**CAEECC-Hosted Working Group on Underserved Customers**

**5th Meeting of the Phase 1 WG**

**July 12, 2021 1:30-3:30pm**

*See Supporting Documents on* [*Meeting Page*](https://www.caeecc.org/7-12-2021-uwg-mtg)

**Facilitators: Dr. Scott McCreary & Katie Abrams, CONCUR Inc**

*Note to CAEECC members*: to ensure an efficient meeting, please read the background materials and come prepared with focused clarifying questions. We particularly recommend that you review the Executive Summary and Conclusions of each report.

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| **Time** | **Topic** |
| **1:30-1:35** | **Agenda Review, Goals for the Day, and Equity Metrics WG Announcement** |
| **1:35-2:15** | **Small-Medium Business Sector**   * Theo Love (Green Love Economics) and Ed Coulson (UCI) to present final analysis, findings and conclusions * Questions & discussion from CAEECC members |
| **2:15-3:05** | **Public Sector**   * Ranjit Deshmukh, Michelle Le, Atherv Gole, and Sydney Litvin (UCSB) to present final analysis, findings and conclusions * Questions & discussion from CAEECC members |
| **3:05-3:15** | **Residential Sector**   * Jenny Berg (BayREN) to present key findings and conclusions from report finalized in Jan 2021 |
| **3:15-3:30** | **Wrap Up & Adjourn**   * Potential Implications for related CAEECC activities (Equity WG) * Timeline for final deliverable (summary report to be posted to CAEECC website and shared w/ CPUC) |

For Reference: Excerpt from Prospectus on Key Research Questions

1. Identify the scope of the analysis including a) the metrics that will be used to evaluate whether certain groups of customers are being “adequately served” relative to other groups; b) the reasons/barriers those groups face to participate, be that economic, non-native English speakers, geographically isolated, etc.; and c) who and how the data will be acquired and analyzed, and the timeline
2. Acquire the necessary data and analyze to what extent certain customers segments are not being “adequately served.”
3. For each type of documented underserved customer, identify the likely causes for being underserved—whether it’s the HTR definition, or some other reason or reasons
4. Based on 1-3, develop (in consultation with CAEECC members, other stakeholders, and ED) next step recommendations including the forums and processes to develop appropriate strategy or strategies for addressing each underserved customer segment and the metrics to set goals and measure progress.