**Note to the Equity WG**: This is a strawman proposal that builds on NRDC’s proposed Equity Metrics (from both 9/3 and 9/10) to further define (or in some cases, slightly re-define) the metrics so that the information is able to directly answer three major questions for the CPUC and outside stakeholders. These questions make it easier to discuss the broad value of equity programs.

This strawman was developed by Jenn (representing BayREN) and has not been reviewed. I would like to put forth the big picture concepts of how we make “Equity Metrics” useful at the 9/14 WG. I am not attempting to create additional metrics, but rather attempting to make those that have been put forward be more meaningful at the PA or State level.

The specific questions that I am seeking to use the proposed metrics to answer are:

1. Who (which groups) is the State serving with the equity programs and how are these groups being “served”?
2. Are equity programs leading to energy savings in the targeted equity populations (in the short-term)? Specifically…
   1. What are the direct energy savings (and GHG reductions) through CPUC funded programs?
   2. What are the expected bill savings from the participant perspective (claimed or unclaimed[[1]](#footnote-1) through the CPUC programs that track savings)?
3. What are the “holistic” benefits from the equity programs?

This proposal also starts to distinguish between what should be a metric and what should be an indicator using the context above.

1. ***Who (which groups) are we serving with the equity programs and how are these groups being “served”?***

*Notes: This data would come from tracking data/outputs.*

* *To answer the question “who is being served by the equity programs” in a way that is meaningful, programs would need to record each participant/target in one of three non-overlapping groups: e.g., DAC, non-DAC HTR, and other underserved (with descriptions specified) so that those engaged are only counted once. Programs should describe and verify “underserved” group in a way that could be audited at a later date, if desired by the PA or CPUC.*
* *The categories for “how are these groups being served” would need some thought from the group. It would be imperfect, but it would be a start to understanding the services being provided. Without this categorization, a social media post that recorded names would have the same “value” as a program that installed energy efficiency measures. The categories should range from low to high. These are just examples below. A program would record at the highest level of engagement or impact.*
  + **LOW** -Improving access to “energy efficiency” by increasing general awareness to bills and energy saving opportunities
  + **MED** -Improving access to “energy efficiency” by providing services such as audits, technical assistance, financial support or other (specify) support for EE such as panel upgrades
  + **HIGH** -Improving access to “energy efficiency” through the support of GHG-saving measures that were not claimed through CPUC programs (e.g., kits provided, energy-saving measures installed with non-CPUC funding)
  + **HIGH/COUNTED** -Improving access to “energy efficiency” by directly connecting targets to CPUC funded program where their participation was recorded, and saving were tracked. (Note that this is a count of participants. The energy savings are captured in the metrics below.)
  + [CATEGORY FOR INNOVATION?]

**METRICS TO ANSWER Q1**

The metric (with target) is the overarching numbered statement in each row. The A-D information below would be considered “indicators” but would be required to be rolled up to the metric above. We note that this still has the same issues with overlapping PA programs.

|  |
| --- |
| 1. **Total # residential (SF or MF unit) equity-priority HHs served**   This should be recorded as either SF or MF, and also in one of three discrete categories that make up “equity-priority communities” **(*DAC, non-DAC HTR or other underserved).*** Record each HH only once at the highest level of engagement given the categories below. Categories TBD.  [ADD CATEGORIES] |
| 1. **Total # MF equity-priority buildings served**   This should be recorded in one of three discrete categories **(*DAC, non-DAC HTR or other underserved).*** Record each property only once at the highest level of engagement. Categories TBD.  [ADD CATEGORIES] |
| 1. **Total # small business equity-priority buildings served**   This should be recorded in one of three discrete categories **(*DAC, non-DAC HTR or other underserved).*** Record each property only once at the highest level of engagement. Categories TBD.  [ADD CATEGORIES] |
| 1. **Total # Ag or Ind. equity-priority customers served**   This should be recorded as Ag or Ind. in one of three discrete categories **(*DAC, non-DAC HTR or other underserved).*** Record each property only once at the highest level of engagement. Categories TBD.  [ADD CATEGORIES] |
| 1. **Total # disadvantaged contractors or workers served**   This should be recorded by type of worker (contractor, student) in one of three discrete categories **(*DAC, non-DAC HTR or other underserved).*** Record each property only once at the highest level of engagement. Categories TBD.  [ADD CATEGORIES: trained, mentored or supported (not trained), resulted in contract or project] |
| 1. **Total # disadvantaged communities (or community buildings or community groups) where the community is the targeted**   This should be recorded in one of three discrete categories **(*DAC, non-DAC HTR or other underserved).*** Record each property only once at the highest level of engagement. Categories TBD. |

1. ***Are equity programs leading to energy savings in the targeted equity populations (in the short-term)? Specifically…***
   1. ***What are the direct energy savings (GHG reductions) through CPUC funded programs?***
   2. ***What are the expected bill savings from the participant perspective (claimed or unclaimed through the CPUC programs that track savings)?***

*Notes: This data would come from tracking data/outputs. Both of the bold numbered items would be metrics. Note that the metric for the first one is GHG reductions (since kWh and therm savings roll up to GHG reductions). KWh, kW and therms would be tracked but not a metric in the short-term.*

**METRICS TO ANSWER Q2**

The metric (with target) is the overarching numbered statement in each row. The A-C information below would be considered “indicators” but would be required to be rolled up to the metric above.

|  |
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| 1. **GHG reductions (tons) [direct savings]** 2. Total kWh savings 3. Total therm savings 4. Total kW savings |
| 1. **Expected first-year bill savings in total $ for equity-priority communities**   [*Note: intent is to ensure relevant programs are designed to help the participant directly save money even if not through a CPUC program. Calcs would be prospective and compared to baseline conditions to focus upgrades on the most impactful measures/strategies. This is a broader or “more loose” calculation of energy savings that would include kits, etc.] [participant perspective/all savings]* |

1. ***What are the “holistic” benefits from the equity programs (looking at them in more of a benefit/cost assessment where ideally, they would all be combined although we may not be able to monetize all benefits at this stage)?***

*Notes: This one would not be able to be fully output based. A and B could be answered by program outputs, but the others would need to be collected through evaluation surveys. In the short term, C-F may be counted as “units of benefit” where one customer or building reporting the benefit is measured. Eventually, this could be monetized but we understand that there would need to be an agreement on what values to use to monetize non-energy benefits. Note that all of the measurements below are primarily for energy saving activities, but this includes both claimed and unclaimed efforts (e.g., kits where participants see and report energy savings but the savings are not currently claimed through the workpaper process).*

**METRICS TO ANSWER Q3**

The metric (with target) is the overarching numbered statement. The A-F information below would be considered “indicators” but would be required to be rolled up to the metric above. In the short-term, the target may need to be set with the knowledge that only A and B may be able to be monetized in the short-term.

|  |
| --- |
| 1. **Benefits to participants and to society as a whole (all A-F below in $ and units until units can be monetized) per dollars ($) spent** |
| 1. Energy savings in dollars [*Note: intent is to ensure the best use of customer funds to yield the most benefit to the participant and/or community]* - “energy benefits”\* |
| 1. GHG emission reductions in dollars – “climate benefits”\* |
| 1. Health – “non-energy benefits” in “counts of customers reporting this benefit” until we can monetize. Reporting at least one of: 2. Indoor air quality 3. Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air) 4. Reduction in mold 5. Other |
| 1. Comfort - “non-energy benefits” in “counts of customers reporting this benefit” until we can monetize. Reporting at least one of: 2. Reduced drafts 3. Quieter interior 4. Managed interior temperature (e.g., cool during heatwave, warm during cold spell) 5. Other |
| 1. Safety -“non-energy benefits” in “counts of customers reporting this benefit” until we can monetize. |
| 1. Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of customers reporting this benefit” until we can monetize |

\*These should essentially agree with TSB and may really be one item.

1. Claimed savings are counted already. This would include savings such as those from kits, audits, and technical assistance that don’t currently get counted in standard programs because they don’t have workpapers. [↑](#footnote-ref-1)