**GUIDING PRINCIPLES AND OBJECTIVES FOR A LONG-TERM ROLLING CYCLE**

**INTERNAL STAKEHOLDER DOCUMENT**

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| **Guiding Principles of a Long-Term Rolling Program Cycle Model** | **Desired Outcomes of an Improved Regulatory Process Supported by a Long-Term Rolling Cycle Model** |
| **Manageability** (simple, streamlined, and predictable) | 1. **Reduced and streamlined administrative and regulatory burden, extended program operating period.**
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| 1. **Regulatory predictability:** (e.g., eliminate start/stop, pre-determined schedule to enable stakeholders to organize resources, etc.)
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| **Effectiveness[[1]](#footnote-1)**(in program participation, in energy savings and in procurement planning)  | 1. **Robust EE industry**: (e.g. improve the viability for participation by stabilizing and simplifying program offerings, build demand by attracting high performance implementers, contractors, installers and other market actors; ensure predictability, continuity, reliability and confidence by enabling flexibility for continuous improvement and delinking contracts from CPUC regulatory processes, among other strategies etc.)
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| 1. **Enhanced customer experience:** (e.g., increase ease of customer participation; design programs and service delivery mechanisms to better engage customers; address needs and align with customer decision-making processes; etc.)
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| 1. **Maximized energy savings/energy demand reductions.**
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| 1. **Improved confidence in EE savings and maximized EE savings potential in resource planning to ensure the most cost-effective investment decisions.**
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| 1. **Alignment between Strategic Plan and other CPUC and state long-term energy efficiency regulatory goals, policies and procedures.**
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|  **Accountability** (of ratepayer dollars spent and effective implementation)  | 1. **Cost-effective use of ratepayer funds**
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| 1. **Transparency:** (e.g., in planning, accounting, and reporting)
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| 1. **Legitimize EE as a resource**
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| 1. **Improved program feedback mechanisms and EM&V through adaptive management strategies**
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1. At least one entity required the following addition to “Desired Outcomes” listed under the “Effectiveness” principle to fully support this document: “**Improved Implementer and Portfolio Performance:**  Reduce or eliminate avoidable interruptions and postponements in program implementation.  The continuity of a rolling portfolio model will improve implementer and portfolio performance, thereby allowing greater focus on customers.” As this feedback came in after the discussion period for this document, this supplementary concept is noted here. [↑](#footnote-ref-1)