% budget was not a 30% increase over the budget, but rather that up to 30% of a PA's total budget can be allocated to MS and Equity.
 - Lucy Morris, PG&E: Agreed that the 15% increase is not accurate. Requested additional clarification on the 15% increase. Raised caution that HTR customers are expensive to reach (hence hard to reach).
 - Kevin Ehsani, SoCalGas: Echoed thoughts about the 15%. Proposed going back to the drawing board.
- General
 - Lucy Morris, PG&E: Recommend a territory-wide view as to not hold the PA accountable, but to look at the customers themselves and the entire shared view of equity customers on a whole. Echoed the importance of a holistic territory view.
 - Jenn Mitchell Jackson, BayREN: Clarified if this would be a statewide target. Asked if CalPA recommends including folks in CARE or ESA programs.
 - Ahlsedt: Responded that it's not meant to be statewide, but rather by PA. Clarified that CalPA does not have a position yet on inclusion of CARE or ESA, but personally thinks that it should be exclusive of these populations to track new customers being served
 - Chris Malotte, SCE: Generally supportive of the approach. Requested clarification on the exclusion of industrial and agricultural or other non-residential sectors. Noted confusion about what "buildings" includes or doesn't include.

Appendix C: Topic 2 (Methodology & Approach) Discussion

The following discussion is organized by proposed discussion question (slide 34):

- Suggested timeline to develop methodology details?
 - Laurel Rothschild, The Energy Coalition: Suggested that methodology details need to be coordinated with all PAs and it will take time and perhaps will need facilitation.
 - Lucy Morris, PG&E: Proposed to focus on the metrics in Category 3 ahead of the indicators in Category 3.
 - Laurel Rothschild, The Energy Coalition: Agreed to prioritize metrics in Category 3 first
- Suggested regulatory process for setting methodologies?
- Studies needed to develop certain methodologies (and timeline and lead for studies)?
 - Lucy Morris, PG&E: Flag trackers that need a definition versus a study. Some could be knocked out in a couple hours of meeting while some will need a full study.
 - Laurel Rothschild, The Energy Coalition: agreed to flag metrics that do not need a study.
 - Mitchell-Jackson: Agreed with Morris. Non-energy benefits metrics will require a study and to move to make progress on it.
 - Jim Doderhoff, Silent Running: Agreed with Morris to focus first on that which can be readily measured.
- Is annual reporting of these metrics sufficient?
 - Laurel Rothschild, The Energy Coalition: Noted that PAs discussed annual reporting and seems sufficient.
 - Jim Doderhoff, Silent Running: Suggested to not report more often than annually and to keep it simple.
- Is segment level reporting sufficient?
 - Laurel Rothschild, The Energy Coalition: Agreed, but need to go back to CalPA proposal and acknowledge other equity customers being served

The following discussion relates to the proposed framework slide (slide 35)

- Laurel Rothschild, The Energy Coalition: Noted that this makes sense.
- Jim Doderhoff, Silent Running: Noted that 'trending' relative to the last year is not encompassed by framework
- Kevin Ehsani, SoCalGas: Suggested to use this framework just for metrics.
- Jacobsohn: Clarified that the purpose is for anything being reported has the same level of clarity. Outlined a few key questions about this framework: *Who is doing what and in charge of what? What is the timeline?*
- Erica Helson, 3CREN: Asked if this framework is separate or in addition to ED/PA Reporting Template?

- Jacobsohn: Clarified that this is open for discussion and whether there can be clarity for compare and contrasting data.
- Lujana Medina, SoCal REN: Noted that SoCal REN developed this table to help understand what went into each metric and why. Noted that moving forward, would likely not need 'Core Value' but rather identify 'Segments'. Noted the Applicable Sectors might be helpful because entities like SoCas REN will report equity metrics for all sectors, even Resource Acquisition. Noted that this framework can help understand the nuances for each of these elements, and avoid standardization as long as the nuances are called out. Suggested that perhaps a definition or clarification table could be used as an appendix.