

# Market Support Metrics Working Group Huddle Meeting Summary

Date: Thursday, September 1, 2022

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

On September 1, 2022, the CAEECC facilitated, at the request of CPUC Energy Division, a reconvening (“Huddle”) of the Market Support Metrics Working Group (MSMWG) virtually via Zoom. There were forty two participants including representatives from 19 MSMWG member and ex-officio organizations and 10 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.caeec.org/market-support-wg-huddle](http://www.caeec.org/market-support-wg-huddle). Relevant materials include:

- Agenda (*Market Support Metrics Working Group Huddle Agenda*),
- Slide Deck (*Market Support 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.
- Participants took an interest in identifying the roles for reporting progress trackers.
- A proposal was put forth to streamline progress tracker methodology development and target-setting through a prioritization of, for example, two metrics per Sub-Objective.

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), 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).

## Agenda & Housekeeping

*Slides 2 - 10*

Michelle Vigen Ralston introduced the following agenda and provided general reminders, zoom etiquette, CAEECC Ground Rules and Meeting Norms. In particular, Ralston made a note about inclusivity as it relates to using pronouns and offered a resource to Huddle participants ([Why I Put Pronouns on my Email Signature \(and LinkedIn profile\) and You Should Too](#)).

- 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 MSMWG 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

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. Ralston then explained how the Huddles fit into the larger Metrics Workshop and CPUC Scoping Memo effort.

## Huddle Discussion on the Agenda and Objectives

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

## Introduction and Background

*Slides 11 - 32*

Katie Abrams provided 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 and Ralston also recapped the MSMWG 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:

- MSMWG Final Report breakdown (*slides 17 - 19*)
- 2024-2031 EE Application Attachment Tables relevance (*slides 20 - 21*)
- ED Categorization Analysis overview (*slides 22 - 32*)

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

- Many of the metrics proposed in Market Support focus on Awareness, Knowledge, Attitude, and Behavior (AKAB) surveys which need further specifics on their construction.
- Many of the metrics or indicators that are sufficiently clear to collect information are from existing Emerging Technologies Program (ETP) and Workforce Education & Training (WE&T) metrics.

In addition, Ralston walked through the ED Categorization Analysis, showcasing the differences between the Working Group Final Report and the ED Spreadsheet (*see slides 24 - 32 for more information*).

## Huddle Discussion on MSMWG Recap

- Kevin Ehsani, SoCalGas: Asked for clarification, recalling were two non-consensus principles: Community Engagement as a principle and Target Setting.
  - Suhaila Sikand, Common Spark Consulting: Noted that Community Engagement was non-consensus for the Equity Metrics Working Group, and that this conversation was centered on Market Support Metrics, for which the non-consensus item was Target Setting.

## Topic 1: Metrics Categorization

Slides 33 - 36

Ralston 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 Metrics Categorization

Below is a 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
    - MS\_3; MS\_4; MS\_13; MS\_14; MS\_15; MS\_16
  - Metrics/indicators to move from Category 2 to Category 3
    - (WE&T/MS) 301; (WE&T/MS) 306
  - Metrics to be converted to indicators
    - MS\_3; MS\_4; MS\_5; MS\_6; MS\_7; MS\_9; MS\_10; MS\_11; MS\_12; MS\_13; MS\_14; MS\_15; MS\_16; MS\_34; MS\_35; MS\_36; MS\_37
  - Metrics/indicators to be eliminated
    - MS\_17; MS\_18; MS\_22; MS\_29
  - Select two metrics from each Sub-Objective to prioritize into finalizing with Targets.
- Some specific questions were asked regarding certain sets or topics of metrics:
  - Some programs referenced are statewide programs while others are local, or have local counterparts. Discussions centered around whether or not PAs who do not have statewide program data should be required to report on such progress trackers. It was suggested that statewide program administrators report on statewide programs and if those programs have local counterparts to collaborate (in a way to be determined) on reporting.

- It was noted that methodologies to report on financing programs as described in MS\_29 & MS\_30 may already be available, or at least an example or framework for them. The California Hub for Energy Efficiency Financing (CHEEF) Pilot Program is currently tracking and reporting on this data, which *may* serve as a framework for other programs of similar caliber, however, each program has its own capabilities and nuances.
- A request was given to describe and distinguish indicators from metrics and the intent of each. In keeping with the MSMWG discussions and report, many Huddle participants agreed that **Indicators are not meant to have targets, whereas Metrics are. For further clarification, Metrics, without targets, are still metrics because the intent is for them to, at some point, have a target assigned.**

## Next Steps on Topic 1: Metrics Categorization

Ralston invited proposals prior to the Sept 15 workshop and noted how discussion at this meeting would help inform the workshop.

- WG Members or the Public are welcome to submit proposals or additional thoughts to the Facilitation Team by September 7 COB.
- Facilitation team will post a Huddle summary

## Topic 2: Methodology and Approach

*Slides 37 - 41*

Ralston 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 summary of the discussion (see [Appendix C](#) for the full discussion).

- Proposal to add 'Role' in framework and methodology, shown on Slide 39 to add specificity to the responsibilities of parties. Noted that the role defines the regulatory methodology
- Requested clarification on 'Reported' and 'Core Value' in sample framework. Noted that Core Value refers to the Values based programming that is specific to RENS, and may not apply to other PAs.
- Discussion on applicability of 'Denominator' in every metric, and the time it takes to set one.

## Next Steps on Topic 2: Methodology and Approach and Adding Specificity

Ralston thanked the group noting that this discussion was very helpful to inform the September 15 Metrics Workshop.

- 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 42 - 44*

Ralston 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**

- Mary Sutter, BayREN: Reminded the Huddle that RENs were required to create a separate set of metrics (Value Metrics), discussing what value the RENs bring to the state.
- Ely Jacobsohn, CPUC: Clarified that CPUC is looking to understand that the RENs provide an interesting and unique value and want to reward the big things RENs are doing to find commonalities. Requested the public to think about what combination or elements or pieces the CPUC should look at and prioritize.

### **Next Steps on REN Performance Requirements**

- 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

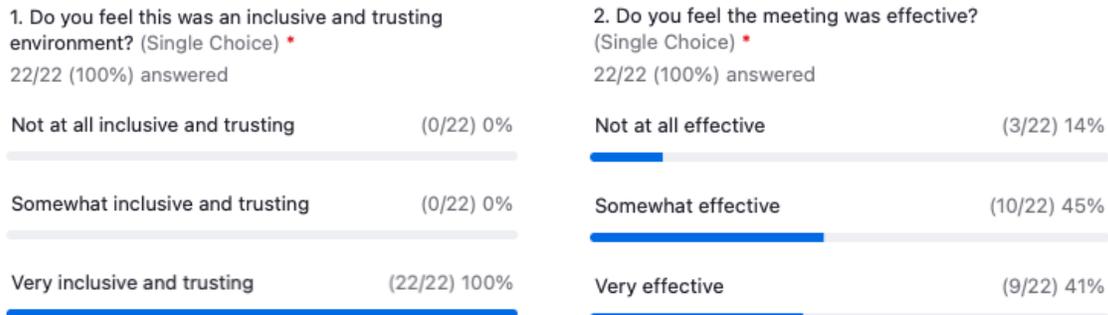
## Wrap Up

Slides 33 - 38

Ralston welcomed the participants to submit comments, thoughts, and requests by September 7, 2022 (before the Metrics Workshop on September 15, 2022).

## Meeting Evaluation

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



## Next Steps

Ralston 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 which 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

Organization	Name
<b>Working Group Members &amp; Alternates</b>	
3C-REN	Nancy Barba (Frontier Energy)
3C-REN	Erica Helson
BayREN	Mary Sutter (Grounded Research)
CalPA	James Ahlstedt
CalPA	Sophie Babka
CalPA	Shelly Lyser
State Treasury Office (CAEATFA)/CHEEF	Kaylee D'Amico
CodeCycle	Dan Suyeyasu
I-REN	Margaret Marchant (Frontier Energy)
I-REN	Benjamin Druyon (WRCOG)
PG&E	Ben Brown
PG&E	Rob Bohn
RCEA	Stephen Kullmann
SBUA	Ted Howard
SCE	Christopher Malotte
SCE	Kellvin Anaya
SDG&E	Elaine Allyn
SJVCEO	Courtney Kalashian
SJVCEO	Samantha Dodero
SoCalGas	Kevin Ehsani
SoCalREN	Lujuana Medina
SoCalREN	Fernanda Craig
The Energy Coalition	Craig Perkins
The Mendota Group	Grey Staples
Viridis	Don Arambula
<b>Ex-Officio</b>	
CEC	Brian Samuelson
CPUC Energy Division	Ely Jacobsohn

CPUC	Peter Franzese
CPUC	Alison LaBonte
CPUC	Rashid Mir
CPUC	Jason Symonds
CPUC	Christie Torok
<b>Public</b>	
Frontier Energy	Katie Nash
Greenbank Associates	Alice Sung
ICF	Cody Coeckelenbergh
Lincus	Patrick Ngo
RCEA	Patricia Terry
SoCalGas	Alison Dourigan
SoCalREN	Frederick Chung
Tierra Resources Consulting	Nick Snyder
Tierra Resources Consulting	Matthew Joyce
Yinsights	Carol Yin

## Appendix B: Topic 1 Discussion

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

- General Comments
  - Peter Franzese, CPUC: Asked if there are baselines for any of the progress trackers
    - Facilitator's response after meeting: baseline data is being collected via the Attachment tables in each of the PA's Applications
  - Cody Coeckelenbergh, ICF: Suggested that progress trackers be set as indicators in the early years while PAs are tracking data and then set targets to become metrics halfway through the application period or in the next application period. Suggested to think about progress trackers as indicators rather than metrics since there are no clear metrics with targets.
    - Abrams: Noted that while target setting was non-consensus for the WG, the distinction was that metrics would, at some point, have targets, and indicators are tracked but not expected to have targets.
    - Cody Coeckelenbergh, ICF: Noted confusion about Abrams response. Remembered conversations at MSMWG about dates to set targets. Noted that in their mind, metrics without targets are indicators until they have a target upon which they become a metric.
    - Ralston: Clarified that metrics are expected to eventually have targets set. Raised a discussion question by ED, *which progress trackers are more or less ready for the next step of setting targets*. Noted that when and how target-setting happens is the creative space the Huddle was working in at the moment.
    - Ely Jacobsohn, CPUC: Built off Ralston, clarifying that the CPUC is still exploring all options. Noted that in terms of timing, the big question for the CPUC is when to set targets for metrics. Noted another key question by the CPUC: *how to refer to metric or indicators*. Clarified that indicators were not intended to have targets.
    - Chris Malotte, SCE: Agreed with definitions of indicators being tracked on an ongoing basis and look back upon it. Agreed that the definition of metric is to set targets or have a desire to set targets in the long term.
  - Kaylee D'Amico, CAEATFA/CHEEF: Provided an overview that CHEEF is currently only CPUC-authorized, non-IOU statewide financing program and that the staff participated in WG as 'Access to Capital' became sub-objective. Clarified that these metrics (MS 29 and MS 30) were originally recommendations from the CHEEF team, who are not part of EE

- portfolio. Noted that recommendations were based on what CHEEF is already doing and no matter the outcome of this process, CHEEF will continue to collect this data. Clarified that anything coming out of other agencies, will need to follow these metrics in their own way.
- Mary Sutter, BayREN: Noted that there are a lot of metrics. Described how it is unclear how they will be used. Suggested to think about progress trackers with the following mindsets: *'what would we do with the information requested'* and *'how should the CPUC use this information.'* Proposed selecting two key metrics to track per Sub-Objective and offered others as explainers to what's working and not working in the market.
    - Elaine Allyn, SDG&E: Agreed with approach.
  - Elaine Allyn, SDG&E: Clarified that some of the progress trackers are focused towards statewide program. Sought clarity if only statewide lead implementers would report this data as not everyone has that data.
    - Ely Jacobsohn, CPUC: Raised to question what the current practice is now for PAs. Clarified that there might not be a need to change the current practice.
    - Mary Sutter, BayREN: Recalled that the WG did not determine *who* would collect the data. Noted that since the last WG Meeting, the WE&T has gone to a third party program. Suggests that third party implementers should be responsible to give data to PG&E and PG&E should be responsible to provide these metrics to the state.
    - Rob Bohn, PG&E: Clarified that PG&E runs certain statewide WE&T but these do not replace local WE&T programs that may exist. Raised to question how to this data may be combined to account for local efforts and who might be responsible for reporting this data..
    - Elaine Allyn, SDG&E: Clarified and agreed with Rob Bohn that both statewide and local programs exist. Offered an example, WE&T 306 is a statewide program and PAs don't have that data. Local programs would be reported by PAs where applicable, but not the statewide programs for each PA.
  - Rob Bohn, PG&E: New construction segments can influence Market Support metrics. Noted that work is needed to decide how to report them.
  - Sophie Babka, CalPA: Questioned if the PAs can breakdown and report on statewide programs by service territory, referencing that the budget is broken up by service territory .
    - Elaine Allyn, SDG&E: Clarified that decision language for the statewide program does not require that a certain percentage be within a certain IOU service territory that the budget is collected from. Provided an example that program X might have Y households in Service Territory Z, but allocated to Service Territory W. Noted that outcomes are intended statewide, not by Service Territory and therefore not a requirement.

- Sophie Babka, CalPA: Clarified that it's not evenly allocated because the money a PA is spending is not necessarily from their ratepayers and that the data may not be accurate to the distribution of program participants.
    - Christie Torok, CPUC: Clarified that the design and intent of statewide programs would be uniform statewide and funding consistent regardless of distribution of services by IOU. Noted that it doesn't mean that metrics can't be reported by IOU territory, but was created to increase efficiency.
      - Sophie Babka, CalPA: Asked if it's possible to report metrics, is it possible to see what portion of the budget was allocated to that?
      - Christie Torok, CPUC: Clarified that perhaps one could, but noted it's not necessarily in line with the intent.
  - Rob Bohn, PG&E: Recalled that the idea was trying to capture 'what's going on on the whole market level', however, the MSMWG noted the difficulty to associate and attribute that to individual programs. Recalled that the WG tried to measure local efforts, but that it resulted in many hundreds of metrics. Emphasized that the compromise by the MSMWG was to track at the segment level (not program level) and have program-specific metrics that would help with accountability of what PAs are trying to achieve. Noted that there may not need to be a direct link or attribution between statewide programs and metrics because the metrics are meant to be captured at segment level.
  - Mary Sutter, BayREN: Offered context and background that Market Sector is about 142 programs and about \$4.5M. Distinguished that the equity side only has 45 programs but the same money allocation. Offered framing of '*how much should we spend on this*'; '*where should evaluation and research occur*'; '*where should money be spent across 142 programs*'.
- MS\_3
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator because it looks at qualitative post programmatic implementation and lends itself to be an indicator versus metric. Difficult/challenging to set a target because not very quantitative, however holds a value as an indicator due to the measuring effectiveness
  - Mary Sutter, BayREN: Brought to light the extensive work of the ME&O on residential methodology to track *awareness* and *knowledge*. Suggested this can be referenced as a potentially useful baseline and to have authors from Opinion Dynamics to weigh in for a broader use of their methodology. Proposed moving to Category 2. Noted that non-residential needs additional consideration. Studies for consideration include [Marketing, Education & Outreach Effectiveness Assessment: Annual Performance Report](#); [ME&O Collaborative Process Assessment](#); [Marketing, Education & Outreach Consensus Project Report](#)

- MS\_4
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator because it looks at qualitative post programmatic implementation and lends itself to be an indicator versus metric.
  - Mary Sutter, BayREN: Brought to light the extensive work of the ME&O on residential methodology to track *awareness* and *knowledge*. Suggested this can be referenced as a potentially useful baseline and to have authors from Opinion Dynamics to weigh in for a broader use of their methodology. Proposed moving to Category 2. Noted that non-residential needs additional consideration. Studies for consideration include [Marketing, Education & Outreach Effectiveness Assessment: Annual Performance Report](#); [ME&O Collaborative Process Assessment](#); [Marketing, Education & Outreach Consensus Project Report](#)
- MS\_5
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator because it looks at qualitative post programmatic implementation and lends itself to be an indicator versus metric.
- MS\_6
  - Lujana Medina, SoCaREN: Recommended changing this metric to an indicator because it looks at qualitative post programmatic implementation and lends itself to be an indicator versus metric.
- MS\_7
  - Lujana Medina, SoCaREN: Recommended changing this metric to an indicator because it looks at qualitative post programmatic implementation and lends itself to be an indicator versus metric.
- (WE&T/MS) 301
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
  - Kevin Ehsani, SoCalGas: Noted confusion about these metrics. Suggested to move from Category 2 to Category 3. Raised concern for data collection methodology. Requested further definition as collaborations not relevant.
- (WE&T/MS) 302
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (WE&T/MS) 303
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Suggested remove what's

being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.

- (WE&T/MS) 304
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (WE&T/MS) 305
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (WE&T/MS) 306
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
  - Kevin Ehsani, SoCalGas: Noted confusion about these metrics. Suggested to move from Category 2 to Category 3. Raised concern for data collection methodology.
  - Elaine Allyn, SDG&E: Noted that this is a statewide program and would then not be reported by every PA.
    - Ralston: Clarified that if this gets to Category 1, only the statewide program implementer would report on that data.
  - Cody Coeckelenbergh, ICF: Suggested to remove the name of that program 'Career and Workforce Readiness' to apply the metric more broadly to other programs that may exist in relation.
    - Elaine Allyn, SDG&E: Disagreed, noting that the metrics seeks data about the participants of this specific program and if they are employed. Questioned its applicability to other WE&T programs.
- MS\_9
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_10
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_11
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_12

- Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_13
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
  - Mary Sutter, BayREN: Noted that there was extensive work from Energy Market Innovations (EMI) who talked to a lot of stakeholders and found information that could be used as a baseline (although the work may be a little dated) on HVAC quality installs for AKAB. Questioned if there is sufficient budget to report this due to the amount of time and budget EMI used for this study. Proposed moving to Category 2 and talking to authors of the work who may have informative knowledge.
- MS\_14
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
  - Mary Sutter, BayREN: Noted that there was extensive work from EMI who talked to a lot of stakeholders and found information that could be used as a baseline (although the work may be a little dated) on HVAC quality installs for AKAB. Questioned if there is sufficient budget to report this due to the amount of time and budget EMI used for this study. Proposed moving to Category 2 and talking to authors of the work who may have informative knowledge.
- MS\_15
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
  - Mary Sutter, BayREN: Noted that there was extensive work from EMI who talked to a lot of stakeholders and found information that could be used as a baseline (although the work may be a little dated) on HVAC quality installs for AKAB. Questioned if there is sufficient budget to report this due to the amount of time and budget EMI used for this study. Proposed moving to Category 2 and talking to authors of the work who may have informative knowledge. (*Studies for reference: [California HVAC Quality Installation/Quality Maintenance Customer Decision-Making Study](#); [California HVAC Contractor & Technician Behavior Study, Phase II](#)*)
- MS\_16
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
  - Mary Sutter, BayREN: Noted that there was extensive work from EMI who talked to a lot of stakeholders and found information that could be used as a baseline (although the work may be a little dated) on HVAC quality installs for AKAB. Questioned if there is sufficient budget to report this due to the amount of time and budget EMI used for this study. Proposed moving to Category 2 and talking to authors of the work who may have informative knowledge. (*Studies for reference: [California HVAC Quality](#)*)

[Installation/Quality Maintenance Customer Decision-Making Study; California HVAC Contractor & Technician Behavior Study, Phase II\)](#)

- MS\_17
  - Lujana Medina, SoCalREN: Recommended this metric be eliminated. Noted the difficulty to obtain a value and that actions do happen to reach actors but quantifying it is challenging.
- MS\_18
  - Lujana Medina, SoCalREN: Recommended this metric be eliminated. Noted the difficulty to obtain a value and assess the value of a partnership unless its a quantifiable metric.
- (ETP/MS) 314
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (ETP/MS) 315
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (ETP/MS) 316
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (ETP/MS) 317
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (ETP/MS) 318
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove

what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.

- (ETP/MS) 319
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- (ETP/MS) 320
  - Chris Malotte, SCE: Warned of duplicating efforts and redundancy for measuring WE&T and ETP Common Metrics. Questioned how WE&T and ETP metrics might get displayed and reported. Noted that these may not be as important to track, but rather more of an FYI. Suggested remove what's being tracked elsewhere and already has a process in order to streamline these Market Support Metrics.
- MS\_22
  - Lujana Medina, SoCalREN: Recommended this metric be deleted as it is not applicable to all PAs.
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
  - Chris Malotte, SCE: Noted that this is a metric.
- MS\_23
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
- MS\_24
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
- MS\_25
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
- MS\_26
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
- MS\_27
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
- MS\_28
  - Chris Malotte, SCE: Distinguished that these are related to innovation, but not ETP.
- MS\_29
  - Lujana Medina, SoCalREN: Recommended this metric be eliminated. Noted this metric as evasive to consumers.

- Chris Malotte, SCE: Made the distinction that these metrics were created for CHEEF, and might not be applicable to everyone.
- Kaylee D’Amico, CAEATFA/CHEEF: CHEEF tracks on monthly/quarterly basis already.
- Elaine Allyn, SDG&E: Noted that this information is not being collected. Noted that some forms of reporting depend heavily on type of financing, and might not be applicable to all financing programs.
  - Lujana Medina, SoCalREN: Agreed, noted that SoCalREN doesn’t track this data.
- MS\_30
  - Chris Malotte, SCE: Made the distinction that these metrics were created for CHEEF, and might not be applicable to everyone.
  - Kaylee D’Amico, CAEATFA/CHEEF: CHEEF tracks on monthly/quarterly basis already.
  - Elaine Allyn, SDG&E: Noted that this information is not being collected. Noted that some forms of reporting depend heavily on type of financing, and might not be applicable to all financing programs.
    - Lujana Medina, SoCalREN: Agreed, noted that SoCalREN doesn’t track this data.
  - Kaylee D’Amico, CAEATFA/CHEEF: Reminded the Huddle that CHEEF was asked to present their programs and tracking at MSMWG last fall. Suggested that perhaps this should not be a recommendation but rather a reference to build more flexible metrics for other programs to use.
- MS\_34
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_35
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_36
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.
- MS\_37
  - Lujana Medina, SoCalREN: Recommended changing this metric to an indicator.

## Appendix C: Topic 2 Discussion

- Suggested timeline to develop methodology details?
  - Mary Sutter, BayREN: Requested clarification on methodologies and what is being considered. Noted that much of AKAB is around surveying, there are methods already in place, and other metrics don't.
    - Ralston: Reframed and clarified if there is enough guidance on the establishing consistent methodologies for the other groups of metrics.
  - Mary Sutter, BayREN: Proposed adding 'Role', specifically *who is doing this work*. Distinguished that the CPUC leading vs PA leading means a different amount of work per person and different regulatory process.
    - Ralston: Clarified role is determining level of oversight.
  - Ralston: Asked if the PAs have any preferences on who should be establishing these roles for the required level of certainty.
  - Carol Yin, Yinsights: Noted that there are more than 50 metrics because many of these metrics have multiple parts, and each part likely requires a different data collection methodology.
- Suggested regulatory process for setting methodologies?
- Studies needed to develop certain methodologies (and timeline and lead for studies)?
- Is annual reporting of these metrics sufficient?
- Is segment level reporting sufficient?
- Is this a useful framework? Who should determine definitions? (slide 39)
  - Ely Jacobsohn, CPUC: Provided context that the CPUC is seeking to establish methodologies and add specificity. Noted that this framework in SoCalREN's BBAL both adds specificity and clarity and is derived from the Common Metrics in Tab 17 of EE Application Tables. Clarified that the CPUC is trying to learn from those efforts and improve. Noted that *Role* isn't here, but it could be valuable to know who is doing what and how. Also noted that *timeline* or *prioritization* for development/completion is also not represented. Requested the public to suggest appropriate ways to consider metrics.
  - Mary Sutter, BayREN: Requested clarification on '*reported*' and '*core value*'. Noted that the *denominator* can vary widely for non-residential and that when looking across the market, the applicable segments are fuzzy, i.e. how to categorize an HVAC contractor working in commercial and residential. Suggested that the group think through these kinds of questions. Questioned what product Market Support non-ETP measures support. Noted that the denominator may or may not be applicable to each metric. Reminded the Huddle that this also takes time to set.
    - Ralston: Suggested that instead of creating a framework for each metrics, to group progress trackers like AKAB, commercial/residential. Noted that the CPUC is asking about the

regulatory support for this and might lead to some deep conversations.

- Lujana Medina, SoCalREN: Clarified that the tables were on the previous Unique Value Metrics (UVM) filing. '*Core Value*' could be changed to '*Segment*'. Argued that all metrics have a numerator or denominator. Clarified that '*Reported*' is the timing/cadence of reporting and that this table is looking at the nuance to reporting.
- Carol Yin, Yinsights: Reminded the Huddle that for the common metrics, PAs had weekly meetings over 6 weeks to go through every single one of the 330 metrics to agree on how to calculate every term, and where that data would come from.
- Kevin Ehsani, SoCalGas: Requested clarification of '*Core Value*'.
- Lujana Medina, SoCalREN: Noted that when developing unit metrics, they were central themes. Since then, SoCalREN went through a REN Process Study and have since refined these. Suggested that this line could be changed to '*Segments*' or whatever the PA prefers to label it as. Noted that SoCalREN plans to include this table in the Appendix of their reporting for consumer transparency.

## Appendix D: Meeting Norms and Ground Rules Excerpt

### CAEECC Ground Rules Excerpt

- Attend all meetings (or send designated alternate)
- Do your homework (complete pre-and post-meeting work to ensure productive meetings and that a complete deliverable is finalized)
- Facilitation team posts materials 5 days before the meeting
- If there are recommendations you don't agree with, propose alternatives or think creatively to try to bridge the gap

To learn more, view the document “CAEECC Goals, Roles, and Responsibilities” for the full list of ground rules at: <https://www.caeccc.org/caeccc-info>

### Meeting Norms

To encourage a space of inclusion and diversity, WG members 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.