

# CAEECC EMSWG Meeting #4 Summary

Date: Wednesday, January 17, 2024

Time: 9:00 am - 12:00 pm PT

On January 17, 2024, the Equity & Market Support Working Group (EMSWG) met for its fourth Meeting via Zoom. There were over 30 attendees, including representatives from 18 EMSWG Member organizations and 3 representatives from Ex-Officio agencies, as well as 14 Members of the Public (see [Appendix A](#) for a full list of meeting attendees). This meeting was facilitated by Katie Wu (Wu) of Common Spark Consulting and supported by Sooji Yang (Yang) of Common Spark Consulting and Susan Rivo (Rivo) of Raab Associates.

Supporting meeting materials are available at:

<https://www.caeec.org/equity-market-support-wg-mtg-4>. Relevant materials include:

- Agenda (01-17-2024 EMSWG Meeting #4 - Agenda (posted 01-10-2024, rev. 01-12-2024))
- Slide Deck (01-17-2024 EMSWG Meeting #4 - Slide Deck (posted 01-10-2024, rev. 01-12-2024))
- Consolidated Homework Responses (Consolidated 01-05 EMSWG Homework Responses (posted 01-10-2024, rev. 01-12-2024))
- PG&E WE&T Statement of Collaboration Sample Template (PG&E WE&T Statement of Collaboration Sample Template (posted 01-12-2024))

## Overview

Key Meeting Takeaways:

- Members generally agreed that it is important for PAs to use the same agreed-upon definitions for terms in the Indicators.
- There were differing suggestions on how to define partnerships: (1) partnerships should be limited to contracted relationships, and (2) partnerships should not be limited to contracted relationships but still include an agreement that the relationship is mutually beneficial.
- Members generally agreed that “action taken” should be the basis of defining a partner, and that the denominator for Market Support Indicator #18 should be the total number of partners.
- There were differing suggestions on how to define collaborations: (1) collaborations and partnerships are generally the same, and (2) collaborations are noncontractual relationships while partnerships are contractual relationships; and whether Market Support Indicator #13 should be limited to Workforce Education and Training (WE&T): (1) limiting it to WE&T allows for a longitudinal

view of the data over the years, and (2) expanding it beyond WE&T will capture collaborations in other programs.

- A remaining question about “type” is whether to define it as unpaid versus paid, type of partner (e.g. non-profit, small business, etc.), and/or contractual versus noncontractual.
- Members prioritized Market Support Indicators #22 and #23 for discussion at a future meeting. Market Support Indicators #5 and #6-10 were identified as a lower priority.

*This meeting summary is intended to capture this meeting’s discussion of ideas, concerns, alternative options for proposals and consensus; it is a high-level summary and not a transcript.*

Key acronyms that may be used in this document include California Energy Efficiency Coordinating Committee (CAEECC), California Public Utilities Commission (CPUC), Energy Division (ED), energy efficiency (EE), working group (WG), disadvantaged communities (DAC) and hard-to-reach (HTR) communities, CPUC’s Environmental and Social Justice Action Plan (ESJ Action Plan), Program Administrator (PA), Investor-owned utilities (IOU), Regional Energy Network (REN), community-based organization (CBO), Disadvantaged Communities Advisory Group (DACAG), and Total System Benefits (TSB).

## **Welcome & Introductions**

*Slides 1 - 4*

Wu welcomed and introduced participants to the fourth meeting of the EMSWG. Opening remarks included a summary of the EMSWG process thus far, and observations on the possible outcomes from the working group. Wu shared expectations for deliverables, which include providing some clarity for a handful of priority Indicators. Wu acknowledged that at the end of the working group process, there will likely still be issues to be clarified and resolved before the PAs are able to consistently report on the Indicators.

- A Member asked for clarification on whether the survey results from the previous homework assignment (addressing Equity Indicators) have been finalized yet.
  - Wu replied that it has not yet been finalized and the results will be discussed at the January 31st meeting.
- A Member agreed with the expectations that Wu shared and suggested that the EMSWG could forego clarifying the AKAB Indicators to focus the limited time on the Equity and Market Support Indicators.
  - Wu replied that Members will have a chance to discuss whether to discuss the AKAB Indicators or not at the end of the meeting.
- A Member asked when the Community Engagement Indicators will be discussed.
  - Wu replied that that is in plan for a later time, no sooner than March 2024.

Wu presented the meeting objectives, which included:

1. Clarify definitions for terms used in Market Support Indicators #1, 10, 13, 18, & 20
2. Discuss other priority Market Support Indicators

To achieve meeting objectives, the Facilitation Team developed the following agenda:

- Welcome
- [Topic 1](#): Partnerships
- [Topic 2](#): Partners
- [Topic 3](#): Collaborations
- [Topic 4](#): Type & Purpose
- [Topic 5](#): Other Priority Market Support Indicators
- Wrap Up and Next Steps

## Topic 1: Partnerships

*Slides 5 - 7*

Wu presented the suggested definitions of “partnerships” from the [homework assignment](#), as well as listed the Market Support Indicators (#1, 2, 18, & 20) that include “partners”/“partnerships.” Wu then guided the group through discussion questions (*italicized below*) while she live-edited notes onto the slide (screenshot included below).

### Summary of Discussion on Partnerships

*Is it important/required that PAs use the same agreed-upon definition? (this question applies for all terms)*

- A number of Members commented that it is important to have the same agreed-upon definitions because these Indicators will be seen by various stakeholders and so having agreed-upon definitions supports a consistent interpretation of information and provides a more apples-to-apples comparison across the PAs. A Member noted that applying the same definition for disadvantaged communities (DAC) in particular is critical. Another Member noted that using the same definitions will be especially important for the PAs as they are setting up systems for data collection. Another Member in the chat suggested that these definitions may need more consideration from a diverse community as an effort to dejargonize the terminology.
- Wu asked whether a data dictionary is necessary for this set of Indicators and whether it already exists.
  - A Member commented being unaware of a specific data dictionary and shared that the previous MSWG discussed suggested definitions but did not finalize them.
  - A number of Members discussed whether the [Energy Efficiency \(EE\) Policy Manual](#), maintained by the ED, could serve as a data dictionary. A few Members noted that the Manual may not be the best place to store and

consistently update the definitions as it historically does not get updated very often. A Member from ED agreed that the Manual may be difficult to rely on for definitions and will check in with the ED about what the process looks like to update the Manual. A Member noted that data dictionaries and definitions are separate items as data dictionaries are used to capture detailed aspects to reporting within systems such as CEDARS.

- Wu noted that the final report can include an appendix for the agreed-upon definitions.

*Should "partnerships" be defined as formal, contracted relationships?*

- A number of Members commented that partnerships should not be limited to contractual relationships because partnerships span a breadth of organizations from public sector to private sector, and contractual relationships may be unnecessarily burdensome for community-based organizations, nonprofits, and trade allies and schools.
- A number of Members commented that there should at least be some agreement in written form that shows the existence of the partnership. A PA Member shared that instead of a contract, they tracked partnerships through photos at events, sign-in sheets, and emails and outreach efforts that prove partners (i.e. trade schools) promoted their events. Another PA Member shared that their internal definition of partnership is limited to contractual relationships, but if the EMSWG decides on a more expanded definition of partnerships, then they may have to use both an internal and external definition. Another Member noted that a sub-objective in the Market Support Indicators state that partnerships should provide benefits to both parties, thus a partnership should include some acknowledgement that both parties are benefitting from the relationship. Another Member mentioned that there should be a transparent statement of the level of relationship that is recognized by both parties to ensure consent between the parties, and suggested a statement of relationship such as an MOU to be used.
- A number of Members raised the scenario of partnerships with trade allies – some Members noted that these relationships are often noncontractual as formal contracting can be burdensome to these partners while another Member noted that relationships with trade allies in resource programs are generally documented via an “authorized agent” agreement. A Member provided an example of a written, non-legally binding document (i.e. statement of collaboration) between IOUs and their partners in the Workforce Education and Training (WE&T) program.
- Wu noted that the Facilitation Team will consolidate and simplify the initial definitions and provide a draft to the WG for further edits. A Member suggested gathering review from other partners who may be interested to ensure all perspectives have been captured in the definitions.

MS #20: Assessed value of the partnership by partners (A, P) - What methods are available to assess the value of a partnership? Should PAs all use the same method to report on this Indicator?

- A Member suggested that the value of partnership should be asked of partners, such as through a survey or interview, to help support the improvement of a partnership. If used, surveys should be consistent across the PAs. Multiple Members agreed.
- A Member noted that partnerships may be multi-year efforts and suggested that the value be assessed annually to assess the value of the partnership for that year.
- A Member asked what is meant by value – whether it is a dollar value or a list of benefits, etc.
- A Member noted that community or target population "partners" or potential partners are not present in the meeting to state the "value" or the benefit they receive or not.

### Discussion Questions:

1. Is it important/required that PAs use the same agreed-upon definition? (this question applies for all terms)
2. Should "partnerships" be defined as formal, contracted relationships?
3. MS #20: Assessed value of the partnership by partners (A, P) - What methods are available to assess the value of a partnership? Should PAs all use the same method to report on this Indicator?

### Live-edit Notes:

- Yes, important to have the same definitions (+4); (don't necessary need perfectly aligned definitions) ; supports consistent gathering and interpretation of information and applies to applies comparison across PAs
- Unaware of an existing definitions document but there is an EE Policy Manual that definitions could be added to (but it doesn't get updated very often (Pam will find out more about the update process) so create a separate document first (e.g., Appendix to the WG Report))
- Partnerships should not be limited to contracted relationships (contracts may be unnecessarily burdensome for nonprofits or CBOs); but **there should be an agreement that there is a partnership and working relationship where something is gained by both parties** (e.g., MOU, photos, emails)
- Example: Work with Trade Schools and instructors to add EE content to their curriculum; difficult to get instructor attention so signing an agreement may be too much
- PG&E has a strict definition of partnership that requires it to be contracted
- IOU WE&T teams have a statement of collaboration document (not legally binding) for partners (different than agreement with vendor)
- MS Segment has a sub-objective on Partnerships
- On value of a partnership - would be determined after the fact perhaps by survey or interview; PAs could lead on how to determine; guidelines on how to collected/assess would be appreciated
  - Need more discussion on what is meant by "value" and whether it is cumulative or individual, a monetary amount, or qualitative value
- Partnerships are likely to be multi-year so expect to report value in each year

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## Topic 2: Partners

Slides 8 - 10

Wu presented the suggested definitions of "partners" from the [homework assignment](#), as well as listed the Market Support Indicators (#1, 18, & 20) that include "partners." Wu then guided the group through discussion questions (*italicized below*) while she live-edited notes onto the slide (screenshot included below).

## Summary of Discussion on Partners

*Is it important to distinguish paid and unpaid partners (for example, via "type")?*

- A Member suggested that distinguishing between paid and unpaid may be helpful, but they are not the only "types" to consider as type can be defined as the type of business within the EE program that is partnering with the program, as the type of partnership whether contractual or informal, or as the combination of both.
- A Member suggested using a limited number of broad "buckets" of the type of business such as CBO, public entity, or private entity instead of using paid versus unpaid. Another Member added that type could also include disabled veteran business enterprise (DVBE), environmental justice, minority, woman, disadvantaged business enterprise (MWDDBE), for-profit, non-profit, and etc.
- A Member suggested using the word "entity" instead of "businesses" as it encompasses more types of partners that are not limited to economic enterprises.

*For Market Support Indicator #18, how should "action taken" be defined in the context of partner support of energy efficiency; what insight is needed into the specific criteria needed to measure and evaluate these 'actions'?*

- A Member suggested that "action taken" be defined to what the partners agreed to do.
- A Member suggested that the Indicator should not be limiting on "action taken," as it could encompass conducting a joint training or incorporating EE into marketing. A few Members agreed and added that providing a list of examples of actions taken could be helpful to PAs.
- A Member asked whether a partner should still be considered a partner if no action has been taken.
  - A Member replied that the intention of partnerships is to mean actions are taken.
- Wu asked how Members interpreted "type" in the Indicator – whether it is interpreted to mean type of partner or type of action taken.
  - A Member understood this as type of partner.
  - A Member replied in the chat that type is understood to mean two identified partners taking action and what benefit is received (as consented and recognized by the receiving partner).

*For Market Support Indicator #18, what is the appropriate denominator for the percentage calculation? Considering that partners in the program are expected to have a baseline awareness, how can we accurately measure awareness while acknowledging their pre-existing involvement?*

- A Member suggested that the denominator would be the “universe” of partners, noting that this number would not be a fixed number over time. The estimated percentage of partners that have taken action supporting EE by type would be helpful for PAs to discern what programs are performing well in terms of their partnerships and which are not – it may be limiting to take a granular approach to these percentages (e.g., comparing 65% to 67%).
- A Member in the chat suggested that the denominator should include all partners and that any subpopulations should be addressed via additional Indicators or metrics.
- A PA Member commented that they originally understood this Indicator to be a whole number as the changing denominator leads to ambiguity.
  - Wu clarified that the Indicator states a percentage.
  - A Member added that the previous MSWG intended for the Indicator to be a percentage of the number of partners that take action over the number of partners in a given year, and that the changing nature of the denominator shouldn't present too much of an issue.
- A PA Member questioned whether the Indicator would ever have a result that is less than 100, noting that they define partnerships through actions taken so this Indicator would be 100% for its Market Support programs. Another Member agreed and added that a condition for reporting partners is that action has been taken.
  - A Member replied that the Indicator is a way to capture the quality of the partnerships as counting the number of partners doesn't provide an indication of quality. This Indicator could help PAs improve their programs. A Member from ED agreed. Another Member commented that Market Support Indicator #20 captures the quality of partnerships more so than Market Support Indicator #18.
  - A Member provided an example of a partner that does not take action: contractors are often called "partners" but some contractors in informal partnerships do not take action to support or promote EE.
- Wu asked what readers should expect to see with the Indicator.
  - A Member replied that the Indicator would be a single number (percentage) for each PA's portfolio.
- A Member expressed caution that trade allies (whose partnerships with an IOU are set up through an authorized agent agreement to do the actual work of installing EE measures) are not directly involved in these discussions. Including trade allies in the definition of partners may present complications for the PAs.
  - A Member commented that Market Support Sub-Objective #3 on partnerships specifically calls out contractors in partnerships.

### Discussion Questions:

1. Is it important to distinguish paid and unpaid partners (for example, via "type")?
2. For MS Indicator #18, Percentage of partners that have taken action supporting energy efficiency by type (Q, P):
  - a. How should "action taken" be defined in the context of partner support of energy efficiency; insight needed into the specific criteria needed to measure and evaluate these 'actions'
  - b. What is the appropriate denominator for the percentage calculation? Considering that partners in the program are expected to have a baseline awareness, how can we accurately measure awareness while acknowledging their pre-existing involvement?

### Live-edit Notes:

- Should distinguish paid and unpaid but these are not the only types (see Topic 4)
- "Type" might be the type of entity or it could refer to the characteristics of the relationship
- In previous WG, "partnerships" was brought in as a subobjective to understand who is supporting delivery of EE
- "Action taken" would be the basis of the partnership - what did the entities agree to do together?
- Providing examples would be helpful but don't want to limit the "actions" (e.g., incorporating EE into marketing, offering a workshop or training, something else/"other")
- "By type" refers to type of partner
- Denominator would be universe of partners, but that is not fixed over time
- SDG&E interprets MS#18 as a whole number
- Less important if it's 67 vs 75, but is important if it's 10 vs 90
- Example of partners that might not take action = contractors
- MS 18 intended to capture the quality of partnership - are partners doing what they said they would?

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## Topic 3: Collaborations

Slides 12 - 15

Wu presented the suggested definitions of "collaborations" from the [homework assignment](#), Market Support Indicator #13, and the definition of "collaborations" provided in the 2023 CPUC Workforce Education and Training Program Evaluation Report. Wu then guided the group through discussion questions (*italicized below*) while she live-edited notes onto the slide (screenshot included below).

### Summary of Discussion on Collaborations

*How do "collaborations" differ from "partnerships," if at all? Is there any reason that "partnerships" and "collaborations" should not be defined in the same way?*

- A Member provided background context to how "collaborations" showed up in the previous MSWG, and noted that Market Support Indicator #13 was historically intentionally specific to WE&T and most, if not all, of the supply Indicators were focused on WE&T. There are 77 programs in the Market Support sector, 11 of which are WE&T-type of efforts looking to increase supply in the marketplace. The 11 programs represent roughly 16% of the total budget in the Market Support programs over the next 4 years. Market Support Indicator #13 was intended to continue tracking the WE&T data without changes to provide a longitudinal view of the WE&T programs.



- A PA Member commented that collaborations and partnerships should be defined exclusively as they define collaborations as relationships without a contracted agreement and partnerships as contractual relationships.
- A few Members see the two terms as essentially the same – partnerships include noncontractual relationships and collaborations (which are already captured in the WE&T program) are noncontractual relationships with evidence of agreement. A Member shared that collaborations and partnerships were swapped throughout the Indicators in an exercise to see if they can be used interchangeably, and found that the terms can be used interchangeably and suggested using the definition of collaboration as it is more encompassing.
- A Member asked if the terms are considered the same, then what would the difference be in terms of Market Support Indicators #1 and #13, and whether Market Support Indicator #13 should remain as a WE&T metric (but at the portfolio level).
  - A Member suggested that Market Support Indicator #13 should remain as a WE&T metric because there is a continuity benefit and there are other Market Support Indicators that capture a broader view beyond WE&T.
- A Member asked for clarification about whether Market Support Indicator #13 is asking to be separated by business plan sector.
  - Facilitator's note: *The Indicator notes "by business plan sector;" however, because it is not clear whether the Market Support Indicator #13 should only apply to WE&T activities, the process to report by business plan sector is not clear.*
- A Member asked for an example of a collaboration that brings mutual benefit to the involved parties.
  - A Member shared an example in terms of a WE&T program, where a community college is working with a PA to expand its EE curriculum. The PA would pay a vendor to develop the curriculum but since the community college is not paid or in a contractual agreement with the PA, it is considered a collaboration.
  - A PA Member shared in the chat that its WE&T team had the following types of entities in its list of collaborations for last year: non-profits, professional organizations, colleges, cities, and workforce development organizations.

#### *Should Market Support Indicator #13 should be specific to WE&T programs?*

- A Member suggested adding the Market Support sub-objectives in the spreadsheet with the Indicators, and drawing a boundary may be necessary with the Indicator as there are programs outside of WE&T (such as new construction) that contain an element of training and can be considered in this Indicator.
- A Member noted that in the WE&T programs, if the definition of partnership is strictly contractual, then it may not be captured by the Indicator, and there may be relationships considered collaborations outside of the WE&T programs that would also be overlooked. A number of Members agreed that limiting the

Indicator to WE&T may be a disservice to the uncaptured collaborations across the portfolio, such as in the statewide Quality Installation / Quality Management (QI/QM) program. A Member from ED noted that the ED would like to see the Indicator used for tracking and accountability and preferred to not limit the Indicator to WE&T if it could apply to other programs.

- A Member asked if partnerships are not limited to contractual relationships, would there be double counting with the overlap between collaborations and partnerships.
  - A Member replied that there should not be an issue as long as the definition of collaboration remains how it is described in WE&T.
- A Member asked in the chat if the Common Metric could be reported as WE&T only and Market Support Indicator #13 reported as the whole Market Support segment no matter what sector.
  - A Member replied that there is value in that but having a similar Indicator across two different locations (Common Metrics and Market Support Indicators) could cause confusion in understanding the differences in the values reported.
- A Member from ED commented that ED would be interested to know which programs specifically include training, whether or not they are WE&T.
- A Member asked in the chat if cross-PA collaboration would count for the Indicator.
- Wu noted that if collaborations are captured as a type of partner in Market Support Indicator #1, the contextual descriptions with the Indicator will be important. The Facilitation Team will brainstorm specific follow-up questions for a future meeting or homework.

### Discussion Questions:

1. How do "collaborations" differ from "partnerships," if at all? Is there any reason that "partnerships" and "collaborations" should not be defined in the same way? Should "collaborations" and "partnerships" be mutually exclusive?
2. How should the 2023 CPUC WE&T Program Partnerships with Training Institutions Evaluation Report be used to define "collaboration," if at all?
3. What are the mechanics of providing contextual descriptions with numerical information including expected key information and level of detail?

### Live-edit Notes:

- Part of "Supply" indicator for Partnership sub-objective - MS 13 used to be specific to WE&T, specific to sharing training resources (Indicator would still be reported for WE&T)
- PG&E aligns "partnerships" with contracts; "collaborations" are less formal
- SDG&E, 3C-REN, and SoCalREN look at partnerships and collaborations the same; collaborations are not necessarily contractual relationships but have evidence of agreement to work together also
- If partnerships and collaborations are the same, what is the difference between MS 1 and MS 13?
- Should this Indicator be limited to WE&T (as it is currently applied)? [3C-REN says yes]
- Collaboration example - community college that wants to expand its EE curriculum and receives a curriculum update from a vendor paid by the PA
- 11 of 77 MS programs are targeting WE&T (\$115M/\$725M over the next four years)
- New construction programs (also statewide QI/QM) also have a training element - should that be folded into MS13?

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## Topic 4: Type & Purpose

Slides 16 - 19

Wu presented the suggested definitions of “type” and “purpose” from the [homework assignment](#), and the Market Support Indicator (#1) that includes both terms. Wu then guided the group through discussion questions (*italicized below*) while she live-edited notes onto the slide (screenshot included below).

### Summary of Discussion on Type & Purpose

*What else, if anything, needs to be done to facilitate consistent reporting by PAs on “type” and “purpose” for MS Indicator #1?*

- A Member asked how PAs are planning to present the information.
  - A Member replied that CEDARS is not currently set to accommodate Common Metrics or Market Support Indicators, but it has a document depository where files can be uploaded. The Indicators could also follow the workbook process used to report on Common Metrics. The workbook is included as an attachment to the PA annual report; however, with the quarterly reporting requirement set for some of the Indicators, reporting on the Indicators through the workbook quarterly may look different from the annual reporting of the Common Metrics.
- A Member from ED noted that the ED does not want reporting to be cumbersome for PAs and is curious to know what would work for the PAs.
  - Wu noted that the January 24th meeting will include an update from PAs on the Advice Letter development process and how PAs plan to report on the Indicators.
- A Member uplifted a question for future discussion: is “type” contractual/noncontractual or a type of entity or a combination of both? (For example, should PAs report that a partner is a local government partner in a contractual partnership?)

### Discussion Questions:

1. What else, if anything, needs to be done to facilitate consistent reporting by PAs on "type" and "purpose" for MS Indicator #1?

### Live-edit Notes:

- How would the information be presented? CEDARS is not currently set up to report on Common Metrics or Indicators (nor would it be ready in the near future). But CEDARS has a document repository. Common Metrics are currently reported in a workbook that is an attachment to the Annual Report that is submitted to CEDARS
- Indicator reporting should not be overly cumbersome; what would work for PAs?
- Quarterly reporting of some indicators would lead to a slightly different reporting process
- Follow up - is "type" about the partner or about the characteristics of the relationship?

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## Topic 5: Other Priority Market Support Indicators

*Slides 20 - 25*

Based on the [homework assignment](#), Wu shared additional Market Support Indicators that were raised for discussion, including Market Support Indicators #5, #6-10, #22, and #23. Wu then launched a Zoom poll to ask Members to rank the suggested Indicators by level of priority.

Members prioritized Market Support Indicators #22 and #23 for discussion at a future meeting. Market Support Indicators #5 and #6-10 were identified as a lower priority.

## Other Priority Market Support Indicators Saved

00:10:24 | 1 question | 14 of 23 (60%) participated

### 1. Other Priority Market Support Indicators (Rank Order)

14/14 (100%) answered



## Summary of Discussion on Other Priority Market Support Indicators

- A Member noted that he ranked Market Support Indicator #5 as a lower priority because CWR (Career and Workforce Readiness) has a specific meaning in WE&T and this metric has been reported on for many years now.
- A Member asked about background context and the importance and prevalence of Market Support Indicators #6-10 across Market Support programs.
  - A Member replied that these Indicators are Common Metrics for the Emerging Technology Program (ETP), and noted uncertainty about whether the Indicators would apply to many programs.
  - A Member from ED commented the Member could follow up with the ED contact overseeing ETP programs.
  - A Member noted that these Indicators could extend beyond ETP programs and shared an example of new construction as a place for emerging technologies. Similar to the WE&T discussion, these Indicators could take a more expansive approach or remain limited to ETP.
- Wu asked if the Common Metrics on ETP programs will continue to be reported on given Market Support Indicators #6-10 target the same data.
  - A Member replied that PAs will most likely continue reporting the Common Metrics even if duplicative, unless the ED had different intentions.

## Wrap Up and Next Steps

Slides 26 - 29

Wu provided a recap of the day, reminded participants of the meeting objectives, and shared next steps, including:

- Meeting #4 Summary will be posted on January 24.
- Meeting #5 will be held on January 24, 2024 from 9am-12pm PT.
- Meeting #6 materials will be posted on January 24.

## Appendix A: Attendees

Organization	Name
<b>CAEECC Members</b>	
3C-REN	Erica Helson
AMBAG	Amaury Berteaud
BayREN	Mary Sutter
MCE	Brandon Ewart
Mendota Group	Grey Staples
Oracle	David Siddiqui
PG&E	Moses Gastelum
RCEA/RuralREN	Patricia Terry
Resource Innovations	Derek Avery
SBUA	Ted Howard
SCE	Gary Golden
SDG&E	Stephanie Guterrez
Silent Running LLC	James Dodenhoff
SoCalGas	Halley Fitzpatrick
SoCalREN	Patrick Ngo
The Energy Coalition	Rebecca Hausheer
The Energy Coalition	Natalie Espinoza
William Worthen Foundation	Alice Sung
<b>Ex-Officio</b>	
CPUC	Pam Rittelmeyer
CPUC, Energy Division	Ely Jacobsohn
CA Public Advocates	James Ahlstedt
<b>Other Interested Stakeholders</b>	
BayREN	Jenn Mitchell-Jackson
Birch Road Consulting	Katie Abrams

Frontier Energy	Jesse Farber-Eger
ICF	Jesse Feinberg
Frontier Energy	Margaret Marchant
SDG&E	Matt Saintarbor
Frontier Energy	Nancy Barba
PG&E	Conrad Asper
PG&E	Rob Bohn
SCE	Jessica Lau
SoCalRen	Tessa Charnofsky
SD Community Power	Sheena Tran
SDG&E	Greg Green
Unknown	Aaron Jones
<b>Facilitators</b>	
Katie Wu	Common Spark Consulting
Sooji Yang	Common Spark Consulting