

Equity Metrics Working Group “Huddle”

Tuesday August 30, 2022 | 10am - 12pm PT

Hosted by California Energy Efficiency Coordinating Committee (CAEECC) as a brief reconvening of the Equity Metrics Working Group in preparation for September CPUC workshop on Metrics

Zoom How-To

- Log on a few minutes **early**, if possible, to ensure your technical connection is working.
- Share your **video** if possible – this fosters engagement and helps mimic an in-person meeting setting.
- **Raise your hand** to enter the queue to speak—then wait for the Facilitator to call on you.
- **Mute** yourself when you're not speaking.
- When to use the chat:
 - Chat everyone: "+1", share resources, non-substantive questions/comments
 - Chat Suhaila: share anonymous concerns
 - WG Members asked to raise their hand and speak if they have substantive input

Public Comment

Welcome Members of the Public!

- The Public can participate by sharing feedback at any point in the meeting via the chat. We will include these comments in the meeting summary posted to the CAEECC website.
- The Public can also email the facilitation team facilitator@caeccc.org with input after the huddle.
- Dedicated time for public input and discussion will be set aside at the September 15th workshop.

Agenda

Time	Topic & Description
10:00	Intro & Background
10:30	Topic 1: Metrics Categorization
11:15	Topic 2: Methodology and Approach
11:50	Topic 3: Regional Energy Network (REN) Performance Requirements
11:55	Wrap Up

Intro & Background

Let's get started

- Huddle Objectives
- CPUC Introductory Remarks
- Brief reintroductions
- Recap of Working Group outcomes
- Present how August huddle work will feed into September Metrics workshop

Huddle Objectives

1. **Gather input on ED categorization analysis**, and note any areas of disagreement and next steps
2. **Gather ideas for further work on methodology + data**
3. **Tee up conversation on whether RENs need additional metrics** and if so, what new metrics
4. **Inform the Metrics Workshop planning process** based on conversations at this meeting.

CPUC Introductory Remarks

How Today's Meeting Fits in

Working Group convened in 2021

Proposed 13 metrics and indicators; most were adopted in ED's reporting template posted late 2021



ED Scoping Memo June 2022

Scope includes Goals and Accountability, further defined to include indicators, metrics, and targets – and a corollary to TSB for RENs. Record closes end of Rebuttal Briefs, approx May 2023



WG Huddle in preparation for Metrics workshop

Three topics

1. Metrics categorization
2. Details on metrics and indicators
3. REN performance requirements

Scoping Memo: Issue #3 on Goals and Accountability

Are the proposed indicators, metrics and targets for the portfolios, segments, and programs reasonable, and do they demonstrate growth and progress needed to meet future opportunities? What additional guidance, if any, is needed to better define target customer segments (e.g., underserved)?

Facilitation Team



Reintroductions – it's been nearly a year!

What's your
favorite thing
about
summertime?

In the chat, please re-introduce yourself with your:

- Name and pronouns
- Organization
- Answer to the Icebreaker question

CAEECC Working Group (WG) Members

	#	Company	Lead	Alternate
CAEECC Members	1	3C-REN	Alejandra Tellez	Marisa Hanson-Lopez
	2	BayREN	Jennifer Mitchell-Jackson	Jenny Berg
	3	California Public Advocates (CalPA)	Shelly Lyser/James Ahlstedt*	Sophie Babka*
	4	California Efficiency + Demand Council (CEDMC)	Clark McIsaac*	Joe Desmond*
	5	CodeCycle	Dan Suyeyasu	
	6	Center for Sustainable Energy (CSE)	Fabi Lao*	Rebecca Baptiste*
	7	MCE	Stephanie Chen	Qua Vallery
	8	Natural Resources Defense Council (NRDC)	Julia de Lamare	Lara Ettenson
	9	PG&E	Lucy Morris	Lindsey Tillisch*/Angela McDonald*
	10	Redwood Coast Energy Authority (RCEA)	Aisha Cissna	Stephen Kullmann
	11	Small Business Utility Advocates (SBUA)	Ted Howard	Theo Love
	12	Southern California Edison (SCE)	Christopher Malotte	Patty Neri/Carol Edwards*
	13	San Diego Gas & Electric (SDG&E)	DeDe Henry	Elaine Allyn
	14	San Joaquin Valley Clean Energy Organization (SJVCEO)	Courtney Kalashian	Samantha Dodero
	15	SoCalGas	Kevin Ehsani	Sebastian Garza*
	16	SoCalREN	Lujuana Medina	Fernanda Craig*
	17	The Energy Coalition	Laurel Rothschild	Genaro Bugarin*

**Represents new leads or alternates*

Ex-Officio & Non-CAEECC WG Members

	#	Company	Lead	Alternate
Non CAEECC Members	18	Energy Efficiency Council (EEC)	Allan Rago	Ron Garcia
	19	Rising Sun Center for Opportunity	Alejandro Castelan	Julia Hatton
	20	Silent Running LLC	James Dodenhoff	
	21	TRC	Marissa Van Sant	Sophia Hartkopf
	22	Viridis	Mabell Garcia Paine	Don Arambula
	23	Resource Innovations	Corey Grace	Bobby Johnson
	24	High Sierra Energy Foundation	Pam Bold	
Ex-Officio	25	ACEEE	Roxana Ayala	Ariel Drehobl
	26	California Air Resources Board (CARB)	Emma Tome	Melanie Zauscher
	27	California Energy Commission (CEC)	Brian Samuelson	Kristina Duloglo/Aparna Menon
	28	California Public Utilities Commission (CPUC)	Ely Jacobsohn	Nils Strindberg/ Jason Symonds

What's happened so far?

Brief recap of Equity Working Group outcomes

- Met June-October 2021; final report posted to CAEECC website
- Reached consensus on nearly all its recommendations
- PAs were required to use the WG's recommendations in developing their energy efficiency portfolio applications and Business Plans.
- ED developed two spreadsheets with input from the WG
 - a. 2024-2031 EE Application Attachment Tables
 - b. Metrics & Indicators Categorization Spreadsheet

Equity Metrics Working Group materials, including final report:

<https://www.caeec.org/equity-metrics-working-group-meeting>

Key Terms & Acronyms

Key Term

Indicators are progress trackers that do not typically have targets associated with them.

Metrics are progress trackers that do or are expected to have targets associated with them.

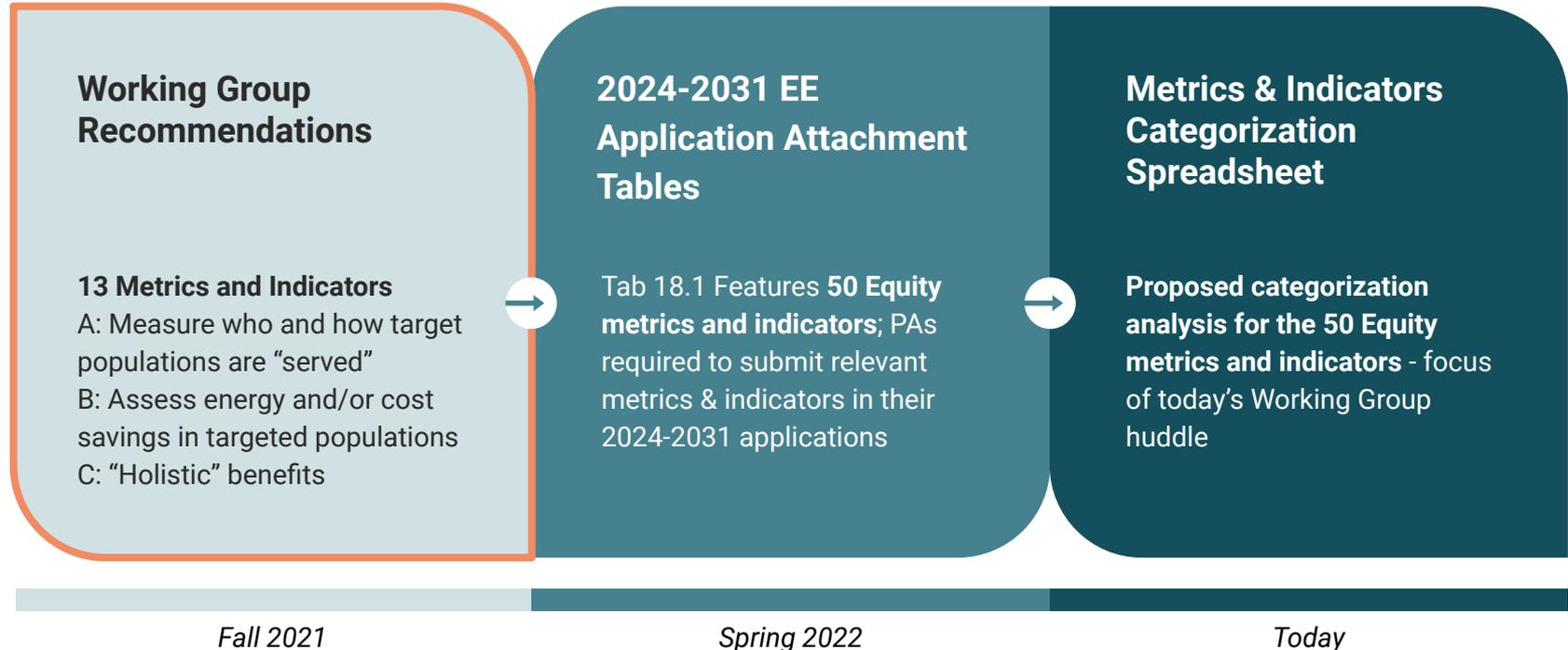
Targets are forecasted achievements against which to track progress.

Progress Trackers refers to all three terms above.

Acronyms:

- Community Based Organization (CBO)
- Disadvantaged Community (DAC)
- Energy Division (ED)
- Equity Metrics Working Group (EMWG)
- Hard to Reach (HTR)
- Household (HH)
- Market Support (MS)
- Multifamily (MF)
- Program Administrator (PA)
- Regional Energy Network (REN)
- Resource Acquisition (RA)
- Single family (SF)

From Working Group to Today



Equity Metrics Working Group (EMWG) Final Report Key Recommendations

7 Principles (i.e., segment vs program level, guidelines to setting metrics, program portfolios, best practices for program development, reporting, target setting (non-consensus), and community engagement (non-consensus))

Primary Objective: “For hard-to-reach, disadvantaged, and/or underserved individuals, households, businesses, and communities: address disparities in access to energy efficiency programs and workforce opportunities*; promote resilience, health, comfort, safety, energy affordability**, and/or energy savings; and reduce energy-related greenhouse gas and criteria pollutant emissions***.”

Equity Metrics Working Group (EMWG) Final Report Key Recommendations (continued)

Recommended 13 Metrics and Indicators across the following 3 categories

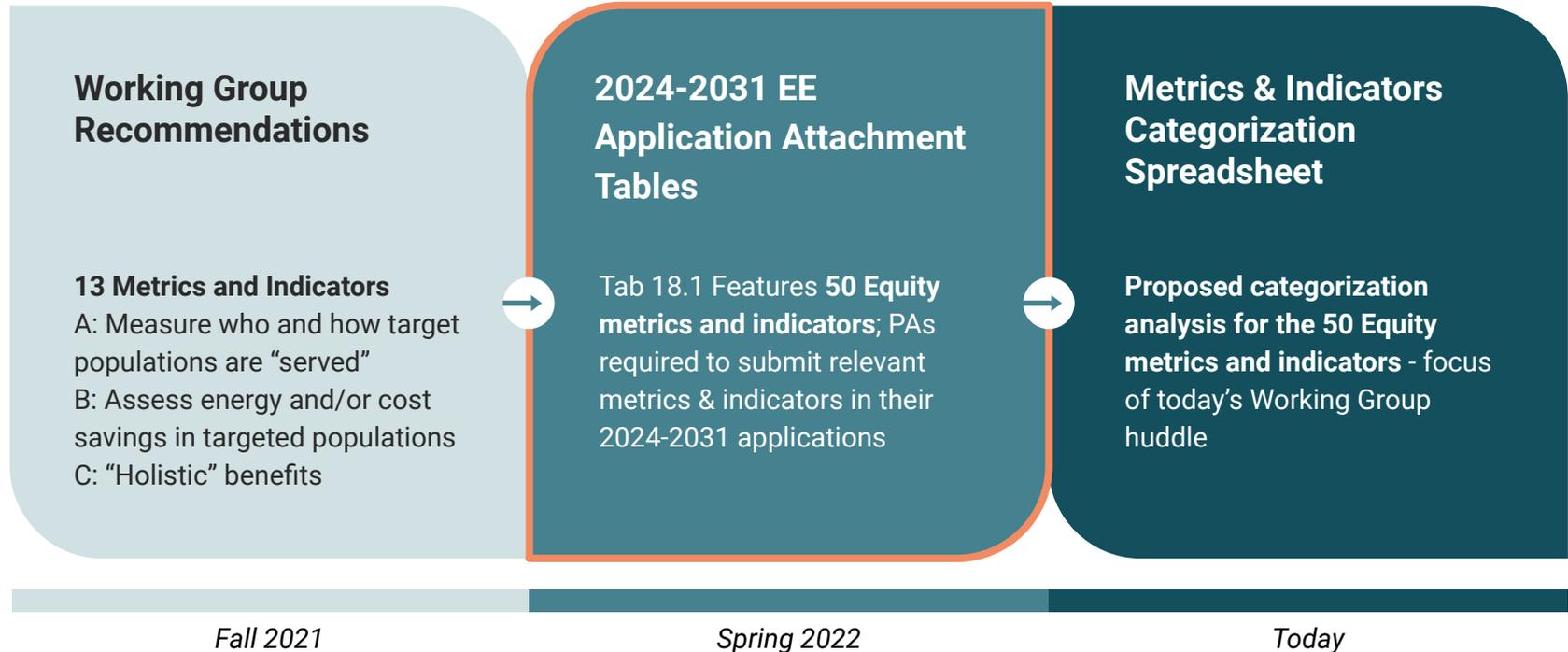
- A. Measure who and how target populations are “served” (9 consensus recommendations)
- B. Assess energy and/or cost savings in targeted populations (2 of 3 recommendations were consensus)
- C. “Holistic” benefits (1 consensus recommendation)

Also proposed a definition of “Underserved” (non-consensus)

Reached consensus on all but 3 recommendations

- 8 of 10 Metrics were consensus
- 2 of 3 Indicators were consensus

From Working Group to Today



Summary of Equity Metrics & Indicators in “2024-2031 EE Application Attachment Tables”

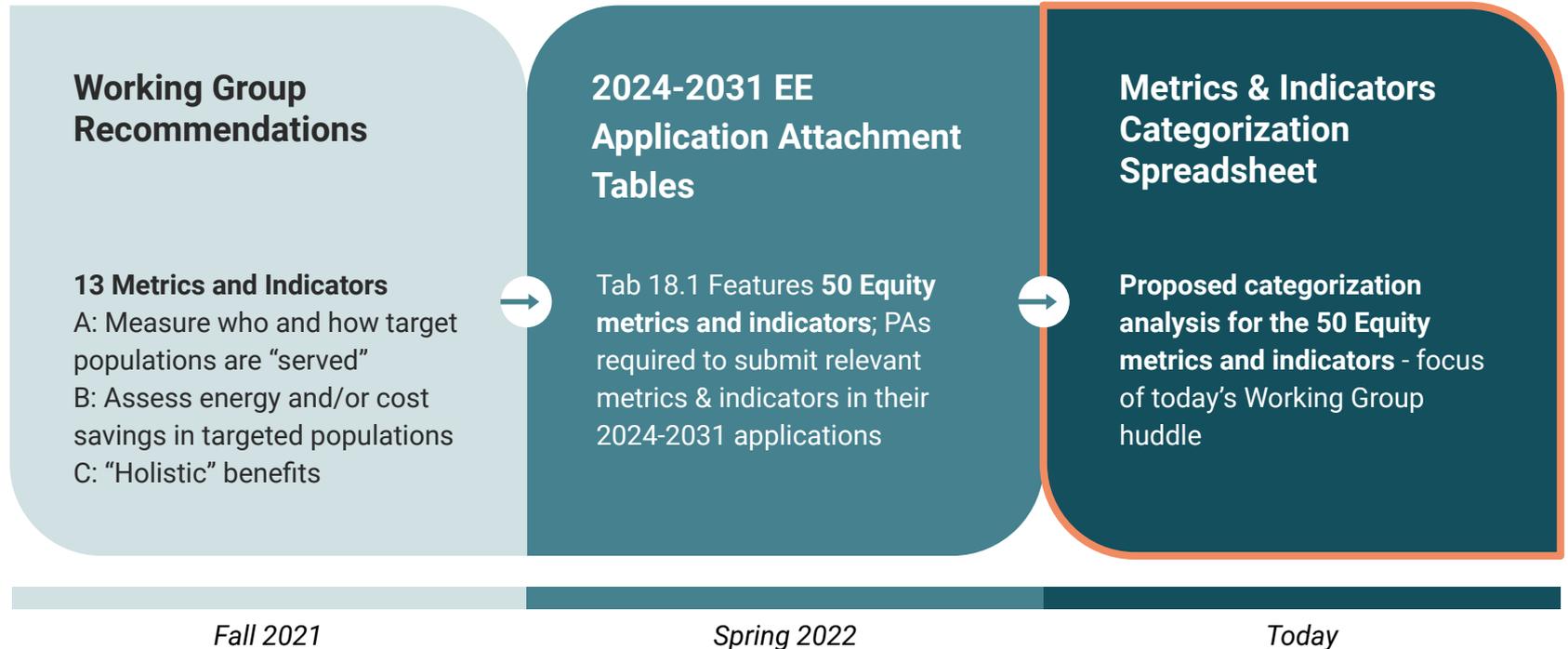
Background:

- The Equity Metrics WG Final Report recommendations formed the basis of the ED “2024-2031 EE Application Attachment Tables” circulated in late 2021 for the 2024-2031 applications

Summary:

- **50 total metrics & indicators:**
- 13 primary metrics and indicators; 37 supporting indicators
 - **Bucket A: who and how target populations are served**
 - 7 metrics
 - 18 supporting indicators
 - **Bucket B: energy and/or cost savings in target populations**
 - 8 primary indicators
 - 19 supporting indicators
 - **Bucket C: “holistic” benefits**
 - 1 primary indicator

From Working Group to Today



High-level Summary of Equity Metrics & Indicators

- The main metrics proposed are counts of **total Equity Segment Program** participants by sector.
- The one additional metric proposed is **first-year bill savings** for participants in Equity Segment programs.
- The indicators are split between **well-defined energy savings and TSB indicators**, and **non-energy benefits categories** that have no established methodology defined. There is a non-consensus indicator regarding community engagement tracking as well.

Turning EMWG Final Report into ED's Categorization Spreadsheet (1 of 3)

Bucket A: who and how target populations are served

Total # **residential** (SF or MF unit) **equity-targeted households** (HHs) served by the Equity programs

- 4 indicators: "market support" (MS) vs "resource acquisition" (RA) for single family vs multifamily

Total # **MF equity-targeted buildings** served by the Equity programs

- 2 indicators: market support vs resource acquisition

Total # **Ag or Ind. equity-targeted customers** served by the Equity programs

- 4 indicators: market support vs resource acquisition for agriculture vs industrial

Total # **equity-targeted public facilities and equipment or community projects** served by the Equity programs

- 2 indicators: market support vs resource acquisition

Total # **small and medium business (SMB) equity-targeted participants** served by the Equity programs

- 2 indicators: market support vs resource acquisition

Total # of **companies/non-profits served** by the Equity Segment programs

- 2 indicators: market support vs resource acquisition

Total # of **contractors/workers** served by Equity Segment Programs

- 2 indicators: # and % of contractors and/or workers vs companies/non-profits

Note: "RA" refers to direct savings and "MS" refers to indirect activities

Turning EMWG Final Report into ED's Categorization Spreadsheet (2 of 3)

Bucket B: energy and/or cost savings in target populations

Expected first-year bill savings in total \$ for equity-targeted program participants (metric)

- [no indicator]

GHG reductions: 1) Equity-all; 2) DAC; 3) HTR; 4) Underserved

Total kWh savings: 1) Equity-all; 2) DAC; 3) HTR; 4) Underserved

Total kW savings: 1) Equity-all; 2) DAC; 3) HTR; 4) Underserved

Total therm savings: 1) Equity-all; 2) DAC; 3) HTR; 4) Underserved

***Community engagement activities during program design** and to identify community needs and solutions

***Community engagement activities during program implementation**

***Community engagement activities during program assessment**

**non-consensus recommendation (WG split on community engagement as a Principle vs Indicator)*

Turning EMWG Final Report into ED's Categorization Spreadsheet (3 of 3)

**Bucket C:
"holistic"
benefits**

Energy and climate benefits (monetized within TSB) - e.g., health, comfort, safety, and economic or other "non-energy benefits":

- 1) Health
- 2) Comfort
- 3) Safety
- 4) Economic or other "non-energy benefits"

Equity Metrics & Indicators from ED Categorization Spreadsheet

Indicator / Metric	Proposed Metric / Indicator (facilitator note: <i>italics represents indicators added by ED after the WG report</i>)	CATEGORY 1: Clear Metric with Target	CATEGORY 2: Clear indicator, or metric without target (i.e. requiring additional info to determine target)	CATEGORY 3: Unclear Indicator of Metric without Target (e.g. specificity, definition, unit, methodology, role, etc) to track and evaluate progress)
Indicator	Total kWh savings_EquityAll		X	
Indicator	<i>Total kWh savings_EquityDAC</i>			X
Indicator	<i>Total kWh savings_EquityHTR</i>			X
Indicator	<i>Total kWh savings_EquityUnderserved</i>			X
Indicator	Total kW savings_EquityAll		X	

Category 1: ED did not fill in (clear metric with target) as it would like to first hear from stakeholders

Category 2: ED Staff identified **27** progress trackers that are likely sufficiently clear to begin collecting information in 2024.

Category 3: ED staff identified **23** progress trackers as needing further clarity.

TOPIC 1: Metrics Categorization

Goal: begin to gather input on ED proposal, note areas of disagreement and next steps

- Discuss ED analysis
- Discuss CalPA proposal on targets
- Discuss next steps in preparation for September workshop

Breaking Down ED's Categories

CATEGORY 1
Clear Metric with
Target



CATEGORY 2
Clear Indicator or
Metric without
Target



CATEGORY 3
Unclear Indicator or
Metric without
Target

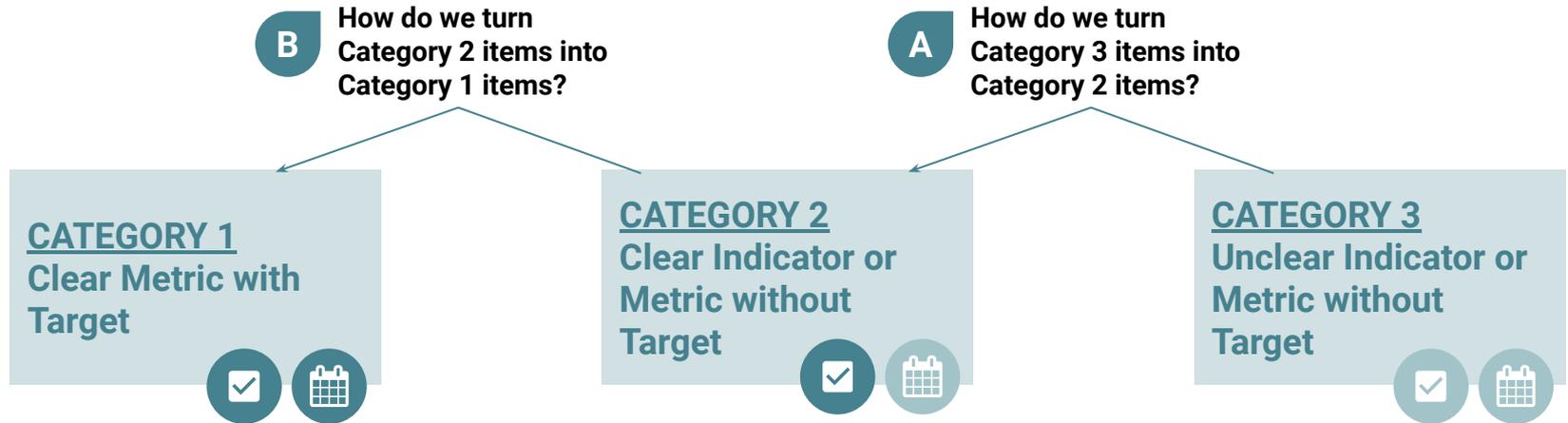


Indicators are progress trackers that do not typically have targets associated with them.

Metrics are progress trackers that do or are expected to have targets associated with them.

Targets are forecasted achievements against which to track progress.

Discussing ED's Categories



Indicators are progress trackers that do not typically have targets associated with them.

Metrics are progress trackers that do or are expected to have targets associated with them.

Targets are forecasted achievements against which to track progress.

CalPA Proposal on Targets

Next Steps on Metrics Categorization

Possible ways to prep for September workshop:

- Facilitation team to post notes from today's discussion, and incorporate into the workshop planning
- WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th
- Other ideas/suggestions?

TOPIC 2: Methodology and Approach

Goal: begin to gather ideas for further work on methodology & targets + data

- Discuss development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines
- Discuss next steps in preparation for September workshop

Working Group Member Discussion

Discuss development of a framework for useful, meaningful, and consistent definitions, granularity, methodologies, and baselines.

Proposed discussion questions:

1. Suggested timeline to develop methodology details?
2. Suggested regulatory process for setting methodologies?
3. Studies needed to develop certain methodologies (and timeline and lead for studies)?
4. Is annual reporting of these metrics sufficient?
5. Is segment level reporting sufficient?

Possible Framework for Metrics & Indicators - thoughts?

Metric or Indicator	[Insert metric or indicator language here]
Reference #	
Numerator	
Denominator	
Reported	
Unit	
Methodology	
Data Source	
Core Value	
Applicable Sectors	

Possible “Groupings” for Approach to Methodology

Ideas to Consider in Advance of 9/15 workshop (to avoid discussing methodologies for 50 metrics & indicators)

- AKAB
- Customer count
- KWh/kW/therms and %
- Roles (i.e., for data collection)
- *Others?*

Next Steps on Adding Specificity

Possible ways to prep for September workshop:

- Facilitation team to post notes from today's discussion, and incorporate into the workshop planning
- WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th
- Other ideas/suggestions?

TOPIC 3: Regional Energy Network (REN) Performance Requirements

Goal: tee up conversation on whether RENs need additional metrics and if so, what new metrics?

- Background on existing REN metrics and reporting requirements
- Discuss next steps in preparation for September workshop

Today (i.e. 2022-23)	IOUs	CCAs (note these rules are only for apply-to-administer CCAs. Elect-to-administer CCAs have different rules, see D.14-01-033).	RENs
Portfolio level (Goals/Targets)	CPUC adopts IOU service territory wide energy savings and TSB Goals in D.21-09-037	CCAs forecast their own energy savings and TSB Target in their 2022-23 BBALs, per D.21-09-037	RENs forecast their own energy savings and TSB Target in their 2022-23 BBALs, per D.21-09-037
Resource Acquisition	Must meet or exceed a forecasted TRC of 1.0, per D.21-05-031	Must meet or exceed a forecasted TRC of 1.0, per D.21-05-031	No TRC Threshold
Market support and equity	Cannot exceed a cap of 30% of portfolio budget, per D.21-05-031	Cannot exceed a cap of 30% of portfolio budget, per D.21-05-031	No cap on the percentage of their portfolio budget that can be spent on these segments, per D.21-05-031
In applications for 2024-2027	IOUs	CCAs	RENs
Portfolio level (Goals/Targets)	CPUC adopts IOU service territory wide TSB Goals in 2024 (will keep calculating energy savings, but will only have to meet TSB)	CCAs may update their energy savings and TSB Targets in their mid-cycle True-up ALs, per D.21-09-037.	RENs may update their energy savings and TSB Targets in their mid-cycle True-up ALs, per D.21-09-037.
Resource Acquisition	No changes	No changes	No changes
Market support and equity	No changes	No changes	No changes
Other			

Next Steps on REN Performance Requirements

Possible ways to prep for September workshop:

- Facilitation team to post notes from today's discussion, and incorporate into the workshop planning
- WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th
- Other ideas/suggestions?

Wrap Up

Before we go...

- What we accomplished today
- Next steps in preparation for September 15th workshop
- What to expect at the workshop
- Live meeting evaluation

Homework and Next Steps

- By 9/7: WG participants and the Public invited to submit additional thoughts/comments by Sept. 7th
- By 9/8: Facilitation team to post notes from today's discussion, and incorporate into the workshop planning
- Other ideas/suggestions?

Moving Forward: Workshop September 15, 2022

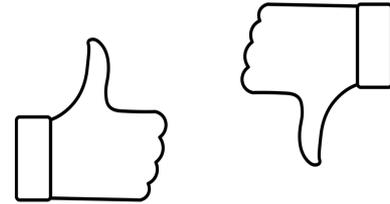
September Workshop Objectives:

- Continue to discuss categorization of indicators and metrics, and what might be ripe for targets
- Map out development of proposal(s) for improved definitions, granularity and methodologies in testimony
- Build understanding around metrics to assure RENO's budgets achieve just outcomes for ratepayers

Review of Today

Meeting Outcomes

1. **Gather input on ED categorization analysis**, and note any areas of disagreement and next steps
2. **Gather ideas for further work on methodology + data**
3. **Tee up conversation on whether RENs need additional metrics** and if so, what new metrics
4. **Inform the Metrics Workshop planning process** based on conversations at this meeting.



How did we do?



Live Meeting Evaluation

Do you feel this was an inclusive and trusting environment?

Not at all safe Somewhat safe Very safe

Do you feel the meeting was effective?

Not at all safe Somewhat safe Very safe

What worked well? How can we improve?

Appendix Slides

- Equity Metrics Working Group
Non-consensus items
- Recommended reporting
templates
- Definitions - background

EMWG Target-setting options summary for non-consensus item

Target-Setting Option	First Choice Option	Acceptable Option
<p>Option 1: Targets will be set by the PAs for Equity segment metrics following the collection of the first two program years of data (or a baseline has been set using reasonable proxy data). (12 first choice, 21 acceptable of 24 voting members)</p>	<p>3C-REN, BayREN, CEDMC, MCE, PG&E, RCEA, SCE, SCG, SDGE, Silent Running LLC, SJVCEO, Viridis Consulting</p>	<p>3C-REN, BayREN, CEDMC, CodeCycle, CSE, High Sierra Energy Foundation, MCE, PG&E, RCEA, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SCE, SCG, SDGE, Silent Running LLC, SJVCEO, SoCalREN, The Energy Coalition, TRC, Viridis Consulting</p>
<p>Option 2: In their Budget Applications, PAs will propose targets and/or set a date certain by which they will propose targets for all Equity segment metrics (12 first choice, 19 acceptable of 24 voting members)</p>	<p>Cal Advocates, CodeCycle, CSE, EEC, High Sierra Energy Foundation, NRDC, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SoCalREN, The Energy Coalition, TRC</p>	<p>3C-REN, BayREN, Cal Advocates, CEDMC, CodeCycle, CSE, EEC, High Sierra Energy Foundation, MCE, NRDC, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SCG, Silent Running LLC, SoCalREN, The Energy Coalition, TRC, Viridis Consulting</p>

EMWG Community engagement options summary for non-consensus item

Community Engagement Option	First Choice Option	Acceptable Option
<p>Option 1: Community engagement as an Indicator (8 first choice, 17 acceptable of 24 voting members)</p>	<p>CSE, MCE, NRDC, Rising Sun Center for Opportunity, SBUA, Silent Running LLC, SoCalREN, The Energy Coalition*</p>	<p>CEDMC, CodeCycle, CSE, EEC, High Sierra Energy Foundation, MCE, NRDC, Rising Sun Center for Opportunity, RCEA Resource Innovations, SBUA, Silent Running LLC, SJVCEO, SoCalREN, The Energy Coalition, TRC, Viridis Consulting</p>
<p>Option 2: Community engagement as a Principle (16 first choice, 22 acceptable of 24 voting members)</p>	<p>3C-REN, BayREN, Cal Advocates, CEDMC, CodeCycle, EEC, High Sierra Energy Foundation, PG&E, RCEA, Resource Innovations, SCE, SCG, SDGE, SJVCEO, TRC, Viridis Consulting</p>	<p>3C-REN, BayREN, Cal Advocates, CEDMC, CodeCycle, EEC, High Sierra Energy Foundation, MCE, NRDC, PG&E, RCEA, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SCE, SCG, SDGE, SJVCEO, SoCalREN, The Energy Coalition, TRC, Viridis Consulting</p>

EMWG “Underserved” definition options summary for non-consensus item

Underserved Definition Option	First Choice Option	Acceptable Option
<p>Option 1: Use ESJ Action Plan Definition (2 first choice, 13 acceptable of 24 voting members)</p>	<p>Cal Advocates, CodeCycle</p>	<p>3C-REN, BayREN, Cal Advocates, CEDMC, CodeCycle, High Sierra Energy Foundation, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SCE, SCG, SJVCEO, TRC</p>
<p>Option 2: Use ESJ Action Plan Definition + allow an avenue for PAs to propose additional ‘underserved’ with rationale. (19 first choice, 21 acceptable of 24 voting members)</p>	<p>3C-REN, BayREN, CEDMC, CSE, EEC, NRDC, PG&E, Resource Innovation, Rising Sun Center for Opportunity, SBUA, SCE, SCG, SDGE, Silent Running LLC, SJVCEO, SoCalREN, The Energy Coalition, TRC, Viridis Consulting</p>	<p>3C-Ren, BayREN, CEDMC, CodeCycle, CSE, EEC, High Sierra Energy Foundation, NRDC, PG&E, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SCE, SCG, SDGE, Silent Running LLC, SJVCEO, SoCalREN, The Energy Coalition, TRC, Viridis Consulting</p>
<p>Option 3: Allow the PAs to determine underserved. (3 first choice, 14 acceptable of 24 voting members)</p>	<p>High Sierra Energy Foundation, MCE, RCEA</p>	<p>3C-REN, BayREN, CEDMC, CodeCycle, High Sierra Energy Foundation, MCE, RCEA, Resource Innovations, Rising Sun Center for Opportunity, SBUA, SCE, SCG, SJVCEO, TRC</p>

Recommended Reporting Templates

Metric (dark green) and Metric/Indicator (light blue) to Measure Who and How Target Populations are "Served"	BAC/HTR/Under served customer/HH/building/project/participant count
A.1. Total # residential (SF or MF unit) equity-targeted households (HHs) served by the Equity programs	
Single Family – equity market support (ex: education, information, training, technical support, etc.)	
Single family – equity resource acquisition (ex: energy saving action, etc.)	
Multifamily – equity market support (ex: education, information, training, technical support, etc.)	
Multifamily – equity resource acquisition (ex: energy saving action, etc.)	
A.2. Total # MF equity-targeted buildings served by the Equity programs	
Equity – Market support (ex: education, information, training, technical support, etc.)	
Equity – resource acquisition (ex: energy saving action, etc.)	
A.3. Total # Ag or Ind. equity-targeted customers served by the Equity programs	
Ag – equity market support (ex: education, information, training, technical support, etc.)	
Ag – equity resource acquisition (ex: energy saving action, etc.)	
Ind – equity market support (ex: education, information, training, technical support, etc.)	
Ind – equity resource acquisition (ex: energy saving action, etc.)	
A.4. Total # equity-targeted public facilities and equipment or community projects served by the Equity programs	
Equity – Market support (ex: education, information, training, technical support, etc.)	
Equity – resource acquisition (ex: energy saving action, etc.)	
A.5. Total # small and medium business (SMB) equity-targeted participants served by the Equity programs	
Equity – Market support (ex: education, information, training, technical support, etc.)	
Equity – resource acquisition (ex: energy saving action, etc.)	
A.6. Total # of companies/non-profits served by the Equity Segment programs	
Equity – Market support (ex: education, information, training, technical support, etc.)	
Equity – resource acquisition (ex: energy saving action, etc.)	
A.7. Total # of contractors/workers served by Equity Segment Programs	
A.8. Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs	
A.9. Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BPOC-owned) with contracts to implement Equity Segment programs	

Notes:

Record each household/building/customer only once

Counts of market support participants should be market support engagement only with no resource acquisition elements

Resource acquisition counts include participants with claimable savings

Metric (dark green), Consensus Indicator (light green), and Non-Consensus Indicator (tan) to Assess Energy and/or Cost Savings in Targeted Populations	Savings	
B.1. Expected first-year bill savings in total \$ for equity-targeted program participants (metric)		
<i>[Note: Intent is to ensure relevant programs are designed to help the participant directly save money even if not through a CPUC program. Calcs would be prospective and compared to baseline conditions to focus upgrades on the most impactful measures/strategies. This is a broader or "more loose" calculation of energy savings that would include kits, etc.] [participant perspective/all savings]</i>	\$	
B.2. Direct Savings from Equity Segment programs		
GHG reductions (tons)		
Total kWh savings		
Total therm savings		
Total kW savings		
B.3. Non-Consensus Item: Count and type of community engagement activities targeted at disadvantaged, hard-to-reach, and underserved communities:		B.3. is a non-consensus item
Community engagement activities during program design and to identify community needs and solutions	(count)	(types)
Community engagement activities during program implementation	(count)	(types)
Community engagement activities during program assessment	(count)	(types)
Metrics – dark green		
Consensus Indicator (light green)		
Non-Consensus Indicator (tan)		

Indicator for "Holistic" Benefits	\$	Units/count
C.1. Combined total benefits to participants and to society as a whole (all A-E below in \$ and/or units until units can be monetized)		
A. Energy and climate benefits (monetized within TSB)	(=TSB)	
B. <u>Health</u> – "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other		
C. <u>Comfort</u> – "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other		
D. <u>Safety</u> – "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at least one of: improved safety of appliances, other		
E. <u>Economic</u> or other "non-energy benefits" (as proposed by the PAs or program) in dollars or "counts of participants receiving this benefit" until we can monetize		
Note: white cells indicate where a standard calculation methodology is not yet determined for this indicator; a PA may have a method for populating		

Definitions - background

Hard-to-reach (HTR): Mixed definitions. See “CPUC HTR Definitions and Context for CAEECC UWG” posted to the huddle meeting page:

<https://www.caeec.org/equity-metrics-wg-huddle>

Disadvantaged community: Defined by CPUC. See

<https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/infrastructure/disadvantaged-communities>

Underserved: See previous slide on non-consensus options from EMWG

“Equity-targeted”: Term EMWG used to refer to those targeted by the Equity Segment programs. Per the Decision, this includes DAC, HTR and underserved populations.