

Third-Party Solicitations Annual Stakeholder Meeting

February 29, 2024
10:15 am to 3:00 pm

Hybrid: In-Person and Virtual Meeting
PG&E's Oakland General Office, 2nd Floor
300 Lakeside Drive, Oakland, CA 94612

Virtual Meeting: [Click here to join the meeting](#)
Meeting ID: 288 231 999 179 **Passcode:** KFyxwN
Audio-only
[+1 415-906-0873,,759678657#](#) United States, San Francisco
Phone Conference ID: 759 678 657#

Start Time	Min	Session	Objectives	Presenter/Facilitator
10:15	10	Opening	<i>Introductions and agenda</i> <ul style="list-style-type: none"> Agenda and Safety Meeting Purpose and Goals Survey Results from March 2023 Meeting 	Elizabeth T. Lowe Independent Evaluator Barakat Consulting, Inc
10:25	25	<i>Session 1</i> EE Recent Decisions	<i>What's new?</i> <ul style="list-style-type: none"> EE Decision Updates and Resources 	Jessie Levine Third Party Solicitation Lead CPUC Energy Division
10:50	15	<i>Session 2</i> Independent Evaluators' Semi-Annual Reports (SARs) June and December 2023	<i>Effective Practices</i> <ul style="list-style-type: none"> Effective Practices Across IOUs Noted in the Recent SARs 	Elizabeth T. Lowe Barakat Consulting, Inc
11:05	10	Break		
11:15	60	<i>Session 3</i> IOU Portfolio Update & Upcoming Solicitations	<i>IOU Updates</i> <ul style="list-style-type: none"> Solicitations Schedule Updates, including How the IOUs are Managing Their EE Portfolios Process Improvements to Encourage Bidder Participation 	Facilitator: Jessie Levine, Energy Division Carter Prescott, SCE Brian Johnston, SoCalGas Alton Kwok, SDG&E Matt Braunwarth, PG&E
12:15	30	Lunch Break		
12:45	60	<i>Session 4</i> Implementer Panel	<i>Stakeholder Observations</i> <ul style="list-style-type: none"> What Improvements Have Implementers Seen and Would Like to See? How are Implementers Aligning with CPUC Policies in New EE Business Cycle 	Facilitator: Hob Issa, Lincus <ul style="list-style-type: none"> Siva Sethuraman, Cascade Energy Patsy Dugger, AESC Basu Mukherjee, Global Energy Services, Inc
1:45	10	Break		

Start Time	Min	Session	Objectives	Presenter/Facilitator
1:55	40	<i>Session 5</i> Independent Evaluator Panel	<i>Independent Evaluator Observations</i> <ul style="list-style-type: none"> • Small/Diverse Business Enterprise Participation in Solicitations and Implementation • Keys to Success: Tips and Tactics for Bidders 	Facilitator: Coby Rudolph, CPUC Energy Division <ul style="list-style-type: none"> • Don Arambula, Don Arambula Consulting • Kim Crossman, Great Work Energy • Richard Milward, MCR Corporate Services • Elizabeth T. Lowe, Barakat Consulting, Inc.
2:35	15	Open Discussion	<ul style="list-style-type: none"> • Participant Engagement • Topics for Next Stakeholder Forum 	Jessie Levine, CPUC Energy Division
2:50	10	Closing	<i>Post Meeting Items</i> <ul style="list-style-type: none"> • Surveys • Slide Deck & Meeting Minutes will be Posted to CAEECC 	Elizabeth T. Lowe, Barakat Consulting, Inc.
3:00		Adjourn		