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 Targeted Process Evaluation of the Local Government Partnership Program: Final Report (Research Into Action, Calmac ID #SCE0397.00, ED WO #2036)

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.

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.

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."

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:Targeted Process Evaluation of the Local Government Partnership Program: Final ReportProgram:LGPAuthor:Research Into ActionCalmac ID:SCE0397.00ED WO:2036

Link to Report: http://calmac.org/publications/LGP_TPE_Final_Report_11.28.16.pdf

					PG&E (if applicable)		SCE (if applicable)		SCG (if applicable)		SDG&E (if applicable)	
ltem #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommen- dation Recipient	Disposi- tion	Disposition Notes	Disposi- tion	Disposition Notes	Disposi- tion	Disposition Notes	Disposi- tion	Disposition Notes
	84-85	The LGP program presents a steep learning curve for LGs, implementers, and program staff alike, and partnership representatives report com- plex administrative barriers to completing LGP work. Four- teen LGP representatives, without prompting, reported a steep learning curve to under- standing how the partnerships operate, their obligations as implementer or partnership participants, and the adminis- trative requirements to which they must adhere. For new partnership staff, the time spent learning the ins and outs of the program distracts from project work, delaying partner- ship activities. The challenges associated with getting up-to- speed on partnership require- ments also leads some LGs to deprioritize partnership work. Further, there is evidence that new IOU program staff also ex- perience a learning curve with the LGP program; they may not know how to provide in- formation or support re- quested by partnerships and may have less time available to field information requests as they get up to speed.	The IOUs should develop Quick Start guides for their program implementers and LGs. The Quick Start guides should outline, in clear lan- guage, the goals of the IOU's LGP program, the role that LG and LGP staff play in meeting those goals, the activities eligi- ble and ineligible for funding instructions for invoicing and rebate applications, and time- lines for progress reporting. The guides could also include preapproved M&O materials. A Quick Start guide would ena- ble new partnership staff to get up to speed on the pro- gram more quickly, and it could serve as a resource for IOU program staff. We recom- mend that the IOUs update this annual manually so that it includes up-to-date program information. Or, if the Quick Start guides are provided online, the IOUs could make ongoing updates as program changes occur. An online guide could also serve as a platform for the IOUs to communicate changes in incentives and re- bates. Over time, the IOUs might collaborate to create a single LGP Quick Start guide	If incorrect, please indi- cate and redi- rect in notes. All IOUs	Choose: Accepted, Rejected, or Other Accept	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review. PG&E hosts a "new partners" boot camp each year in an effort to "on- board" new and existing LG staff within LGPs. The boot camp pro- vides an overview of PG&E pro- grams, incentives and partnerships as well as guest speakers from the LGPs sharing best practices. At- tendees are provided copies of the slide deck as a reference. PG&E will work to develop a Quick Start guide to supplement this effort. An example of an existing guide aligned with the Quick Start guide is PG&E LGP Regional Direct Install Manual which captures in one place all policies and procedures associ- ated with implementing direct in- stall. PG&E has also created a DropBox containing preapproved M&O ma- terials which will be shared with its Partners. PG&E is working with the other IOUs to be more consistent state- wide. Several of the strategies for greater consistency have been iden- tified in the EE Business Plan. Any updates to the LGP program model will be reflected in the Quick Start guide.	Choose: Accepted, Rejected, or Other Accept	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review. SCE is working to develop more ef- fective tools to explain the revised ELP model. This includes new mar- keting pieces and new checklists to assist partners. Additionally, SCE will begin developing a quick start guide for new partners. SCE is also considering developing a new partner orientation similar to PG&E. Lastly, SCE is working with the other IOUs to be more consistent statewide. Several of the strategies for greater consistency have been identified in the EE Business Plan. Any updates to the LGP program model will be reflected in the quick start guide.	Choose: Accepted, Rejected, or Other Accept	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review. SoCalGas will work with the other IOU's to develop a quick start guide for new partners. SoCalGas is also considering devel- oping a new partner orientation similar to PG&E and will coordinate with SCE on this activity. Lastly, SoCalGas is working with the other IOUs to be more consistent statewide. Several of the strategies for greater consistency have been identified in the EE Business Plan. Any updates to the LGP program model will be reflected in the quick start guide.	Choose: Accepted, Rejected, or Other Accept	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review. SDG&E will work with the other IOU's to develop a quick start guide and orientation for new partners, however SDG&E is not looking to add new partnerships at this time. Current LGP contracts are valid through 2020, at which time SDG&E, with input from our LGPs and LGs, will determine if modifying the list of LGPs is appropriate for this region. Lastly, SDG&E is working with the other IOUs to be more consistent statewide. Several of the strategies for greater consistency have been identified in the EE Business Plan. Any updates to the LGP program model will be reflected in the quick start guide.

2 R62 Idea wate is the statubal of th													
1 1			In addition to the steep pro-	that ensures LGPs partnering									
Image: Section in a particulation that has been section in a particulation that has been section in a particulation in the partin the particulatio			gram learning curve, 20 part-	with multiple IOUs do not face									
1 1			nership representatives re-	inconsistent requirements.									
2 2 56 60% subset to structure the structure that the spectrum of the structure			ported administrative chal-	Other information that would									
2 6-8 168-wine the section sectin section section sectin section sectin section section section s			lenges associated with the re-										
2 4.8 Use where the rescapeut to rescape the rescapeut to rescapeut to rescape the rescapeut to rescapeu			-										
I Is and information of the starting of the star				-									
 Revert. In the statement with a state of the statement with the statement wi				_									
IIIs bed of frage about the section in body and application strength the particular space about the dimension of the body space the space about the dimension of the body space the space about the dimension of the body space the space about the body space about the body space the space about the body space about the body space about the body spaceII				e ,									
Image: Section reported to indication reported in order sources while partners while indications while partners while partner													
2 8-4 LOPs value to technical asking to approximation of approximation approximation of approximation approximated approximation of approximation of approximated appr			-										
Image: Solution partnership: Solution partn													
Image: Selips:				-									
2 83-46 End-where the technical content is the indication of the CP arrows that a strate- ring at CP arrows the CP arrows that a strate- ship content to the technical content is the content of the CP arrows that a strate of the CP arrows that a strate- ship content to the content of the CP arrows that a strate- the content to the content of the CP arrows that a strate- tent content to the content of the content of the content the content to the content of the content of the content the content to the content of the content of the content the content to the content of the content of the content the content to the content of the content of the content the content to the content of the content of the content of the content of the content t			-										
2 856 Log-subset the testing and the Log program. In addition, the duck symmetry is work to a practical place to a practical place to the confidemention metrodism the cold growmetry metrody is which to a cold growmetry metrody is which to a cold growmetry metrody is the confidemention of the confidemention is a constrained of the confidemention of the confidemention is a constrained of the confidemention of the confidement of the confidemention of the confidement													
2 85-46 Get what the technical assistment from additions or any ordination and 3 JOC. All IOUs Accept SGRE provides LGP: the page SGRE provides LGP: the page 2 85-46 Get what the technical assistment from addition or any provide lines for addition or addition of addition or addition of addition of addition or addition of addition or addition of addition o													
2 85.46 Lefs value the technical assistance offense is supported to East the calculation of magning energy efficiency. Con- munity in which lass are supported to East the calculation of magning energy efficiency. Con- munity in which lass are supported to East the calculation of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is through the Construction of magning en- ergy assings. Jacobian expension is support 11 calculation of on- tage assings. Jacobian expension is through the Construction is support 11 calculation of on- tage assings. Jacobian expension is through the Construction is support 11 calculation of on- pare ergy assings. Jacobian expension is support 11 calculation of on- tage assings. Jacobian expension is through the Construction is support 11 calculation of on- satisfield is assistance offension. The magning en- ergy assings. Jacobian expension is support 11 calculation of on- satisfield is assistance offension. The social status expension is through the Construction is through the Construction in addition. Jacobian expension is support 11 calculation of on- satisfield is assistance offension. The magning en- ergy assings. Jacobian expension is through the Construction is through the they receare through the Construction is through the Construction in addition. Jacobian expension is through the construction is through the they receare through the conspension is through the construction is through the constru- ing a													
2 8-8 Left value the collaborative meter energy efficiency commender energy efficiency energy efficiency commender energy efficiency commender energy efficiency energy efficiency energy energy. The process learned from efficiency energy energy energy efficiency energy energy energy energy efficiency energy energy energy energy efficiency energy energy efficiency energy energy energy efficiency energy energy efficiency energy en													
2 85-80 GP value the technical assist trace for monothy in which GS or LGPs multiply multiply multiply technical assistance of Homosations and Society and Store Society discussed which GS or LGPs multiply multiply multiply multiply technical assistance of Homosations and Society and Store Society discussed which GS or LGPs multiply mu													
III				-									
L N Numbry multiply movel Loss of LGPs partnershy innovations and subject may participate. Finally, the Partnershy innovations and subject may participate. Finally through the LGP subject meets tace currently available through the LGP program and before in complex energy savings, of Date in additions of ongoing energy savings, of Date in partnershy report patients that calculation of ongoing energy savings, of Date in partnershy report patients that calculation of ongoing energy savings, of Date in patients that they would benefit for adultical partnershy in the LGP. Subject for the calculation of ongoing energy savings, of Date in patients the savings platform that would sape port patients that calculation of ongoing energy savings, of Date interstructure the program and before it combles through the HDC structure interstructure the program and before it combles through the HDC structure through the HDC structure interstructure the program and before it combles through the HDC structure through the end structure through the HDC structure through the through the HDC structure through the end structure through the end structure through the HDC structure through the end structure through the				_									
Image: Participation of the solution of the solutin the solution of the solutin the solution of													
2 85-96 LGPs value the technical assistance of terring to sport may provide ideas to add through the CSP program and would benefit from additional technical assistance of terring to sport may provide ideas to addition through the CSP program and would benefit from additional technical assistance of terring to sport may calculation of addition and the provide through the CSP program and would benefit from additional technical assistance of terring to sport may calculation of addition technical assistance of terring to sport may calculation of addition technical assistance of terring to sport may calculation of additional technical assistance of terring to sport may calculation of addition technical assistance of terring to sport may calculation of addition to the to calculation of addition addition technical assistance of terring to sport may calculation of addition technical assistance of terring to the port calculation of addition technical assistance of terring to the port calculation of addition terring addition to the technical assistance of the program terring the port calculation of addition the port addition addition addition terring addition, PG&E is actively explore the port addition addition the port addition, PG&E is actively explore the port addition addition the port addition, PG&E is actively explore the port addition addition the port addition, PG&E is actively explore the port addition addition additis port methor is calculated eneregy straing, add papring the port													
Image: Substance is substance to support on yrowide loads for ad- ditional actions that partners his can take to augment their partners this partners to include in their partners this partners this partners this partners this equides. All IOUs Accept SS&E is developing a meter based swips part of this score to include in the guides. Other 1 for Calculation of orgoing en- ergry swings. CL is exploring opportunities several opportunities to assist with the local governments with calculation of ongoing en- gry and to build basefit from additional through the IOC. Partnership representations on the local in partnership argebra there would basefit from additional would basefit from additional they would not be able to con- duct sole of through the IOC. Partnership representation of the technical assistance they receive through the IOC. Partnership representation of the technical assistance they receive through the IOC. Partnership representation of the technical assistance they receive through the intervals from additional the partnership argebra to in addition of the technical assistance they receive through the intervals from additional technical assistance they receive through the intervals from additional the partnership representation of the technical assistance they receive through the intervals from additional the partnership representation of the technical assistance they receive through the intervals from additional technical assistance they receive through the intervals from additional technical assistance they receive through the intervals from additional the partnership argementation and the intervals from additional the technical assistance they receive through the intervals the partnership assignest that partnership staff and resources. In partnership istar and resources													
Image: Part of the part				•									
Image: Set in the standard of the standard in the partnership efforts that could be update include in the guides. distant actions that partnership efforts that could be update include in the guides. All IOUs ACCEPT SDG&E provides LGPs the opport partnership efforts that could be update include in the guides. ACCEPT SDG&E provides LGPs the opport partnership efforts that could be update include in the guides. ACCEPT SDG&E provides LGPs the opport part partnership efforts that could be update include in the guides. ACCEPT SDG&E provides LGPs the opport part partnership efforts that would support port partnership efforts at through the LGP program and would benefit from addition of ongoing energy savings, 2E IMS inplementing EMS, and IOC. Partnership efforts the could customers through the LGP program to believe it enables it rectical assistance of thrings the fort will intillarly for calculation of ongoing energy savings, 2E IMS inplementation, and 3J JOC. ACCEPT SDG&E provides LGPs the opport part partnership efforts will have part partnership efforts will have parave partnore partnore have partnership efforts will have partners													
Image: Provide the subject on take to sugment their partnership efforts that could be useful to include in their partnership efforts that could be useful to include in their partnership efforts that could be useful to include in the guides. All IOUs Accept savings platform that would support to a guorements with the local governments with a starter of target to support local governments with the local governments with t													
Image: Inclusion of ongoing savings splatform that would support uptile score to support local governments with the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings pattern that would support uptile score of the savings and paying rebases. At though the is offer the calculation of ongoing energy savings. SCE is exploring savings savings and paying rebases. At though the is offer the calculation of ongoing energy savings. SCE is exploring savings and paying rebases. At though the is offer the calculation of ongoing energy savings. SCE is exploring savings and paying rebases. At though the is offer the calculation of ongoing energy savings. SCE is exploring savings and paying rebases. At though the is offer the calculation of ongoing energy savings. SCE is exploring savings and paying rebases. At though the is offer the calculation of ongoing energy savings. SCE is exploring optic the calculation of ongoing energy savings. SCE is exploring is a worke-bailed energy savings. SCE is exploring is a worke-bailed energy savings. SCE is exploring optic savings. SCE is exploring is a worke-bailed energy savings. SCE is exploring optic savings. SCE is exp													
Image: Inclusion of oncode useful to include in the guides.Could be usefu													
Image: Note the spectral state of the guides.Image: Note the guides.Image: Note of the guides.Image: Note of the guides.Note of the guides. <t< td=""><td> </td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>													
2 85-86 LGPs value the technical assistance derivations of orgoing savings. Internet to support calculation of ongoing savings. Internet to calculation of ongoing savings. Internet to calculation of ongoing savings. Internet to calculation of ongoing savings. Internet technical assistance derivational customers during and paying repersentatives note the benefits of engineerings values. The social context method work that they receive through the LGP program and believe it conduction to the conduct work that they receive through the to conduct work that they receive through the to conduct work that they would be applied to the partnership staff and resources. In particular, target and believe it conduction to the partnership support. Lissons learned from the partnership staff and resources in partnership staff and resources in the plot sould be applied to the partnership staff and resources in the program to hele partnership staff and resources in the plot sould be applied to the program to hele partnership support. Lissons learned from the program to hele partnership staff and resources. In addition, PG&E is actively exploring and paying representatives note the benefits of engines. These societs are measuring and there are concert. Lissons learned from the plot would be applied to the program to hele partnership staff and resources. In particular tips approximation and to concert. Lissons learned from the savings and paying reprint to full-scale launch. Check to concert the savings and paying representations are concerted to concert the program to hele partnership staff and resources. In particulated energy savings offerings. Accept to save the application of the program to hele partnership staff and resources. In addition of the program to fully addition and state government with the savings, and paying representatives not the benefits of engineerings. Accept to savetas are paying the fully Coporticulat													
Image: several sequencefeasibility of expanding tech- incial assistance of ferings to support: 1 calculation of on- going energy savings, 21 EMS implementing energy savings, implementing energy savings, implementing ing is of the technical assistance they receive through the LGP program and believe it enables program and believe it enables program and believe it enables program and believe it enables ing a JOC pilot to help inform how best to structure the program to they would not be able to con- duct solely with partnership staff and resources. In particu- lar, partnership representatives on the lar, partnership registersta ing saugest that partnership staff and resources. In particu- lar, partnership representatives on the lar, partnership staff and resources. In particu- lar, partnership representatives on the perifer serves. The sons learned for and lar, partnership staff and resources. In particu- lar, partnership staff and resources. In particu- lar, partnership staff and resources. In particu- lar, partnership staff and resources. In partnership staff and resources. In partnership staff and resources. In partnership suggest that partnership staf		07.00											
 a b b b b b b b b b b b b b b b b b b b	2	85-86		-	All IOUs	Accept	• •	Other		Accept		Accept	
k k k k k k k k k k k k k k k k k k k			•										
 k k k k k k k k k k k k k k k k k k k													
Image: bit is a bit is bit is bit is bit image: bit is b									0		-		
 a label in addition to the technical assistance the bene-fits of the technical assistance the yreceive through the LGP program and believe it enables the yreceive through the LGP program and believe it enables they need and calculated energy savings. b a didtion, PG&E is actively exploring a JOC pilot to help inform how best to structure the program to help accelerate projects within local government, Lessons learned from the pilot would be applied to the program prior to full-scale launch. c uson institutional customers c uson institutional c uson institutio									0 0 0,				
EMS, and JOC. Partnership representatives note the bene- fits of the technical assistance program and believe it enables they receive through the LGP program and believe it enables they not conduct work that they not conduct work that it uss noted the benefits of en- gineering support. Our find- ing suggest that partnership suggest that partnership would benefit from additionalEMS, and JOC. Partnership ment), the platform will eventually be available for LGs. In addition, PG&E is actively explor- ing a JOC pilot to help inform how best to structure the program to help accelerate projects within local duct solely with partnership staff and resources. In particu- lar, partnership suggest that partnership would benefit form additionalMy Data which allows customers to connect their energy sugges data to qualified for USs. This program use normalized meter data for measuring and tracking the savings, and paying in- ing a JOC pilot to help inform how best to structure the program to help accelerate projects within local duct solely with partnership staff and resources. In particu- lar, partnership representa- tives noted the benefits of en- gineering support. Our find- ings suggest that partnership would benefit from additionalMy Data which allows customers to connect their energy supress of the program to help accelerate projects within local help accelerate projects within local help accelerate projects within local help accelerate projects within local ing support. Our find- ings suggest that partnership would benefit from additionalMy Data which allows customers to connect their energy supress interess to connect their energy supress interess to support our find- ings suggest that partnership would benefit from additionalMy Data which allows customers <b< td=""><td></td><td></td><td></td><td>implementation, and 3) JOC.</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></b<>				implementation, and 3) JOC.									
Image: specify and the specific specific specific the specific spe									0				
afits of the technical assistance they receive through the LGP program and believe it enables them to conduct work that they would not be able to con- duct solely with partnership staff and resources. In particu- lar, partnership ings suggest that partnership staff and resources. In particu- lar, partnership ings suggest that partnership would benefit from additionalbe available for LGs. In addition, PG&E is actively explor- ing a JOC pilot to help inform how best to structure the program to help accelerate projects within local government. Lessons learned from the pilot would be applied to the program prior to full-scale launch.data to qualified third parties. Another performance- Based Retrofit High Opportunity. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings or EMS in pleme the pilot would be applied to the program prior to full-scale launch.data to qualified third parties. Another performance- Based Retrofit High Opportunity. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings or EMS implementation sup-ing level, outside of traditional deemed and calculated energy savings or EMS implementation such support. This program use normalized meter data for measuring and tracking the savings, and paying insenter socal- gas will encourage affections that partnerships wishing to explore JOC to discuss it with the Energy Network.press interest in calculation on genergy savings or EMS implementation addition addition of the provides isocal gov- energy							0						
herethey receive through the LGP program and believe it enables them to conduct work that they would not be able to cond duct solely with partnership ing suggest that partnerships would benefit from additionalIn addition, PG&E is actively explor- ing a JOC pilot to help inform how best to structure the program to help accelerate projects within local government. Lessons learned from the pilot would be applied to the program prior to full-scale launch.Another option is through the Public Sector Performance- Based Retrofit High Opportunity. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings.deemed and calculated energy sav- ing a JOC pilot to help inform how best to structure the program to help accelerate projects within local government. Lessons learned from the pilot would be applied to the program prior to full-scale launch.Another option is through the Public Sector Performance- Based Retrofit High Opportunity. The socalREN provides local gov- ernments the opportunity to utilize Job Order Contracting through the Energy Network. Therefore Socal- Gas will encourage all customers wishing to explore JOC to discuss it with the Energy Network.energy savings of EMS implementation sup-2) For EMS implementation sup-2) For EMS implementation sup-2) For EMS implementation sup-another option is through the Public Sector Performance- Based Retrofit High Opportunity. The socalREN provides local gov- ernments the opportunity to utilize Job Order Contracting through the Supervise.energy savings of Firings. Supervise.another option is through the Supervise. <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>													
Public Sector Performance- bin addition, Poer is a timely explor- ing a JOC plot to help inform how best to structure the program to help accelerate projects within local government. Lessons learned from the pilot would be applied to the program prior to full-scale launch. Would benefits of en- gineering support. Our find- ings suggest that partnerships would benefit from additional													
Image a begin between the conduct work that they would not be able to con- duct solely with partnership staff and resources. In particu- lar, partnership representa- tives noted the benefits of en- gineering support. Our find- ings suggest that partnerships would benefit from additionalImage a begin the fund method best to structure the program to help accelerate projects within local government. Lessons learned from the pilot would be applied to the program prior to full-scale launch.Based Retrofit High Opportunity. This program use normalized meter data for measuring and tracking the savings, and paying incenties, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings.The SoCalREN provides local gov- ernments the opportunity to utilize Job Order Contracting through the Energy Network. Therefore SoCal- Gas will encourage all customers wishing to explore JOC to discuss it with the Energy Network.place provides an easy path to I such support on board.							In addition, PG&E is actively explor-						
they would not be able to con- duct solely with partnership staff and resources. In particu- lar, partnership representa- tives noted the benefits of en- gineering support. Our find- ings suggest that partnerships would benefit from additional This program use normalized meter data for measuring and the pilot would be applied to the program prior to full-scale launch. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. The socaltery provides local gov- erments to opport. Our find- ings suggest that partnerships would benefit from additional This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. This program use normalized meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. This program use normalized tracking the savings offerings.											5 5		
duct solely with partnership staff and resources. In particu- lar, partnership representa- tives noted the benefits of en- gineering support. Our find- ings suggest that partnerships would benefit from additional meter data for measuring and tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. Job Order Contracting through the Energy Network. Therefore SoCal- Gas will encourses it wishing to explore JOC to discuss it with the Energy Network.													
staff and resources. In particu- lar, partnership representa- tives noted the benefits of en- gineering support. Our find- ings suggest that partnerships would benefit from additional staff and resources. In particu- the pilot would be applied to the program prior to full-scale launch. tracking the savings, and paying incentives, primarily at a whole- building level, outside of tradi- tional deemed and calculated energy savings offerings. Energy Network. Therefore SoCal- Gas will encourage all customers wishing to explore JOC to discuss it with the Energy Network.			-										such support on board.
Iar, partnership representatives, noted the benefits of engineering support. Our find-ings suggest that partnerships would benefit from additional incentives, primarily at a whole-building level, outside of tradi-tional deemed and calculated energy savings offerings. incentives, primarily at a whole-building level, outside of tradi-tional deemed and calculated energy savings offerings. Gas will encourage all customers Would benefit from additional Would benefit from additional Image: Network interfore socar-building level, outside of tradi-tional deemed and calculated energy savings offerings. Gas will encourage all customers													
tives noted the benefits of en- gineering support. Our find- ings suggest that partnerships would benefit from additional			-										
gineering support. Our find- ings suggest that partnerships would benefit from additional ing suggest that partnerships tional deemed and calculated energy savings offerings. with the Energy Network.							program prior to full-scale launch.						
ings suggest that partnerships energy savings offerings. would benefit from additional 2) For EMS implementation sup-									_				
2) For EMS implementation sup-											with the Energy Network.		
2) FOI EWIS IMPLEMENTATION SUD-													
			technical assistance in three										
port, see has provided Green	- i												
Button Connect My Data which			areas, however.						BUTTON CONNECT IVIV Data which				
			areas, however.										
			First, calculating ongoing sav-						allows customers to connect				

goals and to demonstrating			3) For Job Order Contracting,	
the benefits of LGP work to			SoCalREN provides local govern-	
key LG stakeholders. Repre-			ments the opportunity to utilize	
sentatives from 23 partner-			Job Order Contracting through	
ships said they struggled to			the Energy Network. As dis-	
calculate their energy savings			cussed in SCE's Business Plan,	
by looking at past utility bills			SCE will encourage all customers	
because this requires technical			wishing to explore JOC to lever-	
mathematical calculations,			age the Energy Network's JOC of-	
which were further con-			ferings.	
founded by rate increases. Cal-			icrings.	
culating savings can be partic-				
ularly challenging where there				
are multiple service accounts				
for one facility because linking				
together data from multiple				
meters to calculate the total				
energy savings for the project				
is difficult.				
Second, EMS facilitate bench-				
marking and help LGs and				
LGPs identify and prioritize up-				
grade opportunities and con-				
duct troubleshooting. Findings				
indicate that many LGs do not				
have an EMS in place and				
those that do report that the				
system is outdated or that				
staff do not know how to use				
it. Partnerships and LGs would				
benefit from technical support				
encouraging the installation of				
EMS and helping to increase				
the functioning and utilization				
of existing systems.				
Third, some projects require				
an RFP process for municipal				
retrofit contractors and, for				
some partnerships, this task is				
beyond the expertise of LG				
staff. Indeed, some LGs ac-				
quired outside assistance to				
support the RFP process for				
municipal retrofits. These chal-				
lenges can delay retrofits.				
Some partnerships have bene-				
fitted from JOC made available				
through organizations such as				
the National Joint Powers Alli-				
ance that provide LGs with a				
list of pre-approved contrac-				
tors. Were the IOUs to provide				
JOC, it would expedite the pro-				
cess of selecting a qualified				
contractor for retrofit projects,				
helping to shorten the project				
timelines.				

3 86	5 LGPs benefit from cross-part- nership collaboration such as	The IOUs and CPUC should fa- cilitate the integration of non-	IOUs and CPUC	Accept	PG&E actively supports and encour-	Accept	In order to assist with greater best practice sharing and enhance effi-	Accept	In order to assist with greater best	Accept	SDG&E's Emerging Cities Program
	the SEEC Forum, the CPUC-led Stakeholder Advisory Group, and other regional collabora-	collaborating member LGs or LGPs into existing collabora- tions. The IOUs and CPUC have	CrUC		ages collaboration of LGPs through the Rural Hard To Reach group as well through the Central California All Partners Meeting and through		ciencies, SCE and SoCalGas have worked to regionalize partnerships incorporating several single city		practice sharing and enhance effi- ciencies, SCE and SoCalGas have worked to regionalize partnerships by proposing to incorporate several		and local government partnership with SANDAG have created regional collaborative networks which allow non-partner LGs to collaborate with
	tive networks and forums. Many partnership representa- tives cited the benefits of col- laboration across partnerships. Indeed, representatives cited relationships they developed through the program as	a high-level view of partner- ship needs and activities and may be able to recognize op- portunities for LGs and LGPs that are not currently collabo- rating with others to join exist- ing collaborative networks.			SEEC. Additionally, PG&E hosts two semi-annual All Partners meetings to encourage collaborating/net- working. The semi-annual All Part- ners meetings typically include at least one local representative from each Partnership.		partnerships into regional partner- ships (e.g. Santa Ana to OC Cities, Redlands to San Bernardino). Addi- tionally, SCE has peer-to-peer meet- ings, all partners meetings, a Cen- tral CA All Partners meeting, and Rural Hard to Reach working group		single city partnerships into re- gional partnerships (e.g. Santa Ana to OC Cities, Redlands to San Ber- nardino). Additionally, SoCalGas and SCE participate in peer-to-peer meetings, all partners' meetings, a Central CA All Partners meeting,		LGPs and share energy efficiency best practices. Chula Vista's LGP also leads an energy efficiency col- laborative for the South Bay non- partner cities. Non-partner local governments are able to participate in all Statewide
	among their most significant program accomplishments. Collaboration can support ca- pacity building, reduce individ- ual partnership costs, and ena- ble partnerships to transfer	IOU program managers should encourage increased partner- ing and establish the necessary connections among LGPs that would benefit from collabora- tion. The LGPs should be al-					to assist with collaboration, identify issues, and share best practices. SCE currently provides opportuni- ties for non-LGP local governments to participate in Public Sector offer- ings. Non-partner local govern-		and Rural Hard to Reach working group to assist with collaboration, identification of issues, and sharing of best practices. SoCalGas currently provides oppor- tunities for non-LGP local govern-		Energy Efficiency Collaborative pro- grams including the SEEC Forum, Beacon Program, and ClearPath tool. Additionally, non-partner local governments are able to participate in existing deemed, customized,
	proven techniques for project implementation. Further, LGPs have worked together to effec- tively lobby the IOUs and the CPUC to make changes that help the program better serve	lowed to decide what net- works they participate in, se- lecting the most pertinent net- works.					ments are able to participate in all Statewide Energy Efficiency Collab- orative programs including the SEEC Forum, Beacon Program, and Clear- Path tool. Additionally, non-partner local governments are able to par-		ments to participate in Public Sec- tor offerings. Non-partner local gov- ernments are able to participate in all Statewide Energy Efficiency Col- laborative programs including the SEEC Forum, Beacon Program, and		and certain third party programs.
	California communities. Cross- partnership collaboration can take many forms, including formalized regional partner- ships, informal partnerships to address specific needs, or op- portunities to exchange ideas						ticipate in existing express, custom- ized, and certain third party pro- grams. Lastly, SCE will continue to evaluate potential new partners be- ing mindful of their ability and de- sire to be active participants.		ClearPath tool. Additionally, non- partner local governments are able to participate in existing express, customized, and certain third party programs.		
	at meetings such as the annual SEEC forum.										
4 87	 Diversity in partnerships' SP activities and the current reporting approach enable flexibility but preclude comparison across partnerships. Interviews with LGP representatives revealed considerable variability in partnerships' SP goal setting, SP activity selection processes, and tracking and reporting processes. While this flexibility may enable partnerships to tailor SP activities to LGs' unique needs and goals, this diversity precludes comparison across partnerships that are conducting SP activities under the same SP menu item. The apparent lack of clarity and specificity in some partnerships' objectives also indicates an opportunity for partnership implementers and IOU program staff to more 	The CPUC and IOUs should adapt the SP tracking tool and metrics we developed to pro- vide data essential to under- standing project status and accomplishments in support of decision-making – decisions ranging from those regarding program elements to those re- garding the program's future scope and funding.	IOUs and CPUC	Accept	PG&E worked in collaboration with CPUC ED staff, the other IOUs, and LG partners to develop a statewide streamlined Strategic Plan Semi-An- nual Report. This revised report provides a concise understanding of project status, scope, accomplish- ments, and best practices. The first revised Semi-Annual Report was submitted in Oct 2016.	Accept	SCE worked in collaboration with CPUC ED staff, the other IOUs, and LG partners to develop a statewide streamlined Strategic Plan Semi-An- nual Report. This revised report provides a concise understanding of project status, scope, accomplish- ments, and best practices. The first revised Semi-Annual Report was submitted in Oct 2016.	Accept	SoCalGas worked in collaboration with CPUC ED staff, the other IOUs, and LG partners to develop a statewide streamlined Strategic Plan Semi-Annual Report. This re- vised report provides a concise un- derstanding of project status, scope, accomplishments, and best practices. The first revised Semi-An- nual Report was submitted in Oct 2016.	Accept	SDG&E worked in collaboration with CPUC ED staff, the other IOUs, and LG partners to develop a statewide streamlined Strategic Plan Semi-Annual Report. This re- vised report provides a concise un- derstanding of project status, scope, accomplishments, and best practices. The first revised Semi-An- nual Report was submitted in Oct 2016.

6	88	Partnership needs may have	The IOU program managers	All IOUs	Accept	PG&E will continue to encourage its	Accept	SCE is actively engaging with local	Accept	SoCalGas is ac
		not been fully met through	should investigate through			LGP local partners to leverage		governments about issues related		local governm
		the established energy data	one-one- one discussions with			Green Button and My Data for their		to energy data. SCE understands		lated to energ
		access procedures, as sug-	each LGP its specific limita-			own usage information and the En-		that there are still many issues LGs		continue to pa
		gested by the considerable	tions in accessing and making			ergy Data Request Process for com-		face when trying to access commu-		well as encour
		variability in the degree part-	use of LG energy data. This in-			munity usage data.		nity data and have asked ICLEI (de-		other LGs and
		nerships are able to access LG	vestigation should guide the			In addition, PG&E will continue to		veloper of ClearPath GHG inventory		ClearPath GHC
		energy usage data. The IOUs	IOUs' work with the Energy			actively pursue conversations with		tool) to sit on the Energy Data Ac-		on the Energy
		need to craft and implement	Data Access Committee to fa-			its LGP local partners to better un-		cess Committee to provide the Lo-		tee to provide
		data access policies that meet	cilitate LGPs ready access and			derstand limitations related to data		cal Government perspective to key		ment perspect
		regulatory constraints.	use of energy data, as well as			access.		decision makers. SCE will encourage		makers.
		Limited access to energy usage	possibly lead to the identifica-					the EDAC to consider adding COG's		Additionally, S
		data impedes partnership	tion of additional support that					as agencies that are similar to edu-		Local Governm
		planning and action. Some	would benefit LGPs.					cational institutions.		Energy Data R
		partnerships have had diffi-						Additionally, SCE encourage Local		community us
		culty accessing timely and ac-						Governments to leverage Green		community us
		curate energy-usage data for						Button Connect My Data for their		
		their jurisdictions, and LGP						own usage information and the En-		
		representatives requested im-						ergy Data Request Process for com-		
		proved access to customer						munity usage data.		
		data to inform their decision-						munity usage uata.		
		making and to understand the								
		impacts of prior municipal ret-								
		rofit projects. This barrier is								
		particularly great for imple-								
		menters that operate outside								
		of the LG structure, such as								
		AOG/COG/JPAs, who de-								
		scribed being in a "middle-								
		man" position that limits their								
		access to energy usage data.								
		Multiple state and federal reg-								
		ulations prevent the IOUs from								
		sharing confidential customer								
		data, so third-party imple-								
		menters are not able to access								
		their member LGs' accounts								
		without legal agreements and								
		are dependent upon their								
		member LGs or utility partner								
		for access to savings infor-								
		mation.								
7	00 00		The IOI is that some as smark		Accept		Accort	SCE is actively engaging with level	Assant	
7	88-89	Partnerships in geographically	The IOUs that serve geograph-	All IOUs	Accept	PG&E is actively engaging with local governments about issues related	Accept	SCE is actively engaging with local	Accept	SoCalGas is ac
		isolated areas continue to ex-	ically isolated partnerships			0		governments about issues related		local governm
		perience marketplace barriers	should increase their efforts			to geographically isolated partner-		to geographically isolated partner-		lated to geogr
		to partnership activities, es-	to better serve these commu-			ships. PG&E has highlighted this in		ships. SCE has highlighted this in		partnerships,
		pecially but not solely related	nities. Through one-on-one			the EE Business Plan as a key strat-		the EE Business Plan as a key strat-		and broader le
		to municipal retrofits, in spite	conversations, the IOUs should			egy. Additionally, PG&E helps fund a		egy. Additionally, SCE helps fund a		highlighted th
		of ongoing awareness of the	identify specific support that			Rural Hard-to-Reach Working Group		Rural Hard-to-Reach Working Group		Plan as a key s
		issues faced by geographically	would benefit these geograph-			to discuss key issues related to geo-		to discuss key issues related to geo-		SoCalGas part
		isolated LGPs in the northern	ically isolated partnerships.			graphically isolated partnerships.		graphically isolated partnerships.		helps fund sor
		part of the state. Our findings	Study findings suggest these					Lastly, SCE is trying to leverage		to participate
		documented that geograph-	partnerships might benefit					online tools and the Tulare Energy		Reach Workin
		ically isolated partnerships	from funding for contractor					Education Center to provide con-		issues related
		with low population density	trainings to spur the availabil-					tractor trainings to spur the availa-		lated partners
		experienced difficulty access-						bility of local contractors.		supported cor
		ing contractors trained on en-								and training o
		ergy efficiency and, for some,								past and will c

actively engaging with ments about issues re- ergy data. SoCalGas will participate on EDAC as burage EDAC to include nd ICLEI (developer of HG inventory tool) to sit gy Data Access Commit- de the Local Govern- ective to key decision <i>t</i> , SoCalGas encourages nments to leverage the a Request Process for usage data.	Accept	SDG&E is actively engaging with lo- cal governments about issues re- lated to energy data. SDG&E will continue to participate on EDAC. The City of Chula Vista also partici- pates on EDAC and helps to convey the challenges that SDG&E and LGPs face in providing useful data that complies with all privacy laws. Additionally, SDG&E encourages Lo- cal Governments to leverage the Energy Data Request Process for community usage data.
actively engaging with ments about issues re- graphically isolated s, both on a one-on-one r level. SoCalGas has this in the EE Business y strategy. Additionally, articipates as well as some of its LGP partners te in the Rural Hard-to- ting Group to discuss key ed to geographically iso- erships. SoCalGas has contractor education g on EE programs in the Il continue to consider	Accept	SDG&E actively engages with all of its local government on energy effi- ciency activities through its network of Account Executives and partner- ship programs. SDG&E's more re- mote areas lie primarily in the unin- corporated areas of San Diego County, which has a robust local government partnership with SDG&E. Additionally, the Emerging Cities Program is designed to pro- vide energy efficiency support to non-partner governments in SDG&E territory.

a lack of energy efficient ity of local contractors	knowl-	how to provide loc	al contractors SDG&E's Energy Inn	novation Center,
equipment available locally. edgeable about energy	effi-	with EE training wh	nere appropriate. located no more that	an a two hour
We recognize that these issues ciency.		A recent example i	s the ASHRAE au- drive from anywher	re in SDG&E ter-
are part of ongoing conversa-		dit training which y	vas jointly of-	ist Workforce,
tions occurring among IOUs,		fered by SoCalGas	and PG&E in Education & Trainin	າg (WE&T) pro-
the CPUC, and LGPs and see		Santa Maria for co	ntractors, and lo- gram specifically de	esigned to im-
value in those conversations.		cal government sta	ff members to prove contractor kn	nowledge of en-
Despite these ongoing efforts		learn how to perfo	rm energy au-ergy efficiency. Add	litionally, in col-
to address energy efficiency		dits. SoCalGas and	PG&E are work- laboration with the	Local Govern-
marketplace barriers in these		ing with LGs in the	region to bring ment Partnership p	programs, the
communities, there is still		additional training	which the region WE&T programs car	n deliver train-
room for improvement.		finds valuable.	ings at locations tha	at are more con-
			venient for the audi	lience provided
			there are enough at	ttendees.