**Energy Efficiency Third-Party Solicitations Stakeholder Forum**

**Date: July 28, 2021 8am-12noon**

**Meeting Information:**

Microsoft Teams meeting

**Join on your computer or mobile app**

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**Or call in (audio only)**

+1 415-906-0873,,764590961#   United States, San Francisco

Phone Conference ID: 764 590 961#

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**Independent Evaluator semi-annual reports are located** [**HERE**](https://www.caeecc.org/independent-evaluator-reports-solic)

**Meeting Agenda:**

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| **Time (am)** | **Topics** | **Presenter(s)** |
| 8:00 – 8:05  | **Introduction & Safety** | Bella Shamoun (PG&E) |
| 8:05 – 8:15 | Opening Remarks | Alison LaBonte - Energy Division (CPUC) |
| 8:15 – 8:35 | **Topic 1:**Portfolio Update, Budget Advice Letters, EE ApplicationsTSB Goal and Impacts on Bidder Community  | Presenters – 12-15 minutes* SCG: Erin Brooks
* PG&E: Matt Braunwarth
* SCE: Brandon Sanders
* SDG&E: Elaine Allyn/Roland Mollen

Participants Q&A – 5 minutes |
| 8:35 – 8:55 | **Topic 2:**Independent Evaluators’ Semi-Annual Report* IE Update
* Discussion / Legal input on redactions to IE Semi-annual reports before made public
 | Presenters – 15 minutes* IE Update: Elizabeth Lowe (IE)
* Legal input on redactions: Don Arambula (IE)

Participants Q&A - 5 minutes |
| 8:55 – 9:05 | **Topic 3:**3P Process Evaluation Study Update | Presenter – 7 minutes* Opinion Dynamics: Noel Stevens

Participants Q&A – 3 minutes |
| 9:05 – 9:30 | **Topic 4:** Two Stage Solicitations Team Progress Report | Presenters – 20 minutes* Independent Evaluator: Grey Staples
* IOUs: Roland Mollen

Participants Q&A - 5 minutes |
| 9:30 – 10:00  | **Topic 5:**Overview of Engagement Touchpoints* Options for Implementation Plan Webinars
* Options more frequent communication to stakeholders
 | Presenter – 20 minutes* Independent Evaluator: Melanie Gillette

Participants Q&A - 10 minutes |
| 10:00 – 10:10 | **Break** |  |
| 10:10 – 10:40 | **Topic 6:**Cultivating Small and Diverse Businesses as 3P EE Implementers * Small and Diverse businesses as drivers of program innovation
* IOU Current Practices
* How can IOUs develop better strategies for our upcoming applications?
 | Presenters – 15.5 minutes* Lead-in: Kim Crossman (IE)
* SCE: Marissa Barrera
* SCG: Emma Ponco
* SDG&E: David Roellich
* PG&E: David Pell
* Small Business Utility Advocates: Ted Howard

Kim Crossman facilitates the interactive discussion with stakeholders – 14.5 minutes |
| 10:40 – 11:25  | **Topic 7:**Bidder Feedback* IOU Stats / Status on feedback. What IOUs have learned. What changes result from feedback sessions.
* Participant Discussion/Feedback
 | Presenters – 25 minutes* Lead and facilitator: Elizabeth Lowe (IE)
* PG&E: Matt Braunwarth
* SCE: Marissa Barrera
* SCG: Erin Brooks
* SDG&E: Steve Jaffe

All Participants - 20 minutes |
| 11:25 – 11:55 | Open Discussion | Facilitator: Brandon Sanders (SCE)All Participants |
| 11:55 – 12noon | Closing |   |
|  | Next Steps:* Slide deck and meeting minutes to be posted to CAEECC after the meeting
* Survey will go out to the participants
* Looking for topics for the next meeting

Closing remarks | Next Steps – Bella Shamoun (PG&E)– 2 minClosing remarks – Alison LaBonte (CPUC)– 3 min |

Facilitator & timekeeper: Lisa Paulo

Run the presentation: Bella Shamoun

Monitor the “chat” and “raise hand” for Q&A: Brandon Sanders

Note-takers for the meeting minutes: Independent Evaluators - Grey Staples and Melanie Gillette