

RTR Appendix

Southern California Edison, Pacific Gas and Electric, Southern California Gas, and San Diego Gas and Electric (“Joint Utilities” or “Joint IOUs”) developed Responses to Recommendations (RTR) contained in the evaluation studies of the 2013-2015 Energy Efficiency Program Cycle. This Appendix contains the Responses to Recommendations in the report:

RTR for the 2013-2015 Commercial Direct Install Process Evaluation: Phase 2 Report
(Opinion Dynamics, Calmac ID #CPU0135.02, ED WO #ED_I_Com_2)

The RTR reports demonstrate the Joint Utilities’ plans and activities to incorporate EM&V evaluation recommendations into programs to improve performance and operations, where applicable. The Joint IOUs’ approach is consistent with the 2013-2016 Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan¹ and CPUC Decision (D.) 07-09-043².

Individual RTR reports consist of a spreadsheet for each evaluation study. Recommendations were copied verbatim from each evaluation’s “Recommendations” section.³ In cases where reports do not contain a section for recommendations, the Joint IOUs attempted to identify recommendations contained within the evaluation. Responses to the recommendations were made on a statewide basis when possible, and when that was not appropriate (e.g., due to utility-specific recommendations), the Joint IOUs responded individually and clearly indicated the authorship of the response.

The Joint IOUs are proud of this opportunity to publicly demonstrate how programs are taking advantage of evaluation recommendations, while providing transparency to stakeholders on the “positive feedback loop” between program design, implementation, and evaluation. This feedback loop can also provide guidance to the evaluation community on the types and structure of recommendations that are most relevant and helpful to program managers. The Joint IOUs believe this feedback will help improve both programs and future evaluation reports.

¹ Page 336, “Within 60 days of public release of a final report, the program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings. The IOU responses will be posted on the public document website.” The Plan is available at <http://www.energydataweb.com/cpuc>.

² Attachment 7, page 4, “Within 60 days of public release, program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings as they relate to potential changes to the programs. Energy Division can choose to extend the 60 day limit if the administrator presents a compelling case that more time is needed and the delay will not cause any problems in the implementation schedule, and may shorten the time on a case-by-case basis if necessary to avoid delays in the schedule.”

³ Recommendations may have also been made to the CPUC, the CEC, and evaluators. Responses to these recommendations will be made by Energy Division at a later time and posted separately.

Response to Recommendations (RTR) in Impact, Process, and Market Assessment Studies

Study Title: 2013-2015 Commercial Direct Install Process Evaluation: Phase 2 Report
Program: Commercial DI
Author: Opinion Dynamics
Calmac ID: CPU0135.02
ED WO: ED_I_Com_2
Link to Report: http://www.calmac.org/publications/CPUC_Commercial_DI_Evaluation_Phase_II_Report_FINAL_2017-04-25.pdf

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	Disposition	Disposition Notes
				If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.
1	39	Identifying and reaching the key decision maker within a business, especially a small business, can be challenging. However, results from the customer survey indicate that contacts at participating customers were significantly more likely to have personally participated in the energy audit than those at nonparticipating customers. While there are multiple potential explanations for this finding, we hypothesize that this one-on-one interaction may help better educate customers about the benefits of the retrofit and give implementers a greater opportunity to make their case for full participation (i.e., installation of recommended equipment).	Where possible, include the individual responsible for making decisions regarding energy efficiency investments in the energy audit.	PG&E, SCE, SDG&E	Accepted	Based on Direct Install Implementer feedback, attempting to engage key decision makers directly is already standard practice. Implementers understand that working directly with key decision makers throughout the sales process increases the likelihood of program participation, and make every reasonable effort to work directly with that person or persons. However, in many cases the decision maker(s) delegate to another representative of the customer for parts of the sales process, including the energy audit, and then become re-involved when the project proposal is being presented. PG&E will communicate the recommendation to Direct Install Implementers to reinforce the message. No program changes required.