

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 and beyond. This Appendix contains the Responses to Recommendations in the report:

RTR for the CPUC Group A: Residential Direct Install Program Impact Evaluation - Program Year 2021 (DNV GL, Calmac ID #CPU0351.01)

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 CPUC Decision (D.) 07-09-043¹ and the Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan² for 2013 and beyond.

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 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.”

² 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>.

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
SDG&E Response

Study Title: Residential Direct Install Program - Program Year 2021
Program: Direct Install
Author: DNV GL
Calmac ID: CPU0351.01
ED WO: Residential Direct Install Program - Program Year 2021
Link to Report: https://www.calmac.org/publications/CPUC_Group_A_PY2021_Residential_Install_Program_Impact_Evaluation_-_Final_Report_CALMAC.pdf

MANAGEMENT APPROVAL AFTER REVIEWING ALL IOU RESPONSES		
Name		Date
PG&E	N/A	
SCE	N/A	
SCG	N/A	
SDG&E	Briana Bracamonte	8/18/2023

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	Disposition	SDG&E 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	74	As in the past two program years, direct install smart thermostats have a low gross realization rate.	Although the claimed savings for smart thermostats were revised downwards by approximately 10% starting in PY2024, the continued low gross realization for this measure suggests that the savings need further revision. The findings also suggest that programs consider improved customer/contractor training when installing smart thermostats in direct install programs.	CPUC, All PAs	Accepted	SDG&E agrees with further revising the savings to match closer to realized impacts and supports the decision to evaluate and update the measure package savings. With SDG&E's current residential direct install programs the implementer provides guidance to customers on how to navigate the smart thermostat application and setting. The customer also has access to the manual and help center with pertinent information, including video tutorials. SDG&E will encourage their third-party implementers to continue both contractor and customer training on the use and programming of smart thermostats.
2	74	Direct install fan motors also continue to have low realization rates.	We recommend a new HVAC motor baseline study and a revision to the fan motor replacement measure package since its baseline fan motor efficiency is based on a 15-year-old study. Together with this update, programs should review the criteria for installing these measures.	CPUC, All PAs	Accepted	SDG&E supports the adoption of a new baseline study for HVAC motor fan replacements, if this measure is to remain active.
3	74	Similarly, direct install fan controls have a low realization rate.	The fan motor control measure package savings are based on a 2012 SCE study. We recommend a review to understand why the savings based on that study are not realized and a revision of the fan control measure package savings methodology. Together with this review, the programs should re-assess the criteria for installing these measures	CPUC, All PAs	Accepted	SDG&E supports the adoption of a new baseline study for HVAC motor fan replacements.

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4	75	The water heating (aerator) measures included in the current evaluation also have a low realization rate.	There are two possible explanations for the low aerator realization rates: 1) inflated unit energy savings due to inaccurate assumptions in the deemed measure package of hot water consumption at sinks or electric water heater presence, or 2) the change in flow rate could be less than assumed or is uncertain. Both explanations require investigation and correction if necessary	CPUC, All PAs	Accepted	SDG&E supports an update to the existing measure package to address any baseline assumptions that have led to lower realized savings.
5	75	Two of the three HVAC tuneup measures (HVAC fan repair and coil cleaning) delivered close to half of the claimed savings for each measure, while the third (HVAC RCA) only delivered 2% of the claimed savings for the measure.	This finding supports prior decisions to sunset the RCA measure. The measure should remain closed	CPUC, All PAs	Accepted	SDG&E supports expiration of these HVAC tune up measures.
6	75	Savings shapes indicate that measures like fan motors and duct sealing reduce consumption proportionally to the HVAC consumption and deliver savings during the summer peak demand hours and across all seasons.	Continue to include these measures in the residential HVAC program portfolio	CPUC, All PAs	Accepted	SDG&E agrees with the evaluators' recommendation to include measures like fan motors and duct sealing in the residential portfolio. Currently, SDG&E's current residential direct install programs offers fan motors and duct sealing measures. SDG&E supports including these measures in current and future programs and will encourage our third-party Implementers to adopt these in their programs, where applicable.
7	75	The demographic profiles and evaluated NTGRs indicate that these programs are reaching the right population segments	Maintain targeting and outreach to these customers.	CPUC, All PAs	Accepted	SDG&E currently utilizes KPIs to measure and reward 3Ps for targeting and engaging HTR and DAC customers. Additionally, SDG&E is currently soliciting for equity focused programs to further engagement from this customer segment.
8	75	The programs' new integrated demand side management is yielding success. A higher proportion of participants was aware and enrolled in SCE's smart thermostat demand response program compared to nonparticipants.	Continue to offer information to increase awareness about SCE's demand response programs and offer to enroll participants in these programs at the time of energy efficiency installations.	CPUC, All PAs	Accepted	SDG&E agrees with the evaluators' recommendation to increase awareness with demand response programs. SDG&E has various programs that includes information around SDG&E's demand response programs. For example, SDG&E's RES program, a single-family direct install program, increases awareness about SDG&E's demand response programs by installing smart thermostats that are pre-enrolled into SDG&E's AC Saver Program. SDG&E will continue to encourage third-party Implementers to increase awareness, where applicable.
9	76	While customers were generally satisfied with the programs, with 87% reporting overall satisfaction, they reported somewhat lower satisfaction with the information and the benefits the programs provided	Follow up to ensure installed equipment works as intended and provide better education and information, particularly for measures with behavioral aspects, to enable customers to receive the full benefits of the installations.	CPUC, All PAs	Other	SDG&E currently utilizes KPIs to measure and reward third-party implementers for conducting surveys from past participants where they receive feedback on whether participants were satisfied with the installed measures. Any issues regarding the installation will be included in the response and the third-party implementer will follow up with the participant to address their concerns.
10	76	Program activities were consistent with one of the CPUC's ESJ goals and more information is needed to	Establish an equity metric framework and specific equity- and access-related metrics for all	CPUC, All PAs	Other	SDG&E agrees that ESJ goals should be included in certain programs. However, SDG&E believes that these goals are better

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		assess consistency with the rest of the CPUC ESJ goals.	programs. Where a quantitative metric is not practical, guide programs about what activities would be consistent with the ESJ goals.			delivered and tracked in programs that are indicated as either a market support or equity program. Additionally, within our resource acquisition portfolio, HTR and DAC metrics are included and tracked.