**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**

[Click here to join the meeting](https://teams.microsoft.com/l/meetup-join/19%3ameeting_NzI3ZDVhYzItOTQyOC00MDZiLWI0NjYtOTE3YjY5OTA0OWI1%40thread.v2/0?context=%7b%22Tid%22%3a%2244ae661a-ece6-41aa-bc96-7c2c85a08941%22%2c%22Oid%22%3a%22e85cef42-2b8e-4c27-afae-63e1f6a63a8e%22%7d)

**Or call in (audio only)**

[+1 415-906-0873,,764590961#](tel:+14159060873,,764590961# )   United States, San Francisco

Phone Conference ID: 764 590 961#

[Find a local number](https://dialin.teams.microsoft.com/f67b92ca-d71f-42b6-8e87-03270c2d4bee?id=764590961) | [Reset PIN](https://mysettings.lync.com/pstnconferencing)

Need Help with Teams? Click on the Help option in this invite to connect you directly to our Teams at PG&E Training site!

[Learn More](https://aka.ms/JoinTeamsMeeting) | [Help](https://pge.sharepoint.com/sites/Office365Hub/SitePages/Teams-at-PG&E.aspx) | [Meeting options](https://teams.microsoft.com/meetingOptions/?organizerId=e85cef42-2b8e-4c27-afae-63e1f6a63a8e&tenantId=44ae661a-ece6-41aa-bc96-7c2c85a08941&threadId=19_meeting_NzI3ZDVhYzItOTQyOC00MDZiLWI0NjYtOTE3YjY5OTA0OWI1@thread.v2&messageId=0&language=en-US)

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

**Meeting Agenda:**

|  |  |  |
| --- | --- | --- |
| **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 Applications  TSB 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 min  Closing 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