

# California Public Utilities Commission (CPUC) Metrics Workshop Agenda

Date: September 15, 2022; 9:30am - 2:30pm PT

URL to join workshop: <https://us02web.zoom.us/j/87206251598>

Supporting materials: <https://www.caeec.org/9-15-22-cpuc-metrics-workshop>

Facilitated by CAEECC Facilitator Michelle Vigen Ralston (Common Spark Consulting)

## Background

The CPUC Energy Division is convening a workshop on Indicators, Metrics and Targets. The Metrics workshop will be facilitated by CAEECC, and will build on the work of the CAEECC [Equity Metrics Working Group](#) and the [Market Support Metrics Working Group](#). The Working Groups met in 2021 and reconvened for brief “huddles” August 30th and September 1st, respectively, in preparation for the workshop. Members of the public are welcome to attend (view public attendee details below).

**Recommended Prep Work:** We encourage participants to review the materials (see “supporting materials” link above) prior to the meeting to facilitate an efficient and productive meeting.

## Workshop Objectives

- A. **Categorization of indicators and metrics**, and which might be ripe for **targets** and when
- B. **Framework for adding specificity** to proposed targets, metrics, indicators, methodologies, and baselines
- C. Higher priority **metric(s) or goal(s) that focus on RENS'** overall value to ratepayers
- D. **Optimal/preferred regulatory approaches and timing** for consideration and approval of topics above

## Agenda

*Note: Meeting times and flow may vary based on stakeholder input and facilitator discretion*

Time	Topic & Description	Lead
9:30	<b>Intro &amp; Background</b> A) Review agenda and meeting objectives  B) Introductory remarks from the CPUC  C) Background & Context from CAEECC - including recap of Outcomes from Working Group “Huddles”	A) Facilitator  B) Ely Jacobsohn, Peng Gong, and Alison LaBonte (CPUC)  C) Facilitator
10:15	<b>TOPIC A: Metrics Categorization</b> A) Comments and proposals on ED categorization overall	A) Meeting Participants*

	<ul style="list-style-type: none"> <li>a. Market Support metrics</li> <li>b. Equity metrics</li> </ul> <p>B) Equity segment target-setting</p> <ul style="list-style-type: none"> <li>a. Presentation(s) by proponents (DACAG, CalPA, and IOU PAs)</li> <li>b. Comments on proposal presentation(s)</li> </ul> <p>C) Next steps (i.e. comments and proposals)</p> <p><i>Objective: Gather input and provide context to inform proposals on categorization of indicators and metrics, and which might be ripe for targets and when</i></p>	<p>B) Meeting Participants + Proposal from the Disadvantaged Communities Advisory Group (Roger Lin of the Center for Biological Diversity and Elena Krieger from PSE for Healthy Energy) + Proposal from CalPA (Mike Campbell and James Ahlstedt) + Proposal from IOU Program Administrators (Chris Malotte, SCE)</p> <p>C) Facilitator</p>
11:45	Lunch	
12:15	<p><b>TOPIC B: Specificity &amp; Approach</b></p> <p>A) Comments and proposals on topic 2 key questions (see questions 1-6 on page 3)</p> <p>B) Comments and proposals on development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines</p> <ul style="list-style-type: none"> <li>a. Market Support metrics</li> <li>b. Equity metrics</li> </ul> <p>C) Next steps (i.e. comments and proposals)</p> <p><i>Objective: Gather input and provide context to inform proposals on a framework for adding specificity to proposed targets, metrics, indicators, methodologies, and baselines</i></p>	<p>A) Meeting Participants</p> <p>B) Meeting Participants + Disadvantaged Communities Advisory Group proposed definitions and CE test to consider NEBs</p> <p>C) Facilitator</p>
1:30	Stretch	
1:35	<p><b>TOPIC C: REN Performance Metrics and Associated Targets</b></p> <p>A) Background on existing REN metrics and reporting requirements</p> <p>B) Comments and proposals, if any, on REN performance requirements</p> <p>C) Next steps (i.e. comments and proposals)</p> <p><i>Objective: Gather input and provide context to inform proposals on higher priority metric(s) or goal(s) that focus on RENs' overall value to ratepayers</i></p>	<p>A) Nils Strindberg, CPUC and Mary Sutter, Grounded Research on behalf of BayREN</p> <p>B) Meeting Participants</p> <p>C) Facilitator</p>
2:20 - 2:30	<p><b>Wrap Up</b></p> <p>A) Recap of the day, goals, outcomes</p> <p>B) Next steps</p>	<p>A) Facilitator</p> <p>B) Facilitator</p>

\*Meeting participants refers to Members of the Public, CAEECC Members, and Equity and Market Support Metrics Working Group Members.

## Public Participation

Members of the Public will be invited to speak Public at specific times throughout the course of the meeting. In addition to verbal remarks, the Public can submit comments to the Facilitators via email before and after the huddle ([facilitator@caeccc.org](mailto:facilitator@caeccc.org)), or use the chat function during the meeting to submit comments that will be included in the meeting summary.

## Joining the Meeting

This meeting will be held on the Zoom Platform. We encourage you to use the desktop or web client of Zoom over the mobile app or dial-in mechanisms<sup>1</sup>. To join the meeting, please follow the instructions below:

**Join Zoom Meeting:** <https://us02web.zoom.us/j/81387384314>

**Webinar ID:** 872 0625 1598

One tap mobile :

3126266799,,87206251598#

6465588656,,87206251598#

Dial in: 312 626 6799

International numbers available: <https://us02web.zoom.us/j/kcHqfGcQXI>

## Key Questions

### TOPIC 1: Metrics Categorization

1. Which metrics are ripe for setting targets by the end of 2023 for MS&E? (Metrics with Targets)
2. Which indicators and metrics are sufficiently clear to begin collecting information and tracking progress (but not setting targets) in 2024? (Information Collection)
3. Which indicators and metrics need further vetting and deliberations to clarify granularity, methodologies and/or baselines? (I&M Under Construction)

### TOPIC 2: Specificity & Approach

1. What is important to Parties in developing definitions, granularity, methodologies, and baselines that will help them propose these improvements to indicators and metrics identified in question 3 (above) in their testimony?
2. Timeline to develop selected methodology details?
3. What is the regulatory process for the methodologies and eventual targets to be set down the road?
4. Are any studies needed to develop methodologies (such as NEBs)? If so, who will lead study and when would it need to be completed?
5. Is annual reporting of these metrics sufficient?
6. Is segment level reporting sufficient?

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<sup>1</sup> For more information, visit [Zoom Support](#)

### **TOPIC 3: REN Performance Metrics and Associated Targets**

1. Have metrics been proposed that would be appropriate to serve as a corollary to TSB and CE Tests for RENs?
2. Should a new metric(s) be proposed to serve as a corollary to TSB and CE for RENs?
3. Is whatever stakeholders propose above relevant to all PAs not just RENs?