General Feedback – contact [facilitator@caeecc.org](mailto:facilitator@caeecc.org) if you having trouble sorting for your specific sector recommendations

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| # of recs | Issue # | Comment | Suggested action | PA incorporated  (Y/N) and reason |
| 1 | 0004 | Ensure subcommittees have hard to reach customers/Stakeholders when establishing metrics and strategies. | * PAs should work with Subcommittee Co-chairs to broaden the range of participants for the July Stage 3/4 meetings. |  |
| 2 | 0005  0038  0096  0147 | Include in BPs what expected roles of implementers will be and the markers they will be required to meet, including schedule of when bidding will likely occur.  Request was made for PAs to include some proposed minimum level of program renewal into portfolios so that fresh ideas continue to be incorporated.  Minimum portfolio refresh rate requirement -- establish a minimum threshold for amount of programs that are refreshed/bid out in later years in portfolio | * Per discussion at CC 4/20 meeting, a subgroup is developing more specifics and PAs should consider these as they are developed. * Each PA is encouraged to include a timeline re: bidding and when various strategies are anticipated to occur in their July Stage 3/4 documents. |  |
| 3 | 0009 | Discuss retrocommissioning role in BPs. | * While this is com/public/ind predominately, request was made for PAs to include such strategies (in addition to controls, etc.) even if policies prohibit. * Suggestion that this be included in the overarching policy issues discussion. * Could also include RCx as a strategy with the caveat “pending policy guidance.” |  |
| 4 | 0010  0021 | BPs should include trajectory of where PAs expect to be in the future based on the past (i.e., need baselines and metrics) | * This will help put proposed strategies and expected savings into perspective. * Suggest PAs include the baseline in their BPs of macro metrics (e.g., energy savings). * Provide baseline information re: metrics and related goals (e.g., % more than previous vs. a # that doesn’t provide the magnitude of the proposed goal). * Need baseline information prior to establishing goals for various metrics |  |
| 5 | 0011 | Request for 4 types of data comparison (1) end use (2) bldg./biz type (3) owner structure/sophistication and (4) delivery/installation channels. | * Thus far 1 and 2 were most consistently provided, with owner structure mainly in the residential. * PAs should consider including these comparisons to provide insights into successes or challenges of these various areas. |  |
| 6 | 0016  0018  0019  0036  0056 | Information to be included in data summary | * Provide breakdown of, SMB, owner/rental in commercial etc. to provide a granular level of information to inform strategies * Include service territory data such as percentage of budget, expected potential savings, etc. * PAs should mine internal info/audits/assessments to see what uptake the programs are getting. * Include information across climate zones to inform focus of strategies. * Include middle income data separate from general to understand scope of opportunity |  |
| 7 | 0022 | Refer to technical potential in market analyses | * Given the fact that the PAs must work with the current policy structure and the other competing needs to file, could reference the technical opportunity in abstract |  |
| 8 | 0025  0058  0061 | How is the matter of transitioning to supply-side style EE procurement going to be addressed in the business plan  How BPs impact the GRID  How BPs intersect/interact with the IDER proceeding | * The PAs should include how the EE/BP efforts fit into the larger context, including the intersection of these approaches. * Can note how some of the efforts (e.g., RFOs) may be outside the realm of the EE BP given the use of different assumptions for previous RFOs, but can still note how they should be connected/coordinated with such efforts. * Similarly, how does the BP fit into the broader context of the electricity grid |  |
| 9 | 0029 | Suggestion to illustrate stranded potential | * Not sure if this is timely given the 802 guidance whitepaper, etc. but if PAs have such information, could include if it supports a problem statement |  |
| 10 | 0048 | Request made that BPs include “road map” to making data more accessible to markets, implementers and even non-implementers, including with respect to locational data | * Part of this issue will be resolved by AB 802 by January 1, 2017 through CEC process, but not necessarily all of data access requested will be covered. * PAs should include an update of the status of that proceeding and other processes to address other requests. * PAs ideas for future task force or other to resolve the issue. |  |
| 11 | 0054 | Highlight how EMV informed the BP strategies, etc. | * Ongoing comment from CPUC to show how the strategies align with information gleaned from the evaluations. * Further, what hasn’t been working in the past around this particular strategy and what’s the support for thinking the new/expanded/continued approach will address the challenge (whether from the eval or other source of info). |  |
| 12 | 0060 | Issue of overlapping territories (IOU vs REN or CCA) and any correlated issues should be addressed in Business Plans where appropriate. | * This would fit into the process the PAs are currently doing to weave in x-cutting as well as statewide efforts. |  |
| 13 | 0104 | Importance of addressing HVAC issues | * There are a number of implementation specific suggestions in the recommendation, but the strategy can still be high level (e.g., address worker training needs, assurance of quality installation, etc.) |  |
| 14 | 0112 | Proposing tiered incentives/kickers for EE RFO or other | * Include in BPs if PAs would like to pursue this approach |  |

As of 5/6/16 there are:

1. 2 Agricultural-specific comments
2. 7 Commercial-specific comments
3. 33 CC-specific comments
4. 1 Industrial-specific
5. 50 Multiple Sector-specific comments (aggregated/summarized in above table)
6. 8 Public-specific comments
7. 18 Residential-specific comments
8. 9 C&S-specific comments
9. 1 ET – specific comment
10. 14 WE&T-specific comments