

## 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 Process Evaluation of the San Mateo County Energy Watch Local Government Partnership Program*** (Evergreen Economics, Calmac ID #SCG0218.09, ED WO #2115)

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) Plan<sup>1</sup> and CPUC Decision (D.) 07-09-043<sup>2</sup>.

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> 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>2</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>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:** Process Evaluation of the San Mateo County Energy Watch Local Government Partnership Program  
**Program:** LGP  
**Author:** Evergreen Economics  
**Calmac ID:** SCG0218.09  
**ED WO:** 2115  
**Link to Report:** [http://calmac.org/publications/LGP\\_SanMateo\\_Report\\_091617.pdf](http://calmac.org/publications/LGP_SanMateo_Report_091617.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	36	The longer contracting process within the SMCEW, along with evolving incentives at PG&E make it challenging to implement municipal retrofits.	We recommend that PG&E program staff take action to proactively communicate program changes to San Mateo C/CAG staff. Possible solutions include adding San Mateo C/CAG staff to the notifications that PG&E sends to contractors, incorporating a formal update process during meetings between both San Mateo C/CAG and PG&E staff, or developing a web portal with up-to-date program information. This will improve the San Mateo C/CAG's knowledge of current program offerings and help the San Mateo C/CAG recognize when projects may no longer be eligible for incentives.	PG&E	Accepted	PG&E will work to improve timely communication of programmatic changes to San Mateo C/CAG staff. PG&E is in the process of establishing a formal communication protocol that will be utilized for communications with all LGPs. Proactive communication is central to this protocol. Furthermore, PG&E will closely monitor the most common measures implemented within the municipal segment and send updates to all LGPs as measure incentive levels and/or eligibility change. PG&E will evaluate the feasibility of creating a web portal to communicate/track measure-level changes to the programs utilized by municipalities.
2	36	High turnover among local government staff has resulted in lost institutional knowledge and requires resources to be put towards training new staff.	We recommend San Mateo C/CAG staff and PG&E program staff work together to compile program documentation and materials into reference and training materials for new local government staff to reduce the impact of high staff turnover, if not already available.	San Mateo C/CAG, PG&E	Accepted	PG&E will work with San Mateo C/CAG staff and other LGPs to compile program documentation and materials into reference and training materials for new local government staff and other stakeholders central to the work of LGPs. PG&E is planning on using an online "Wiki" platform to capture program documentation and material that will be accessible to LGP stakeholders at any time in one central online location.
3	36	At present, SMCEW municipalities do not have a pre-qualified pool of contractors or a job order contracting approach. One interview subject explained that this is something the SMCEW is considering developing	The SMCEW LGP is considering development of a pre-qualified contractor pool, or establishment of a job order contracting process. We support this development, and recommend that the San Mateo C/CAG work together with PG&E to develop a pre-qualified pool of contractors and possibly job order contracting. This development will help to streamline project planning and implementation and to shorten the amount of time that could allow for a change to occur in program offerings or incentives.	San Mateo C/CAG, PG&E	Accepted	PG&E's effort to currently implement JOC across LGPs is currently underway and SMCEW will be incorporated into PG&E's overall JOC initiative. PG&E expects to have this program operational before the end of 2018.