# Q2 2026 CAEECC Meeting #50 Summary

## June 9, 2026, 10:00am–2:15pm, Zoom + Los Angeles + San Francisco

The California Energy Efficiency Coordinating Committee (CAEECC) met for its fiftieth annual meeting on June 9, 2026 online via Zoom and in-person in Los Angeles and San Francisco. There were 89 attendees, including representatives from 21 CAEECC Member organizations and 3 attendees from one CAEECC Ex-Officio agency as well as 65 Members of the Public. This meeting was facilitated by Katie Abrams (Abrams) and Amber Zirnhelt (Zirnhelt) of Birch Road Consulting; Michelle Vigen Ralston (Ralston) and Suhaila Sikand (Sikand) of Common Spark Consulting; and supported by Susan Rivo of Raab Associates.

Meeting attendees and presenters are available in *Appendix A*. Common acronyms are available in *Appendix B*. Supporting meeting materials are available at: https://www.caeecc.org/6-9-2026-full-caeecc-mtg.

# Meeting Takeaways

- CAEECC Members discussed four topics for possible engagement (Cost-Effectiveness (CE) Reform, Fuel Switching, Integrated Demand Side Management (IDSM), and Title 24 Compliance Improvement). CE was short one vote; fuel-switching and IDSM were short 2 votes.
- CAEECC Members sought clarity on the scoping of topics like cost-effectiveness prior to any potential CAEECC engagement on the topic.
- A fifth proposal, developed during the meeting, was approved to host another Workshop on Workforce Standards to discuss workforce availability and qualifications, apprenticeships, and code literacy and training.
- Energy Division presented updates including recent ED Energy Efficiency Work, CEDARS updates, and Business Plan Application Timeline
- Members thanked the EAC for their contributions over the course of the pilot after EAC Members presented the recommendations shared in the Memo dated June 1, 2026.

# Meeting Overview

The Meeting Summary is divided into the following sections:

1. **Energy Division Updates** - Slides 18-28 - *Appendix C*
2. **CAEECC Workforce Standards Workshop Update** - Slides 33-46 - *Appendix D*
3. **Equity Advisory Committee Update** - Slides 48-61 - *Appendix E*
4. **Policy Proposals for CAEECC Engagement** - Slides 63-95 - *Appendix F*
5. **CAEECC Business Items** - Slides 97-104
6. *Optional Assembly (CalMTA Updates) - Slides 112-121 - Appendix G*

This meeting summary is intended to capture the overarching discussion of ideas, concerns, alternative options for proposals and consensus, and as such, substantive agenda items are included. *For more detailed discussion, review the Appendices or reach out to the Facilitation Team*.

# Energy Division Updates

Pam Rittelmeyer (CPUC) presented Energy Division (ED) updates including recent ED Energy Efficiency Work, CEDARS updates, and Business Plan Application Timeline.

**Summary of Discussion**

- The Elect-to-Administer calculation was posted on 6/7/26 in a ruling.
- The Viable Electric Alternatives (VEA) will likely have an earlier timeline progression than a decision on the definition of "multifamily" since the staff proposal for VEAs was docketed early in the year.
- There are three areas where cost-effectiveness (CE) tests are being discussed or proposed to be discussed:
    - DER Proceeding (R.22-11-013) defines the commission-wide CE test inputs, including the Avoided Cost Calculator (ACC). In late 2025, a Decision (D.25-11-005) determined the process for the next set of ACC updates, which would come into effect in the EE portfolio in time for the 2028-2035 Business Plans. This new set of avoided costs would be used in the EE Potentials & Goals study next year. After the Business Plans are done, the PAs would use the latest ACC to update their forecasts in 2027.
    - Energy Efficiency Proceeding (R.25-04-010) mentioned in the Order Instituting Rulemaking and July 2025 Scoping Ruling that it may take on CE, however, there is no current proceeding activity on this issue at the moment.
    - Business Plan Applications (A.26-03-009 Consolidated) includes several policy reform proposals on CE by various PAs. The Commission has yet to decide if and how CE will be scoped into this proceeding.
- Events such as the 6/19/26 Prehearing Conference on Business Plan Applications are best found in the service list subscription of the application or in the CPUC's Daily Calendar.

*Additional detail is available in Appendix C*.

# Workforce Standards Workshop Update

Zirnhelt presented key outcomes from the Workshop on Workforce Standards held on May 18, 2026, including workshop participation highlights, an overview of breakout topics, and high-level recommendations to PAs and ED.

**Summary of Discussion**

- Additional high-level recommendations include:
    - Further CAEECC discussion to establish a better understanding of apprenticeships and the difference between contractors and technicians.
- “Thresholds” in this context means the rebate cost point at which certain workforce requirements kick in.
- CAEECC should consider additional discussion on:
    - the impacts of artificial intelligence (AI) on apprenticeships with key experts.
    - the availability of workforce.
    - appropriate residential workforce qualifications
    - ongoing collaboration opportunities with trades and CBOs.
- CAEECC should first take a deeper dive on key topics from the Workshop and issues and opportunities identified as part of the breakout discussions before committing to a big step action. This follow-up could be either a workshop or a small group collaboration with those involved in the workshop.
- SoCalREN noted a barrier for compliance for small contractors includes Department of Industrial Relations (DIR) requirements and costs. SoCalREN learned from the CEC’s Equitable Building Decarbonization program that the DIR) requires a fee on top of a license with a certified payroll platform, causing more operating costs.
- SoCalREN noted a gap in the statewide workforce program’s ability to serve participants well, especially due to a minimal budget available on a per participant basis  and the cost challenges of addressing this issue.

*Additional detail is available in Appendix D.*

# Equity Advisory Committee Update

Sikand provided an overview of the Equity Advisory Committee (EAC). Julia Hatton (Rising Sun Center for Opportunity) and Amaury Berteaud (LGSEG) presented the EAC’s final recommendations to CAEECC, PAs, and ED. Ralston elevated a few recommendations in light of the Policy Proposal discussion CAEECC had later in the meeting.

**Summary of Discussion**

- The additional topic for discussion on Community-Designed EE Programs is the same work that SoCalREN and BayREN are doing and EAC has a desire to learn more, make observations, and maybe suggest action items. This concept is also important for PAs to coordinate further.
- The affordability metric is calculated by dividing the cost of utility service by income of the residential customer, but it does not include household size in the income metric.
- There are too many common metrics and the E5351 Resolution acknowledges that over half are not currently useful because of challenges with data collection,

lack of relevance, uncertainty of data quality, comprehensiveness, or consistency, unjustifiable expense, or possible duplication of other reported data.
- CEDARS flags include an HTR flag and a CalEPA flag (the latter maps to DAC communities). However, the flags are claims-based and do not have the architecture to report only one data input, such as expenditure.
- Non-PA organizations found the EAC Memo helpful even though they were not the target audience.
- A glossary of terms would be helpful for market support metrics to ensure PAs are all using the same interpretation, enable "N/A" response options, and effectively report metrics.
- Energy Savings Assistance (ESA) contractors are finding it difficult to align their hiring to the apprenticeships and training of workers.
- It's difficult to look across the equity segment and understand which equity programs have activity in them because of the varying total resource cost (TRC) and total system benefit (TSB). Metrics for Resource Acquisition (RA) programs map their benefits well to TRC and TSB. However, programs like Equity and workforce, education, and training (WE&T) have trouble mapping their long-term benefit through TRC and TSB. TRC values vary for equity programs depending on the nature of each program, not necessarily due to lack of activity.

*Additional detail is available in Appendix E.*

## Policy Proposals for Possible CAEECC Engagement

Four CAEECC Members presented four proposals (Cost-Effectiveness (CE) Reform, Fuel Switching, Integrated Demand Side Management (IDSM), and Title 24 Compliance Improvement) for consideration for CAEECC engagement. The first three topics were brought forth to address common policy recommendations elevated in the 2028-2035 Business Plans. Another proposal about workforce standards was developed during the meeting based on the previous Workshop on Workforce Standards session. CAEECC Members asked clarifying questions and discussed each proposal. CAEECC Members created one alternative to the proposals on CE Reform with a workshop not hosted by CAEECC. Because this alternative would not be hosted by CAEECC, this alternative proposal was not voted upon. The Facilitation Team first tested for consensus on each of the 5 proposals, followed by a vote as consensus was not reached for any proposal. Voting protocol did not allow for abstention and further discussion at the Q3 meeting may address this ambiguity in the Groundrules.

**Outcome:** CAEECC members approved the Workforce proposal as follows:

- Topics:
  - Workforce qualifications - residential and commercial
  - Apprenticeships
  - Code literacy & trainings

- Purpose:
    - Establish common understanding
    - Problem solve and develop recommendations
- Timing: Fall 2026 or later
- Venue: 2-3 hour Workshop followed by Working Group (if warranted)

**Summary of Discussion**

- While CAEECC has latitude in choosing discretionary topics, some CAEECC Members were concerned by the uncertainty of whether the proposed topics for engagement were or would be part of the scoping of issues (e.g. Cost-Effectiveness Reform, IDSM) in the EE proceeding, the 2028-2035 Business Plan Application proceeding, or another proceeding outside of CAEECC's influential authority.
- CAEECC Members proposed that non-CAEECC venues might be more appropriate for several topics including CE Reform, Fuel Switching, Compliance Improvement, and IDSM.

*Additional detail is available in Appendix F.*

# CAEECC Business Items

Sikand and Abrams presented an update on website modifications and the hiring of a Website contractor to fix glitches and improve the user experience of the CAEECC website.

# Optional Assembly: Cal MTA

Smita Gupta (CalMTA) presented updates on the second tranche of market transformation initiative (MTI) portfolio programs—including Residential Heat Pump Water Heating, Commercial Rooftop Units, and Commercial Replacement and Attachment Window Solutions—and coordination with the EE portfolio and Business Plans.

**Summary of Discussion**

- The TRC calculated for the MTIs does not factor in non-energy benefits (NEBs), but were still high for the 3 MTIs.
- The ACC used in the TSB and TRC calculations is the currently approved ACC.

*Additional detail is available in Appendix G.*

# Appendix A: Attendees

### Presenters

| |
|---|
| **Energy Division Updates:** Pam Rittelmeyer **(CPUC Energy Division**) |
| **Workshop on Workforce Standards:** Amber Zirnhelt (**Birch Road Consulting)** |
| **Equity Advisory Committee:** Suhaila Sikand (**Common Spark**) |
| **CAEECC Policy Proposals:** Alice Havenar-Daughton (**MCE**), Patricia Terry (**NREN**); Dan Suyeyasu (**Codecycle)**; Laurel Rothschild (**TEC**) |
| **CAEECC Business Items:** Katie Abrams (**Birch Road Consulting)** |
| **Optional Assembly:** Smita Gupta (**CalMTA**) |

### CAEECC Members

| | | |
|---|---|---|
| 3C-REN | Alejandra | Tellez |
| BayREN | Jane | Elias |
| CodeCycle | Dan | Suyeyasu |
| CCRREN | Trevor | Keith |
| CSE* | Rocky | Fernandez |
| Frontier Energy | Nancy | Barba |
| I-REN | Benjamin | Druyon |
| LGSEC | Amaury | Berteaud |
| MCE | Alice | Havenar-Daughton (co-chair) |
| NRDC | Lara | Ettenson |
| PG&E | Lisa | Hunter |
| NREN | Patricia | Terry |
| SBUA | Ted | Howard |
| SCE | Jessica | Lau |
| SDG&E | Stacie | Risley |
| SDREN | Sheena | Tran |
| SJVCEO | Courtney | Blore |
| SMW Local 104 | Chris | Ruch |
| SoCalGas | Mori | Farid |
| SoCalREN | Lujuana | Medina |
| The Energy Coalition | Laurel | Rothschild (co-chair) |

### Ex Officio CAEECC Members

| | | |
|---|---|---|
| CPUC | Pamela | Rittelmeyer |
| CPUC | Ely | Jacobsohn |
| CPUC | Coby | Rudolph |

### Members of the Public

| | | |
|---|---|---|
| American Electric Supply | Kathy | Mastrianni |
| BluePoint Planning | Bianca | Hutner |
| Brandt Energy Strategies | Melissa | Brandt |
| Cadmus Group | Jeana | Swedenburg |
| Cascade Energy | Emily | Lange |
| Center for Accessible Technology | Kate | Woolford |
| CalMTA | Smita | Gupta |
| CCRREN | Jordan | Garbayo |
| ClearResult | Matt | Clark |
| ClearResult | Kim | Dicello |
| ClearResult | Nadine | Stewart |
| CPUC | Heather | Iwamuro |
| CPUC | Jessie | Levine |
| CPUC | Amy | Reardon |
| CPUC | Christie | Torok |
| CPUC | Ana | Zapata |
| DAC | Don | Arambula |
| Earth Justice | Rebecca | Barker |
| Ecology Center | Brenda | Hopewell |
| Ecology Center | Lore | James |
| Energy Solutions | Tobyn | Smith |
| Environmental Innovations | Natalia | Bogolasky |
| Environmental Innovations | Brooke | Wright |
| Frontier Energy | Kristin | Larson |
| Frontier Energy | Emily | Carter |
| Frontier Energy | Margaret | Marchant |
| Frontier Energy | Jessica | Meylor |

| | | |
|---|---|---|
| ICF | Mark | Oullette |
| IHACI | Ricardo | Grizzelle |
| IREN | Casey | Dailey |
| MAAC Project | Claudia | Huerta |
| MCE | Jennifer | Green |
| Mendota Group | Grey | Staples |
| MW Consulting | Mark | Wallenrod |
| PacifiCorp | Alex | Osteen |
| Peninsula Clean Energy | Jana | Kopyciok-Lande |
| Peninsula Clean Energy | Matthew | Rutherford |
| PG&E | Rob | Bohn |
| PG&E | Sebastian | Csapo |
| PG&E | Jenny | Roecks |
| Richmond Connects | Alison | LaBonte |
| Rising Sun Opportunities | Sneha | Ayyegari |
| Rising Sun Opportunities | Julia | Hatton |
| SCE | Elizabeth | Gomez |
| SCE | Mara | Portlock |
| SCE | Larry | Tabizon |
| SDGE | De De | Henry |
| SDREN | Aisha | Cervantes-Cissna |
| SoCalREN | Audrey | Bragg |
| SoCalREN | Tessa | Charnofsky |
| SoCalREN | Tory | Coffin |
| SoCalREN | Sulma | Hernandez |
| SoCalREN | Shelley | Osborn |
| SoCalGas | Sapen | Acharya |
| SoCalGas | Roy | Christian |
| SoCalGas | Emma | Ponco |
| SoCalGas | Anders | Danryd |
| The Energy Coalition | Natalie | Espinoza |
| The Energy Coalition | Craig | Perkins |

| | | |
|---|---|---|
| The Energy Coalition | Makenna | Troy |
| The Energy Coalition | Rebecca | Hausheer |
| The Energy Coalition | Makenna | Troy |
| TRC Companies | Nic | Dunfee |
| TURN | Ruthie | Lazenby |
| Willdan | Jill | Bushman |

## Appendix B: Common Acronyms

Common acronyms used in this document include:

- California Energy Efficiency Coordinating Committee (CAEECC)
- California Public Utilities Commission (CPUC)
- Energy Division (ED)
- California Energy Commission (CEC)
- California Air Resources Board (CARB)
- Energy efficiency (EE)
- Working group (WG)
- Disadvantaged communities (DAC)
- Hard-to-reach (HTR) communities
- Justice equity diversity and inclusion (JEDI)
- CPUC's Environmental and Social Justice Action Plan (ESJ Action Plan)
- Portfolio Administrator (PA)
- Investor-owned utilities (IOU)
- Regional Energy Network (REN)
- Community-based organization (CBO)
- Market transformation (MT)
- Equity Metrics Working Group (EMWG)
- Market Support Metrics Working Group (MSMWG)
- Evaluation measurement and verification (EM&V)
- Ordering Paragraph (OP)
- Disadvantaged Communities Advisory Group (DACAG)
- Low-Income Oversight Board (LIOB)
- Evolving CAEECC Working Group (ECWG)
- Compensation Task Force (Compensation TF)
- Mid-Cycle Advice Letters (MCALs)
- Order Instituting Ruling (OIR)
- Non-Energy Impacts (NEIs)
- Non-Energy Benefits (NEBs)
- Integrated Demand Side Management (IDSM)

## Appendix C: Energy Division Updates Detailed Discussion

- **Laurel Rothschild (TEC):** I appreciate the CEDARS dashboard. Are there any updates on viable electric alternatives (VEAs), including its timeline or on the Multifamily definition?
    - **Coby Rudolph (CPUC):** The Elect-to-Administer calculation was sent out yesterday. Because the VEA Staff Proposal was issued earlier this year prior to any Multifamily work, it is likely that we will see progress on VEAs sooner than any Multifamily definition.
- **Ted Howard (SBUA):** What's the latest progress on the cost-effectiveness proceeding?
    - **Coby Rudolpoh (CPUC):** The DER Proceeding (R.22-11-013) is where Commission-wide CE test inputs are handled, including the ACC. In that proceeding, a Decision from a couple months ago guided the process for the next set of ACC updates and would come into effect in EE portfolios in 2028 for the next Business Plan applications. This new set of avoided costs would be used in the EE Potentials & Goals study next year. After the Business Plan applications are done, the PAs would use the avoided costs updates to update their forecasts in 2027. On the energy efficiency proceeding CE, there were some CE related items scoped into EE rulemaking although no current proceeding activity on this issue right now. In various BP applications, different PAs submitted a range of proposals on CE issues and ED will decide the scope of the application proceeding and if CE would fit into this.
- **Chris Ruch (SMW Local 104):** Where do you find information on the 6/19 meeting, because it's not on the CPUC events page?
    - **Coby Rudolpoh (CPUC):** Join as a party to the application proceeding or subscribe to the service list because that's where the announcements are made. The CPUC Daily Calendar will have it. The "Upcoming Events" page only has the high-profile events.

## Appendix D: Workshop of Workforce Standards Detailed Discussion

- **Chris Ruch (SMW Local 104):** I have received lots of feedback from people new to CAEECC that there were great outcomes on communication and coordination. A missing recommendation is that there needs to be a better understanding of apprenticeships—an apprenticeship does not necessarily mean union, it means that a person passed a certain bar of education. Another missing recommendation is that there needs to be more education on the difference between contractors and technicians (the person actually doing the work).
- **Ely Jacobsohn (CPUC):** What does "thresholds" mean on slide 43?
    - **Facilitator:** thresholds were discussing the specific project cost thresholds in D.18-10-008 for HVAC ($3,000) and ALC ($2,000) projects.

    - **Chris Ruch (SMW Local 104):** The threshold is not the cost of the job, it's the rebate. Rebates don't track the same inflation as the job does.
    - **Coby Rudolph (CPUC):** It's the threshold at which certain workforce requirements kick in and once you are above the rebate amount, certain additional requirements kick in.
- **Ted Howard (SBUA):** Following up on apprenticeships, Germany has great apprenticeship opportunities. In the context of AI and the insecurity of people committing to a 4-year degree, it makes apprenticeships look favorable again. What are the impacts of AI and where should we go from here?
    - **Chris Ruch (SMW Local 104):** We could have a whole discussion on this with experts from the Department of Industrial Relations (DIR), like Stacey T. Garden, who can talk about the landscape of apprenticeships and the considerations given AI, as it does impact our industry.
- **Chris Ruch (SMW Local 104):** Before we talk about taking a big action, there was a lot of really good stuff that came out of the meetings that not everyone participated in. It would be great to talk through some topics that need more discussion (e.g. apprenticeships, AI impacts, technician vs contractors). Perhaps another workshop with a presentation and discussion on one topic and stacking those on top of another would be useful.
- **Laurel Rothschild (TEC):** I support this need for more discussion and propose a small group collaboration with you and others directly involved in the workshop would be helpful.
- **Ted Howard (SBUA):** SoCalREN made a few interesting points in the workshop including: lack of code literacy and trainings (many contractors assumed T24 applies to public works but applies to all building types); the DIR requirements and costs of compliance is a significant barrier for small contractors; the CA Advanced Lighting Controls Training Program certification has a workforce shortage, and the limited availability of contractors in rural markets.
    - **Lujuana Medina (SoCalREN):** DIR requires a fee on top of a license with a certified payroll platform. Many contractors will be more apprehensive in going after project opportunities that require more capital resources out of their operating costs. SoCalREN discovered a huge gap in the current market on lighting requirements and workforce standards in the statewide workforce programs where the total budget for these programs divided by the number of workers available to participate equates to roughly $1.30 per person. SoCalREN had a program to address this in their Business Plans, but removed it because it was too costly and comments indicated we were doing too much. We don't talk about the demand of workforce that is needed. A lot of the rebuilds, new construction, and Clean Energy programs require certified, well trained quality control and insurance in the workforce.
    - **Chris Ruch (SMW Local 104):** The availability of workforce is commonly misunderstood and this should be another topic of discussion.

- **Jennifer Green (MCE):** I agree that more discussion (working group) is needed around appropriate residential workforce qualifications recommendations, ongoing collaboration opportunities with trades and CBOs (e.g. high road training partnerships).

# Appendix E: Equity Advisory Committee Detailed Discussion

- **Stacie Risley (SDGE):** How is the Community-Designed EE Programs different from the SoCalREN work?
  - **Facilitator:** This is the SoCalREN work, the goal is to understand the work and see if there's best practices that could be applied.
  - **Stacie Risley (SDGE):** All the PAs are involved with the SoCalREN work already, so what extra value would EAC be bringing?
  - **Facilitator:** It's unknown right now, it's just a desire to learn more about this, make observations, and maybe action items.
- **Ted Howard (SBUA):** This was a comprehensive report. In Recommendation #2, an metric affordability ratio is calculated by the cost of utility service divided by the income of the residential customer. To start, it would be good to amend this metric instead of adding a metric because there are too many. This should also apply for the small business perspective as well. The E5351 resolution relating to this data stated that roughly half of the existing common metrics are not currently useful because of challenges with data collection, lack of relevance, uncertainty of data quality, comprehensiveness, or consistency, unjustifiable expense, or possible duplication of other reported data. The metrics need to be further discussed. Additionally, CEDARS currently only has a flag for underserved customers but not yet for HTR or DAC customers.
  - **Julia Hatton (Rising Sun):** The metric doesn't take into account household size. Household income without the number of people in the household is not an accurate measurement.
  - **Amaury Berteaud (LGSEC):** CEDARS has an HTR Flag and a CalEPA flag (the disadvantaged flag). The flags are very claims-based so meaning project based, or profit based). So if there is an equity program that does not install measures and it does not claim savings, they can't properly use this flag because they might only have expenditure and no other data to report. There is data architecture that could be used to report these things.
- **Chris Ruch (SMW Local 104):** There's lots of good stuff in here. Even though a technician organization is not the target of these recommendations, we found it useful in our organization to help us think through rebates and how to reach out to people. There's a lot of value in these.
- **Jane Elieas (BayREN)**: I want to give a shout-out to the EAC for these recommendations. In the list of additional topics to consider, there is value in PAs coordinating around community designed portfolios. While there is the SoCalREN

Advice Letter, BayREN also proposed something similar in our Business Plans. We think the PAs could get behind some of this work on how to integrate the community more in the EE portfolio.

- **Jennifer Green (MCE):** There are so many types of WE&T programs, training, job placement, general education, and more. Using one set of metrics for all of them is difficult, but I understand the need for them. The metrics and indicators for market support need a clear glossary of terms so we can effectively report on them, have a similar understanding across PAs, or reply with N/A for metrics that don't apply when needed. The EAC did great work to help define this.
- **Coby Rudolph (CPUC):** On the workforce pipeline we've heard feedback from Energy Savings Assistance (ESA) contractors that it can be difficult for ESA contractors to find qualified workers which may be due to cadence and timing of training and hiring needs is tough to align. I appreciate the reference to the pipeline needs and encourage folks to think about how to make the pipeline smoother and forge connections across program areas. On the Equity program side, there are difficulties tracking and evaluating market support programs where some of the outcomes are a little more diverse and difficult to quantify in a uniformed way. On this note, we've seen challenges to look across equity segment programs and know which ones have activities going. For example, in *equity* resource acquisition (RA) programs, we see a need for more investment to reach DAC, HTR, or underserved customers, sometimes showing as a TRC of 0.8. But then in other *equity* resource acquisition programs they show a TRC of 1.0. And then others have a very low TRC, and we can't tell why there doesn't seem to be activity in that program. How can we compare equity programs and equity program delivery to maximize the dollars being spent to achieve benefits?
    - **Amaury Berteaud (LGSEC):** It's important to differentiate between "resource acquisition equity programs" which drive short-term savings to DAC Communities. The metrics and tracking mechanisms used for RA are well-suited for these equity programs that are going into communities and have immediate outcomes. We do not have good metrics to assess other types of equity programs (equity, WE&T, etc), such as programs that are leading to greater access to incentives or supporting resiliency against energy spikes. The work that the equity programs do sees value on the ground but it doesn't always translate to the hard TSB or TRC metrics.
    - **Julia Hatton (Rising Sun):** Note on workforce "pipeline" - there's both a pipeline of workers and the pipeline of work (supply/demand), and they're related. Bundling/aggregating projects can create a more consistent pipeline of work, which in turn can attract workers and provide opportunities to pay better wages and benefits (which can also attract workers).

# Appendix F: Policy Proposal Detailed Discussion

**Cost-Effectiveness (CE) Reform**:

- **Aisha Cervantes-Cissna (SDREN):** If CAEECC does take on CE Reform, what would the next steps be, who would take on comment writing in this instance?
    - **Facilitator:** CAEECC is not a party so would not be writing comments as an intervenor. Historically stakeholders or Working Group (WG) members may refer to the WG recommendations in their personal comments or attach CAEECC recommendations as a motion.
- **Lara Ettenson (NRDC):** If CE reform isn't in scope in the Business Plan Applications, is it premature to vote? I don't want to do anything not in scope.
    - **Facilitator:** It might be in scope in the EE proceeding or other relevant proceedings.
    - **Laurel Rothschild (TEC):** These topics may be touched on in several proceedings. We won't know for up to 45 days after the pre-hearing conference so likely early August. Considering summer schedules, any WG approved today wouldn't actually launch until after the scope is released.
        - **Lara Ettenson (NRDC):** If this is going to be in a subsequent proceeding, or the concurrent process for ACC, CAEECC has not been given the ability to participate or offer recommendations in these venues.
- **Lara Ettenson (NRDC):** This is the relevant CE scope of the general EE proceeding: "the scope of this proceeding will include any cost-effectiveness issues that are specific to the energy efficiency programs, such as energy efficiency costs, or the applicability of cost-effectiveness requirements to different administrators or segments of the energy efficiency portfolio. Matters that are more generally applicable to distributed energy resources, such as the design of the individual cost-effectiveness tests or their inputs should be handled in the Distributed Energy Resource Cost-Effectiveness R.22-11-013." I am calling out this part of the scope because it's limited: "energy efficiency costs, or the applicability of cost-effectiveness requirements to different administrators or segments of the energy efficiency portfolio."
- **Stacie Risley (SDG&E):** SDG&E opposes CAEECC engaging on CE because feels duplicative and uses a lot of people's time in WG sessions and subcommittees. Because of the stark differences in party positions on this topic, it is unlikely we will get consensus and that would be a lot of financial cost.
- **Jessica Lau (SCE):** If we use the societal cost test (SCT) or Program Administrator Cost (PAC) test, they can't be decided upon in the EE proceeding. If that's the case, would we still do this in this WG?
    - **Laurel Rothschild (TEC):** It is still worthwhile to raise these issues in any CAEECC engagement and point out the interconnectedness of these issues.
    - **Alice Hauvenar-Daughton (MCE):** It's unclear what is and isn't in scope in the EE proceeding scope based on the State Auditor report and CPUC responses. The State Auditor report specifically called out the inclusion of participant costs; the CPUC response said it would occur in the EE proceeding. This is a little contradictory.

    - **Coby Rudolph (CPUC):** I'm hesitant to do a live interpretation of the scoping memo language. Recognizing the diverse views on CE, there's room for folks to talk about different issues related to CE and which issues can be scoped in which proceeding. I'm not sure that the scope of each issue in each proceeding should be defined right now or affect what CAEECC wants to take on.
        - **Lara Ettenson (NRDC):** We would need clarification from the Administrative Law Judge or Assigned Commissioner, can we have that as a follow up?
- **Lara Ettenson (NRDC):** I don't disagree with Stacie on the challenges but it's worth noting that the origins of CAEECC are to try to figure out how to bridge different perspectives. However, I'm hesitant to vote until we see the scope or get clarification of scope.
- **Amaury Berteaud (LGSEC):** Is there a limit on the number of things we can take on in summer or fall of 2026?
    - **Facilitator:** Yes, we cannot do all of them this summer and/or fall.
- **Aisha Cervantes-Cissna (SDREN):** I agree with Stacie's comments on centralizing comments and discussion. I propose an amendment to have a workshop in the general EE proceeding that has this item in scope. This alternative workshop would include a panelist that could speak to reform and a synthesis of common reform proposals and another panelist that is a program design expert to speak to tangible strategies. This could include a Commissioner in that forum versus at CAEECC where they wouldn't be as likely to participate.
    - **Facilitator:** Can you please clarify the role of CAEECC in your alternative?
    - **Aisha Cervantes-Cissna (SDREN):** I could see it where CAEECC could serve as a venue or CAEECC WG to create a more cohesive WG proposal that synthesizes consensus reforms raised in the CE proposal slides; there could be a panelist that presents the synthesized WG proposal as part of the workshop idea I mentioned, but ultimately I'd like to see this centralized in the proceeding.

**Fuel Switching**

- **Anders Danryd (SoCalGas):** I don't think our proposal is meaningfully different from any other utility's. It's a fuel neutral approach.
- **Lisa Hunter (PG&E):** We will be voting no on this as there are better suited venues for this discussion. CalTF and the Reporting Project Coordination Group (PCG) are better suited for energy savings with the experts in those rooms.
- **Lara Ettenson (NRDC):** Has there already been thought as to who has to be present to have a productive conversation?
    - **Facilitator:** In the optional Member meeting to discuss policy proposals on May 19th, the group identified PAs, CARB, CEC, and CAEECC as key stakeholders.
- **Coby Rudolph (CPUC):** This is an issue coming up in income-qualified programs in both general ESA and also in the 2028-2033 ESA full cycle proceeding, where

the Commission is also considering the results and outcomes from the San Joaquin Valley (SJV) Pilot.[1]

**Compliance Improvement**

- **Stacie Risley (SDG&E):** I'm not super familiar with Title 24. Is there another venue that enforces this topic, maybe another city? What organizations handle Title 24 compliance?
    - **Dan Suyeyasu (CodeCycle):** Local building departments. However, the main reason the standards are over 700 pages is because of ratepayer funded programs. It feels odd to say someone else should think about the impacts on code compliance when these ratepayer funded programs added complexity to the codes.
- **Aisha Cervantes-Cissna (SDREN):** The workshop would be CAEECC facilitated, correct?
    - **Dan Suyeyasu (CodeCycle):** Yes.
- **Stacie Risley (SDG&E):** Can you make this optional for PAs to attend.
    - **Facilitator:** There is no PA requirement to join, but there are CAEECC involvement thresholds for WGs (at least ⅓ of members must participate). That being said, when PAs are involved, there is more efficacy.

**Integrated Demand-Side Management (IDSM)**

- **Lara Ettenson (NRDC):** Is Lisa Paulo still at the CPUC as this is something that she's been working on for a while.
    - **Coby Rudolph (CPUC):** Lisa and other experts at CPUC would be appropriate to reach out to.
- **Lisa Hunter (PG&E):** With the reporting at PCG, would that be a more appropriate venue than at CAEECC as they are already taking on this issue with the correct experts involved.
    - **Lara Ettenson (NRDC):** If non-PAs can't join the PCG, then PCG members should join a CAEECC venue. If CAEECC Members can, then we can look into this venue.
    - **Laurel Rothschild (TEC):** Is PCG working on the data access and reporting piece of this list specifically?
        - **Lisa Hunter (PG&E):** Yes.
- **Anders Danryd (SoCalGas):** SoCalGas submitted a Tier 3 Advice Letter to implement an IDSM program in the current cycle and propose to continue that in Business Plans. Why aren't we included in the list of PAs in the proposal?
    - **Laurel Rothschild (TEC):** The PAs listed proposed a policy change in their Business Plan Applications.
- **Jane Elias (BayREN):** What is the venue proposal for this?
    - **Laurel Rothschild (TEC):** This proposal is workshop first and then decide next steps.

[1] The SJV Pilot proceeding is currently closed.

# Appendix G: Optional Assembly Detailed Discussion

- **Ted Howard (SBUA):** Can you talk about NEBs and their ability to overcome perceived costliness?
  - **Smita Gupta (CalMTA):** For MTI purposes in terms of TRC calculated in TSB does not factor NEBs, it's more for the consumer as a benefit and to make a market case for showing the value of programs compared to doing nothing. It's a market-facing, consumer-facing, or decision-maker-facing articulation of the NEBs that make a value proposition for a particular initiative.
    - **Ted Howard (SBUA):** You had high TRCs in all three, not even including the NEBs.
    - **Smita Gupta (CalMTA):** Yes, we acknowledge that the NEBs help make the business case for adopters and not necessarily the applicant.
- **Anders Danryd (SoCalGas):** The ACC is just getting updated. Will you integrate this into your TSB and TRC calculations?
  - **Smita Gupta (CalMTA):** We are currently using the approved ACC. There will be third-party evaluators that will be brought on board for each MTI and there will be opportunity for each MTI to revisit and reassess the most appropriate next step.