

Template for the next SC meeting

DRAFT v.2

What is the customer profile of the whole sector?
[who are we dealing with and what have they been doing
in the past? Setting the stage]

- Graph 1: sector all - % of portfolio savings and expenditures, etc.
- Graph 2: bar graph (s) to describe % of sector with profile breakdowns
- Graph 3: % that have participated
- Graph 4: If possible/useful, provide the most interesting mix/match data that are informing the PA plans
- (see notes for examples of breakdown)

Topic 1: Problem Statement [after doing data analytics, this is what you observed as the overarching problem for that particular customer segment/subsegment]

- **[insert observation with cite to PA data/RASS/RSS/CEUS/ impact evals, market assessments, process studies, other evaluations or data sources, etc.]**
 - Observation 1 :There is a low participation rate in X
 - Graph 1: Data to support observation 1
 - Observation 2: Buildings are old
 - Graph 2: Data to support observation 2
 - Observation 3: Different climate zones have different needs
 - Graph 3: Data to support observation 3
 - Etc.

Topic 1: Possible Solutions for Discussion and Metrics

Strategies	Metrics
Work with new touchpoints (N) [note if this replaces something else]	Year 1, THIS happens , in Year 2, THAT happens
Expand xyz (C)	e.g....
Build relationships with industry (N and C)	e.g....

Topic 1: Key Industry and Other Partners

- **[who is involved?]**
- **[who will do what part?]**
- **[note re: bidding timing]**
 - Presume BPs will need to be approved prior to putting out for bid, so hard to say now what/when

Appendix

- **[additional sources of ideas beyond what was indicated on slide 3]**
 - Industry discussions
 - ACEEE next reports on new solutions
 - Bestpractices webpage
 - Consortium for energy efficiency
 - Etc.

Appendix

- **[proposed cancellation of programs and replacement, if needed]**
 - Here (or if you prefer throughout the ppt) list those programs that are no longer proposed to continue and (a) why nothing is replacing it or (b) what it's being replaced with and why.
 - If there are themes about why certain programs are closing (e.g., RCx is not feasible under current rules) please make those clear as well as the policy issues could be taken up by the CC.

Things to think about for Stage 2

- How best to present the cross-cutting overlap or overlap across sectors (e.g., schools and hospitals in commercial and public)
- How best to show the connection to EE strategic plan and AB 758 recommendations (e.g., a cross over bridge? Sub-bullets? Other?). Also consider 802, AB 793, other?
- How best to describe overlap and how that's being addressed
- Where does the plan for sharing data fit in (is it here in stage 2? or perhaps not until stage 3?)

Things to think about for Stage 2 or possibly stage 3

- Include metrics like e.g., "only 7,000 HH per year are in the program, but we believe the new strategy will get us to 15,000 in 2017 and up to about 40,000 per year by 2019." Or, "We're only reaching 5% of the target customers now, but with this new strategy, we hope to reach 10% per year within a year of launch"
- Can BPs include graphs showing trajectory of where PAs were 5-10 years ago, where they are today, and where they are expected to trend as a result of the proposed strategies (in terms of market and program impacts) as they relate to any substantive goal expressed.
- Request to include percentage of stock that programs will affect.

Things to think about for Stage 3 or possibly stage 3 Cont.

- Another request was made for information in Business Plans (e.g. data regarding service territory, percentage of budget, expected potential savings) that would be helpful to implementers in bidding on programs
- Discussion about how to build consensus about data gaps, e.g., what is a commercial building? And key definitions, especially what is “routine maintenance”? Data from market assessments and experience in the field may be helpful in answering these questions but there are gaps. Conversations with implementers and those in the market will provide valuable information. Is there a way to get data and document current business practices so that we can build a record of what “maintenance” is in California?