**MTWG (Part 2) - Membership:**

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| **Lead** | **Proxy** | **Organization** |
| **CAEECC Member Organizations:** |
| Serj Berelson | Greg Wikler | CEDMC |
| Bernie Kotlier  |  | CEE |
| Dan Suyeyasu  |  | CodeCycle |
| Christina Torok |  | CPUC |
| Raghav Murali  | Stephen Gunther  | CSE |
| Lara Ettenson | Merrian Borgeson | NRDC |
| Jonathan Burrows | Ryan Chan | PG&E |
| TBD  |  | Public Advocates Office |
| Ivan Jimenez |  | SBUA |
| Randall Higa | Brandon Sanders | SCE |
| Doug White |  | SDG&E |
| Randy Young |  | Sheetmetal Workers Local 104 |
| Courtney Kalashian  |  | SJVCEO |
| Erin Brooks  | Benjamin Piiru | SoCalGas |
| Lujuana Medina | Julie Tan | SoCalREN  |
| Marc Costa |  | The Energy Coalition |
| **Non-CAEECC Member Organizations:** |
| Don Arambula | Frank Spasaro | Don Arambula Consulting |
| Teddy Kisch |  | Energy Solutions |
| Anne Neiderberger | Jon Gordon | Enervee |
| Jay Luboff |  | Jay Luboff Consulting |
| Brian Barnacle |  | Outthink |
| Margie Gardner | Lauren Casentini | Resource Innovations  |
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**Applications:**

**Organization:**  Don Arambula Consulting (DAC)

​

**Lead:**  Don Arambula​​

**Alternate Proxy:**  Frank Spasaro​

 ​

Dr. Raab,

We are asking to be part of the upcoming CAEECC Market Transformation (MT) Working Group to address a limited set of issues regarding the handling of various seams issues between Market Transformation Initiatives (MTIs) and other energy efficiency (EE) related programs, ahead of the selection of an independent Market Transformation Administrator (MTA).  Because of our extensive knowledge of Market Transformation principles applied to California EE, our firsthand programmatic experience, and our desire to have future MTIs effectively achieve their intended goals, we are interested in participating in the MT Working Group.  Our participation should be seen by the Working Group members as a valuable resource especially given our in depth understanding and practicable knowledge of MT-focused programs. ​

​

The lead representative, Don Arambula, and his proxy, Frank Spasaro, have extensive knowledge of California’s MT-focused program design.  Both Don and Frank have a combined 55+ years in market transformation program experience in California.  In 1992, Don supported the development and release of the first market transformation type program in California.  Don has been instrumental in the development and implementation of many of California’s MT programs over the past three decades.  As the portfolio designer of the largest EE portfolio in California’s history, Don has firsthand knowledge of the difficulty with overlapping programs and the benefits of coordinated program offerings targeted at the same technologies and/or customer groups.  Frank Spasaro, alternate proxy, has similar extensive experience as the energy efficiency director for one of the four investor-owned utilities where he successfully coordinated the delivery of several EE programs focused on common EE technologies.  ​

​

In review of the CAEECC groundrules, we believe we can satisfy the criteria except for in-person meeting attendance due to the current California Stay-at-Home Order.   However, we are always available for call-in attendance to meetings.  We are not a CAEECC member nor an active organization in the proceeding.  DAC is an PG&E Independent Evaluator for energy efficiency program solicitations which may include the solicitation of the future MTA. ​

​

We sincerely believe that our inclusion in the Working Group will provide substantial value to the Working Group and the effort to address seams with future MTIs and EE/DSM programs. Please let us know if you have any questions or concerns regarding our request.  Thank you, in advance, for your consideration of our request.  ​

Don Arambula

Don Arambula Consulting

Phone:  714.403.6529

email: don.arambula@outlook.com

* Jay Luboff, Jay Luboff Consulting

See attached

**Appendix**

**Relevant Communication with CAEECC MTWG Members (confirming they do not need to apply):**

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* Julie Tan, County of Los Angeles (Manages SoCalREN’s public sector programs and EM&V)

---------- Forwarded message ---------
From: **Meredith Cowart** <meredith@concurinc.net>
Date: Wed, May 27, 2020 at 4:53 PM
Subject: Re: FW: CAEECC Market Transformation and Underserved WGs
To: Lujuana Medina <LMedina@isd.lacounty.gov>
Cc: Jonathan Raab <raab@raabassociates.org>

Thank you Lujuana. We'll let Julie know.

On Wed, May 27, 2020 at 4:19 PM Lujuana Medina <LMedina@isd.lacounty.gov> wrote:

Yes that works. Thanks Meredith.

**From:** Meredith Cowart <meredith@concurinc.net>
**Sent:** Wednesday, May 27, 2020 1:01 PM
**To:** Lujuana Medina <LMedina@isd.lacounty.gov>
**Cc:** Jonathan Raab <raab@raabassociates.org>
**Subject:** Fwd: FW: CAEECC Market Transformation and Underserved WGs

Lujuana,

Please see the emails below from Julie Tan - she would like to participate in both the Market Transformation and Underserved Working Groups. Since you plan to participate in both WGs on SoCalREN's behalf, do you think it would be appropriate for you to serve as Lead and Julie to serve as your Proxy on both groups?  Please let us know.

Best,

Meredith

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| **Jennifer Berg** |

 | 10:53 AM (3 minutes ago) |  |  |
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| to Jonathan, Lara, me |

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Yes, I think she should work through Lujuana. Jenny

**From:** Jonathan Raab [mailto:raab@raabassociates.org]
**Sent:** Wednesday, May 27, 2020 6:41 AM
**To:** Lara Ettenson <lettenson@nrdc.org>; Jennifer Berg <jberg@bayareametro.gov>
**Cc:** Meredith Cowart <meredith@concurinc.net>
**Subject:** FW: CAEECC Market Transformation and Underserved WGs

**\*External Email\***



Lara/Jenny

Read original email below from Julie Tan.

She’s a Program Manager at the County of Los Angeles and manages SoCalREN’s public sector programs and EM&V.  She’s interested in applying for membership in both WGs.

Should she just work w/Lujuana on this—as opposed to separate membership?

Thanks Meredith. Please let me know if you need any additional info from me/SoCalREN.



**Julie Tan**

Program Manager II-ISD-EES

Direct: (323) 265-8183

 Please consider the environment before printing this message.

**From:** Meredith Cowart <meredith@concurinc.net>
**Sent:** Monday, May 25, 2020 7:47 AM
**To:** Julie Tan <JTan2@isd.lacounty.gov>
**Cc:** Susan Rivo <Susan@raabassociates.org>; Jonathan Raab <raab@raabassociates.org>
**Subject:** Fwd: FW: CAEECC Market Transformation and Underserved WGs

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| CAUTION: External Email. Proceed Responsibly. |

Julie,

Susan forwarded your note to me as I'm now tracking Membership of both Working Groups. Per your question, we will discuss w/Co-Chair, facilitator, and SoCal Ren and then will get back to you.

Best,

Meredith

---------- Forwarded message ---------
From: **Susan Rivo** <Susan@raabassociates.org>
Date: Thu, May 21, 2020 at 8:59 PM
Subject: FW: CAEECC Market Transformation and Underserved WGs
To: Jonathan Raab <raab@raabassociates.org>
Cc: Meredith Cowart <meredith@concurinc.net>

FYI

Susan Rivo

Raab Associates, Ltd.

118 South Street, #3A

Boston, MA 02111

Tel. 617.350.5544

Fax. 617.350.6655

susan@raabassociates.org

[www.raabassociates.org](http://www.raabassociates.org/)

**From:**Julie Tan <JTan2@isd.lacounty.gov>
**Date:**Thursday, May 21, 2020 at 8:57 PM
**To:**Susan Rivo <Susan@raabassociates.org>
**Subject:**RE: CAEECC Market Transformation and Underserved WGs

Hello Susan,

I am looking to gain clarification on how to become a member of the working groups. I am a Program Manager at the County of Los Angeles and I manage SoCalREN’s public sector programs and EM&V. As a Program Manager for SoCalREN, do I need to complete applications for these two working groups?

Thanks,

**Julie Tan**

Program Manager II-ISD-EES

Direct: (323) 265-8183

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| Jonathan Raab <raab@raabassociates.org> |

 | 2:23 PM (1 hour ago) |  |  |
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| to Chas, me |

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Received and thanks for pointing out the problem w/email.

Yes received, and yes PG&E was on original MTWG.  You should check w/Ryan Chan who’s the lead CAEECC Member—about PG&E’s representation in this round.

**Jonathan Raab, Ph.D.**

Raab Associates, Ltd.

118 South Street, Suite 3A

Boston, MA 02111

Work. 617.350.5544

Cell. 617.529-9222

raab@raabassociates.org

[www.RaabAssociates.org](http://www.raabassociates.org/)

**From:**"Ehrlich, Chas" <CKE1@pge.com>
**Date:**Thursday, June 11, 2020 at 1:56 PM
**To:**Jonathan Raab <raab@raabassociates.org>
**Subject:**MTWG

Hi Raab,

Please confirm that this is a working email address: it is misspelled in the 5/21/2020 email announcing the MTWG (one “s” in [raabasociates.org](http://raabasociates.org/)).

I am interested in participating in the Market Transformation Working Group, but have not yet sought approval to do so as a PG&E empolyee.

Is there already PG&E representation on the committee?   Would I be welcome to participate as a non-IOU/PA representative?

Thanks,

-Chas

**Charles Ehrlich**
Customer Care Program Engineer, Senior

Custom Solutions for Energy Efficiency

Custom Implementation Team (CIT)

Pacific Gas and Electric Company

202 Cousteau Place | Davis | CA | 95618

**o: 530-757-5228 | m: 530-304-7767 | f: 530-757-5240**

**email:****Charles.Ehrlich@pge.com**

**Together, Building a Better California**

**Email Communication with Non-CAEECC MTWG Members who participated last time:**

* Resource Innovations (Margie Gardner as Lead, Lauren Casentini as Proxy)

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| **Meredith Cowart <meredith@concurinc.net>** |

 | Fri, May 22, 1:37 PM (5 days ago) |  |  |
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| to mgardner, Susan, Jonathan |

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Margie,

Jonathan forwarded me your note. That's correct - since you were previously a Member of the MTWG, you don't need to apply. I've taken note that Lauren Casentini will serve as your proxy.

Hope all is well!!

Best,

Meredith

---------- Forwarded message ---------
From: **Jonathan Raab** <raab@raabassociates.org>
Date: Fri, May 22, 2020 at 12:29 PM
Subject: FW: MTWG
To: Meredith Cowart <meredith@concurinc.net>

Pls note and respond.  Thx

**Jonathan Raab, Ph.D.**

Raab Associates, Ltd.

118 South Street, Suite 3A

Boston, MA 02111

Work. 617.350.5544

Cell. 617.529-9222

raab@raabassociates.org

[www.RaabAssociates.org](http://www.raabassociates.org/)

**From:**Margie Gardner <mgardner@resource-innovations.com>
**Date:**Friday, May 22, 2020 at 11:11 AM
**To:**Jonathan Raab <raab@raabassociates.org>
**Cc:**Lauren Casentini <lcasentini@resource-innovations.com>
**Subject:**MTWG

Hi Jonathan,

I see in the fine print that I don’t need to apply to be on the MT WG (let me know if I’m wrong about that)… But also wanted to let you know that Lauren Casentini from RI will be my back up if for some reason I can’t attended.

Have a great weekend!

**MARGIE GARDNER** *Senior Advisor, Resource Innovations*

503.810.1155 *cell*
[www.resource-innovations.com](https://na01.safelinks.protection.outlook.com/?url=http%3A%2F%2Fwww.resource-innovations.com&data=02%7C01%7Cmgardner%40resource-innovations.com%7Cd939ad8b4d124d7277c508d695c3aacd%7Cf47531636e054a32bf82acbc0efbc64d%7C0%7C0%7C636861064962553042&sdata=j6gLB%2BEXxfownKcl%2FFoWd5LikEQmLqp8N5QKm4tljD8%3D&reserved=0)

* Energy Solutions (Teddy Kisch as Lead):

Thanks for letting me know.

Cheers,

Meredith



On Wed, May 27, 2020 at 10:43 AM Teddy Kisch <tkisch@energy-solution.com> wrote:

Hi Meredith,

Nice hearing from you, we look forward to participating. I will be the lead representative.

Regards,

Teddy

**Teddy Kisch, LC  |**Senior Project Manager**|**tkisch@energy-solution.com  **|** **office:** (510) 852-8414 **mobile:**951-965-0004**|**449 15th Street, Oakland CA 94612

**From:** Meredith Cowart <meredith@concurinc.net>
**Sent:** Wednesday, May 27, 2020 7:41 AM
**To:** Teddy Kisch <tkisch@energy-solution.com>
**Cc:** Jonathan Raab <raab@raabassociates.org>; Susan Rivo <Susan@raabassociates.org>
**Subject:** Re: FW: Participation on MT working group

Teddy,

Per the email sent last Thursday, as a former member, Energy Solutions does not need to apply to participate in Phase 2 of the MTWG. You have already let us know that Energy Solutions would like to participate, so your org is included in the roster. Will you be the lead representative, or will someone else? Please let us know.

Best,

Meredith

On Fri, May 15, 2020 at 11:20 AM Meredith Cowart <meredith@concurinc.net> wrote:

Teddy,

Thanks for your message.  We've added you to the list of potential participants and will circle back in the next week or two with more information on what criteria need to be met in order to participate in the MTWG (Part 2).

Per your questions, you can refer to the [MTWG prospectus](https://4930400d-24b5-474c-9a16-0109dd2d06d3.filesusr.com/ugd/849f65_9cdf44e1588b4621a503231966f3a3a2.docx?dn=MTWG%20Part%202%20Prospectus%20redline.docx) , and the draft meeting summary, which will be posted by next Wed to the [meeting webpage](https://www.caeecc.org/5-14-20-caeecc) (under a new section which will be called "Documents Posted After the Meeting"). If you still have questions then, please let us know.

Best,

Meredith (and the CAEECC facilitation team)

---------- Forwarded message ---------
From: **Jonathan Raab** <raab@raabassociates.org>
Date: Thu, May 14, 2020 at 3:29 PM
Subject: FW: Participation on MT working group
To: Meredith Cowart <meredith@concurinc.net>

**Jonathan Raab, Ph.D.**

Raab Associates, Ltd.

118 South Street, Suite 3A

Boston, MA 02111

Work. 617.350.5544

Cell. 617.529-9222

raab@raabassociates.org

[www.RaabAssociates.org](http://www.raabassociates.org/)

**From:**Teddy Kisch <tkisch@energy-solution.com>
**Date:**Thursday, May 14, 2020 at 2:49 PM
**To:**Jonathan Raab <raab@raabassociates.org>
**Subject:**Participation on MT working group

Hi Jonathan,

Energy Solutions participated in the first round of MT working group. Are we able to participate in the second round of the MT working group?

Also - will the MT administrator be able to implement any of the future MT initiatives  within the MT program or simply oversee all work? It sounded like Christie intimated that in her comments, and so I wanted to make sure I understood clearly if you were referring the working group scoring committee or the entire MT initiative itself.

Thanks,

Teddy

**Teddy Kisch, LC  |**Senior Project Manager**|**tkisch@energy-solution.com  **|** **office:** (510) 852-8414 **mobile:**951-965-0004**|**449 15th Street, Oakland CA 94612

**Email Communication with New Non-CAEECC Members (Need to apply):**

* Jay Luboff, Jay Luboff Consulting

Jay,

Susan and Jonathan forwarded your message to me about your interest in participating in the MTWG (Part II). If you participated in the MTWG Part I, you do not need to apply (but please let me know that this is the case).  Otherwise, please see the application instructions on the meeting page per the below. Please let me know if you have any questions.

Warm regards,

Meredith

 **From:**"no-reply@crm.wix.com" <no-reply@crm.wix.com>
**Reply-To:**Jay Luboff <jay.luboff@jayluboffconsulting.com>
**Date:**Monday, June 1, 2020 at 10:35 AM
**To:**"facilitator@caeecc.org" <facilitator@caeecc.org>
**Subject:**New message via your website, from jay.luboff@jayluboffconsulting.com

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| **Jay Luboff** just submitted your form: |
| [https://www.caeecc.org/](https://u2382462.ct.sendgrid.net/ls/click?upn=NF0xrC6l-2FJE4TzUrHsONwruVu4wnz4n-2FmFeVTGS-2F0P4-3Dt4be_XwcjuWenVU2Phpkr9VHoUCnwsRXb-2BGH8m1jlZwITjJtRBrnl8AkFK1ux-2BYJiK0cTRqoS-2Bodq8K6KYGtNLc67gQ4jHULvxGqM0O-2Bu9wpAW6de-2FP1AXTcgaNuLDToEVD3YC6tXOYpQV707ubO5prGctpIHt-2FW46Pe2DWA5lCQ9QacycD4a6j0R7V-2Fo4zvJdSKl96ARg61umGZ5ksXb2-2F2wcptN25uhM4w0QG1FT-2F38J5z7-2F12TUNtRR00lYrR939XhmJ-2B5yNuGG-2BBRikARhqDPJbh7PzVJQH99rQrbseXa5xNrTWH5WBgmbj43dhVrE6SuO8NuUIFAJRJFnNxZCk8P5g-3D-3D) |

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| **Message Details** |
| Name: Jay Luboff |
| Email: jay.luboff@jayluboffconsulting.com |
| Subject: MTWG II |
| Message: Hi Jonathan, I am interested in joining the MTWG II. I do not see the criteria listed, but if there is an "application" please point me to it. … and yes, I do have the request MT experience in CA, with NEEA in the Northwest and elsewhere. Thank you very much for your kind consideration. |

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* Don Aramula, Don Arambula Consulting

Meredith

Did I not forward this to you previously?

Looks like should add Don to list of Underserved for sure, and maybe MTWG.

Will discuss w/co-Chairs and follow-up w/you.  He will need reminder about application deadlines, and maybe extension on Underseved if we dropped the ball.

**Jonathan Raab, Ph.D.**

Raab Associates, Ltd.

118 South Street, Suite 3A

Boston, MA 02111

Work. 617.350.5544

Cell. 617.529-9222

raab@raabassociates.org

[www.RaabAssociates.org](http://www.raabassociates.org/)

**From:**Lara Ettenson <lettenson@nrdc.org>
**Date:**Tuesday, June 2, 2020 at 1:12 PM
**To:**Jennifer Berg <jberg@bayareametro.gov>, Jonathan Raab <raab@raabassociates.org>
**Subject:**FW: pls read and respon if interested: CAEECC Market Transformation and Underserved Working Group Opportunities

Hi All –

See my interchange with Don. I’ll reply to him tomorrow after our check in.

Best,

Lara

**From:** don arambula <don.arambula@outlook.com>
**Sent:** Monday, June 1, 2020 11:57 AM
**To:** Ettenson, Lara <lettenson@nrdc.org>
**Subject:** Re: pls read and respon if interested: CAEECC Market Transformation and Underserved Working Group Opportunities

Lara

As for the commitment, I should be fine as there are fewer solicitations to monitor this year.  The only significant roadblock would be Tuesday meetings as this time is lockdown by PRG meetings.  If I'm allowed to be represented as an alternate (Frank Spasaro) when such conflicts arise, then there is no issue.

As for the MTWG, I am one of the PG&E IEs so I could be working the MTA solicitation.  I did notice potential MTA bidders on the working group (e.g., RI) so, I'm assuming it would be fine.  I can check with PG&E and the CPUC.

Pls let me know if it feels to awkward else I'll submit.  Thanks.

Don Arambula

Don Arambula Consulting

Phone:  714.403.6529

email: don.arambula@outlook.com

**From:** Ettenson, Lara <lettenson@nrdc.org>
**Sent:** Monday, June 1, 2020 7:30 AM
**To:** don arambula <don.arambula@outlook.com>
**Subject:** RE: pls read and respon if interested: CAEECC Market Transformation and Underserved Working Group Opportunities

Hi Don –

I think for sure the underserved group is fine. For market transformation, we’d have to double check but I would think it should be ok given that the IE and MT wouldn’t overlap. However, I don’t recall you being very engaged in the last group you signed up for. The [**Criteria and Application Process for Underserved WG Phase I**](https://eur05.safelinks.protection.outlook.com/?url=https%3A%2F%2F4930400d-24b5-474c-9a16-0109dd2d06d3.filesusr.com%2Fugd%2F849f65_5d5caf6aec204c7084da3ab97436dc65.docx%3Fdn%3DCriteria%2520and%2520Application%2520Process%2520for%2520Und&data=02%7C01%7C%7C211db70fa27d4a6492c808d806384f3a%7C84df9e7fe9f640afb435aaaaaaaaaaaa%7C1%7C0%7C637266186198486797&sdata=WQ1jDzhaO4Dy5wn9yD%2BMmAUfD94r4LVP2TjCrfwwPYs%3D&reserved=0) includes the following. Can you commit to being at all the meetings and actively engage?

Thanks,

Lara

·         Agreement to abide by all the CAEECC roles and responsibilities for Members and by the CAEECC Working Group [groundrules](https://eur05.safelinks.protection.outlook.com/?url=https%3A%2F%2Fdocs.wixstatic.com%2Fugd%2F849f65_68e76679fd054bd6ad34e1c2ba0a4168.pdf&data=02%7C01%7C%7C211db70fa27d4a6492c808d806384f3a%7C84df9e7fe9f640afb435aaaaaaaaaaaa%7C1%7C0%7C637266186198496791&sdata=QuCBNzmajOuNHo%2F8AHfJsoAS8RFYVy%2BmlMxlKI4rONk%3D&reserved=0), including but not limited to:

Ability to attend all Working Group Meetings (in person when face-to-face meetings resume, or online otherwise) [Note: Can send alternate from organization if lead representative cannot attend];

**From:** don arambula <don.arambula@outlook.com>
**Sent:** Thursday, May 28, 2020 10:31 AM
**To:** Ettenson, Lara <lettenson@nrdc.org>
**Subject:** Re: pls read and respon if interested: CAEECC Market Transformation and Underserved Working Group Opportunities

Lara

Hope all is well.  I'm experiencing lack of coordination among multiple DSM programs regarding HPWHs so, the need for coordination is very timely.  I have some ideas on how to solve it.

Also, the HTR issue is very interesting to me.  I had sponsored the notion of replacing HTR with DAC as a way to create a common, stable definition for all DSM offerings across California.  I also have a deep history with the origins of HTR from the early 2000s.  We had tried to identify truly underserved but the customer groups tended to be higher income.

Assuming my current IE role doesn't matter, do you see a problem with me requesting  to join the groups?

Don Arambula