

## 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: PY2021 Local Third-Party Impact Evaluation*** (Calmac ID #CPU0352.01)

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.) 07-09-043<sup>1</sup> and the Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan<sup>2</sup> 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.<sup>3</sup> 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.

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<sup>1</sup> 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.”

<sup>2</sup> 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>.

<sup>3</sup> 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:** Local Third-Party Programs – Program Year 2021  
**Program:** Residential Zero Net Energy Transformation Program (RZNET – SDGE4002)  
**Author:** DNV  
**Calmac ID:** CPU00352.01  
**ED WO:** GroupA\_L3PP\_YR5 - Group A PY2021 Local Third-Party Program Evaluation  
**Link to Report:** [Group A PY2021 Local Third-Party Impact Evaluation - Final Report CALMAC.pdf](#)

<b>MANAGEMENT APPROVAL AFTER REVIEWING ALL IOU RESPONSES</b>		
	Name	Date
PG&E		
SCE		
SCG		
SDG&E	Jen Taylor	8/2/2023

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	4.1.3	Evaluated NTG values are higher than DEER default in most cases.	Program attribution (NTGRs) is higher than expected. Programs should continue targeting similar population segments. We recommend that the DEER team review the default NTG values for measures offered through downstream delivery channels.	All	Accepted	SDG&E agrees with the evaluated results and plans to support potentially higher NTG values for evaluated measures during the next draft DEER Resolution comment period.
2	4.2.2	Direct outreach and partnering with other organizations/entities were effective outreach innovations/strategies.	Programs that use intelligent targeting and other data-based approaches should consider a hybrid approach that leverages direct outreach strategies.	All	Other	SDG&E's RZNET program already uses a direct marketing approach that proved successful as noted in the study.
3	4.5	Not all programs tracked outreach innovations making it difficult to assess their true impact.	Programs should identify a common set of KPIs based on similar definitions and benchmarks to monitor and facilitate comparison of the performance of innovations across programs over time and use the results to refine program design and improve outcomes.	All	Reject	SDG&E rejects the evaluator's recommendations that all programs should identify a common set of key performance indicators. SDG&E does strive to have common key performance indicators with similar definitions across programs where there are similar goals and targets. However, each program targets a specific segment with a specific program design. Therefore, key performance indicators are developed to ensure success with that specific segment and design.
4	4.2.2, 4.7	Outreach activities appear to be one-directional, where the local 3PPs do not provide opportunities for community input into program design.	Build more community input into all phases of program delivery.	All	Other	SDG&E rejects the evaluator's recommendations that third-party implementers need to provide an opportunity for input into the program design as at the phase of implementation does not allow for program design changes. The program design adheres to a rigorous solicitation process where many stakeholders provide input. Additionally, prior to implementation of the program there is a public webinar where an opportunity to provide input is given. However, most SDG&E programs do solicit feedback from participants and make adjustments to their programs based on this feedback.
5	4.4.3, 4.6.2	Program delivery innovations will take time to achieve deeper savings.	Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery innovations in delivering deeper savings.	All	Accepted	SDG&E agrees with the evaluators recommendations that the local third-party programs are in their beginning stages of implementation and will require more time to achieve deeper savings.

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	Disposition	Disposition Notes
6	4.7	The program's activities were consistent with some of the CPUC ESJ goals but not others, and more information is needed to assess consistency with several others.	PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESJ Goals 4.1, 6.1, 8, and 9.	All	Other	SDG&E agrees that ESJ goals should be included in certain programs. However, SDG&E believes that these goals are better 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.
7	4.3.2	Local 3PPs are more effective than peer programs at reaching HTR and DAC customers.	Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.	All	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.