

# Market Support Metrics Working Group “Huddle”

Thursday September 1, 2022 | 10am - 12pm PT

Hosted by California Energy Efficiency Coordinating Committee (CAEECC) as a brief reconvening of the Market Support Metrics Working Group in preparation for September CPUC workshop on Metrics

# Zoom How-To

- Log on a few minutes **early**, if possible, to ensure your technical connection is working.
- Share your **video** if possible – this fosters engagement and helps mimic an in-person meeting setting.
- **Raise your hand** to enter the queue to speak—then wait for the Facilitator to call on you.
- **Mute** yourself when you're not speaking.
- When to use the chat:
  - Chat everyone: “+1”, share resources, non-substantive questions/comments
  - Chat Suhaila: share anonymous concerns
  - WG Members asked to raise their hand and speak if they have substantive input

# Public Comment

## Welcome Members of the Public!

- The Public can participate by sharing feedback at any point in the meeting via the chat. We will include these comments in the meeting summary posted to the CAEECC website.
- The Public can also email the facilitation team [facilitator@caeccc.org](mailto:facilitator@caeccc.org) with input after the huddle.
- Dedicated time for public input and discussion will be set aside at the September 15<sup>th</sup> workshop.

# CAEECC's Ground Rules

- 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

See the Scope of Work (Appendix A) for the full list of Ground Rules:

<https://www.caecc.org/compensation-task-force>

# 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.

*Creating a space of inclusion and diversity*

# Agenda

<b>Time</b>	<b>Topic &amp; Description</b>
10:00	Intro & Background
10:30	Topic 1: Metrics Categorization
11:15	Topic 2: Methodology and Approach
11:50	Topic 3: Regional Energy Network (REN) Performance Requirements
11:55	Wrap Up

# Huddle Objectives

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

# CPUC Introductory Remarks



# How Today's Meeting Fits in

## Working Group convened in 2021

Proposed 48 metrics and indicators



## ED Scoping Memo June 2022

Scope includes Goals and Accountability, further defined to include indicators, metrics, and targets – and a corollary to TSB for RENs. Record closes end of Rebuttal Briefs, approx May 2023



## WG Huddle in preparation for Metrics workshop

Three topics

1. Metrics categorization
2. Details on metrics and indicators
3. REN performance requirements

## Scoping Memo: Issue #3 on Goals and Accountability

Are the proposed indicators, metrics and targets for the portfolios, segments, and programs reasonable, and do they demonstrate growth and progress needed to meet future opportunities? What additional guidance, if any, is needed to better define target customer segments (e.g., underserved)?

# Intro & Background

Let's get started

- Brief reintroductions
- Recap of Working Group outcomes
- Present how August huddle work will feed into September Metrics workshop

# Reintroductions – it's been nearly a year!

Brag time, what's something you're proud of?

In the chat, please re-introduce yourself with your:

- Name and pronouns
- Organization
- Answer to the Icebreaker question

# Market Support Metrics Working Group (MSMWG) Members

	#	Company	Lead	Alternate
CAEECC Members	1	3C-REN	Erica Helson	Jordan Garbayo
	2	BayREN	Mary Sutter	Jenny Berg
	3	California Public Advocates (CalPA)	Shelly Lyser/James Ahlstedt*	Sophie Babka
	4	California Efficiency + Demand Council (CEDMC)	Clark McIsaac*	Joe Desmond*
	5	CodeCycle	Dan Suyeyasu	
	6	Center for Sustainable Energy (CSE)	Fabi Lao*	Rebecca Baptiste*
	7	PG&E	Ben Brown	Rob Bohn
	8	Redwood Coast Energy Authority (RCEA)	Stephen Kullman	Lara Ettenson
	9	Small Business Utility Advocates (SBUA)	Ted Howard	Theo Love
	10	Redwood Coast Energy Authority (RCEA)	Aisha Cissna	Stephen Kullmann
	11	Southern California Edison (SCE)	Christopher Malotte	Patty Neri
	12	San Diego Gas & Electric (SDG&E)	DeDe Henry	Elaine Allyn
	13	San Joaquin Valley Clean Energy Organization (SJVCEO)	Samantha Dodero	Courtney Kalashian
	14	SoCalGas	Kevin Ehsani	Art Montoya/Halley Fitzpatrick
	15	SoCalREN	Patrick Ngo	
	16	The Energy Coalition	Craig Perkins	Rebecca Hausheer*

*\*Represents new leads or alternates*

# Ex-Officio & Non-CAEECC WG Members

	#	Company	Lead	Alternate
Non CAEECC Members	18	CHEEF	Kaylee D'Amico	Bill Heberger
	19	ICF	Cody Coeckelenbergh*	Julia Hatton
	20	The Mendota Group	Grey Staples	
	21	Viridis	Mabell Garcia Paine	Don Arambula
Ex-Officio	22	California Public Utilities Commission (CPUC)	Ely Jacobsohn	Alexander Merigan/Peng Gong
	27	California Energy Commission (CEC)	Brian Samuelson	

# What's happened so far?

## **Brief recap of Market Support Working Group outcomes**

- Met July - September 2021; final report posted to CAEECC website
- Reached consensus on nearly all its recommendations
- PAs were required to use the WG's recommendations in developing their energy efficiency portfolio applications and Business Plans.
- ED developed two spreadsheets with input from the WG
  - a. 2024-2031 EE Application Attachment Tables
  - b. Metrics & Indicators Categorization Spreadsheet

Market Support Metrics Working Group materials, including final report:

[www.caecc.org/market-support-metrics-wg](http://www.caecc.org/market-support-metrics-wg)

# Key Terms & Acronyms

## Key Term

**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.

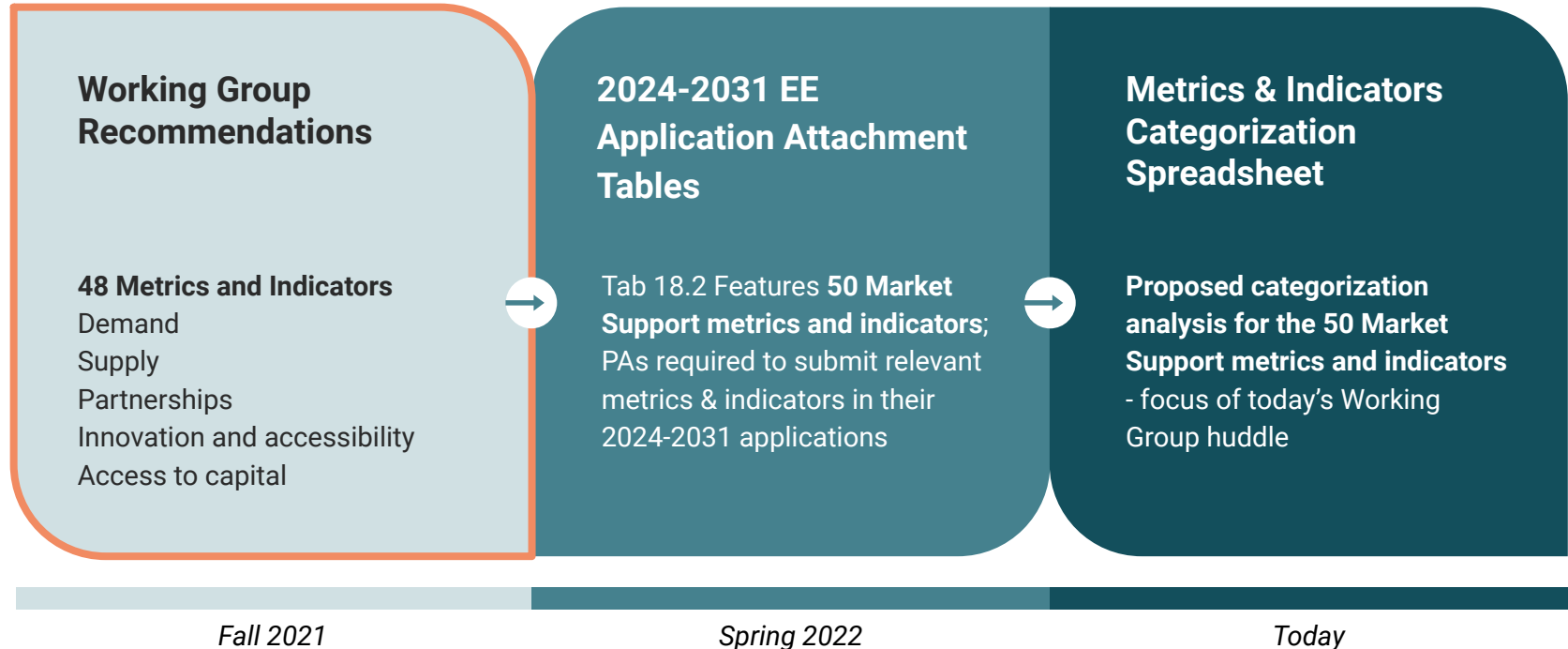
**Progress Trackers** refers to all three terms above.

## Acronyms:

- Awareness, Knowledge, Attitude, and Behavior (AKAB)
- Energy Efficiency (EE)
- Emerging Technologies Program (ETP)
- Energy Division (ED)
- Marketing Education & Outreach (ME&O)
- Market Support (MS)
- Market Support Metrics Working Group (MSMWG)
- Resource Acquisition (RA)
- Workforce Education and Training (WE&T)



# From Working Group to Today



# MSMWG Final Report Key Recommendations

**6 Principles:** Segment vs program; Guidelines to setting metrics; Relationship between programs and sub-objectives; Program portfolios; Reporting; *Target setting (non-consensus)*

**Primary Objective:** “Supporting the long-term success of the energy efficiency (EE) market”.

*“EE Market” defined as “individuals and organizations participating in transactions around energy efficiency products or services including customers and market actors (which notably includes demand and supply side).”*

**5 Sub-Objectives:** Demand, Supply, Partnerships, Innovation and accessibility; Access to capital

# MSMWG Final Report Key Recommendations

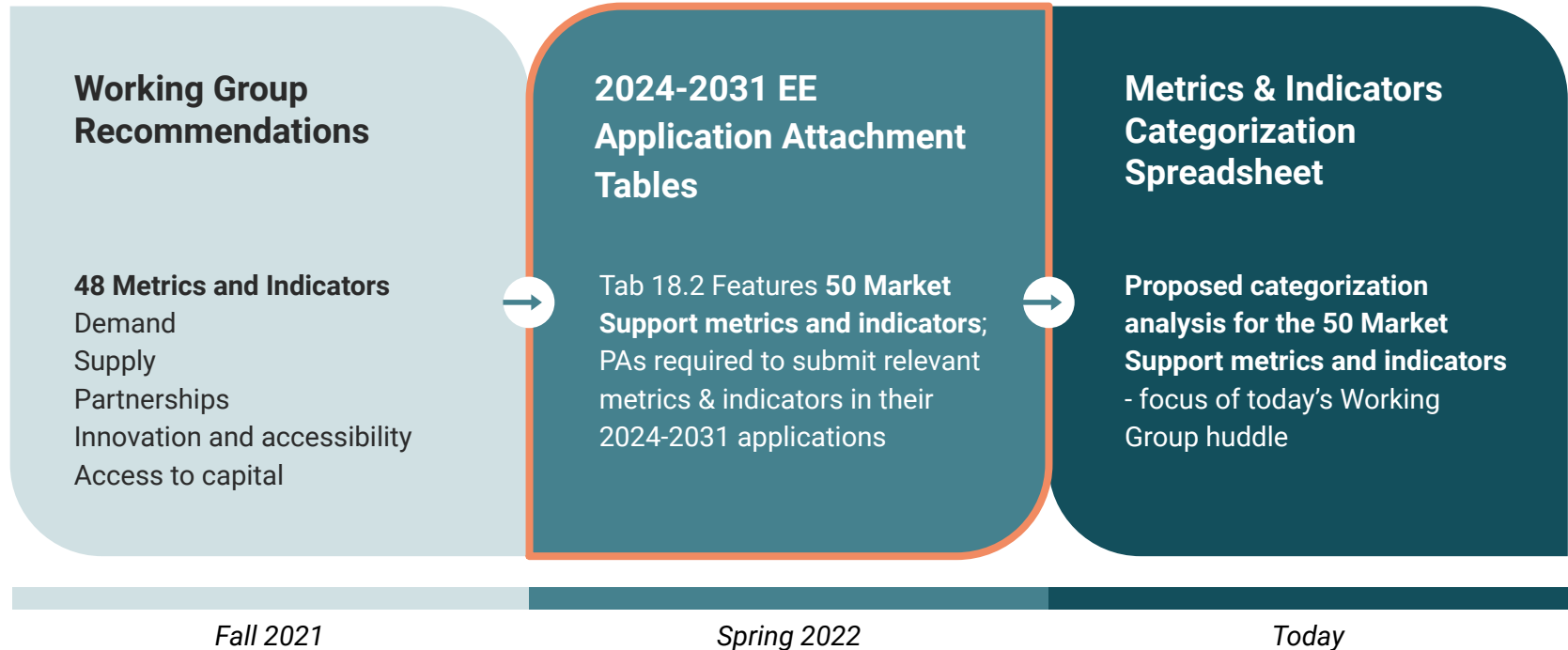
## Recommended 48 Metrics and Indicators across the 5 Sub-Objectives

- *MSMWG noted that there can be useful data in Marketing Education & Outreach (ME&O) and other evaluations.*

**Recommended actions to two key scope questions:** how to address non-consensus issues and the distinction between Market Transformation and Market Support objectives.

**Non-consensus:** Principle 6 – Target Setting

# From Working Group to Today



# Summary of Market Support Metrics & Indicators in “2024-2031 EE Application Attachment Tables”

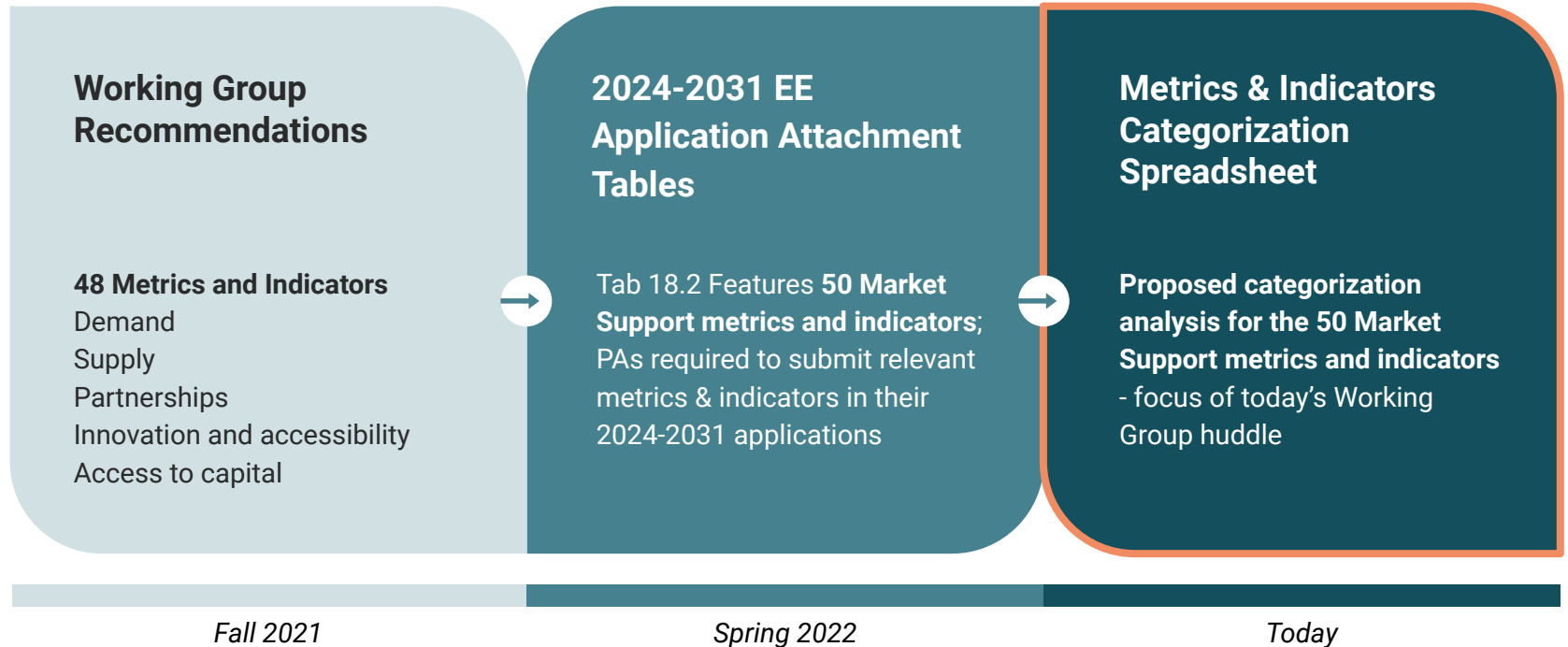
## Background:

- The Market Support Metrics WG Final Report recommendations formed the basis of the ED “2024-2031 EE Application Attachment Tables” circulated in late 2021 for the 2024-2031 PA applications

## Summary:

- **50 total Market Support metrics (47) & indicators (3)**
- Metrics and Indicators were derived from WE&T Metrics (5), ETP Metrics (7), and Market Support WG (38)
- Metrics bucketed into 5 sub-objectives: 1) Demand, 2) Supply, 3) Partnerships, 4) Innovation and Accessibility, and 5) Access to Capital
- Each sub-objective recommendation includes the following:
  - a. Applicable existing Metrics that will continue to be tracked and data collected
  - b. New Metrics with data that can be collected now (program outputs for relevant programs)
  - c. New Metrics with data that needs to be collected later

# From Working Group to Today



# High-level Summary of MSMWG Metrics & Indicators

- 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**.

# Turning MSMWG Final Report into ED's Categorization Spreadsheet

● Applicable existing metrics that will continue to be collected (0)

◆ New metrics with data that can be collected now (2)

▲ New metrics with data that needs to be collected later (5)

## Sub-Objective 1: Demand

Number and % increase/decrease of inquiries and/or requests for information on EE products and services through relevant MS programs ◆

Number and % increase/decrease of customers receiving information, education, or outreach on EE projects, products, and services through relevant MS programs ◆

% of customer sample aware of EE product/service (awareness) ▲

% of customer sample that is knowledgeable of EE product/service's benefits (knowledge) ▲

% of customer sample that is interested in obtaining an EE product/service (attitude) ▲

% of customer sample that has taken action towards obtaining EE product/service (behavior a) ▲

% of customers that have obtained EE products/services (behavior b) ▲



# Turning MSMWG Final Report into ED's Categorization Spreadsheet

● Applicable existing metrics that will continue to be collected (6)

◆ New metrics with data that can be collected now (1)

▲ New metrics with data that needs to be collected later (next slide)

## Sub-Objective 2: Supply

Number of collaborations by Business Plan sector to jointly develop or share training materials or resources. ●

Number of participants by sector ●

Percent of participation relative to eligible target population for curriculum ●

Percent of total WE&T training program participants that meet the definition of disadvantaged worker. ●

Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers ●

Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training ●

Number of Contractors (that serve in PA service territory) with knowledge and trained by relevant MS programs to provide quality installations that optimize EE ◆

# Turning MSMWG Final Report into ED's Categorization Spreadsheet

▲ New metrics with data that needs to be collected later (8)

## Sub-Objective 2: Supply (cont)

% of market actors aware of energy efficient products and/or services that can be supplied to customers (awareness) ▲

% of market actors knowledgeable of energy efficient products and/or services that can be supplied to customers (knowledge) ▲

% of market actors that are interested in supplying energy efficient products and/or services to customers (attitude) ▲

% of market actors that have supplied energy efficient products and/or services to customers (behavior) ▲

% of market actors aware of what is required to perform/ensure quality installation of energy efficient products and/or services that optimizes energy efficiency savings (awareness) ▲

% of market actors knowledgeable of how to perform to perform/ensure quality installation of energy efficient products and/or services that optimizes energy efficiency savings (knowledge) ▲

% of market actors that are interested in performing/ensuring quality installation of energy efficient products and/or services that optimizes energy efficiency savings (attitude) ▲

% of market actors that have performed/ensured quality installation of energy efficient products and/or services that optimizes energy efficiency savings (behavior) ▲

# Turning MSMWG Final Report into ED's Categorization Spreadsheet



Applicable existing metrics that will continue to be collected (0)



New metrics with data that can be collected now (1)



New metrics with data that needs to be collected later (2)



Indicator (2)

## Sub-Objective 3: Partnerships

Number of EE customers/market actors reached through partner networks and partner communications channels



Assessed value of the partnership by partners



% of partners that have taken action supporting energy efficiency



Number of partners by type and purpose



Dollar value of non-ratepayer in kind funds/contributions utilized via partnerships



# Turning MSMWG Final Report into ED's Categorization Spreadsheet



Applicable existing metrics that will continue to be collected (5 or 7)



New metrics with data that can be collected now (next slide)



New metrics with data that needs to be collected later (next slide)

Prior year: % of new measures added to the portfolio that were previously ETP technologies

Prior Year: # of new measures added to the portfolio that were previously ETP technologies

Prior year: % of new codes or standards that were previously ETP technologies

Prior Year: # of new codes and standards that were previously ETP technologies

Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available (kWh).

Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available (kW).

Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available (Therms).

**Sub-Objective 4:  
Innovation  
and  
Accessibility**

# Turning MSMWG Final Report into ED's Categorization Spreadsheet



Applicable existing metrics that will continue to be collected (3)



New metrics with data that can be collected now (3)



New metrics with data that needs to be collected later



Indicator (1)

## Sub-Objective 4: Innovation and Accessibility (cont)

Number of new, validated technologies recommended to CalTF

Number of market support projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology

Cost effectiveness of a technology prior to market support programs relative to cost effectiveness of a technology after intervention by the market support programs (% change in cost effectiveness)

Percent market penetration of emerging/under-utilized or existing EE products or services

Percent market participant aware of emerging/under-utilized or existing EE products or services

Aggregated confidence level in performance verification by product, project, and service (for relevant programs)

Number of providers for performance verification services

# Turning MSMWG Final Report into ED's Categorization Spreadsheet



Applicable existing metrics that will continue to be collected (2)



New metrics with data that can be collected now (3)



New metrics with data that needs to be collected later (next slide)

## Sub-Objective 5: Access to Capital

Participant data, e.g. credit score, census tract income, CalEnviroScreen Scores of areas served, zip code

Comparisons between market-rate capital vs. capital accessed via EE programs, e.g. interest rate, monthly payment

Total projects completed/measures installed and dollar value of consolidated projects

Ratio of ratepayer funds allocated to private capital leveraged

Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products).

# Turning MSMWG Final Report into ED's Categorization Spreadsheet



Applicable existing metrics that will continue to be collected (previous slide)





New metrics with data that can be collected now (previous slide)





New metrics with data that needs to be collected later (4)

## Sub-Objective 5: Access to Capital (cont)

% of market participants aware of capital access opportunities for investments in energy efficient projects, products, and/or services (awareness) 

% of market participants knowledgeable about capital access opportunities for investments in energy efficient projects, products, and/or services (knowledge) 

% of market participants interested in leveraging capital access opportunities for investments in energy efficient projects, products, and/or services (attitude) 

% of market participants that were unable to take action due to access to capital or affordability of energy efficient projects, products, or services (behavior) 

# Market Support Metrics & Indicators from ED Categorization Spreadsheet

Indicator / Metric	Proposed Metric / Indicator (facilitator note: <i>italics represents indicators added by ED after the WG report</i> )	CATEGORY 1: Clear Metric with Target	CATEGORY 2: Clear indicator, or metric without target (i.e. requiring additional info to determine target)	CATEGORY 3: Unclear Indicator of Metric without Target (e.g. specificity, definition, unit, methodology, role, etc) to track and evaluate progress)	Concern About Indicator or Metric in CATEGORY 3: <i>Roles (who is performing info collection?), method (how is info collection being administered?), specificity (how will survey/program participants be categorized and sampled? how will EE products/services be categorized and sampled?), definition (are all terms clearly understood?)</i>
Metric	Number and % increase/decrease of inquiries and/or requests for information on EE products and services through relevant MS programs		X		
Metric	Number and % increase/decrease of customers receiving information, education, or outreach on EE projects, products, and services through relevant MS programs		X		
Metric	% of customer sample aware of EE product/service (awareness)			X	Roles, method, specificity
Metric	% of customer sample that is knowledgeable of EE product/service's benefits (knowledge)			X	Roles, method, specificity
Metric	% of customer sample that is interested in obtaining an EE product/service (attitude)			X	Roles, method, specificity

**Category 1:** ED did not fill in (clear metric with target) as it would like to first hear from stakeholders

**Category 2:** ED Staff identified **21** progress trackers that are likely sufficiently clear to begin collecting information in 2024.

**Category 3:** ED staff identified **29** progress trackers as needing further clarity.



# TOPIC 1: Metrics Categorization

**Goal:** begin to gather input on ED proposal, note areas of disagreement and next steps

- Discuss ED analysis
- Discuss next steps in preparation for September workshop

# Breaking Down ED's Categories

CATEGORY 1  
Clear Metric with  
Target



CATEGORY 2  
Clear Indicator or  
Metric without  
Target



CATEGORY 3  
Unclear Indicator or  
Metric without  
Target

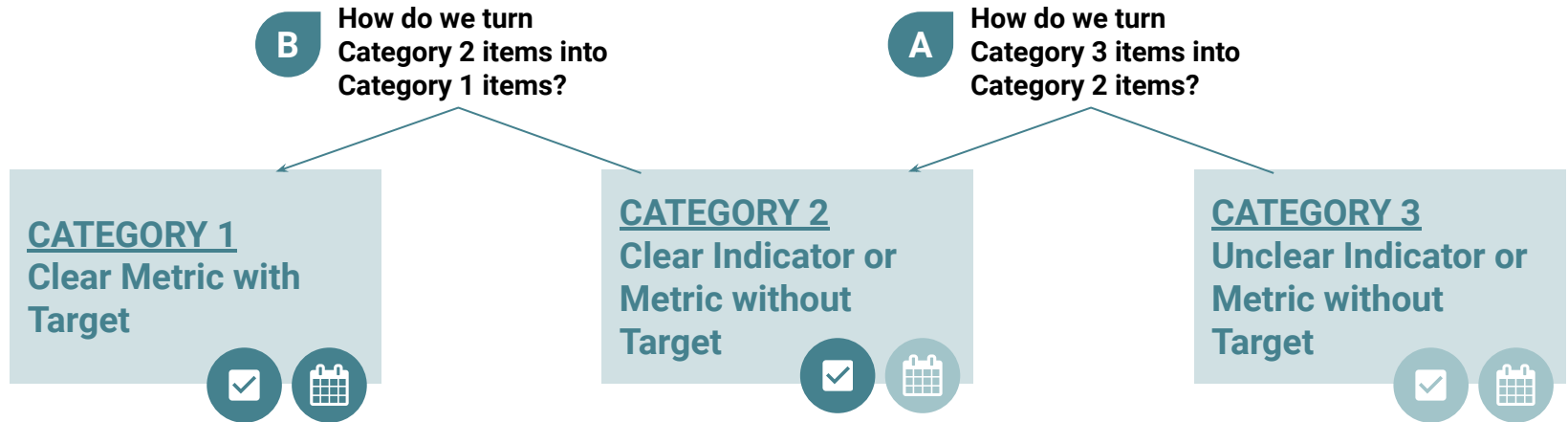


**Indicators** are progress trackers that do not typically have targets associated with them.

**Metrics** are progress trackers that do or are expected to have targets associated with them.

**Targets** are forecasted achievements against which to track progress.

# Discussing ED's Categories



**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.

*Note: when we break into discussion, please reference Metrics/Indicators by their CPUC designated ID Number (Column C)*

# Next Steps on Metrics Categorization

Possible ways to prep for September workshop:

- 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 to the Facilitation Team by Sept. 7th to be considered/incorporated into the September workshop agenda
- Other ideas/suggestions?

# TOPIC 2: Methodology and Approach

**Goal:** begin to gather ideas for further work on methodology & targets + data

- Discuss development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines
- Discuss targets
- Discuss next steps in preparation for September workshop

# Working Group Member Discussion

Discuss development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines

## **Proposed discussion questions:**

1. Suggested timeline to develop methodology details?
2. Suggested regulatory process for setting methodologies?
3. Studies needed to develop certain methodologies (and timeline and lead for studies)?
4. Is annual reporting of these metrics sufficient?
5. Is segment level reporting sufficient?

# Possible Framework for Metrics & Indicators - thoughts?

Metric or Indicator	[Insert metric or indicator language here]
Reference #	
Numerator	
Denominator	
Reported	
Unit	
Methodology	
Data Source	
Core Value	
Applicable Sectors	

# Possible “Groupings” for Approach to Methodology

**Ideas to Consider in Advance of 9/15 workshop** (to avoid discussing methodologies for 50 metrics & indicators)

- AKAB
- Customer count
- KWh/kW/therms and %
- Roles (i.e., for data collection)
- *Others categories of data collection?*



# Next Steps on Adding Specificity

Possible ways to prep for September workshop:

- 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
- Other ideas/suggestions?

# TOPIC 3: Regional Energy Network (REN) Performance Requirements

**Goal:** tee up conversation on whether RENs need additional metrics and if so, what new metrics?

- Background on existing REN metrics and reporting requirements
- Discuss next steps in preparation for September workshop

Today (i.e. 2022-23)	IOUs	CCAs (note these rules are only for apply-to-administer CCAs. Elect-to-administer CCAs have different rules, see D.14-01-033).	RENs
Portfolio level (Goals/Targets)	CPUC adopts IOU service territory wide energy savings and TSB Goals in D.21-09-037	CCAs forecast their own energy savings and TSB Target in their 2022-23 BBALs, per D.21-09-037	RENs forecast their own energy savings and TSB Target in their 2022-23 BBALs, per D.21-09-037
Resource Acquisition	Must meet or exceed a forecasted TRC of 1.0, per D.21-05-031	Must meet or exceed a forecasted TRC of 1.0, per D.21-05-031	No TRC Threshold
Market support and equity	Cannot exceed a cap of 30% of portfolio budget, per D.21-05-031	Cannot exceed a cap of 30% of portfolio budget, per D.21-05-031	No cap on the percentage of their portfolio budget that can be spent on these segments, per D.21-05-031
In applications for 2024-2027	IOUs	CCAs	RENs
Portfolio level (Goals/Targets)	CPUC adopts IOU service territory wide TSB Goals in 2024 (will keep calculating energy savings, but will only have to meet TSB)	CCAs may update their energy savings and TSB Targets in their mid-cycle True-up ALs, per D.21-09-037.	RENs may update their energy savings and TSB Targets in their mid-cycle True-up ALs, per D.21-09-037.
Resource Acquisition	No changes	No changes	No changes
Market support and equity	No changes	No changes	No changes
Other			

# Next Steps on REN Performance Requirements

Possible ways to prep for September workshop:

- 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 to the Facilitation Team by Sept. 7th to be considered/incorporated into the September workshop agenda
- Other ideas/suggestions?

# Wrap Up

Before we go...

- What we accomplished today
- Next steps in preparation for September 15th workshop
- What to expect at the workshop
- Live meeting evaluation

# Homework and Next Steps

- By 9/7: WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th
- By 9/8: Facilitation team to post notes from today's discussion, and incorporate into the workshop planning
- Other ideas/suggestions?

# Moving Forward: Workshop September 15, 2022

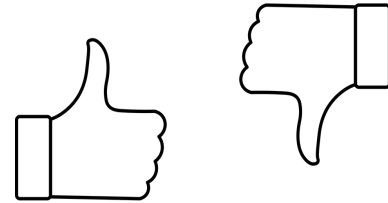
## September Workshop Objectives:

- 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 RENO's budgets achieve just outcomes for ratepayers

# Review of Today

## Meeting Outcomes

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



**How did we do?**



# Live Meeting Evaluation

**Do you feel this was an inclusive and trusting environment?**

Not at all safe ..... Somewhat safe ..... Very safe

**Do you feel the meeting was effective?**

Not at all safe ..... Somewhat safe ..... Very safe

**What worked well? How can we improve?**

# Appendix Slides

- Non-consensus Principle #6 on Target-Setting

# Non-consensus: Principle #6 – Target Setting

Members of the MSMWG noted the following about Options 1 & 2 for Principle 6

- **PG&E:** PG&E strongly supports Option 1 for Principle 6 on target setting and recommends that the PAs submit targets in their 2023 true-up advice letter. This approach gives PAs a clear timeline for gathering the necessary information to provide targets and eliminates the need for additional regulatory filings. Both target-setting options require additional logistical details to be confirmed before baselines and targets for the survey-based (AKAB) metrics can reasonably be established. PG&E recommends having a stakeholder engagement process to work through the logistical details, including survey cadence, funding source(s), roles, and responsibilities.
- **SCG:** Option 1 may read more accurately if the word "set" is replaced with "proposed," however the intent of this Option and its differentiation from Option 2 is clear with either word.
- **SDG&E:** MS segment metrics have been outlined. Without a baseline, we would not have a reasonableness of the targets. Setting them prior to baseline information would not lend itself to meaningful targets. The targets should be reported out through the annual report process.
- **The Mendota Group:** Although we agree with Cal Advocates that proposed metrics should have targets, we are concerned that the metrics as written will be difficult for PA's to estimate and track. Therefore, we prefer deferring the requirement to provide targets to a later date. This is also why we are comfortable with the second part of the Cal Advocates proposal, namely for PA's to identify a date certain for filing PFMs, because this alternative could provide sufficient time to devise targets. In either case, the additional time will enable PAs to determine if the information is, indeed, available and trackable, and to devise appropriate targets.
- **SBUA:** We prefer Option 2, while noting a potential concern that a Petition for Modification (PfM) could cause significant delay, and may dissuade certain potential bidders from participating in related solicitations. We recommend accelerating the PfM process when feasible.
- **Viridis Consulting:** If we want to ensure success of the new portfolio and these new non-resource programs, we need to prioritize data over timing. In other words, the PAs will be able to set effective metrics (and implementers can come up with subsequent effective KPIs) with real-world data. Slowing things down, allowing time to see how these programs run and then identifying metrics a couple of years out, will result in the most optimal portfolio results. On the other hand, setting metrics along at the same time as the program budgets, is not unreasonable. I just think it will create unnecessary issues that would not exist if we went with option 1.

## MSMWG Options for Principle 6

Principle #6 Options: Target-Setting	First Choice Option	Acceptable Option
<p><b>Option 1: Targets will be set by the PAs for MS segment metrics following the collection of the first two program years of data (or a baseline has been set using reasonable proxy data).</b> <i>(15 first choice, 18 acceptable)</i></p>	<p>3C-REN, BayREN, CEDMC, CHEEF, Nexant, PG&amp;E, RCEA, SCE, SCG, SDG&amp;E, SJVCEO, SoCalREN, The Energy Coalition, The Mendota Group, Viridis Consulting</p>	<p>3C-REN, BayREN, CEDMC, CHEEF, CodeCycle, CSE, Nexant, PG&amp;E, RCEA, SBUA, SCE, SCG, SDGE, SJVCEO, SoCalREN, The Energy Coalition, The Mendota Group, Viridis Consulting</p>
<p><b>Option 2: In their Budget Applications, PAs will propose targets and/or set a date certain by which they will propose targets for all MS segment metrics.</b> <i>(4 first choice, 13 acceptable)</i></p>	<p>Cal Advocates, CodeCycle, CSE, SBUA</p>	<p>Cal Advocates, CEDMC, CHEEF, CodeCycle, CSE, Nexant, SBUA, SJVCEO, SoCalREN, The Energy Coalition, The Mendota Group, Viridis Consulting, SBUA</p>