

| # | Common Problem | CPUC Proposed Common Metrics | 6/13/17 PA Response Document | 6/14/17 Ad Hoc CAEECC Mtg Notes |
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General Follow up:

1. Discuss solicitation plan metrics (either at next meeting or 3P solicitation workshop on 6/16/17)
2. Want to make sure the data will be used (i.e., not a metric for the sake of a metric)
3. If data isn't already collected, do we use 1<sup>st</sup> year savings as the baseline?
4. Flexibility that 1<sup>st</sup> year may not have great value (e.g., multifamily, ongoing engagement, etc.) – need to have longer timeframes
5. PAs should include rationale for why data is not available and what it would take to access that data
6. PAs should propose a mechanism to change metrics once they have been adopted in a decision
7. Certain Issues (like HTR, DAC, sq ft, etc.) need to be addressed in the short term but resolved in the longer term through interagency work
8. Overall concern raised about formal public input process regarding these metrics discussions. ED checking with ALJ
9. Request that ED include “purpose” or “intent” language (just a sentence or two) explaining reason for metric.

Portfolio Level – All Sectors

|      |                           |   |     |   |
|------|---------------------------|---|-----|---|
| PL 1 | Capturing energy savings  | Total annual gas, electric, and demand savings  | n/a | n/a   |
| PL 2 | Disadvantaged communities | Total annual gas, electric, and demand savings in zip codes and/or census tracts in the top 25 percent as defined by the CalEnviroScreen Tool | n/a | <p>1. Need clarification re: what is expected for this overarching metric given there are different definitions for the various sectors (i.e., summing up the sectors would not be feasible).</p> <p>2. Currently, PAs take census information and apply it to the zip codes. Then they determine whether a certain zip code has met a threshold to qualify as DAC.</p> <p><b>ACTION ITEM #1: PAs should to get together to confer and if any PA uses different criteria or threshold levels, they should include their rationale and/or proposal in their July 14<sup>th</sup> submission.</b></p> |

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| PL<br>3 | Hard to reach markets | Total annual gas, electric, and demand savings where customers are defined as "hard to reach" | n/a                          | 1. Same comments as PL#2.       |
| PL<br>4 | Cost per unit saved   | Levelized cost of energy efficiency per kWh, therm, and kW                                    | n/a                          | 1. Same comments as RES SF #4.  |

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**Residential Sector – Single Family**

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| RES SF 1 | Capturing energy savings | Annual gas, electric, and demand savings for Single Family Customers | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: First year annualized claimed gas, electric, and demand savings, gross and net.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Sector-level targets will be informed by Goals and Potentials studies, unclear how potentials studies should be used to inform targets for RENs and CCAs.</li> <li>2. PAs are required to report sector level savings, and would like to discuss sector (residential) versus segment (SF/MF) savings and metrics.</li> </ol> | <ol style="list-style-type: none"> <li>1. Request was made that all data should be metered, not calculated or deemed. (it was also noted that such a change would be a policy decision by the Commission and not something the PAs have the authority to change on their own).</li> </ol>  |
| RES SF 2 | Depth of interventions   | Average gas, electric, and demand savings per participant            | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. This is better suited as a program metric.</li> <li>2. Cannot track participants for mid and upstream programs.</li> </ol>  | <p>UPSTREAM/MIDSTREAM</p> <ol style="list-style-type: none"> <li>1. Discussed ways to track sales for midstream/upstream that impact residential customers (e.g., evaluations that parse out res SF lighting savings).</li> <li>2. PAs can track program participation but uncertain re: the denominator (sales in the market) b/c vendors and retailers don't tend to give sales information.</li> <li>3. Suggestion for upstream/midstream: numerator (reported up/midstream savings) divided by respective market population (accounts).</li> <li>4. Hasn't been tracked-to-date so would only have data moving forward.</li> </ol> |

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| RES<br>SF<br>3a | Penetration of energy efficiency programs in the eligible market | Percent of participation relative to eligible Population  | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. This is better suited as a program-level metric.</li> <li>2. Cannot track participants for mid and upstream programs.</li> <li>3. Not all PAs can accurately distinguish between SF and MF. PAs suggest developing a common approach to identifying SF and MF customers and clarifying other eligibility issues.</li> </ol> | <p>Key Comments re: MF/SF distinction</p> <ol style="list-style-type: none"> <li>1. What is the intended definition for SF vs. MF (e.g., T24 definition; billing definition; common wall definition vs. # unit).</li> <li>2. No matter what definition, PAs don't have an accurate way to operationalize it. If PAs can agree on a consistent methodology for separating SF/MF per the CPUC definition, but may not be highly accurate, would that be sufficient for the commission?</li> <li>3. Additional challenge: can only do account #, not necessarily property.</li> </ol> <p><b>ACTION ITEM #2: ED to check if the approach to come up with a consistent approach, even if it is not highly accurate, is acceptable.</b></p> |
| RES<br>SF<br>3b | Penetration of energy efficiency programs in the eligible market | Percent of participation in disadvantaged communities (defined by zip code and/or census tract in CalEnviroScreen Tool) | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Need to determine whether census tract to ZIP code mapping is available.</li> <li>2. HTR, DAC, and Low Income overlap affects targets and interpretability.</li> </ol>  | <ol style="list-style-type: none"> <li>1. Acknowledged that that HTR and DAC can overlap but continue to want PAs to report on both.</li> <li>2. CPUC has previously made decisions on HTR (e.g., RENS' focus; ESPI resolution, etc.). In addition, SB 350 (DAC focus) AB 2672 (access to Central Valley NG access – statute provided criteria for DAC) added a focus but without a specific definition.</li> <li>3. For both HTR and DAC there are versions of definitions on record. HTR is in the 2013 EE Policy Manual and updated via ESPI Resolution (voted by Commission). It is in scope of A.</li> </ol>   |

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|           |  |  |  | <p>17-01-013 et al. DAC is on the record re: IOU WE&amp;T but not for customers.</p> <ol style="list-style-type: none"> <li>4. Need to determine definition for setting targets in the July 14th filing with the understanding that this is a broader statewide conversation.</li> <li>5. Acknowledge that HTR is not ubiquitous (e.g., central valley HTR is different than Bay Area HTR) but also that we should be consistent wherever possible.</li> <li>6. Current DAC definition discussions include SGIP, IRP, Track 2. No final decision yet.</li> <li>7. Clarification was made that denominator is eligible DAC (not all population). Therefore: participation of DAC/Eligible DAC.</li> <li>8. Gathering eligible HTR population is challenging, would need to explore data collection options.</li> <li>9. Regardless, all PAs should include footnote re: what definition/eligibility criteria they are using.</li> </ol> <p><b>ACTION ITEM #3: ED to get direction from decision makers re: which definition to use for July 14<sup>th</sup>, acknowledging the need for additional conversation.</b></p> |
| RES SF 3c | Penetration of energy efficiency programs in the eligible market | Percent of participation by customers defined as "hard to reach" | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Need to clarify definition of HTR</li> </ol> | <ol style="list-style-type: none"> <li>1. Same comments as RES SF #3b.</li> <li>2. Same comments as PL#2.</li> <li>3. Propose that only need to establish baseline once (frozen baseline) and not worry about</li> </ol>  |

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|          |                     |  | <ol style="list-style-type: none"> <li>2. HTR, DAC, and Low Income overlap affects targets and interpretability</li> <li>3. Not all PAs can support the distinction between SF and MF-dwelling units.</li> </ol>                                   | burden of recalculating each year because it won't change materially over medium term.  |
| RES SF 4 | Cost per unit saved | Levelized cost of energy efficiency per kWh, therm, and kW                                       | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Need to define levelized cost at sector level.</li> <li>2. Not all PAs have costs by \$/kW.</li> </ol>         | <ol style="list-style-type: none"> <li>1. PAs will need to add to the E3 tool to pull info for <u>sector</u> levelized cost.</li> <li>2. Should include all costs (ME&amp;O, incentives, etc.).</li> </ol> <p><b>ACTION ITEM #4: Clarify on next iteration of Common Metrics that this is requested for PAC only across the board.</b></p>  |
| RES SF 5 | Energy intensity    | Average energy use intensity of single family homes (average usage per household – not adjusted) | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. The PAs need to determine a common definition of MF to develop a data query to determine SF and MF.</li> </ol> | <ol style="list-style-type: none"> <li>1. RASS estimates provide this data and should be leveraged when available.</li> <li>2. Unadjusted means total residential customer energy usage/total res customer accounts. Not normalized.</li> <li>3. What's the intent of this metric? The intent might be skewed by adoption of solar/EV. Might not be informative b/c of the implication of the other factors besides EE intervention.</li> </ol> <p><b>ACTION ITEM #5: ED will think through underlining intent and potential modifications to this metric given the input at the 6/14/17 CAEECC ad hoc meeting.</b></p> |

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**Residential Sector – Multi Family**

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| RES MF 1 | Capturing energy savings | Annual gas, electric, and demand savings for Multi Family Customers | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative:</b></p> <ol style="list-style-type: none"> <li><b>First year annualized reported gas, electric, and demand savings, gross and net, for MF (in unit).</b></li> <li><b>First year annualized reported gas, electric, and demand savings, gross and net, for MF (common area).</b></li> <li><b>First year annualized reported gas, electric, and demand savings, gross and net, for MF (master-metered).</b></li> </ol> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>The PAs can report MF energy savings. There is potentially an issue differentiating in-unit, common area, and master metered accounts. Going forward PAs can have implementers collect this data, however, there may be a concern for consistency of this information.</li> </ol> | <ol style="list-style-type: none"> <li>Same comment as Residential SF #1.</li> <li>Both numerator and denominator will be somewhat uncertain. If PAs can agree on a consistent methodology for separating SF/MF per the CPUC definition, but may not be highly accurate, would that be sufficient for the commission?</li> <li>Such solutions may be OK, but PAs should also describe what can be done to improve the tracking approach in future. Work going on in other proceedings and in different agencies, such as Governor's effort, SB350 Barriers Report, etc., that may be of help.</li> </ol> |
| RES MF 2 | Depth of interventions   | Average gas, electric, and demand savings per participant           | <p>PARTICIPANT</p> <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>Suggest average gas, electric, and demand savings per dwelling unit.</li> <li>Suggest average gas, electric, and demand savings per property.</li> <li>Cannot track participants for mid and upstream programs.</li> </ol>   | <ol style="list-style-type: none"> <li>Pilots of financing are separate from the Business Plans and are developing depth of intervention definition as well.</li> </ol>  |

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|           |  |  | <p>4. This is better suited as a program metric.</p> <p>PROJECT</p> <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Suggest average gas, electric, and demand savings per dwelling unit.</li> <li>2. Suggest average gas, electric, and demand savings per property.</li> <li>3. Cannot track participants for mid and upstream programs.</li> </ol>   |   |
| RES MF 3a | Penetration of energy efficiency programs in the eligible market | Percent of participation relative to eligible Population | <p>PARTICIPATION</p> <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Cannot track participants for mid and upstream programs.</li> </ol> <p>SQ FT</p> <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Difficult/expensive/impossible to determine square footage of eligible population.</li> <li>2. Cannot track participants for mid and upstream programs.</li> </ol> | <ol style="list-style-type: none"> <li>1. Don't have property data but can do accounts in denominator instead.</li> <li>2. Looking to future, could utilities do meter mapping/data mining to align data systems to meters/metrics?</li> <li>3. Looked at this with CEC re: AB 1103 for benchmarking and wasn't feasible. with existing systems.</li> <li>4. <b>Alternative: Use total savings / # of participants.</b></li> <li>5. Same upstream/midstream comments re: RES SF #2.</li> <li>6. ED ok using a proxy baseline as static from previous studies instead of saying no data with the understanding of updating data and metrics after doing a study when it's available. Be clear if this proxy is PA-specific or for all PAs. Also need to develop a</li> </ol> |



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|           |  |   |   | change management process for adjusting baseline proxies so it is done orderly and with document trail.  |
| RES MF 3b | Penetration of energy efficiency programs in the eligible market | Percent of participation in disadvantaged communities (defined by zip code and/or census tract in CalEnviroScreen Tool) | Updated proposed metric with clarifications/revisions: n/a<br><i>Comments:</i><br>1. Need to determine whether census tract to ZIP code mapping is available<br>2. HTR, DAC, and Low Income overlap affects targets and interpretability                    | 1. Same comments as RES SF #3b.<br>2. Same comments as PL#2.   |
| RES MF 3c | Penetration of energy efficiency programs in the eligible market | Percent of participation by customers defined as "hard to reach"  | Updated proposed metric with clarifications/revisions: n/a<br><i>Comments:</i><br>1. Need to clarify definition of HTR<br>2. HTR, DAC, and Low Income overlap affects targets and interpretability  | 1. Same comments as SF #3b   |
| RES MF 4  | Cost per unit saved  | Levelized cost of energy efficiency per kWh, therm, and kW  | Updated proposed metric with clarifications/revisions: n/a<br><i>Comments:</i><br>1. Need to define levelized cost at sector level<br>2. Not all PAs have costs by \$/kW  | 1. Same comments as RES SF #4.   |
| RES MF 5  | Energy intensity   | Average energy use intensity of Multi-family homes (average usage per household – not adjusted)                         | Updated proposed metric with clarifications/revisions: n/a<br><i>Comments:</i><br>1. The PAs do not have the square footage of MF properties from which to establish baselines. Working with implementers we can begin to track certain downstream programs | 1. Could buy the data or data mine internally.<br>2. PAs should include that information vs. say it's not available. Including how to get it, cost, etc. |

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**Commercial**

|          |                          |   |  |  |
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| COM<br>1 | Capturing energy savings | Annual gas, electric, and demand savings Annual gas, electric, and demand savings as a percentage of overall sectoral usage | <p>TOTAL</p> <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: First year annualized reported gas, electric, and demand savings, gross and net.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>Sector-level targets will be informed by Goals and Potentials studies, unclear how potentials studies should be used to inform targets for RENs and CCAs.</li> </ol> <p>PERCENT</p> <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: First year annualized reported savings, gross and net, as a percentage of 2017 sectoral usage (baseline).</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>Consider using “2017 annual sectoral usage” as the baseline for the duration of the Business Portfolio period. This allows reporting on “doubling” of energy savings. This metric will be calculated with annual sectoral savings in the numerator and 2017 baseline sectoral use as the denominator and is expected to be a small value.</li> </ol> | <ol style="list-style-type: none"> <li>Same comment as Residential SF #1.</li> <li>ED ok using a baseline as static from previous studies as a proxy instead of saying there is no data with understanding of updating data and metrics when it’s available.</li> <li>Would like to understand progress re: Small/Med/Large. PAs can do this, but is more of a reporting request than a metric.</li> <li>Would like to compare PAs to one another but would need common definition of Small/Med/Big to be most accurate. But some PAs object to comparison among PAs due to very different markets for each PA.</li> </ol> <p><b>ACTION ITEM #6: ED to check if ok to keep definitions as they are and put a caveat that “small, med, or large” is a range. THIS APPLIES TO COM/IND/AG.</b></p> <ol style="list-style-type: none"> <li>Leverage Working Group 2 work on new commercial definitions (est. June 30<sup>th</sup> report for review).</li> <li>Recommended to use 2016 as baseline because 2017 will only be half over when submitting metric with targets and baseline data.</li> </ol> |
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| COM<br>2 | Depth of interventions | <p>Energy Savings (kWh, kW, therms) per project (building)</p> <p>Energy savings (kwh, kW, therms) per square foot.</p> | <p>PROJECT</p> <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. The PAs are continuing to discuss the possibility of obtaining savings by project or by building.</li> <li>2. Only for downstream programs.</li> <li>3. We know that the finance group is also working on a “depth of intervention” metric. Further discussion may be needed once that metric is drafted.</li> </ol> <p>SQ FT</p> <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion with the larger group that includes the CPUC</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. The PAs do not collect square footage from participants at this point, but could moving forward. However, the PAs’ experience with reliability of square foot data is that this is very poor (provided by customer when it is available at all) and the cost of collecting the data and then ensuring high quality may be high</li> </ol> | <ol style="list-style-type: none"> <li>1. Pilots of financing are taken out and they are also developing depth of intervention definition as well.</li> <li>2. Sq ft is not collected. Info collected on a sq ft basis is unreliable b/c self-reported. In addition, assessor information not accurate.</li> <li>3. Should work with CEC on this as it is a statewide issue.</li> <li>4. Depending on what the purpose is for square feet metric, could come up with an approach as long as it’s understood to be somewhat inaccurate.</li> </ol> |

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|           |   |   | <ol style="list-style-type: none"> <li>2. Additionally, one PA reached out to an implementer and received this information (<u>underline added for emphasis</u>): “The burden would be placed on our efficiency auditing staff. The result would be more time committed to unessential tasks and less staff hours committed to project scope development and efficiency sales. This formula leads to higher non-incentive payment requirements and decreased savings delivery.”</li> <li>3. There is the possibility of studying how to cost-effectively capture square footage and ensure quality, but this may mean that the metric would not be available until this process is known and adopted by PAs</li> <li>4. It would be difficult to set a baseline or good targets because of lack of historical information and uncertainty around volatility of the value</li> <li>5. Only for downstream programs. We know that the finance group is also working on a “depth of intervention” metric; further discussion may be needed once that metric is drafted</li> </ol> |   |
| COM<br>3a | Penetration of energy efficiency programs and benchmarking in the eligible market | Percent of participation relative to eligible population for small, medium, and large customers | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No changes proposed, keep wording as shown to the left.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. The PAs continue to discuss specifics on who is a participant (e.g., is a participant</li> </ol>  | <ol style="list-style-type: none"> <li>1. General discussion that Penetration and Depth can be opposing (e.g., wide participation and small savings or few participants and deep savings).</li> <li>2. Participation metrics better at program level than sectors.</li> </ol> |

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|           |   |   | <p>an account, a unique combination of known IDs such as premise and account).</p> <ol style="list-style-type: none"> <li>2. The PAs recommend that the eligible population is the entire commercial database of customers (using the same designation as for a participant) and that this value remain static over the business plan years (because the change is minimal each year so should not adversely affect the metric and past lessons learned when updating for the previous PPMs).</li> <li>3. Some PAs define S/M/L accounts based on rate schedule and some by kWh ranges. Further discussion is required since this definition is not uniform across PAs.</li> </ol>               |                                 |
| COM<br>3b | Penetration of energy efficiency programs and benchmarking in the eligible market | Percent of square feet of eligible population | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion with the larger group that include the CPUC.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. All the same issues as described above for the energy savings per square foot.</li> <li>2. If the source of eligible square foot is purchased, the PAs recommend that the square foot within eligible population remain static over the business plan years to reduce costs. If the source of eligible square foot is from the CEC, the PAs note that the square foot cannot determine square footage for government buildings</li> </ol> | 1. Same comments as RES MF #3a. |

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|        |   |  | and therefore the eligible population for commercial and public would not be clear.  |   |
| COM 3c | Penetration of energy efficiency programs and benchmarking in the eligible market | Percent of participation by customers defined as “hard to reach” | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion among the PAs.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>The PAs continue to discuss this metric regarding HTR and disadvantaged communities.</li> </ol>  | 1. Only HTR? No DAC?  |
| COM 4  | Cost per unit saved   | Levelized cost of energy efficiency per kWh, therm and kW.       | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion among the PAs</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>The PAs continue to discuss this metric in terms of overall portfolio versus sector specific</li> <li>Need to define levelized cost at sector level</li> <li>Not all PAs have costs by \$/kW</li> </ol> | 1. Same comments as RES SF #4.  |
| COM 5  | Investment in energy efficiency   | Dollars of investments (all sources)                             | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion with the larger group that includes the CPUC</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>The PAs need clarification on what was desired by the CPUC for this metric. If the</li> </ol>  | <ol style="list-style-type: none"> <li>Some stakeholders have an issue with investment as a metric (creates an incentive just to spend).</li> <li>What does “all sources” mean?</li> <li>Unclear if this is a metric vs. reporting to track trends.</li> <li>What goal does this align with?</li> <li>Request to report by small/med/commercial once the</li> </ol> |

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|          |                  |   | CPUC intended this to reflect loans, need to ensure consistency with finance metrics  | <p>definition is operational. Agreed but will be reporting, not a metric.</p> <p>6. Should the investment for \$/therm/kW/kWh be by program instead of sector? Again, reporting vs. a metric.</p> <p><b>ACTION ITEM #7: ED will review.</b></p>  |
| COM<br>4 | Energy intensity | Percent of square feet of eligible population benchmarked | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: No updates yet because need further discussion with the larger group that includes the CPUC</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Benchmarking is as defined in AB 802. ("Benchmark" means to obtain information on the energy use in an entire building for a specific period to enable that usage to be tracked or compared against other buildings. 25402.10 (a) (1))</li> <li>2. Following AB 802, the eligible population would be defined as buildings over 50,000 square feet.</li> <li>3. The IOU-PAs will know what buildings are being benchmarked in their service territories (because the customer is asking for data). However, this information is a one-way flow (from the IOU to the customer) and may not capture customers who use hard copy billing statements to input data. As such, the IOU will not know the square foot benchmarked, just the approximate number of buildings.</li> </ol> | <ol style="list-style-type: none"> <li>1. Numerator is ok, but issue is denominator is not easy to determine.</li> <li>2. IOUs will have buildings that should be benchmarked and also getting requests for info to benchmark but not all through programs. Question: is this information for programs that benchmark or Statewide benchmarked (i.e., CEC tracked whether participate in a program or not)</li> <li>3. What is the specific goal? Could be an interesting tracking, but not clear it's a metric. Perhaps more relevant as a program metric toward.</li> </ol> <p><b>ACTION ITEM #8: ED will review re: benchmarking.</b></p> |

| # | Common Problem | CPUC Proposed Common Metrics | 6/13/17 PA Response Document  | 6/14/17 Ad Hoc CAEECC Mtg Notes |
|---|----------------|------------------------------|---|---------------------------------|
|   |                |                              | <ol style="list-style-type: none"> <li>4. Should this metric move to being the number of buildings benchmarked in the service territory (i.e., a market value, not a program value)?</li> <li>5. The CEC is capturing similar information—should the IOU-PAs duplicate the information from the CEC?</li> <li>6. If kept with square footage, the PAs will need to purchase information to estimate the number of buildings (or square foot) is in their service territories that are over 50,000 square feet in size</li> <li>7. If kept with square footage, the numerator of square footage could be only those buildings benchmarked through a PA program, which would need to be part of any program application form</li> </ol> |                                 |



| # | Common Problem | CPUC Proposed Common Metrics | 6/13/17 PA Response Document | 6/14/17 Ad Hoc CAEECC Mtg Notes |
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**Industrial**

|          |                          |   |  |   |
|----------|--------------------------|---|--|---|
| IND<br>1 | Capturing energy savings | <p>Annual gas, electric, and demand savings</p> <p>Annual gas, electric, and demand savings as a percentage of overall sectoral usage</p> | <p>TOTAL</p> <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: First year annualized reported gas, electric, and demand savings, gross and net</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>Sector-level targets will be informed by Goals and Potentials studies, unclear how potentials studies should be used to inform targets for MCE (the only REN or CCA with industrial and agricultural sectors in their business plan).</li> </ol> <p>SECTOR %</p> <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: First year annualized reported savings, gross and net, as a percentage of 2017 sectoral usage (baseline).</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>Consider using “2017 annual sectoral usage” as the baseline for the duration of the Business Portfolio period. This allows reporting on “doubling” of energy savings. This metric will be calculated with annual sectoral savings in the numerator and 2017 baseline sectoral use as the denominator.</li> <li>Energy savings as a percentage of use is a small number, and doubling that would still yield a small number.</li> </ol> | <ol style="list-style-type: none"> <li>Same comment as Residential SF #1</li> <li>MCE will continue to use the goals set in their compliance filing until otherwise directed by the Commission</li> <li>Use 2016 as base year similar to above</li> </ol> |
|----------|--------------------------|---|--|---|

| #        | Common Problem  | CPUC Proposed Common Metrics   | 6/13/17 PA Response Document   | 6/14/17 Ad Hoc CAEECC Mtg Notes  |
|----------|---|--|--|--|
| IND<br>2 | Penetration of energy efficiency programs and diversity of participants | Percent of participation relative to eligible population for small, medium and large customers | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>No changes to language, with following caveats.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. "Participant" still needs to be defined. See Commercial common metric</li> <li>2. "Eligible population" can be defined by NAICS codes, but size of population should remain constant over Business Plan period. See Commercial common metric</li> <li>3. Size (S, M, L) is defined differently by PAs, using different metrics. PG&amp;E uses kWh ranges, SCE uses kW ranges. This metric will not be able to "roll up" to a sector level metric across all PAs. Some PA customer size ranges are tied to rates, and thus cannot be aligned across PAs. See Commercial common metric.</li> </ol> | <ol style="list-style-type: none"> <li>1. PAs are fine with this but if the CPUC wants to roll it up, there needs to be a caveat that different PAs use different definitions for S/M/L as noted above.</li> </ol>   |
| IND<br>3 | New participation   | Percent of customers participating that are new participants (annually)                        | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: Percent of customers participating that are new participants (annually), for Small, Medium and Large customers</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. A "participant" can be defined by a unique combination of premise ID and account number</li> <li>2. "New" can be defined as a participant who did not receive an incentive in the past three years (e.g., a 2017 participant did not</li> </ol>  | <ol style="list-style-type: none"> <li>1. Want to see small/med projects increasing and not just large custom from the same customers, so want to see improved outreach to all segments.</li> <li>2. What counts as new? Suggested between 3-5 years consistent with how other programs are being treated.</li> <li>3. What if they participate in a different program? Can they still be considered new?</li> </ol> |

| # | Common Problem | CPUC Proposed Common Metrics | 6/13/17 PA Response Document | 6/14/17 Ad Hoc CAEECC Mtg Notes |
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|  |  |  |   |  |
|--|--|--|---|--|
|  |  |  | <p>receive an incentive in 2014, 2015, or 2016).</p> <p>3. PAs suggest that new customers be reported by size, because it is known that depending on the strategy, there is a tradeoff between participation rate (breadth) and depth of energy savings (depth). At the sector level, these effects may wash out.</p> |  |
|--|--|--|---|--|

**Agriculture**

|      |                          |   |   |                                      |
|------|--------------------------|---|---|--------------------------------------|
| AG 1 | Capturing energy savings | <p>Annual gas, electric, and demand savings</p> <p>Annual gas, electric, and demand savings as a percentage of overall sectoral usage</p> | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>Alternative: First year annualized reported gas, electric, and demand savings, gross and net.</b></p> <p><i>Comments:</i></p> <p>1. Sector-level targets will be informed by Goals and Potentials studies, unclear how potentials studies should be used to inform targets for MCE (the only REN or CCA with industrial and agricultural sectors in their business plan).</p> | 1. Same comment as Residential SF #1 |
|------|--------------------------|---|---|--------------------------------------|

| #       | Common Problem  | CPUC Proposed Common Metrics   | 6/13/17 PA Response Document   | 6/14/17 Ad Hoc CAEECC Mtg Notes  |
|---------|---|--|--|--|
| AG<br>2 | Penetration of energy efficiency programs and diversity of participants | Percent of participation relative to eligible population for small, medium and large customers | <p>Updated proposed metric with clarifications/revisions:</p> <p><b>No changes to language, with following caveats.</b></p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. "Participant" still needs to be defined. See Commercial common metric</li> <li>2. "Eligible population" can be defined by NAICS codes, but size of population should remain constant over Business Plan period. See Commercial common metric</li> <li>3. Size (S, M, L) is defined differently by PAs, using different metrics. PG&amp;E uses kWh ranges, SCE uses kW ranges. This metric will not be able to "roll up" to a sector level metric across all PAs. Some PA customer size ranges are tied to rates, and thus cannot be aligned across PAs. See Commercial common metric.</li> </ol> | <ol style="list-style-type: none"> <li>1. Diversity of agricultural customers more relevant in the program level/implementation metric.</li> </ol> |
| AG<br>3 | Cost per unit saved   | Levelized cost of EE per kWh, therm, and kW  | <p>Updated proposed metric with clarifications/revisions: n/a</p> <p><i>Comments:</i></p> <ol style="list-style-type: none"> <li>1. Need to define levelized cost at sector level</li> <li>2. Not all PAs have costs by \$/kW</li> </ol>   | <ol style="list-style-type: none"> <li>1. Same comments as RES SF #4.</li> </ol>   |