

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 Universal Audit Tool Impact Evaluation—Residential (DNV GL, Calmac ID #CPU0160.01, ED WO #ED_D_Res_9)

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: Universal Audit Tool Impact Evaluation—Residential
Program: UAT Residential
Author: DNV GL
Calmac ID: CPU0160.01
ED WO: ED_D_Res_9
Link to Report: http://www.calmac.org/publications/EDRes9_UAT_ResReport_CALMAC_final.pdf

Item #	Sec. #	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	4.3.4	Savings estimates for high engagement customers can be as much as 2x to 3x the savings estimates for low engagement customers.	Prioritize converting current users to a higher level of engagement. Survey and impact results in combination indicate increased savings from moving already acquired users up into higher levels of engagement is likely to be greater than the yield from new users with high acquisition costs.	All IOUs	Accepted	Prioritization of engaged customers is currently in various stages of implementation across the IOUs. Identifying acquired customers and facilitating the customer's automated journey towards more comprehensive savings is/will be a priority to enable a more cost-effective approach to higher-level engagement.
2	4.3.3 and 4.3.5.5	The majority of users indicated that they followed a link/banner ad to the tool when on their utility website or that they received an email with a link to the tool. The highest completion rate achieved to date has been by PG&E in December 2015 when it deployed an all-electronic marketing mix of social media, email, digital banners, and search engine marketing (SEM) that yield a 92% completion rate. SDG&E's marketing efforts have included email campaigns that include sweepstakes and they have seen success with these efforts with an all-time high completion rate for SDG&E of 40% in December 2016.	Prioritize using electronic methods of promotion and outreach to help market the web-based tool.	All IOUs	Accepted	Electronic methods of promotion/cross-promotion are in place and currently being expanded to ensure acquired customers have higher-level engagement as well as simplifying the initial customer experience.
3	4.3.5.1 and 4.3.5.2	Around half of all users indicated that they used the tool a few times a year or less. The majority of users (62%) felt one visit to the tool was enough since nothing in their home had changed or that they had sufficient information.	Message the value of repeat visits. Messaging, possibly derived through self-learning algorithms underlying the tool, that underscores the value of repeat visits/the next visit—such as continued, customized and valuable information that encourage the customers to continue to engage with the tool—will be more effective.	All IOUs	Accepted	IOUs agree that repeated visits can lead to higher engagement, however, the priority is to cost-effectively enable and/or introduce valuable information or tools to keep customers engaged.

4	4.3.8	Two of the top three reasons indicated by non-users on the survey relate to either a perception that they are already there with respect to their home's level of energy efficiency and their knowledge of what they need to do to save energy or to a presumption that the tool will not have anything new or useful to tell them.	Present customer testimonials of successful savings through engagement to low engaged customers. Match such testimonials to low engaged customers by baseline consumption, daily use pattern and other relevant dimensions to provide empirical evidence of tool efficacy that they can trust and that will spur them to action.	All IOUs	In Review	IOUs will be reviewing various means of promoting high level engagement and sharing success to low engaged customers (including possible testimonials)
5	3.4.4	Results for the model-based matching generated using AMI data indicate well-balanced comparison and treatment matches. In addition, the quality of matches improved substantially for SDG&E electricity data while the conclusion on PG&E electricity data remains unchanged.	The exploratory work in model-based matching suggests there could be benefits from using AMI data in matching.	All IOUs	Accepted	IOUs agree – AMI data is recommended and would benefit future studies.