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May 1, 2024

**Advice Letter 4438-E/ 3299-G
(San Diego Gas & Electric Company ID U 902 E)**

**Advice Letter 5289-E
(Southern California Edison Company ID U 338 E)**

**Advice Letter 6304-G
(Southern California Gas Company ID U 904 G)**

**Advice Letter 7257-E/4906-G
(Pacific Gas and Electric Company ID U 39 E)**

**Advice Letter 75-E
(Marin Clean Energy)**

**Advice Letter 11-E/ 10-G
(Tri-County Regional Energy Network (3C-REN) ID # 220)**

**Advice Letter 26-E
(Bay Area Regional Energy Network (BayREN) ID # 941)
Advice Letter 5-E/ 5-G
(Inland Regional Energy Network (I-REN) ID# 246)**

**Advice Letter 19-E/ 19-G
(Southern California Regional Energy Network (SoCalREN) ID #940)**

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

**SUBJECT: JOINT PORTFOLIO ADMINISTRATOR TIER 2 ADVICE LETTER TO COMPLY WITH
ORDERING PARAGRAPH 11 OF DECISION 23-06-055**

PURPOSE

Pursuant to Ordering Paragraph (OP) 11 of Decision (D.) 23-06-055, San Diego Gas & Electric Company (SDG&E), Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), Southern California Gas Company (SoCalGas), Marin Clean Energy (MCE), Tri-County Regional Energy Network (3C-REN), Bay Area Regional Energy Network (BayREN), Inland Regional Energy Network (I-REN), and Southern California Regional Energy Network (SoCalREN) (referred to as Joint Portfolio Administrators or Joint PAs) hereby submit this Tier 2 Advice Letter (AL).¹

¹ Energy Division provided informal guidance noting that RuralREN, who is currently an approved Regional Energy Network (REN), is exempt from being a participant in the submission of the Joint Advice Letter. However, RuralREN participated in the associated working groups to compile this Advice Letter.

BACKGROUND

A. Regulatory Requirements:

D.23-06-055 specifies,

[t]he portfolio administrators shall jointly submit a Tier 2 advice letter by no later than May 1, 2024 clarifying all of the indicators adopted in this decision, including any modifications from metrics and indicators adopted in Decision 18-05-041, and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines.²

As such, the Joint PAs coordinated on the development of this joint AL, through the California Energy Efficiency Coordinating Committee's (CAEECC) Equity and Market Support Working Group (EMSWG), which is comprised not only of Portfolio Administrator representatives, but also includes Energy Division, utility stakeholders, and members of the public.

OP 11 requires delineation of two parallel workstreams, the first being clarification of indicators that were included in D.23-06-055, which occurred through the EMSWG. The second workstream occurred via coordination amongst the Joint PAs and was focused on modification of metrics and indicators included in D.18-05-041 and the identification of methodologies for baselines.

This AL contains the following attachments:

- Attachment A: EMSWG Final Report;
- Attachment B: Memorandum on Recommendations for Adjusting Common Metrics from D.18-05-041; and
- Attachment C: D.18-05-041 Common Metrics Spreadsheet.

DISCUSSION

1. Clarify D.23-06-055 Indicators

D.23-06-055 adopted thirteen Equity Indicators and twenty-five Market Support Indicators, many of which were metrics or indicators recommended in the previous Equity Metrics Working Group (EMWG) and Market Support Metrics Working Group (MSMWG). D.23-06-055 requested that the CAEECC re-engage the EMWG and MSMWG to discuss and develop recommendations to clarify the adopted Equity and Market Support Indicators. CAEECC reconvened by consolidating the two working group efforts into a single Equity and Market Support Working Group, which spanned from November 2023 – March 2024. The Decision noted:

Many of the adopted indicators would benefit from clarification and further discussion about the valuation methodology. Guidance may be needed for PAs to ensure that baselines for target-setting are clear and consistently applied, to the greatest extent possible. For these reasons, we will ask the CAEECC to re-engage and update, as necessary, the EMWG and MSMWG to discuss and develop recommendations.³

² D.23-06-055 at OP 11.

³ *Id.* at 29.

Attachment A, attached hereto, provides clarification of a limited set of indicators as agreed upon in the working group. The report also includes the background, prospectus, working group overview, recommendations, remaining issues, conclusion, and appendices. As detailed in Attachment A, a great deal of time and effort was expended to create the output included in this AL. Specifically,

The EMSWG met nine times over four months (Table 2). Each meeting was three hours, the preferred maximum time among working group members. Despite the abundant number of meetings, total hours in discussion, homework assignments, and active engagement by the Working Group Members, the EMSWG and Facilitation Team still faced time and bandwidth constraints given the range of possible discussion topics involved in clarifying the “why, what, and how” for Indicators.⁴

There are several “non-consensus”⁵ items in the EMSWG report for areas where the working group members were unable to reach a consensus on the issue. The EMSWG report provides recommendations on how to address each of these issues. The Joint PAs support the recommendations for all non-consensus issues.

2. D.18-05-041 Indicators and Common Metrics

OP 9 of D.18-05-041 adopted a significant number of common metrics and indicators that PAs (Portfolio Administrators) have been reporting on for several years. D.23-06-055 acknowledges that, “there are several common metrics that were adopted within D.18-05-041 that have not been used and/or may not longer be relevant or useful.”⁶ Therefore, D.23-06-055 also requires the Joint PAs to address common metrics from D.18-05-041, “including any modifications from metrics and indicators adopted in Decision 18-05-041.”

While not required by D.23-06-055, to initiate this workstream, however and as agreed upon by all PAs, PG&E contracted with Grounded Research to support the PAs as they collaborated on modifications, suspensions, or removals of metrics and indicators adopted in D.18-05-041. Over the course of five meetings, Grounded Research provided detailed information to the PAs to enable discussion on potential changes to the 330 common metrics and indicators. Attachment B, attached hereto, represents the results of the PAs’ collaboration.

A full listing of proposed modifications to the common metrics and indicators from D.18-05-041 are included in Attachment C, attached hereto. The Joint PAs understand, after this Advice Letter is approved, common metrics and indicators from Attachment A of D.18-05-041 are superseded by Attachment C of this Advice Letter, in alignment with the directives in D.23-06-055 OP 11. Accordingly, after this Advice Letter is approved, reporting will begin and reflect the modifications herein.

3. Discrepancies between CAEECC EMSWG and Common Metrics Working Group

The CAEECC Equity & Market Support Working Group and the Grounded Research Common Metrics Working Group were separate workstreams that did not collaborate due to the tight timelines each working group faced. Several metrics relating to Emerging Technologies Programs (ETP) and

⁴ Attachment A at 10.

⁵ The EMSWG report indicates that although the working group facilitation team does not think the consensus/non-consensus construct is a good fit for some of the topics discussed, the facilitation team decided to use the construct anyway to follow CAEECC’s standard practice of using the construct.

⁶ D.23-06-055 at 29.

Workforce Education & Training (WE&T) were approached differently by each working group. The Common Metrics working group recommended removing all metrics related to ETP (Common metrics #307-329) and WE&T (Common Metrics #301-306), due to appropriate indicator development in the market support segment for these market support programs in D.23-06-055. However, the CAEECC working group did not develop new indicators for a subset of these, citing existing, established and defined, common metrics. An appropriate result of these recommendations being combined would be to shift the common metrics #303-306 (WE&T) and #314-320 (ETP) to being indicators in the Market Support segment, using the existing common metrics definitions.

4. Methodology to Determine D.23-06-055 Indicator Baselines

Pursuant to OP 11, PAs are required to, “[identify] information that could be used as baselines for future targets *or* methodologies for how the indicator information can be used as baselines.”⁷ A baseline is an initial measurement of a condition that is taken at an early time point and used for comparison over time to assess changes. A metric has both a baseline and a target while an indicator has neither. Not all indicators with data that are collected now will become a metric in the future. PAs currently do not have information that can be used to determine baselines for D.23-06-055 indicators. Therefore, the PAs are providing an agreed-upon methodology as to how such indicators may be used as baselines in the future. It is imperative that PAs have tangible information before baselines are determined. The proposed methodology for determining baselines is described in Table 1 below.

Table 1. Methodology to Determine Indicator Baselines

Step	Timing	Responsible Stakeholder	Action
1	Q3 2024	Each PA individually	List all programs being implemented by a PA and mark which common metrics and equity/market support indicators will have data collected from that program. Action: PA uploads file to CEDARS (Documents area or a TBD folder)
2	Q3 2024	PAs collaboratively format a template Each PA individually completes its file	PAs create data-collection spreadsheet template. Individual PAs fill in the data collection instrument for each indicator (i.e., both the remaining common metrics and the equity/market support indicators).
3	Q4 2024	Each PA individually	Begin data collection for programs listed in step 1 and step 2. Programs that begin in Q3 2024 and after will begin to collect relevant data six months after their start date.
4	Q4 2024 to Q2 2025	PAs collaboratively	Hold meetings to enable writing Tier 3 advice letter on goals (due March 1, 2025 per OP 25 of D.23-06-055)
5	Q1 annually	Each PA individually	Provide indicator data by submitting the files in CEDARS (Documents area)

⁷ *Id.* at OP 11 (emphasis added).

Step	Timing	Responsible Stakeholder	Action
	beginning in 2025		
6	Q4 2025	PAs collaboratively	Assess one-year of baseline data to determine which would be good candidates to upgrade to a metric
7	Q1, annually beginning in 2026	Each PA individually	Revisit step 1 and update document in CEDARS

5. Reporting on Indicators and Metrics

The Joint PAs expect to begin tracking indicators adopted and clarified from D.23-06-055 and updated common metrics and indicators from D.18-05-041 as of October 1, 2024, and reporting will follow accordingly. For PAs to begin tracking on October 1, 2024, this AL must be approved no later than August 1, 2024, which gives PAs two months to operationalize and/or modify their reporting practices. For example, Q4 2024 data will become available in the March 1, 2025, claims reporting (for quarterly cadenced reporting) and May 1, 2025 (for annual cadenced reporting).

EFFECTIVE DATE

Pursuant to General Order (GO) 96-B and OP 11 of D.23-06-066, this advice letter is submitted with a Tier 2 designation. SDG&E respectfully requests that this submittal be approved effective on May 31, 2024, which is 30 days after the date this Advice Letter was submitted with the Commission.

PROTEST

Anyone may protest this Advice Letter to the California Public Utilities Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be submitted electronically and must be received by May 21, 2024, which is 20 days from the date filed. There is no restriction on who may file a protest.

The protest should be sent via e-mail to the attention of the Energy Division at EDTariffUnit@cpuc.ca.gov. A copy of the protest should also be sent via e-mail to the address shown below on the same date it is delivered to the Commission.

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NOTICE

A copy of this submittal has been served on the utilities and interested parties shown on the attached list and Service List R.13-11-005, by providing them a copy hereof electronically.

Address changes should be directed to SDG&E Tariffs by e-mail at SDGETariffs@sdge.com.

s/ Clay Faber

CLAY FABER
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General Order No. 96-B
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R.13-11-005

San Diego Gas & Electric Advice Letter 4438-E

ATTACHMENT A
CAEECC Equity and Market Support
Working Group Final Report

CAEECC Equity and Market Support Working Group Final Report

Prepared by Common Spark Consulting, CAEECC Facilitation Team

March 22, 2024

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Executive Summary

Adhering to the California Public Utilities Commission (CPUC) Decision 23-06-055, the California Energy Efficiency Coordinating Committee (CAEECC) re-engaged the previous Equity Metrics Working Group (EMWG) and Market Support Metrics Working Group (MSMWG) to discuss and develop recommendations to clarify adopted Equity and Market Support Indicators. In November 2023, the Equity and Market Support Working Group (EMSWG) convened to clarify the 13 Equity Indicators and 25 Market Support Indicators in the Decision, prioritizing to clarify all 13 Equity Indicators and 9 Market Support Indicators. The table found in [Appendix 1](#) summarizes the Working Group's recommendations for the Indicators to inform the Tier 2 Advice Letter Portfolio Administrators must file on these Indicators by May 1, 2024.

In the initial phase of reporting on the Equity and Market Support Indicators, the Working Group recommends that the PAs take the following steps:

1. Indicators to be reported quarterly and annually should be done so by uploading a spreadsheet in the Documents area of CEDARS, similar to annual Common Metrics submittals by PAs.
2. Links to programmatic information and data should be provided in the spreadsheet to ensure readers can access contextual information when viewing the Indicator reporting, e.g., <https://cedars.sound-data.com/programs/list/>; <https://cedars.sound-data.com/documents/standalone/list/>; and <https://cedars.sound-data.com/reports/summary/>.
3. PAs should consider creating and using a high-level and consistent template across the PAs to report on the Indicators. When developing the template, the PAs should take heed of the Recommendation #25 that states reporting should not be an overly cumbersome process.

Introduction

In June 2023, Commission Decision 23-06-055 requested that the California Energy Efficiency Coordinating Committee (CAEECC) re-engage the previous Equity Metrics Working Group (EMWG) and Market Support Metrics Working Group (MSMWG) to discuss and develop recommendations to clarify adopted Equity and Market Support Indicators. The Commission noted:

"Many of the adopted indicators would benefit from clarification and further discussion about the valuation methodology. Guidance may be needed for PAs to ensure that baselines for target-setting are clear and consistently applied, to the greatest extent possible. **For these reasons, we will ask the CAEECC to re-engage and update, as necessary, the EMWG [Equity Metrics Working Group] and MSMWG [Market Support Metrics Working Group] to discuss and develop recommendations**"¹ (emphasis added).

In November 2023, CAEECC convened the Equity and Market Support Working Group (EMSWG) to support the Portfolio Administrators (PAs) in clarifying the adopted Equity and Market Support Indicators. Over the course of working group meetings, the Facilitation Team observed that the types of questions and issues working group members raised regarding Indicators covered a variety of issues, including why a particular Indicator should be tracked, what is meant to be captured by the Indicator, and how to collect and report data for the Indicator. The "why, what, and how" of each Indicator must be clear and agreed upon by interested stakeholders before being reported to the Commission. Otherwise, the Commission may receive information that is inconsistent across PAs and confusing to readers. Relatedly, early in the working group process, Grounded Research, with support from PG&E and BayREN, offered high-level reflections about the Indicators that were shared and discussed by the Working Group and which the Facilitation Team considers important to uplift. Key points and accompanying Working Group perspectives are set forth below:

- Terms and definitions matter when counting things.
- Indicators will always be imperfect; the level of effort and cost needed for collecting more precise data is important to understand and should be weighed against the benefit of this increased precision.
- With the exception of Statewide Programs, not all Indicators will represent the entire State of California since reporting is often PA-specific. Additional analysis is required to determine if PA-specific programs should be rolled up to the State level.
- There is variability in the type of data available, collected, and reported by PA, program, and segment.
- There is an opportunity to misinterpret the data that is reported/available. Some of the information may be partial or incomplete information that does not fully represent what

¹ D.23-06-055 at page 29.

is occurring (e.g. the exact nature of a program intervention). As the WG [working group] talked through issues, we [Grounded Research] hoped that the challenges become clear and that those challenges can be provided when sharing data with stakeholders.

- Stakeholders may use Indicator results differently. Some stakeholders will look at the results to help understand how well certain groups are being served. Others will look at the results to ensure PA accountability of ratepayer funds. This viewpoint can affect choices [for example, using gross versus net savings values to quantify benefits].²

These high-level reflections helped to shape the conversations amongst and recommendations from the working group.

This Report synthesizes the relevant background and summarizes discussions and outcomes of the Equity and Market Support Working Group (EMSWG). It is intended to inform the PAs' development of the joint advice letter clarifying adopted Indicators due May 1, 2024. EMSWG members reviewed a draft of the report and provided feedback that has been incorporated. The Facilitation Team maintains editorial responsibility for this Final Report.

Background

Previous Metrics Working Groups and Convenings

In Summer 2021, CAEECC convened the Equity Metrics Working Group (EMWG) and Market Support Metrics Working Group (MSMWG) to identify and define objectives and associated key metrics for the respective portfolio segments (i.e., Equity and Market Support). Both groups met four times between July and September 2021 and recommended a robust set of principles, objectives, and metrics to apply to the Equity and Market Support Segments.³

In late August and September 2022, CAEECC Facilitators, at Energy Division's request, convened two "huddles"⁴ and one workshop to continue to discuss and add specificity to Equity and Market Support Metrics, Indicators, and Targets. Key takeaways from the September 15, 2022 Metrics Workshop included:

- "Participants indicated that clarification is needed on many definitions and key terms used throughout the metrics space
- Participants indicated their desire to have a continued stakeholder engagement process to address clarification on definitions, key terms, and to achieve greater specificity on the

² Memo from Grounded Research to CAEECC EMSWG members, [CAEECC EMSWG Considerations for Equity Indicators](#), pages 2-3, dated November 24, 2023.

³ See [EMWG Website](#) and [MSMWG Website](#). Final Reports can be found under "Key Documents."

⁴ A "huddle" is a meeting where information is exchanged and discussion occurs, but no decisions are made.

methodology of data collection and roles and responsibilities, either through a continuation of the [MSMWG] and the [EMWG] or through a similar process.”⁵

Relationship between Metrics, Indicators, and Targets

The Final EMWG Report and Final MSMWG Report indicate the relationships between objectives, sub-objectives, metrics, indicators, and targets (Figures 1 and 2). Note that the main difference between a Metric and an Indicator is that an Indicator does not have an associated Target.

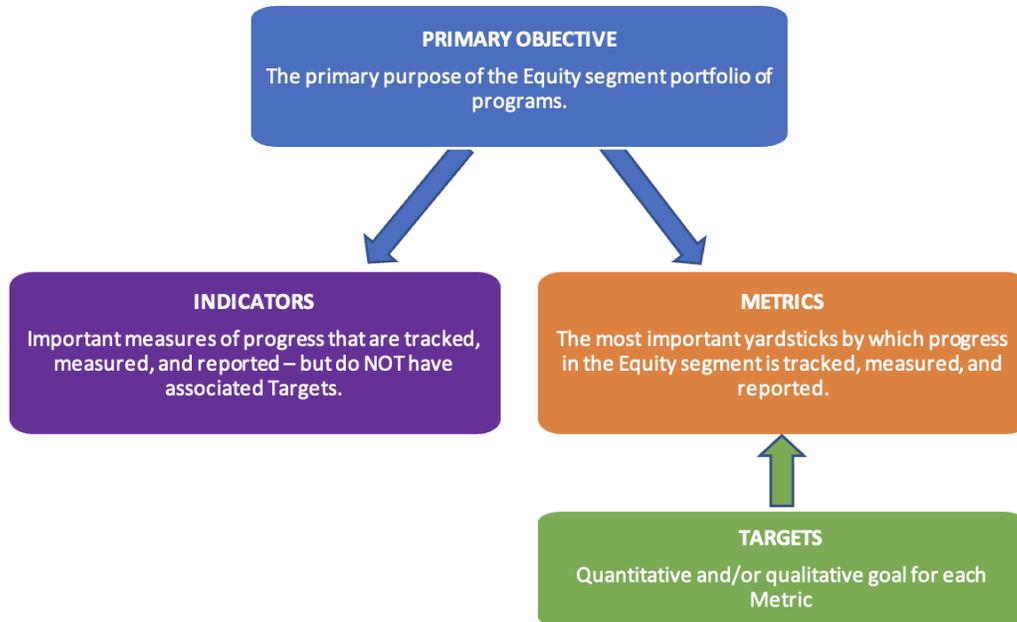


Figure 1. Equity Segment Relationships Among Objective, Indicators, Metrics, and Targets

⁵ CPUC Metrics Workshop Summary, posted 9.23.24 at <https://www.caeec.org/9-15-22-cpuc-metrics-workshop>

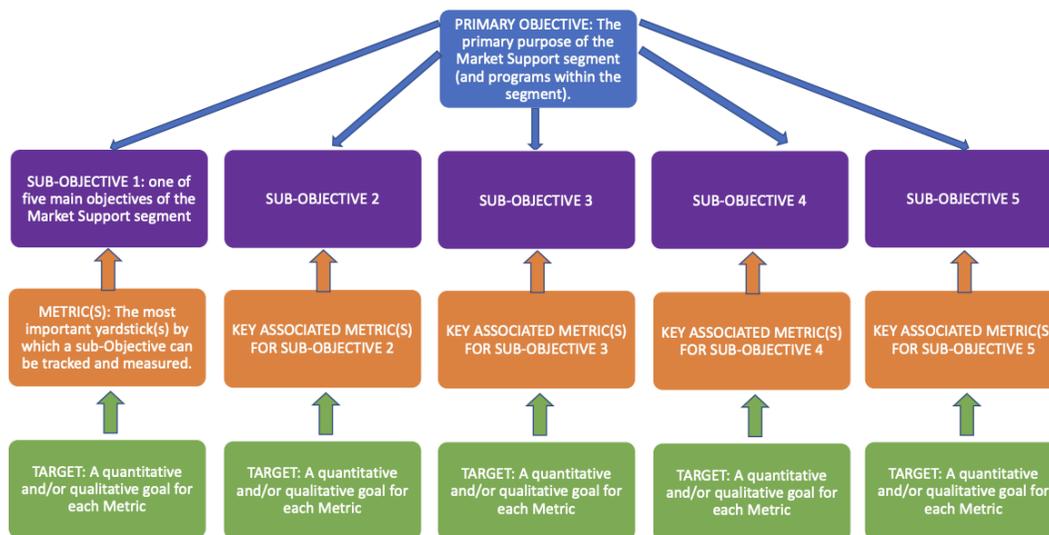


Figure 2. Market Support Segment Relationships Among Objective, Sub-Objectives, Metrics, and Targets

Indicators Adopted in D.23-06-055

In June 2023, the Commission adopted 13 Equity Indicators and 25 Market Support Indicators (Appendix 2). Most of the adopted Indicators were metrics or indicators recommended by the 2021 EMWG or MSMWG. Additionally, the Commission adopted 17 Awareness, Knowledge, Attitude and Behavior Indicators, which are market support indicators structured around annual surveys. The Commission stated that the adopted Indicators "will provide a strong starting point from which to assess progress and impacts of the equity and market support segments of the portfolio."⁶

Working Group Overview

Purpose

In Ordering Paragraph 11 of D.23-06-055, the Commission directed PAs to file a joint Tier 2 advice letter that:

1. Clarifies all of the indicators adopted in the decision

⁶ D.23-06-055 at page 60.

2. Identifies information that could be used as baselines for future targets, or methodologies for how the indicator information can be used as baselines
3. Recommends metrics for removal, suspension, or modification from those included in D.18-05-041 (referred to as "Common Metrics" or "Business Plan Metrics").⁷

As previously noted, the Commission stated that "Many of the adopted indicators would benefit from clarification and further discussion about valuation methodology" and asked CAEECC "to re-engage and update, as necessary, the EMWG and MSMWG to discuss and develop recommendations."⁸ Additionally, the Commission noted that "these recommendations on common metrics may be informed by the CAEECC metrics working groups, to the extent they have desire and capacity to be involved."⁹ Lastly, the Commission stated "...in an effort to make the CAEECC's tasks more manageable, we have removed any requirement for consultation with CAEECC on the AKAB surveys, identification of existing common metrics that should be removed from tracking, and development of methods for ensuring demographic participation. The PAs are free to consult with CAEECC on these items if desirable and time permits, but it is no longer required."¹⁰

Given the language in D.23-06-055 and input from Energy Division, the Facilitation Team drafted a prospectus for CAEECC to consider at the Q3 2023 meeting. The Prospectus identified Required Activities that reflected the Ordering Paragraph 11 language (i.e., to clarify indicators adopted in D.23-06-055 and identify information or methods that can be used as baselines) and Optional Activities that included Common Metrics Update, AKAB Indicators, and Equity and Market Support Goals. CAEECC approved the Prospectus at the Q3 meeting and also approved the EMSWG to provide the final report and recommendations directly to the PAs, rather than to CAEECC.

In approving the Prospectus, CAEECC delegated to the EMSWG to self-determine whether to address Common Metrics, AKAB indicators, and Equity and Market Support Goals. The EMSWG elected not to address Common Metrics and considered addressing AKAB Indicators as an optional activity; Equity and Market Support Goals may be addressed in a later phase of the working group, after Required Activities are completed.¹¹ The Facilitation Team updated the EMSWG Prospectus to reflect the Group's Work Plan decisions.

⁷ Ordering Paragraph 11, D.23-06-055.

⁸ D.23-06-055 at page 29.

⁹ D.23-06-055 at page 20.

¹⁰ D.23-06-055 at page 100.

¹¹ Prospectus for CAEECC Equity & Market Support Working Group (EMSWG), pages 3-4, updated December 19, 2023, available at: <https://www.caeccc.org/equity-market-support-wg> under "Key Documents."

Recruitment Process

Recruitment for the EMSWG began with current CAEECC members and past EMWG and MSMWG Members. Members in the Evolving CAEECC Working Group¹² were also invited to participate. CAEECC Member organizations, past EMWG and MSMWG Members, and participants in the 2022 "huddles" were not required to fill out an application to participate because their qualifications carried over from previous efforts. Stakeholders new to the topic were asked to fill out a simple application that asked about the applicant's experience and/or expertise with energy efficiency evaluation, measurement, and verification approaches; experience related to energy efficiency policy, program design, and/or implementation; and experience working collaboratively in other stakeholder processes. Each of the three applicants was accepted into the EMSWG.

Because the EMSWG was framed as a re-engaging of previous working groups, the recruitment process was short (approximately one week). This may have presented a barrier to broader participation by organizations that have not historically engaged in CAEECC working groups. This short application period may have also presented a barrier to participation from those familiar with CAEECC and its working group, but with limited bandwidth to respond to the outreach.

Working Group Composition

The EMSWG is composed of 12 CAEECC Member organizations, two Ex-Officio CPUC organizations, and six non-CAEECC Member organizations (Table 1). PAs engaged various consultants to support and/or represent them in working group discussions: 3C-REN and Inland REN (I-REN) engaged Frontier Energy; BayREN engaged Grounded Research; SoCalREN engaged Lincus; and SoCalGas engaged Halley Fitzpatrick.

Table 1: EMSWG Member Organizations

CAEECC Affiliation	Organization	Representative & Alternative
CAEECC Member	3C-REN	Erica Helson
CAEECC Member	BayREN	Jane Elias & Mary Sutter
CAEECC Member	Marin Clean Energy	Brandon Ewert & Michael Denevan
CAEECC Member	PG&E	Rob Bohn & Moses Gastelum
CAEECC Member	Redwood Coast Energy Authority /	Stephen Kullman & Patricia Terry

¹² The Evolving CAEECC Working Group (ECWG) was convened in July 2023 as a result of the CAEECC Composition, Diversity, Equity & Inclusion (CDEI) Working Group Report, Section 6: Restructuring CAEECC Recommendations (pages 26-31). Broadly, ECWG was charged with aligning the CAEECC Purpose, Objectives, Structure, and Processes with CPUC and state goals around justice, equity, diversity, and inclusion, and evolving needs of the EE Portfolio.

	RuralREN	
CAEECC Member	SCE	Gary Golden & Jessica Lau
CAEECC Member	SDG&E	Stephanie Gutierrez & Stacie Risley
CAEECC Member	San Joaquin Valley Clean Energy Organization	Courtney Blore Kalashian
CAEECC Member	Small Business Utility Advocates	Ted Howard & Britt Mara
CAEECC Member	SoCalGas	Halley Fitzpatrick & Kevin Ehsani
CAEECC Member	SoCalREN	Lujuana Medina & Patrick Ngo
CAEECC Member	The Energy Coalition	Rebecca Hausheer & Natalie Espinosa
Ex-Officio CAEECC Member	CPUC, Energy Division	Ely Jacobsohn & Pamela Rittelmeyer
Ex-Officio CAEECC Member	CPUC, Public Advocates Office	James Ahlstedt
Non-CAEECC Member	Association of Monterey Bay Area Governments (AMBAG)	Amaury Berteaud
Non-CAEECC Member	The Mendota Group	Grey Staples & Rachel Sours-Page
Non-CAEECC Member	Oracle	David Siddiqui & Mary Sprayregen
Non-CAEECC Member	Resource Innovations	Chrissy Crowell & Chris Pilek
Non-CAEECC Member	Silent Running LLC	James Dodenhoff
Non-CAEECC Member	William Worthen Foundation	Alice Sung & Avery Kintner

Additionally, the Facilitation Team managed a list of "interested stakeholders" who followed along with the EMSWG and contributed to discussions, but did not commit to full participation as a working group member (i.e., attending all meetings, completing pre- and post-meeting work, etc.). The list of interested stakeholders included additional individuals at Member organizations (who were not identified as a lead or alternate), past EMWG and MSMWG members, consultants working for Working Group members (but not representing them in Working Group meetings), and other interested groups (e.g. Frontier Energy, Resource Innovations, and Valley Clean Air Now). Insights from these interested stakeholders added value to working group discussions.

Meetings Summary

The EMSWG sought to finish its discussions with enough time for the PAs to develop and file their joint advice letter by the required May 1, 2024 deadline. Thus, the EMSWG sought to complete its work by March 15, 2024. The EMSWG met nine (9) times over four months (Table 2). Each meeting was three hours, the preferred maximum time among working group members.

Despite the abundant number of meetings, total hours in discussion, homework assignments, and active engagement by the Working Group Members, the EMSWG and Facilitation Team still faced time and bandwidth constraints given the breadth of possible discussion topics involved in clarifying the "why, what, and how" for Indicators. As the Commission noted "[t]he number of metrics and indicators recommended is large and will require collection of a great deal of information."¹³

Table 2. EMSWG Meeting Summary

Activity/ Meeting #	Date	Topic(s)	Homework (after meeting)
Huddle #1	11/1/23	Introduction to the EMSWG	None
Meeting #1	11/7/23	Introduction to the EMSWG	Identification of Priority Indicators for Discussion (10 Responses)
Meeting #2	12/5/23	Equity Indicator Definitions and Work Plan	None
Meeting #3	12/6/23	Equity Indicators #2, 5-9, and 11-12	Equity Indicators Survey (12 Responses); Market Support Indicator Definitions (6 Responses)
Meeting #4	1/17/24	Relationship-related Market Support Indicators	None
Meeting #5	1/24/24	Funding-related Market Support Indicators	None
Meeting #6	1/31/24	Equity and Market Support Indicators	Market Support Indicators Survey (12 Responses)
Meeting #7	2/21/24	EMSWG Draft Report - Equity Topics	None
Meeting #8	2/28/24	EMSWG Draft Report - Market Support Topics	Email suggestions for remaining items to be addressed to the Facilitation Team

¹³ D.23-06-055 at page 59.

Priority Indicators and Issues for Discussion

Language in D.23-06-055 suggested that "clarifying the indicators" primarily meant defining shared valuation methodologies for each indicator. In preparation for the first meeting, PAs provided "starting point" proposals to share their respective thinking about Indicator quantification.¹⁴ It quickly became clear, however, that the working group needed to discuss other foundational items, such as definitions, before addressing valuation methods.

The first EMSWG homework assignment aimed to better understand which Indicators are priorities for group discussion and why. From the 10 responses, the issues identified and accompanying level of detail varied. For example, SoCalREN provided a detailed spreadsheet of issues to be clarified for all metrics, while BayREN/Grouped Research noted higher level issues that affect the Indicators broadly. Further, PG&E noted that all Indicators, with the exception of two WE&T Indicators, could be a priority for discussion. Other homework responses identified priority indicators that were generally different from each other.¹⁵ The Facilitation Team aimed to design meeting agendas that would address a number of cross-cutting issues (e.g., definitions) and specific priority indicators, but ultimately, there was not enough time or bandwidth to address all issues.

Recommendations

Definitions of Consensus, Near Consensus, and Non-consensus

Traditionally, CAEECC and CAEECC working groups make recommendations on a consensus-basis, where consensus is defined as unanimity among working group member organizations. When there is less than 100% agreement on recommendations, dissenting working group members provide alternative proposals and the working group votes on the options; the alternative proposals with voting results are presented as non-consensus recommendations in final working group reports.

The scope of EMSWG discussions (i.e., the why, what, and how for each Indicator) was broad, and the working group was not able to completely address the why, what, and how for every Indicator given the sheer volume and complexity of work required, instead electing to prioritize Indicators and issues for discussion. It is the Facilitation Team's perspective that the consensus/non-consensus construct is not a good fit for some of the topics discussed, given the developing nature of discussions; nonetheless, the Facilitation Team has attempted to follow CAEECC's traditional practice here.

¹⁴ 11-7-2023 PA Starting Proposal - Table of Adopted Indicators, available at: <https://www.caecc.org/equity-market-support-wg-meeting-1> under Materials Posted before the Meeting.

¹⁵ [EMSWG Homework #1 Compilation](https://www.caecc.org/equity-market-support-wg-mtg-2), posted November 28, 2023, available at: <https://www.caecc.org/equity-market-support-wg-mtg-2> under Key Documents.

Facilitators sought consensus via two surveys - one that addressed Equity Indicator discussions and one that addressed Market Support Indicator definitions. Twelve (12) of 20 working group members responded to the surveys.¹⁶ Where possible, the survey results for non-consensus items are shared in the report text and indicated as a response rate (e.g., 5 out of 12 or 5/12). Additionally, the working group discussed consensus and non-consensus recommendations during Meetings #7 and 8 on February 21 and 28. As summarized below, under each topic discussed, there may be consensus and non-consensus recommendations.

Purposes of Indicators

Consensus and Near Consensus

Recommendation #1: The Purposes of Indicators

Working Group members largely agreed on the purposes of Equity and Market Support Indicators. The purposes include:

1. Understanding the impact of Equity and Market Support segment programs across PAs (12/12)
2. Ensuring accountability for dollars spent in the Equity and Market Support segments (10/12)
3. Enabling PAs to make adjustments to Equity and Market Support segment programs based on Indicator data (9/12)
4. Development of goals for the Equity and Market Support segments (12/12)

One Working Group member offered one additional suggestion as the purpose of Equity Indicators: Understanding the distribution of equity target participants by program, sector, and portfolio segment to improve equity-qualified customers' access to the offerings in the energy efficiency portfolio (e.g., equipment, technical assistance, education, etc.)

¹⁶ Respondents were nearly identical between the two surveys, with the exceptions of the Mendota Group (which responded to the Equity Survey but not the Market Support Survey) and SCE (which responded to the Market Support Survey but not the Equity Survey).

Equity Indicators¹⁷

Consensus

Topic: Definition of "Equity Target Participant" (Equity Indicators #1-4, 10, 13)

Equity Ind. #	Indicator Description
1	Count of equity target participants in equity segment, by sector (Quarterly, Sector)
2	Sum of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S)
3	Count of equity target participants in market support segment, by sector (Q, S)
4	Count of equity target participants in resource acquisition segment, by sector (Q, S)
10	Median of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S)
13	Percent of equity target participants in equity segment, by sector (Q, S)

Recommendation #2: Definition of "Equity Target Participant" vs. "Equity Segment Participant" vs. "Equity Market Participant"

The term "**equity target participant**" (used in Equity Indicators #1-4, 10, and 13) is defined as a program participant that meets CPUC-adopted criteria for being hard-to-reach, located in a disadvantaged community, OR underserved.¹⁸ The participant *can* be in an Equity, Market Support, or Resource Acquisition segment program.

Relatedly, an **equity segment participant** *does NOT* have to be hard-to-reach, located in a disadvantaged community, or underserved but must be a participant in an Equity segment program.

Lastly, an **equity market participant** is hard-to-reach, located in a disadvantaged community, and/or is underserved AND is a participant in an Equity segment program. Therefore, an equity target participant in an Equity Segment program is also considered an equity market participant.

¹⁷ The Facilitation Team found Grounded Research's memo, [CAEECC EMSWG Considerations for Equity Indicators](#), very informative and influential in shaping the discussions on Equity Indicators. The Facilitation Team recommends readers review the memo in its entirety for more detailed insight.

¹⁸ See Appendix 3 for Equity Definitions used in the EMSWG.

Non-Consensus

Topic: Counting and Reporting Participants by Sector

Equity Ind. #	Indicator Description
1	Count of equity target participants in equity segment, by sector (Q, S)
3	Count of equity target participants in market support segment, by sector (Q, S)
4	Count of equity target participants in resource acquisition segment, by sector (Q, S)
13	Percent of equity target participants in equity segment, by sector (Q, S)

"Participants" in the energy efficiency portfolio include people, households, businesses, and other entities that actually participated in an energy efficiency program and received equipment (e.g., rebate for an efficient washing machine), service (e.g., direct install of an efficient HVAC system), or information or education (e.g., Home Energy Report, workforce training). The unit to be counted as a participant varies across and within sectors (Table 3).

Table 3. Possible Participant "Units" that could be Counted¹⁹

Sector	Residential (single- and multi-family)	Commercial (small, medium, and large)	Public	Agricultural	Industrial	Cross-cutting (Finance, WE&T, IDSM, C&S)
Unit	Households; Multi-family building; Individual apartment; Community-based organization and the populations they serve	Business energy account; Single-site business; Multi-site business; Non-res building; Business owner; Business staff	Local govt; public agency; local govt or public building; local govt officials	Farms; Buildings at a farm; Farm owners; Farm staff; Pumps or other meters not in a building	Facilities; Individual equipment or processes within facilities	Students; Transitional aged youth; Workers (different than disadvantaged worker); Workers of a specific segment

¹⁹ See [CAEECC EMSWG Considerations for Equity Indicators](#), pages 8-9, dated November 24, 2023.

The EMSWG primarily discussed counting and reporting participants by sector within the context of multi-family participants. Working Group members suggested that because many potential equity-qualified participants reside in multi-family buildings, it is important to track and distinguish this population. Additionally, within working group discussions, reporting participants was expected to occur either directly in quarterly claims reported in CEDARS or using data available in CEDARS. Some of the issues raised extend beyond the multi-family sector so the Facilitation Team has summarized discussions under a broader umbrella, and noted where issues specific to multi-family (or another sector or subsector) were raised.

The Working Group identified the following challenges related to reporting participants:

1. A Working Group Member noted that in the past EMWG discussions, Indicators addressing participant counts were intended to track people touched by a program, and were not necessarily intended to be limited to the specific program or project applicant. They raised that it is important that the unit counted as a participant is transparent and clear to anyone reading Indicator data. They highlighted that CEDARS may not be the right tool for reporting participant counts unless there is a change to the CEDARS structure and/or data.
2. CEDARS is primarily used to report on activities that result in energy savings, and there are a number of Equity and Market Support programs that are not intended to directly result in energy savings for participants. A Working Group member noted that, in theory, PAs could add a blank line with placeholder code to report participant data but this would add many lines of mostly blank data fields to claims data.
3. With regard to the multi-family participants, Working Group members noted that participants can be counted as individual units within a multi-family building, common areas within a multi-family building, or a whole multi-family building. This would be distinguished in CEDARS using the building type field because "multi-family" is not a distinct sector within CEDARS. Distinguishing by building type, rather than by sector, adds complexity to the Indicator data and reporting.
4. The process to report participants in the public sector faces similar issues as reporting multi-family participants - selecting any one unit to report (or reporting multiple units together) doesn't tell the full story of how people in the public sector are benefitting from program interventions. Participant units in the public sector can include buildings, projects, facilities, jurisdictions, and/or public sector officials. The current structure of CEDARS and data in CEDARS does not include this level of granularity.

Recommendation #3: Reporting Participant Counts

In initial reporting, PAs should use PA program data to report participants disaggregated by program and include details on how participants were counted so readers can understand the context. As for counting multifamily participants, the Working Group noted that this challenge exists across all programs beyond the Equity and Market Support segments due to the nature

and scope of the program and how the multifamily unit is metered (i.e., master-metered versus individually metered). In the future, PAs can come to a consistent and/or different level of granularity.

Topic: Values for Benefits Calculations (Equity Indicators #2, 5-9)

Equity Ind. #	Indicator Description
2	Sum of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S)
5	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment (Q, S)
6	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment (Q, S)
7	Sum of all equity segment participants' kW savings in equity segment (Q, S)
8	Sum of all equity segment participants' therm savings in equity segment (Q, S)
9	Sum of all equity segment participants' TSB [Total System Benefits] in equity segment (Q, S)

Recommendation #4: Savings Values for Quantifying Benefits

Indicators that use energy savings values to calculate benefits (i.e., Equity Indicators #2, and 5-9) should use first-year gross ex ante values that are reported to and available from CEDARS. Using these values would capture potential electricity use increases and gas use decreases from fuel substitution measures; however, potential energy use increases from fixed or repaired end uses would not be captured as that data is not included in ex ante data. Additionally, nonclaimable savings (generally defined as energy savings that occur but are not claimable in the energy efficiency portfolio; see Nonclaimable Savings section) are not captured in ex ante data.

A few of the Working Group members supported the following alternatives:

- Using only net ex ante values (The Mendota Group)
- Using both gross and net ex ante values (Small Business Utility Advocates, SoCalREN, SDG&E, and The Energy Coalition)
- Using both first year and lifecycle gross ex ante values for Equity Indicators #6 and #8, addressing electric (kWh) and gas (therm) savings, respectively (Energy Division)
- All potential bill increases (e.g., new or repaired end uses, or other changes in energy use) should be quantified separately via a third-party EM&V study and should not be reported in quarterly data (SoCalREN, The Energy Coalition)

Recommendation #5: Calculating Bill Savings

Equity Indicator #2 (Sum of equity target participants' expected first-year bill savings in equity segment, by sector) should be calculated using a PA-specific electric or gas rate multiplied by first-year, gross ex ante electric or gas savings. The Working Group discussed concerns about whether RENs are able to accurately report on this Indicator because they do not have access to customer billing information and the customers they serve are in multiple CCA territories, each with their own rates. PAs should individually determine the rates they will use to calculate this Indicator, striving for simplicity (e.g., using a bundled IOU rate rather than rates from multiple CCAs).

A Working Group member also noted that using an average tariff rate could distort savings or costs that could be experienced when the majority of energy savings and demand reduction occur during peak periods. The same member emphasized that the calculation and inputs used to quantify Equity Indicator #2 should be completely transparent.

A few of the Working Group members also supported the following alternatives for calculating Equity Indicator #2:

- Using first-year net savings values (The Mendota Group)
- Using evaluated first-year gross and net savings values (Small Business Utility Advocates)

Recommendation #6: Reporting Bill Savings

Working Group members discussed whether one bill savings value should be reported for Equity Indicator #2, or if separate savings should be reported for electricity and gas. Many members supported reporting one value given that the utility bill is one cost for a customer, but it should be clear that electric savings come from specific electric savings and rates, and the same for gas. PA Members agreed that one value is beneficial, but noted that in order to calculate a single number, PAs need to calculate them separately anyway so providing two values is expected to require minimal additional effort.

In Meeting #7, the Working Group voted on the following options:

- Option 1: For Equity Indicator #2, PAs should report Electric and Gas bill savings as one value
- Option 2: For Equity Indicator #2, PA should report Electric and Gas bill savings as two separate values
- Option 3: Another option

In Meeting #7, 16 out of 23 respondents supported reporting electric and gas savings separately. The remaining eight respondents voted for Option 3: Another Option; three of the eight respondents indicated they had no preference.

Topic: Nonclaimable Savings

Many working group members (RuralREN, The Energy Coalition, SoCalREN, Small Business Utility Advocates, Silent Running LLC) noted that nonclaimable savings should be included in the calculation of Equity Indicators #5-9 (and presumably also in the calculation of Equity Indicator #2 for consistency in quantifying benefits). However, the term "nonclaimable savings" does not have an agreed upon definition and no PAs, with the exception of SoCalREN in its Annual Evaluation, Measurement, and Verification (EM&V) Report, currently report nonclaimable savings.

In working group discussions, members generally referenced nonclaimable savings as those that were expected to occur relative to the customer baseline (and that the customer would experience), but for CPUC policy reasons, those savings are not able to be claimed by PAs. For example, nonclaimable savings can result if a customer installs an "expired" measure, such as high/low bay lighting. A measure can be "expired" in CEDARS because it has reached high-enough adoption levels within the general population that it is considered industry standard practice or equipment baseline. However, some customers (particularly those meeting the CPUC's definitions of hard-to-reach, disadvantaged, or underserved) could still be able to achieve those "nonclaimable" savings because they have had limited access to energy efficient equipment or services and are not at the same starting point (or baseline) as the general population. Ultimately, the Working Group agreed that it is premature to include nonclaimable savings in the calculation of Equity Indicators #2 and 5-9 until, at least, a shared definition is adopted for nonclaimable savings.

Recommendation #7: Nonclaimable Savings Data

PAs should not include nonclaimable savings in the calculation of Equity Indicators #2 and 5-9.

A few Working Group members supported the following alternatives:

- Instead of collecting and reporting nonclaimable savings, a more qualitative approach to reporting that focuses on events and customer and stakeholder touchpoints is preferred
- PAs, in consultation with the EMSWG or in another venue, should continue discussions on nonclaimable savings to develop a shared definition and explore options for quantification and reporting (AMBAG)

Topic: Reporting on Statewide Programs

It is not clear how investor-owned utilities (IOUs) should report benefits for Statewide Programs. Typically for Statewide Programs, IOUs receive credit for program benefits in proportion to their share of the budget. It is not clear if this same process should be followed for Equity and Market Support Indicators.

Additionally, to report participant counts in Statewide Programs, it's not clear whether IOUs should report a proportion of participants based on their relative budget contributions, regardless of where the participant is actually located. There appear to be 15 statewide programs (out of 200 total programs) – one in Equity, six in Market Support, and eight in Resource Acquisition; they collectively will spend about \$530 million from 2024-27.

Recommendation #8: Reporting on Statewide Programs

The challenge of reporting on Statewide Programs are not unique to Equity and Market Support Indicators as it also affects Common Metrics. Possible solutions considered by the Working Group include:

1. Provide a single, aggregated statewide value or count that is not separated by PA (5/12)
2. Leverage annual reports and impact evaluations to ensure that benefits are distributed across the state (3/12)
3. Consider how reporting aggregated values for statewide programs would impact goal development and accountability for statewide program goals (6/12)
4. None of the above. Further discussion is needed to clarify Indicators applied to Statewide Programs (3/12)

One Working Group member recommended providing data disaggregated by PA to see which areas of the state are being served.

In Meeting #7, the EMSWG further discussed the challenges of and possible solutions for reporting on Statewide Programs but did not come to agreement on any possible solutions. As such, this Report summarizes the options and defers to the PAs to determine how to approach reporting on Equity and Market Support Indicators for Statewide Programs.

Topic: Equity Indicators #11 and 12

Equity Ind. #	Indicator Description
11	Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector (A, P)
12	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector (A, P)

Working Group members raised concerns with collecting data to determine whether customers meet the CPUC's definitions for hard-to-reach, disadvantaged, or underserved.²⁰ Some of the data needed can be sensitive for customers to provide and, but for the customer, is not accessible to a PA (e.g., household income). Additionally, the energy efficiency program or

²⁰ See Appendix 3.

intervention in which the person or business is participating can affect a PA's ability to gather data. For example, people or businesses participating in a free workshop or educational event can be more hesitant to provide personal information than those receiving equipment incentives or direct installation of equipment.

There was not agreement among working group members about whether more Commission guidance regarding the Commission's definitions for hard-to-reach, disadvantaged, and underserved is needed or not. Six of 12 respondents to the Equity Survey thought that more Commission guidance could be helpful, and the other six respondents either disagreed or did not have an opinion. Generally, some Working Group members thought that enough guidance already exists, but one raised that it may be productive to have further conversation about the feasibility of collecting certain data points. Notably, Working Group members identified that it is not possible to collect data on non-program participants relating to the criteria for being hard-to-reach, disadvantaged, and/or underserved; therefore, it is not possible to develop a total count of hard-to-reach, disadvantaged, or underserved customers (participants and non-participants) at the sector level.

Recommendation #9: Equity Indicators #11 and 12

With regard to calculating Equity Indicators #11 and 12, EMSWG identified that:

- Equity Indicators #11 and 12 should be reported by PA, rather than as one statewide value (7/12)
 - 3C-REN, BayREN, and I-REN identified that one statewide value should be provided. Two other respondents either had no opinion or did not answer the question.
- The denominators for Equity Indicator #11 and 12 should be the total number of program participants at the sector level (i.e., single-family residential, multi-family residential, commercial) (11/12)
 - I-REN identified that the total hard-to-reach population and total disadvantaged community population should be used as the denominators for Equity Indicators #11 and 12, respectively. For Equity Indicator #12, SDG&E also noted that the total disadvantaged community population could be used as the denominator.

Market Support Indicators

Consensus and Near Consensus

Topic: Definition of "Partnership"

MS Ind. #	Indicator Description
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2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P)
20	Assessed value of the partnership by partners (A, P)

Recommendation #10: Definition of "Partnership"

The term "partnership" (used in Market Support Indicators #2 and 20) is defined as:

1. Agreement between at least two entities to engage in a mutually beneficial relationship within the context of EE products, services, education, and/or training
2. The partnership may or may not be legally contracted
3. In cases where a partnership is not contracted, PAs have other documents/materials demonstrating agreement to work together

PG&E suggested that the working group consider adding electrification and decarbonization to the "partnership" definition. Options include:

- A. Adding building electrification and/or building decarbonization to #1 above.
- B. Adding a fourth bullet: "Partnerships may focus on energy efficiency, building decarbonization, and/or decarbonization products, technologies, services, training and outreach.

PG&E also noted a concern that the definition above is overly broad. Suggested additional guidelines include:

- C. Formal documented agreement (contract, MOU, or otherwise) of the partnership arrangement
- D. The scope of the partnership work supports energy efficiency, building electrification, and/or decarbonization
- E. All partners contribute resources (financial or otherwise) to the agreed upon scope of the partnership
- F. The partnership agreement includes clear roles and responsibilities for assuring the partnership meets its objectives

The EMSWG discussed PG&E's suggestions at Meeting #7 and determined not to include them in the definition of "partnership."

Topic: Definition of "Partner"

MS Ind. #	Indicator Description
1	Number of partners by type and purposes (Q, P)

18	Percentage of partners that have taken action supporting energy efficiency by type (Q, P);
20	Assessed value of the partnership by partners (A, P)

Recommendation #11: Definition of "Partner"

The term "partner" (used in Market Support Indicators #1, 18, and 20) is defined as an entity engaged in partnerships including and not limited to educational institutions/organizations, governments, community-based organizations, trade associations, suppliers, manufacturers, contractors (see "Type").

SCE suggested only keeping "an entity engaged in partnerships" and omitting the examples. The Working Group did not agree to this edit and the definition remains as shown above.

Topic: Other Definitions for Market Support Indicator #1

MS Ind. #	Indicator Description
1	Number of partners by type and purposes (Q, P)

Recommendation #12: Definition of "Type"

The term "type" (used in Market Support Indicator #1) should be used to describe the nature of a partner or partnership. Only one type should be associated with each partner and partnership. Possible "types" include and are not limited to:

1. In reference to the type of partner:
 - a. Community-based organization
 - b. Community choice aggregator
 - c. Building Contractor
 - d. Customer
 - e. Educational institution/organization
 - f. Government
 - g. Lending agency
 - h. Manufacturer
 - i. Supplier
 - j. Trade association
2. In reference to the type of partnership:
 - a. Contracted

- b. Informal (includes partnerships via Memorandum of Understanding, Commitment Letter or statement, or letters of collaboration)

Note that listing examples in the definition is not meant to limit the type of partner or partnership, as that can change over time.

Suggested edits to this definition previously included:

- A. Remove "Advocate" as it is overly broad and could potentially overlap with all other listed types
- B. Consolidate "type of partner" to:
 - a. Community-based organization / non-profit
 - b. Contractor
 - c. Government / Public Agency
 - d. Other
- C. Consolidate "type of partnership" to:
 - a. Contracted
 - b. Informal (includes MOU, letters of collaboration, etc.)
- D. Clarify whether "Contractor" means building/construction contractor or consulting contractor

After additional discussion at EMSWG Meeting #7, the definition of "type" was streamlined as presented above.

Recommendation #13: Definition of "Purpose"

The term "purpose" (used in Market Support Indicator #1) is defined as what the partnership seeks to achieve. Examples include and are not limited to:

1. Deliver EE products,
2. Outreach,
3. Education,
4. Job training,
5. Diversify funding options,
6. Program enrollment.

Topic: Market Support Indicator #18

MS Ind. #	Indicator Description
18	Percentage of partners that have taken action supporting energy efficiency by type (Q, P);

Recommendation #14: Other Terms in Market Support Indicator #18

"Taken action" refers to what the partners have done to advance their shared purpose (as defined in Recommendation #13). "Type" relates to the type of partner, as defined in Recommendation #12.

Recommendation #15: Denominator for Market Support Indicator #18

The denominator for Market Support Indicator #18 should be the total number of all partners. Readers should be aware that the total number of all partners is not fixed over time.

Topic: Market Support Indicator #2

MS Ind. #	Indicator Description
2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P);

Recommendation #16: Definitions of "Non-ratepayer in-kind funds/contributions"

The terms "non-ratepayer in-kind funds" and "non-ratepayer in-kind contributions" (used in Market Support Indicator #2) are defined as:

1. "Non-ratepayer in-kind funds" refers to monetary contributions offered for free (e.g., through a grant or donation)
2. "Non-ratepayer in-kind contributions" refers to goods, services (e.g., human capacity), and other tangible assets that are provided for free or at less than the usual charge

These definitions should be used together to develop a single total dollar value for both non-ratepayer in-kind funds and non-ratepayer in-kind contributions to be reported for this Indicator. In Meeting #8, the Working Group clarified its interpretation of the slash in the Indicator language to mean "both, and." Thus, the Working Group finds it reasonable to also report separate dollar values to differentiate between non-ratepayer in-kind funds and non-ratepayer in-kind contributions as an additional level of granularity.

Small Business Utility Advocates slightly disagreed with the definition and suggested adding "An entity paying for services on the PA's behalf" as a third bullet. In Meeting #8, the EMSWG determined not to include this as a third bullet (Figure 3).

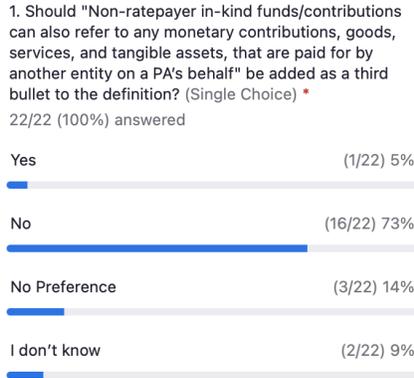


Figure 3. Recommendation #14 Voting Results from EMSWG Meeting #8

Recommendation #17: Transparency in Calculating Market Support Indicator #2

It is reasonable to separate in-kind contributions from in-kind funds when reporting on Market Support Indicator #2. Methodologies for evaluating contributions and distinguishing contributions from funds will be needed.

The translation from "in-kind contributions" to a dollar value should be transparent and well-supported in documentation. It is not expected that the supporting document would be provided when reporting on the Indicator, but rather shared when requested by stakeholders via Data Request.

Topic: Market Support Indicator #25

MS Ind. #	Indicator Description
25	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment) (A, P);

Recommendation #18: Definition of Market-rate Capital

The term "market-rate capital" (used in Market Support Indicator #25) is defined as:

1. Financing obtained from private investors, financial institutions, or capital markets at prevailing market interest rates that reflect the current economic conditions and risks associated with the investment.
2. The market rate, defined as the rate of interest, on a loan or investment which is commonly available on the market for that loan or investment. For a loan, the market rate is the average rate of interest that will be charged to the borrower from a variety of providers.

PG&E suggested identifying the US Prime rate as a good average rate for non-residential customers. The EMSWG determined not to include this in the definition of market-rate capital. Instead, the Working Group recommended that PAs should consider working with their Reporting teams in addition to California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) members or through another venue to determine how PAs will approach reporting on this Indicator before filing their Annual Reports (see also *Recommendation #20*).

Recommendation #19: Definition of "Capital Accessed via Energy Efficiency Programs"

The term "capital accessed via energy efficiency programs" (used in Market Support Indicator #25) is defined as: financing acquired solely through energy efficiency portfolio initiatives and projects (e.g., energy performance contracts, utility programs, green bonds, CAEATFA [California Alternative Energy and Advanced Transportation Financing Authority] GoGreen financing (Off-Bill Financing, On-Bill Repayment); California Revolving Loan Funds). Note that GoGreen financing is accessed directly through the lender or the GoGreen financing programs.

Additional suggestions and comments:

- A. PG&E suggested calculating this Indicator by taking the annual financing program loan repayments for the year and applying the average market rate (e.g., US prime rate) to estimate the interest that would have been paid on the loans in the year using the market rate and subtracting the interest payments that were paid under the EE financing programs. In the case of PG&E On-Bill Financing offering, this is \$0.
- B. I-REN and 3C-REN noted that the methodology for comparison needs to be explicit.
- C. Working Group discussions also highlighted that input from an expert (e.g., someone from CAEATFA or CHEEF (California Hub for Energy Efficiency Financing)) is needed on what types of capital to compare across what comparison points, and that it is not clear whether PACE (Property Assessed Clean Energy) financing is considered market rate.
- D. SoCalREN suggested pausing on collecting data for and reporting on Market Support Indicator #25 until there is PA consensus on data collection. In Meeting #8, the EMSWG determined that pausing on reporting this Indicator is not necessary.

Recommendation #20: Gather Additional Input on Market Support Indicator #25

PAs will consult with their Reporting Teams, CAEATFA members, and potentially others to discuss how they will approach this Indicator before filing their Annual Reports. For example, PAs may consult with these entities to come to a clearer understanding around finance programs for energy efficiency to form a common basis to calculate "market rate capital vs capital accessed via energy efficiency programs."

Topic: Market Support Indicator #22

MS Ind. #	Indicator Description
22	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P)

The EMSWG briefly discussed Market Support Indicators #22. This Indicator is part of the Market Support Segment Sub-Objective on Innovation and Accessibility.²¹ Initially, this Indicator was planned to be captured for the Emerging Technology Program. Market Support Indicator #22 was broadly thought about in terms of products or services and intended to work with Market Support Indicator #21 (Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services (A, P)) to draw a connection between the awareness of energy efficiency products and services and the percent of market penetration of those products and services. Other specific issues raised regarding Market Support Indicators #22 included:

- Need to clarify whether the Indicator relates to any energy efficiency product or a product available through energy efficiency programs. Similarly, need to clarify how to define emerging/underutilized technologies and to what degree they should be linked to the EE Portfolio Emerging Technology Program
- Need to clarify parameters for defining ‘awareness’ regarding emerging/under-utilized or existing energy efficiency products or services
- Need to clarify the methodology for measuring and verifying awareness of energy efficiency products or services among market participant
- Need to define the denominator for the percentage calculation. Considering that partners in the program are expected to have a baseline awareness, how can PAs accurately measure awareness while acknowledging their pre-existing involvement?

Recommendation #21: Pause on Reporting Market Support Indicator #22

Further discussion is needed to clarify what this Indicator is intending to measure, why it is being assessed, how it should be integrated with the EE Portfolio Emerging Technology Program, and how to calculate the Indicator. PAs should pause on reporting Market Support Indicator #22 until these issues are clarified.

Topic: Market Support Indicator #23

MS Ind. #	Indicator Description
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²¹ See Appendix 4, Equity and Market Support Objectives and Sub-Objectives (adopted in D.23-06-055).

23	Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P)
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Market Support Indicator #23 is intended to understand how confident the PAs are in their energy savings claims. The ex-officio representative from Energy Division acknowledged that Indicator cannot apply to every product or service, so it will have to be narrowed rather than applied to the whole portfolio. Working Group Members discussed applying the Indicator to resource programs (i.e., those that directly achieve energy savings) and/or measuring contribution to Total System Benefits. Working Group Members also discussed whose confidence level is meant to be captured - whether the customer, a contractor, a PA, an implementer, or an evaluator. While it seemed that it would likely be PAs (who are responsible for reporting), Members noted how there may be more value in understanding the customer's perspective.

Recommendation #22: Pause on Reporting Market Support Indicator #23

Further discussion is needed to clarify what this Indicator is intending to measure, why it is being assessed, and how to calculate the Indicator. PAs should pause on reporting Market Support Indicator #23 until these issues are clarified.

Non-consensus

Topic: Market Support Indicator #17

MS Ind. #	Indicator Description
17	Ratio of ratepayer funds expended to private capital leveraged by sector (Q, P)

The Working Group discussed the following draft definition for the term "private capital" (used in Market Support Indicator #17):

1. Money owned or controlled by an individual person or a commercial company.
2. Private capital does not include federal or state funding.
3. Capital that was not previously available to the customer or program participant.

Six out of 12 survey respondents slightly agreed, agreed, or strongly agreed with the draft definition. Equally, six out of 12 respondents slightly disagreed, disagreed, or strongly disagreed with the draft definition. Comments shared but not agreed upon by all Working Group members included:

- PAs may not be able to determine the different sources of funds – all they know is the funding they provided and the total project cost. The specificity of the draft definition can lead to errors and confusion. Private capital in this case should be defined by what it is not, namely that it is not ratepayer funds.
- Depending on how you read Item 1, it could imply that the IOU loan pool programs to support OBF are private capital and not ratepayer funds since the loan pool funds are controlled by a commercial company (e.g., PG&E). Perhaps it can be clear that the commercial company referred to is the company spending the money on their own energy efficiency upgrades.
 - At least one Working Group member disagrees with the notion that OBF is private capital because OBF programs are ratepayer-funded.
- Broaden the definition of private capital to include government sources
- The definition needs to include capital that was previously available to the customer because PAs are not going to be able to collect information about what was not previously available for every customer. Recommend striking Item 3.
- Propose updating Item #3 to something like "capital that the program helped participants secure that was not previously available..."
- Considering adding that the private capital was accessed by the program (e.g., grant application assistance provided by the program).
- Add "that was not previously available to the customer" to the end of Item 1.
- Suggested definition: All non-ratepayer funds used to bridge the gap between ratepayer project incentives and the remaining project cost.
- To the extent that the Market Support Indicator #17 is looking to understand the capital leveraged by the sector, funding from local governments or state and federal grants should absolutely be included. Examples include CCAs providing increased incentives out of their general funds, ECAA loans, competitive grant programs that include program funding, etc. Item 2 should be removed.
- The Indicator was originally put forth by the MSMWG in 2021 with the intention to apply only to programs focusing on access to capital (i.e., financing programs). However, with the expansion of this indicator to the whole portfolio, more discussion is needed on what is helpful to measure/track. If the Indicator is intended to assess the whole portfolio (i.e., including Resource Acquisition programs), it makes sense to include the capital already controlled by an individual or organization (i.e., Item 1 makes sense to include). However, if the Indicator is focused on financing programs, then the ratio of only debt capital to ratepayer funds is important (i.e., exclude Item 1 from the definition).

Relatedly, the Working Group did not reach agreement on how to calculate Market Support Indicator #17. One Member noted that measuring private capital across projects will not always be consistent, nor will it be consistently disclosed by the customer. Suggested calculation options include:

- Calculate the “private capital leveraged” by taking the total energy efficiency project costs and subtracting all incentives (rebates, direct install incentives, and 0% interest financing).
- Private capital value should be collected for energy efficiency programs (regardless of segment) that support energy efficiency project/activities.
- Count private capital as any monies encumbered for the purpose of the programs that do not fall under public dollars.
- If the private capital was accessed with assistance by the program, the program would be aware of it and could easily track it.
- A ratio would be acceptable. For example, let's say a sector was able to compile total ratepayer funding of \$10,000 for a given program over one calendar year. Private capital provided an additional \$5,000. The metric would be 1.5 or 150% - Ratepayer funds/Private capital.
- $\text{Project Cost} - \text{Ratepayer Incentives (PA Program Incentives + Any Other Ratepayer Incentives)} = \text{Private Capital}$

Recommendation #23: Pause on Reporting Market Support Indicator #17

Further discussion is needed to come to an agreed upon definition of private capital and determine a method to calculate Market Support Indicator #17. PAs should pause on reporting Market Support Indicator #17 until these issues are clarified.

Topic: Market Support Indicator #13

MS Ind. #	Indicator Description
13	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A, P)

Discussions on Market Support Indicator #13 began with attempting to define "collaborations." The Working Group did not reach consensus on whether "collaboration" and "partnership" should be defined in the same way. Multiple PAs (SDG&E, 3C-REN, and SoCalREN) look at the relationships the same way (i.e., as contractual and non-contractual agreements to work together); PG&E distinguishes collaborations as non-contractual relationships whereas partnerships are contracted agreements. If "collaboration" and "partnership" are defined in the same way, then there would be confusion between Market Support Indicator #13 and Market Support Indicator #1. If "collaboration" and "partnership" are distinguished as non-contractual vs contractual relationships, some working relationships/partnerships/collaborations may not be counted within the Market Support Indicators

In Meeting #6, held January 31, 2024, a Working Group member noted that "collaboration" does not need to be explicitly defined, as the term is used only in Market Support Indicator #17 (and

as a Common Metric applied to Workforce Education and Training (WE&T) programs). Based on the conversation, the Facilitation Team proposed the following:

- This working group need not adopt a definition for "Collaboration".
- MS #13 should not be redlined for specifications on the use of the term "collaboration".
- When reporting, PAs should provide definition through the contextual descriptions as required in the indicator.

Eight out of 12 survey respondents agreed or strongly agreed with the working group not defining "collaboration." Other perspectives included:

- Disagrees with leaving "collaboration" up to PA interpretation. Recommend pausing on collecting Indicator until there is PA consensus on definition and methodology. (SoCalREN)
- PAs should not provide their own definition of collaborations. Collaborations should be synonymous with partnerships. This would align Market Support Indicators with Common Metrics where there is no distinction between collaborations and partnerships. (3C-REN and I-REN)
- Keeping "collaboration" without any specific definition does introduce confusion when "partnerships" are used in other Indicators. This indicator can continue to be called a "collaboration" for two reasons: 1) it will keep this specific indicator as one with a longitudinal set of values and 2) it is specific to sharing of training materials or training resources. (BayREN)

Additionally, the Working Group did not come to agreement on the application of Market Support #13. The Indicator already exists as a Common Metric applied to Workforce Education and Training (WE&T) programs. It is not clear whether it should continue to apply only to WE&T programs, or if it should be expanded to also assess other program areas. Continuing to limit the Indicator to WE&T would allow for longitudinal study of the WE&T program data. Expanding the Indicator beyond WE&T would capture information from collaborations in other programs (e.g., New Construction, Quality Installation / Quality Management)

Per one Working Group member - there may be value in continuing to report this Indicator in both Common Metrics and Market Support Indicators (but applied to different program types); however, having a similar Indicator across two different reporting requirements could cause confusion in understanding the differences in the values reported.

Recommendation #24: Pause on Reporting Market Support Indicator #13

Further discussion is needed to clarify what is intended to be measured and how to calculate the Indicator. PAs should pause on reporting Market Support Indicator #13 until these issues are clarified.

Reporting Process

Different Equity and Market Support Indicators will be reported quarterly versus annually, and at the Segment level versus the Portfolio level.²²

Consensus and Near Consensus

Recommendation #25: Principles for Reporting

1. Indicator reporting should not duplicate existing reporting efforts. PAs report savings claims on a quarterly basis using CEDARS and prepare an Annual Report. These reporting requirements include data overlapping with Equity Indicators such as savings claims. Additionally, specific Indicators (e.g., Market Support Indicators #3-10) are also Common Metrics, currently reported in a workbook uploaded to CEDARS on an annual basis.
2. Instead of providing program-specific data along with the Indicators, links and references to program-specific data will be provided in the reporting spreadsheet (*see also Recommendation #26*). Indicator reporting should not be overly cumbersome for PAs.
3. Reported Indicator data should be easily accessible to and understandable for interested stakeholders.

Recommendation #26: Indicator Reporting Process

The Working Group discussed taking a phased approach to reporting on the Indicators. The initial phase of reporting is envisioned to be more high-level and as PAs begin to report on the Indicators, there may be future iterations (among PAs, or through the Working Group or in similar venue) to adjust the reporting to address any issues and make any improvements as needed. In the initial phase of reporting on the Equity and Market Support Indicators, the Working Group recommends that the PAs take the following steps:

4. Indicators to be reported quarterly and annually should be done so by uploading a spreadsheet in the Documents area of CEDARS, similar to annual Common Metrics submittals by PAs.
5. Links to programmatic information and data should be provided in the spreadsheet to ensure readers can access contextual information when viewing the Indicator reporting, e.g., <https://cedars.sound-data.com/programs/list/>; <https://cedars.sound-data.com/documents/standalone/list/>; and <https://cedars.sound-data.com/reports/summary/>.
6. PAs should consider creating and using a high-level and consistent template across the PAs to report on the Indicators. When developing the template, the PAs should take heed of the Recommendation #25 that states reporting should not be an overly cumbersome process.

²² See Appendix 5.

Non-consensus

In Meeting #8, Working Group members made additional suggestions on the Indicator reporting process that were not held to a consensus vote. These suggestions include:

1. Include a written narrative or summary of the Indicator data alongside the reporting spreadsheet so that members of the public can easily read and understand the data.
2. Incorporate lessons learned from ongoing efforts at the CPUC to create more comprehensible data through data visualization and other means.
3. Create a landing page on CEDARS with easily digestible language for the public that explains how to navigate CEDARS.

Remaining Issues

The Working Group did not comprehensively²³ clarify all of the Equity and Market Support Indicators. The Market Support Indicators that were deprioritized or not discussed in EMSWG meetings include Market Support Indicators #3-12, 14-16, 19, 21, and 24. For example, for Market Support Indicators #6-10 addressing the Emerging Technologies Program, Working Group members raised questions about why the information should be reported but the group did not have time to discuss. In addition, Market Support Indicators #3-10 and 14 are also Common Metrics so the Working Group did not prioritize further clarifying these Indicators as they are already being reported on. Please see the [Summary Table of Indicators](#) for more information about the unclarified Indicators.

In Meeting #8, the PAs agreed to file their Advice Letter based on the recommendations of the Working Group. The PAs interpreted the Decision language to state that PAs need to clarify all Indicators that need clarifying, meaning the Indicators that the Working Group did not discuss or deprioritized do not need to be clarified at this time. However, the PAs indicated willingness to re-open the Working Group or initiating a similar type of process to improve the reporting and further clarify the Indicators after the PAs initially report on the Indicators.

Conclusion

Over the 9 meetings and huddles, the Equity and Market Support Working Group endeavored to clarify the what, why, and how of the 13 Equity Indicators and 9 out of 25 Market Support Indicators. The recommendations on the clarifications of these Indicators are encapsulated in this Report as well as found in the [Summary Table of EMSWG Recommendations of Indicators](#). As for the remaining issues, the Working Group expressed desire to first report on the clarified Indicators to the extent possible, identify any opportunities for improvement, and consider

²³ The "why, what, and how" were not fully clarified, e.g., the methodology of collecting and reporting on Indicator data.

further clarifying the Indicators through this Working Group or through another venue at a later time after the 2024 Annual Report has been filed. This Report will inform the PAs' filing of their Tier 2 Advice Letter in clarifying the Equity and Market Support Indicators.

Appendix 1. Summary Table of EMSWG Recommendations of Indicators

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
E ²⁴ -1	Count of equity target participants in equity segment, by sector (Q, S) ²⁵	Recommendation #2: "Equity target participant" is defined as a program participant that meets CPUC-adopted criteria for being hard-to-reach, located in a disadvantaged community, OR underserved. The participant can be in an Equity, Market Support, or Resource Acquisition segment program.	Address disparities in access to energy efficiency programs	Units can include individual customers, households, single-site business, multi-site business, farm, local government, a California Native American Tribe, a Tribal representative, or other unit(s).	Recommendation #3: In initial reporting, PAs should use PA program data to report participants disaggregated by program and include details on how participants were counted so readers can understand the context. In the future, PAs can come to a consistent and/or different level of granularity.

²⁴ E = Equity

²⁵ Q = Quarterly, S = Sector

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
E-2	Sum of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S)	See Equity Indicator #1 for the definition of "equity target participant"	Promote resilience, health, comfort, safety, energy affordability, and/or energy savings	Dollars	<p>Recommendation #4: Use first year gross ex ante energy savings values to quantify benefits.</p> <p>Recommendation #5: Calculate bill savings using a PA-specific electric or gas rate multiplied by first-year, gross ex ante electric or gas savings. PAs should individually determine the rates they will use to calculate this Indicator, striving for simplicity (e.g., using a bundled IOU rate rather than rates from multiple CCAs). Recommendation #6: Report electric and gas bill savings separately.</p> <p>Recommendation #7: Do not include nonclaimable energy savings in the quantification.</p> <p><i>Multiply program-level first-year gross ex ante energy savings by a PA-specific electric or gas rate. Sum across Equity Segment programs.</i></p>
E-3	Count of equity target participants in market support segment, by sector (Q, S)	See Equity Indicator #1 for the definition of "equity target participant"	Address disparities in access to energy efficiency programs	Same as Equity Indicator #1	Same as Equity Indicator #1
E-4	Count of equity target participants in resource	See Equity Indicator #1 for the definition of "equity target participant"	Address disparities in access to energy	Same as Equity Indicator #1	Same as Equity Indicator #1

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
	acquisition segment, by sector (Q, S)		efficiency programs		
E-5	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment (Q, S)	Recommendation #2: "Equity segment participant" is defined as a participant in an Equity segment program that does NOT have to be hard-to-reach, located in a disadvantaged community, or underserved	Reduce energy-related greenhouse gas and criteria pollutant emissions	Tons of carbon dioxide equivalent	Recommendation #4: Use first year ex ante gross energy savings values to calculate the related greenhouse gas reductions. Recommendation #7: Do not include nonclaimable energy savings in the quantification. <i>Determine the program-level first year ex ante gross energy savings resulting in Equity Segment programs. Use the Cost-Effectiveness Tool (CET) to convert energy savings into greenhouse gas reductions. Sum across Equity Segment programs.</i>
E-6	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment (Q, S)	See Equity Indicator #5 for the definition of "equity segment participant"	Promote resilience, health, comfort, safety, energy affordability, and/or energy savings	kWh	Recommendation #4: Use first year ex ante gross energy savings values. Recommendation #7: Do not include nonclaimable energy savings in the quantification. <i>Determine the program-level first year ex ante gross kWh savings resulting in Equity Segment programs. Sum across all Equity Segment programs.</i>
E-7	Sum of all equity segment participants' kW savings in	See Equity Indicator #5 for the definition of "equity segment participant"	Promote resilience, health, comfort, safety, energy affordability,	kW	Recommendation #4: Use first year ex ante gross energy savings values. Recommendation #7: Do not include nonclaimable energy savings in the quantification.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
	equity segment (Q, S)		and/or energy savings		<i>Determine the program-level first year ex ante gross kW savings resulting in Equity Segment programs. Sum across all Equity Segment programs.</i>
E-8	Sum of all equity segment participants' therm savings in equity segment (Q, S)	See Equity Indicator #5 for the definition of "equity segment participant"	Promote resilience, health, comfort, safety, energy affordability, and/or energy savings	therms	Recommendation #4: Use first year ex ante gross energy savings values. Recommendation #7: Do not include nonclaimable energy savings in the quantification. <i>Determine the program-level first year ex ante gross therm savings resulting in Equity Segment programs. Sum across all Equity Segment programs.</i>
E-9	Sum of all equity segment participants' TSB in equity segment (Q, S)	See Equity Indicator #5 for the definition of "equity segment participant"	Promote resilience, health, comfort, safety, energy affordability, and/or energy savings	Dollars	Recommendation #4: Use ex ante gross energy savings values and other ex ante inputs to calculate the Total System Benefit (TSB) using the Cost-Effectiveness Tool and the TSB Technical Guidance document Version 1.2 (or subsequent version(s)). Recommendation #7: Do not include nonclaimable energy savings in the quantification.
E-10	Median of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S)	See Equity Indicator #1 for the definition of "equity target participant"	Promote resilience, health, comfort, safety, energy affordability, and/or energy savings	Dollars	Recommendation #4: Use first year gross ex ante energy savings values to quantify benefits. Recommendation #5: Calculate bill savings using a PA-specific electric or gas rate multiplied by first-year, gross ex ante electric or gas savings. PAs should individually determine the rates they will use to calculate this Indicator, striving for simplicity (e.g., using a bundled IOU rate rather than rates from multiple CCAs). Recommendation #6: Report electric and gas bill savings separately. Recommendation #7: Do not include nonclaimable energy savings in the quantification.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
					<i>Multiply program-level first-year gross ex ante energy savings by a PA-specific electric or gas rate. Identify the median.</i>
E-11	Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector (A, P) ²⁶	D.23-06-055 defines a "hard-to-reach" customer. See Appendix 3 of the EMSWG Final Report.	Address disparities in access to energy efficiency programs	Percent	<p>Recommendation #9: Report this Indicator by PA, rather than as one statewide value. The denominator should be the total number of participants at the sector level (i.e., single-family residential, multi-family residential, commercial).</p> <p><i>(Number of hard-to-reach program participants) / (Total number of program participants at the sector level (i.e., single-family residential, multi-family residential, commercial))</i></p>
E-12	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector (A, P)	"Disadvantaged community" is defined by subdivision (g) of Section 75005 of the Public Resources Code, CalEnviroScreen, and by the California Environmental Protection Agency pursuant to Health and Safety Code Section 39711. See Appendix 3 of the EMSWG Final Report.	Address disparities in access to energy efficiency programs	Percent	<p>Recommendation #9: Report this Indicator by PA, rather than as one statewide value. The denominator should be the total number of participants at the sector level (i.e., single-family residential, multi-family residential, commercial).</p> <p><i>(Number of disadvantaged community program participants) / (Total number of program participants at the sector level (i.e., single-family residential, multi-family residential, commercial))</i></p>

²⁶ A = Annual, P = Portfolio

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
E-13	Percent of equity target participants in equity segment, by sector (Q, S)	Recommendation #2: "Equity target participant" is defined as a program participant that meets CPUC-adopted criteria for being hard-to-reach, located in a disadvantaged community, OR underserved.	Address disparities in access to energy efficiency programs	Percent	Beyond Recommendation #2 defining "equity target participant" the EMSWG did not develop a specific recommendation to quantify this Indicator. The following is a suggestion from the Facilitation Team. <i>(Number of equity target participants in Equity Segment) / (Total number of equity segment participants)</i>

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS ²⁷ -1	Number of partners by type and purposes (Q, P)	<p>Recommendation #11: "Partner" is defined as an entity engaged in partnerships including and not limited to educational institutions/organizations, governments, community-based organizations, trade associations, suppliers, manufacturers, contractors.</p> <p>Recommendation #12: "Type" should be used to describe the nature of a partner or partnership. Only one type should be associated with each partner and partnership. For "partners" possible "types" include and are not limited to: community-based organization, community choice aggregator, building contractor, customer, educational institution/organization, government, lending agency, manufacturer, supplier, trade association. For "partnerships" possible "types" include</p>	Market Support Sub-Objective #3: Partnerships ²⁸	Units will be specific to the partner, type, and purpose. Refer to Recommendation s #11-13 for examples.	Beyond recommendations addressing definitions, the EMSWG did not develop a specific recommendation to quantify this Indicator. The following is a suggestion from the Facilitation Team. <i>Use PA data to count partners by type and purpose.</i>

²⁷ MS = Market Support

²⁸ Market Support Sub-Objective #3: Partnerships: Build, enable, and maintain partnerships with consumers, governments, advocates, contractors, suppliers, manufacturers, community-based organizations and/or other entities to obtain delivery and/or funding efficiencies for energy efficiency products and/or services and added value for partners.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
		<p>contracted or informal (includes partnerships via MOU, letters of collaboration).</p> <p>Recommendation #13: "Purposes" is defined as what the partners aim to achieve together. Examples include deliver EE products, outreach, education, job training, diversify funding options, and program enrollment.</p>			

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P)	<p>Recommendation #16: The terms "non-ratepayer in-kind funds" and "non-ratepayer in-kind contributions" are defined as:</p> <ul style="list-style-type: none"> "Non-ratepayer in-kind funds" refers to monetary contributions offered for free (e.g., through a grant or donation) "Non-ratepayer in-kind contributions" refers to goods, services, and other tangible assets that are provided for free or at less than the usual charge <p>Recommendation #10: The term "partnership" is defined as:</p> <ol style="list-style-type: none"> Agreement between at least two entities to engage in a mutually beneficial relationship within the context of EE products, services, education, and/or training The partnership may or may 	Market Support Sub-Objective #5: Access to Capital ²⁹	Dollars	<p>Recommendation #17: It is reasonable to separate in-kind contributions from in-kind funds when reporting on Market Support Indicator #2. Methodologies for evaluating contributions and distinguishing contributions from funds will be needed.</p> <p>The translation from "in-kind contributions" to a dollar value should be transparent and well-supported in documentation. It is not expected that the supporting document would be provided when reporting on the Indicator, but rather shared when requested by stakeholders via Data Request.</p>

²⁹ Market Support Sub-Objective #5: Access to Capital: Build, enable, and maintain greater, broader, and/or more equitable access to capital and program coordination to increase affordability of and investment in energy efficient projects, products, or services.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
		not be legally contracted 3. In cases where a partnership is not contracted, PAs have other documents/materials demonstrating agreement to work together			
MS-3	Percent of participation relative to eligible target population for curriculum (Q, S)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #2: Supply ³⁰	Percent	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.
MS-4	Percent of total WE&T program participants that meet the definition of disadvantaged worker ³¹ (Q,	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #2: Supply	Percent	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.

³⁰ Market Support Sub-Objective #2: Supply: Build, enable, and maintain supply chains to increase the capability and motivation of market actors to supply energy efficient products and/or services, and to increase the ability, capability, and motivation of market actors to perform/ensure quality installations that optimize energy efficiency savings.

³¹ [D.18-10-008](#) (Ordering Paragraph 9) defines a disadvantaged worker as "an individual that meets at least one of the following criteria: lives in a household where total income is below 50 percent of Area Median Income; is a recipient of public assistance; lacks a high school diploma or GED; has previous history of incarceration lasting one year or more following a conviction under the criminal justice system; is a custodial single parent; is chronically unemployed; has been aged out or emancipated from the foster care system; has limited English proficiency; or lives in a high unemployment ZIP code that is in the top 25 percent of only the unemployment indicator of the CalEnviroScreen Tool."

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
	S)				
MS-5	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training (A, S)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #2: Supply	Career and workforce readiness participants	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.
MS-6	Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility ³²	Percent	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.

³² Market Support Sub-Objective #4: Innovation and Accessibility: Build, enable, and maintain innovation and accessibility in technologies, approaches, and services development to increase value, decrease costs, increase energy efficiency, and/or increase scale of and/or access to emerging or existing energy efficient products and/or services.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-7	Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	EE Measures	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.
MS-8	Prior year percentage of new codes or standards that were previously ETP technologies (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Percent	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.
MS-9	Prior year number of new codes and standards that were previously ETP technologies (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Codes and Standards	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-10	Savings (lifecycle net kWh, kW, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	net kWh, kW, and therms	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.
MS-11	Number of new, validated technologies recommended to the California Technical Forum (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Technologies	The EMSWG did not discuss this Indicator.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-12	Cost-effectiveness of a technology prior to market support program relative to cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness) (A, S)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Percent	The EMSWG did not discuss this Indicator.
MS-13	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A,	The EMSWG did not come to a conclusion on whether or how to define "collaborations" for the purposes of this Indicator.	Market Support Sub-Objective #3: Partnerships	Collaborations	Recommendation #23: Further discussion is needed to clarify what is intended to be measured and how to calculate the Indicator. PAs should pause on reporting Market Support Indicator #13 until these issues are clarified.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
	P)				
MS-14	Number of unique participants by sector that complete training (Q, S)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #2: Supply	Training participants	The EMSWG did not discuss this Indicator. This Indicator is already a Common Metric reported annually.
MS-15	Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Projects	The EMSWG did not discuss this Indicator.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-16	Total projects completed/measures installed and dollar value of consolidated programs by sector (Q, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Projects	The EMSWG did not discuss this Indicator.
MS-17	Ratio of ratepayer funds expended to private capital leveraged by sector (Q, P)	The Working Group discussed, but did not come to agreement regarding, the following draft definition for the term "private capital": <ol style="list-style-type: none"> 1. Money owned or controlled by an individual person or a commercial company. 2. Private capital does not include federal or state funding. 3. Capital that was not previously available to the customer or program participant. 	Market Support Sub-Objective #5: Access to Capital	Dollars	Recommendation #23: Further discussion is needed to come to an agreed upon definition of private capital and determine a method to calculate Market Support Indicator #17. PAs should pause on reporting Market Support Indicator #17 until these issues are clarified.
MS-18	Percentage of partners that have taken action supporting energy efficiency by	See Market Support Indicator #1 for definitions of "partner" and "type." Recommendation #14: "Taken action" refers to what the partners have done to advance	Market Support Sub-Objective #3: Partnerships	Percent	Recommendation #15: The denominator for Market Support Indicator #18 should be the total number of all partners. Readers should be aware that the total number of all partners is not fixed over time. <i>(Number of partners that have taken action) / (Total number of all partners)</i>

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
	type (Q, P)	their shared purpose (as defined in Recommendation #13). "Type" relates to the type of partner, as defined in Recommendation #12 .			
MS-19	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency (Q, S)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #2: Supply	Contractors	The EMSWG did not discuss this Indicator.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-20	Assessed value of the partnership by partners (A, P)	<p>Recommendation #10: The term "partnership" is defined as:</p> <ol style="list-style-type: none"> 1. Agreement between at least two entities to engage in a mutually beneficial relationship within the context of EE products, services, education, and/or training 2. The partnership may or may not be legally contracted 3. In cases where a partnership is not contracted, PAs have other documents/materials demonstrating agreement to work together <p>See Market Support Indicator #1 for the definition of "partner."</p>	Market Support Sub-Objective #3: Partnerships	TBD by PAs	The EMSWG briefly discussed how to assess the value of a partnership but did not develop a specific recommendation on how to quantify this Indicator.
MS-21	Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services (A, P)	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #4: Innovation and Accessibility	Percent	The EMSWG did not discuss this Indicator.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-22	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P)	The EMSWG discussed this Indicator briefly but did not develop any definitions relating to the Indicator nor come to agreement on what the Indicator is intending to measure.	Market Support Sub-Objective #1: Demand ³³	Percent	Recommendation #21 : Further discussion is needed to clarify what this Indicator is intending to measure, why it is being assessed, and how to calculate the Indicator. PAs should pause on reporting Market Support Indicator #22 until these issues are clarified.
MS-23	Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P)	The EMSWG discussed this Indicator briefly but did not develop any definitions relating to the Indicator nor come to agreement on what the Indicator is intending to measure.	Market Support Sub-Objective #4: Innovation and Accessibility	TBD by PAs	Recommendation #22 : Further discussion is needed to clarify what this Indicator is intending to measure, why it is being assessed, and how to calculate the Indicator. PAs should pause on reporting Market Support Indicator #23 until these issues are clarified.
MS-24	Differential of cost defrayed from customers	The EMSWG did not discuss this Indicator.	Market Support Sub-Objective #5: Access to Capital	TBD by PAs	The EMSWG did not discuss this Indicator.

³³

Market Support Sub-Objective #1: Demand: Build, enable, and maintain demand for energy efficient products and services in all sectors and industries to ensure interest in, knowledge of benefits of, or awareness of how to obtain energy efficiency products and/or services.

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
	(e.g., difference between comparable market rate products and program products) (A, P)				

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
MS-25	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment) (A, P)	<p>Recommendation #18: The term "market-rate capital" is defined as:</p> <ol style="list-style-type: none"> 1. Financing obtained from private investors, financial institutions, or capital markets at prevailing market interest rates that reflect the current economic conditions and risks associated with the investment. 2. The market rate, defined as the rate of interest, on a loan or investment which is commonly available on the market for that product. For a loan, the market rate is the average rate of interest that will be charged to the receiver from a variety of providers. <p>Recommendation #19: The term "capital accessed via energy efficiency programs" is defined as: financing acquired solely through energy efficiency portfolio initiatives and projects (e.g., energy performance contracts, utility programs,</p>	Market Support Sub-Objective #5: Access to Capital	TBD by PAs	Recommendation #20: PAs will consult with their Reporting Teams, CAEATFA members, and potentially others to discuss how they will approach this Indicator before filing their Annual Reports. For example, PAs may consult with these entities to come to a clearer understanding around finance programs for energy efficiency to form a common basis to calculate "market rate capital vs capital accessed via energy efficiency programs."

Ind.	Description Adopted in D.23-06-055	Applicable Definitions ("What")	Objective or Sub-objective ("Why")	"How"	
				Unit	Methodology or Formula
		green bonds, CAEATFA [California Alternative Energy and Advanced Transportation Financing Authority] GoGreen financing (Off-Bill Financing, On-Bill Repayment); California Revolving Loan Funds). Note that GoGreen financing is accessed directly through the lender or the GoGreen financing programs.			

Appendix 2: Equity and Market Support Indicators Adopted in D.23-06-055

Legend: Q = Report Quarterly; A= Report Annually; S = Report at Segment Level; P = Report at Portfolio Level

Segment	#	Indicator Description Adopted in D.23-06-055
Equity	1	Count of equity target participants in equity segment, by sector (Q, S);
Equity	2	Sum of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S);
Equity	3	Count of equity target participants in market support segment, by sector (Q, S);
Equity	4	Count of equity target participants in resource acquisition segment, by sector (Q, S);
Equity	5	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment (Q, S);
Equity	6	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment (Q, S);
Equity	7	Sum of all equity segment participants' kW savings in equity segment (Q, S);
Equity	8	Sum of all equity segment participants' therm savings in equity segment (Q, S);
Equity	9	Sum of all equity segment participants' TSB in equity segment (Q, S);
Equity	10	Median of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S);
Equity	11	Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector (A, P);
Equity	12	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector (A, P);
Equity	13	Percent of equity target participants in equity segment, by sector (Q, S);
Market Support	1	Number of partners by type and purposes (Q, P);
Market Support	2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P);
Market Support	3	Percent of participation relative to eligible target population for curriculum (Q, S);
Market Support	4	Percent of total WE&T program participants that meet the definition of disadvantaged worker (Q, S);
Market	5	Number of career and workforce readiness participants who have been employed for

Segment	#	Indicator Description Adopted in D.23-06-055
Support		12 months after receiving the training (A, S);
Market Support	6	Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P);
Market Support	7	Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P);
Market Support	8	Prior year percentage of new codes or standards that were previously ETP technologies (A, P);
Market Support	9	Prior year number of new codes and standards that were previously ETP technologies (A, P);
Market Support	10	Savings (lifecycle net kWh, kW, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available (A, P);
Market Support	11	Number of new, validated technologies recommended to the California Technical Forum (A, P);
Market Support	12	Cost-effectiveness of a technology prior to market support program relative to cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness) (A, S);
Market Support	13	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A, P);
Market Support	14	Number of unique participants by sector that complete training (Q, S);
Market Support	15	Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology (A, P);
Market Support	16	Total projects completed/measures installed and dollar value of consolidated programs by sector (Q, P);
Market Support	17	Ratio of ratepayer funds expended to private capital leveraged by sector (Q, P);
Market Support	18	Percentage of partners that have taken action supporting energy efficiency by type (Q, P);
Market Support	19	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency (Q, S);
Market Support	20	Assessed value of the partnership by partners (A, P);
Market Support	21	Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services (A, P);

Segment	#	Indicator Description Adopted in D.23-06-055
Market Support	22	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P);
Market Support	23	Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P);
Market Support	24	Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products) (A, P);
Market Support	25	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment) (A, P);

Appendix 3: Equity-related Definitions from D.23-06-055

Decision 23-06-055 Definitions (June 29, 2023)

- **"Equity Market Participants"** = an equity program participant that is identified by at least one of the equity segment flags in CEDARS (e.g., hard-to-reach, disadvantaged, or underserved)
- **"All equity segment participants"** means all of the participants that participated in an equity segment program, regardless of whether they are an equity target participant or not
- **"...PAs must design their equity segment programs to reach, serve and ultimately benefit hard-to-reach and/or underserved customers and/or disadvantaged communities. Customers that may not be considered part of the equity segment will not be precluded from participating in equity segment programs but equity programs must be designed to target (i.e., market and conduct outreach to) and to primarily serve equity segment customers"** (Pages 42-43)
 - **"...equity segment programs should be designed to specifically serve customers (or groups of customers) meeting the criteria specified by PUC Code Section 1601(e) and, if applicable, Government Code Section 12100.63(h)(2)"** (page 46-47)
- **"Underserved"**
 - Residential and Public sectors: An underserved customer is a member of an underserved community, as defined by PUC Code Section 1601(e)
 - PUC Code Section 1601(e): "Underserved community" means a community that meets one of the following criteria:
 - Is a "disadvantaged community" as defined by subdivision (g) of Section 75005 of the Public Resources Code
 - Is included within the definition of "low-income communities" as defined by paragraph (2) of subdivision (d) of Section 39713 of Health and Safety Code
 - Paragraph (2) of subdivision (d) of Health and Safety Code Section 39713: "Low-income communities" are census tracts with median household incomes at or below 80 percent of the statewide median income or with median household incomes at or below the threshold designated as low income by the Department of Housing and

Community Development's list of state income limits adopted pursuant to Section 50093.

- Is within an area identified as among the most disadvantaged 25 percent in the state according to the California Environmental Protection Agency and based on the most recent California Communities Environmental health Screening Tool, also known as CalEnviroScreen
- Is a community in which at least 75 percent of public school students in the project area are eligible to receive free or reduced-price meals under the National School Lunch Program
- Is a community located on lands belonging to a federally recognized California Indian Tribe
- Commercial, Industrial, and Agricultural sectors: An underserved customer must be a member of an underserved community and must also be an "underserved business group" as defined by Government Code Section 12100.63(h)(2) for the CA Small Business Development Technical Assistance Program, i.e., women-, minority-, and veteran-owned businesses, and businesses in low-wealth, rural, and disaster-impacted communities included in a state or federal emergency declaration or proclamation
- **"Hard-to-reach"** - definition most recently established in D.18-05-041; any proposal for a modified definition must include concrete data and analysis; Decision at pages 51-52:
 - The modified definition of 'hard-to-reach' adopted by this decision [D.23-06-055] is:

California Native American Tribes are hard to reach; our state's historical dispossession of Tribes now requires deliberate effort to overcome persistent barriers to providing energy efficiency programs and services to Tribes. California Native American Tribes are defined consistent with the Commission's Tribal Consultation Policy, and any subsequent modification(s).

Specific criteria were developed by staff to be used in classifying a customer as hard-to-reach. Two criteria are considered sufficient if one of the criteria met is the geographic criterion defined below. If the geographic criterion is not met, then at least three (other) criteria must be met. The exception is for California Native American Tribes, who do not need to meet any additional criteria.

There are common as well as separate criteria when defining hard-to-reach for residential versus small business customers. The barriers common to both include:

Customers who do not have easy access to program information or generally do not participate in energy efficiency programs due to a combination of language, business size, geographic, and lease (split incentive) barriers. The common barriers to consider include:

- Geographic criterion –
 - Businesses or homes in areas other than the United States Office of Management and Budget Combined Statistical Areas of the San Francisco Bay Area, the Greater Los Angeles Area and the Greater Sacramento Area or the Office of Management and Budget metropolitan statistical areas of San Diego County, or
 - Businesses or homes in disadvantaged communities, as identified by the California Environmental Protection Agency pursuant to Health and Safety Code Section 39711.
- Language criterion – Primary language spoken is other than English.

For small business added criteria to the above to consider:

- Business Size – 25 or fewer employees and/or classified as Very Small (Customers whose annual electric demand is less than 20 kilowatt (kW), or whose annual gas consumption is less than 10,000 therm, or both), and/or
- Leased or Rented Facilities – Investments in improvements to a facility rented or leased by a participating business customer.

For residential added criteria to the above to consider:

- Income - Those customers who qualify for the California Alternative Rates for Energy, Energy Savings Assistance, or the Family Electric Rate Assistance Programs, and/or
- Housing Type - Multi-family and Mobile Home Tenants (rent and lease)

For the public sector, customer classified as "local government" that meet the geographic criterion above may also be considered hard-to-reach

Decision 21-05-031 Definitions (May 20, 2021; page 14)

- **Resource Acquisition:** Programs with a primary purpose of, and a short-term ability to, deliver cost-effective avoided cost benefits to the electricity and natural gas systems. Short-term is defined as during the approved budget period for the portfolio, which will be discussed further later in this decision. This segment should make up the bulk of savings to achieve TSB goals.
- **Market Support:** Programs with a primary objective of supporting the long-term success of the energy efficiency market by educating customers, training contractors, building partnerships, or moving beneficial technologies towards greater cost-effectiveness.
- **Equity:** Programs with a primary purpose of providing energy efficiency to hard-to-reach or underserved customers and disadvantaged communities in advancement of the Commission's Environmental and Social Justice (ESJ) Action Plan; Improving access to energy efficiency for ESJ communities, as defined in the ESJ Action Plan, may provide corollary benefits such as increased comfort and safety, improved indoor air quality, and more affordable utility bills, consistent with Goals 1, 2, and 5 in the ESJ Action Plan.

ESJ Action Plan Version 2.0 Definitions (April 7, 2022)

- **“Environmental and Social Justice Communities”** or “ESJ Communities” are low-income or communities of color that have been underrepresented in the policy setting or decision-making process, are subject to a disproportionate impact from one or more environmental hazards, and likely to experience disparate implementation of environmental regulations and socio-economic investments in their communities. In addition, ESJ communities include:
 - **Disadvantaged Communities**, defined as census tracts that score in the top 25% of CalEnviroScreen 3.0, along with those that score within the highest 5% of CalEnviroScreen 3.0's Pollution Burden but do not receive an overall CalEnviroScreen score;
 - All Tribal lands;
 - Low-income households; and
 - Low-income census tracts.

Appendix 4: Equity and Market Support Segment Objectives and Sub-Objectives (adopted in D.23-06-055)

Equity Segment

Objective: For hard-to-reach, disadvantaged, and/or underserved communities:

1. Address disparities in access to energy efficiency programs;
2. Promote resilience, health, comfort, safety, energy affordability, and/or energy savings;
3. Reduce energy-related greenhouse gas and criteria pollutant emissions; and
4. Provide workforce opportunities

Market Support Segment

Objective: Supporting the long-term success of the energy efficiency market

1. Sub-Objective #1: Demand: Build, enable, and maintain demand for energy efficient products and services in all sectors and industries to ensure interest in, knowledge of benefits of, or awareness of how to obtain energy efficiency products and/or services. [Activity example: educating customers]
2. Sub-Objective #2: Supply: Build, enable, and maintain supply chains to increase the capability and motivation of market actors to supply energy efficient products and/or services, and to increase the ability, capability, and motivation of market actors to perform/ensure quality installations that optimize energy efficiency savings. [Activity example: training contractors]
3. Sub-Objective #3: Partnerships: Build, enable, and maintain partnerships with consumers, governments, advocates, contractors, suppliers, manufacturers, community-based organizations and/or other entities to obtain delivery and/or funding efficiencies for energy efficiency products and/or services and added value for partners. [Activity example: building partnerships]
4. Sub-Objective #4: Innovation and Accessibility: Build, enable, and maintain innovation and accessibility in technologies, approaches, and services development to increase value, decrease costs, increase energy efficiency, and/or increase scale of and/or access to emerging or existing energy efficient products and/or services. [Activity example: moving beneficial technologies towards greater cost-effectiveness or declining costs]
5. Sub-Objective #5: Access to Capital: Build, enable, and maintain greater, broader, and/or more equitable access to capital and program coordination to increase affordability of and investment in energy efficient projects, products, or services. [Activity example: financing]

Appendix 5: Reporting Cadence for Equity and Market Support Indicators

Table 1. Indicators Reported Quarterly at Segment Level

Segment	#	Indicator Description Adopted in D.23-06-055
Equity	1	Count of equity target participants in equity segment, by sector
Equity	2	Sum of equity target participants' expected first-year bill savings in equity segment, by sector
Equity	3	Count of equity target participants in market support segment, by sector
Equity	4	Count of equity target participants in resource acquisition segment, by sector
Equity	5	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment
Equity	6	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment
Equity	7	Sum of all equity segment participants' kW savings in equity segment
Equity	8	Sum of all equity segment participants' therm savings in equity segment
Equity	9	Sum of all equity segment participants' TSB in equity segment
Equity	10	Median of equity target participants' expected first-year bill savings in equity segment, by sector
Equity	13	Percent of equity target participants in equity segment, by sector
Market Support	3	Percent of participation relative to eligible target population for curriculum
Market Support	4	Percent of total WE&T program participants that meet the definition of disadvantaged worker
Market Support	14	Number of unique participants by sector that complete training
Market Support	19	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency

Table 2. Indicators Reported Quarterly at Portfolio Level

Segment	#	Indicator Description Adopted in D.23-06-055
Market Support	1	Number of partners by type and purposes

Segment	#	Indicator Description Adopted in D.23-06-055
Market Support	16	Total projects completed/measures installed and dollar value of consolidated programs by sector
Market Support	17	Ratio of ratepayer funds expended to private capital leveraged by sector
Market Support	18	Percentage of partners that have taken action supporting energy efficiency by type

Table 3. Indicators Reported Annually at Segment Level

Segment	#	Indicator Description Adopted in D.23-06-055
Market Support	5	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training
Market Support	12	Cost-effectiveness of a technology prior to market support program relative to cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness)

Table 4. Indicators Reported Annually at Portfolio Level

Segment	#	Indicator Description Adopted in D.23-06-055
Equity	11	Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector
Equity	12	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector
Market Support	2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships
Market Support	6	Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies
Market Support	7	Prior year number of new measures added to the portfolio that were previously ETP technologies
Market Support	8	Prior year percentage of new codes or standards that were previously ETP technologies
Market Support	9	Prior year number of new codes and standards that were previously ETP technologies
Market Support	10	Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available
Market Support	11	Number of new, validated technologies recommended to the California Technical Forum

Segment	#	Indicator Description Adopted in D.23-06-055
Market Support	13	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources
Market Support	15	Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology
Market Support	20	Assessed value of the partnership by partners
Market Support	21	Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services
Market Support	22	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services
Market Support	23	Aggregated confidence level in performance verification by production, project, and service (for relevant programs)
Market Support	24	Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products)
Market Support	25	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment)

San Diego Gas & Electric Advice Letter 4438-E

ATTACHMENT B
Final MEMO on Common Metrics

MEMORANDUM

To: Program Administrators involved in the Common Metrics Meetings

From: Mary Sutter

Date: 3/7/24

Re: Adjusting Common Metrics from D.18-05-041



The California Public Utilities Commission (CPUC), in ordering paragraph #11 of Decision 23-06-055 (D.23-06-055) stated: “The portfolio administrators shall jointly submit a Tier 2 advice letter by no later than May 1, 2024 clarifying all of the indicators adopted in this decision, including any modifications from metrics and indicators adopted in Decision 18-05-041, and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines.”

PG&E contracted with Grounded Research to support the Program Administrators (PAs) as they collaborated on the Tier 2 advice letter to determine agreed upon modifications from metrics and indicators adopted in D.18-05-041 (i.e., the 330 common metrics).¹

This memo summarizes the results of the facilitated PA collaboration as of 3/5/24, describes the meetings that occurred for this effort, and provides the memos provided by Grounded Research to support the PA discussion. The PAs continue to meet after 3/5/24 to enable completion of the Tier 2 advice letter, including both the common metrics described herein and the equity and market support indicators where discussions occurred elsewhere. These meetings are not being facilitated by Grounded Research.

Summary

Over the course of five facilitated meetings, Grounded Research provided detailed information to ten PAs to enable discussion on potential changes to the 330 common metrics.² Nine of the ten PAs reached agreement on how to handle all 330 common metrics and why they are proposing changes.

SDG&E is proposing to remove all common metrics for several reasons. According to SDG&E staff, “SDG&E PA Common Metrics only apply to local portfolio metrics only, meaning statewide participation is left out. Statewide data collection does not allow for PA Common Metrics to be calculated. Not only that, but Hard-to-Reach/Disadvantaged Communities are now part of CEDARS uploads and is therefore redundant to keep in the PA Common Metrics. Also, consumption is at the sector level and not program level - SDG&E ends up getting data requested for consumption data at the program level where analysis can actually occur. With Market Support & Equity programs launching, the indicators being tracked there make the PA Common Metrics redundant or obsolete. Lastly moving to TSB makes the reported savings not align with the Metrics.”

Excluding SDG&E’s recommendation of full removal, proposed changes are:

Modification of 115 common metrics (out of 330, 35%). The majority of the metrics proposed for modification (110 out of the 115) are energy savings metrics or GHG metrics where the information is available in CEDARS. For

¹ This effort does not include collaboration that may have occurred amongst the PAs to complete the portion of the Tier 2 advice letter specific to clarifying the equity and market support indicators adopted in D.23-06-055 or any other aspects of completing the advice letter.

² Representatives were from PG&E, SCE, SoCalGas, SDG&E, BayREN, SoCalREN, IREN, 3C-REN, RuralREN, and MCE. These are the 10 PAs with programs in 2024 that are not the “elect-to-administer” PAs. Elect to administer PAs do not have the same level of required reporting.

these 110, the PAs propose to modify each to be an indicator (as the goals are now on TSB, not energy savings values) and to change where the indicator is found from the annual reports to CEDARS. The remaining five are compliance improvement metrics where the PAs propose to change the three metrics that originally were metrics (only for the statewide IOU programs) to indicators (two were originally indicators and only for the RENs). For statewide programs, the PAs propose to have only the lead PA provide data.

Removal of 215 common metrics (out of 330, 65%). While the reasons for removal vary, the top reasons are that the PAs believe that these are no longer useful, or a judicious use of ratepayer funds and the new equity and market support indicators now provide the most current, appropriate information to track. The PAs propose to remove all common metrics for 10 of the 17 grouped metric types. (See Table 1)

The PAs agreed that removal of any common metric does not preclude an individual PA from providing information about the data point within their annual report.

Additionally, for any single family / multifamily metrics that are modified (i.e., not removed), the PAs propose further modification from the existing common metrics categories (e.g., in-unit, common area, master metered) to the existing building type variables already assigned in the claims (i.e., Residential Multifamily, Residential Multifamily Common Area, Residential Single Family). This allows these indicators to be tracked using CEDARS.

Table 1 shows the proposed changes by high level metric type. Table 10 (at the end of this memo) shows each of the 330 metrics, the proposed change, and the reason for the change. (Table 9 lists the reasons for change.)

*Table 1. Summary of Metrics to Remove or Modify
(light blue rows indicate where the PAs propose to remove all metrics)*

#	Metric Type	# of Metrics	# to remove	# to modify
1a	Energy Savings – S1	111	28	83
1b	Energy Savings – S2 – Percent of sectoral savings	24	24	-
1c	Energy Savings in DAC – S3	12	2	10
1d	Energy Savings in HTR – S4	12	2	10
2	Cost per unit saved	42	42	-
3	Depth of interventions	30	30	-
4	ETP	23	23	-
5	Penetration	21	21	-
6	Benchmarking	9	9	-
7	C&S Compliance Improvement	9	5	4
8	C&S Advocacy	6	6	-
9	C&S Reach Codes	1	-	1
10	GHG	7	-	7
11	WE&T	6	6	-
12	Energy intensity	4	4	-
13	Water	4	4	-
14	New participation (industrial sector only)	3	3	-
15	Investment in EE	2	2	-
16	NMEC	2	2	-
17	Satisfaction	2	2	-
<i>Total</i>		<i>330</i>	<i>215</i>	<i>115</i>

Meetings

Grounded Research facilitated five meetings during the PA collaboration around common metrics. (Table 2)

Table 2. Common Metric Collaboration Meetings Facilitated by Grounded Research

Meeting	Date of Meeting	Content of Meeting	Notes
#1	12/11/23	Proposed framework for adjusting common metrics, proposed categories of changes, examples of application of changes, presentation of PA homework required.	To facilitate an expeditious collaboration, Grounded Research requested the PAs to agree or disagree with a strawperson of proposed adjustments to each of the 330 metrics. Attachment 1 describes the homework.
#2	01/18/24	Check-in meeting with all PAs to discuss any issues with homework.	No issues were raised in the meeting. PAs provided the homework to Grounded Research by 1/26/24. Grounded Research then analyzed the answers and summarized areas of agreement / disagreement to facilitate the meeting on 2/1/24. Attachment 2 describes initial areas of agreement / disagreement
#3	02/1/24	First meeting to discuss areas where significant disagreement was seen based on analysis of homework from each PA.	Agreement reached for some metrics but did not have time to discuss all. Grounded Research provided a memo on Single Family / Multifamily metrics and indicators to facilitate discussion of these metrics in the 2/12/24 meeting. Attachment 3 includes specifics on SF/MF metrics.
#4	2/12/24	Second meeting to finish up discussion of areas of disagreement.	Agreement reached on all changes to common metrics and discussions occurred regarding reasons for changes. Grounded Research provided a memo on potential reasons to make changes (based on discussions that occurred amongst PAs on 2/1 and 2/12) to facilitate discussion on 3/5/24.
#5	3/5/24	Meeting to discuss reasons to make changes.	Agreement reached on reasons to make changes. Attachment 4 describes the reasons and agreed upon wording for the reasons.

The remaining pages of this document have details that Grounded Research provided throughout the multiple meeting as noted in italics as the first statement in each attachment.

Attachment 1: Details of Homework

Provided as a document along with the Excel file to facilitate homework. Rather than having the PAs discuss all 330 metrics within multiple meetings to arrive at any adjustments, Grounded Research, in conjunction with PG&E, created an Excel file strawperson with proposed adjustments. Each PA then had the opportunity to agree or disagree with the proposed adjustments. After analyzing PA homework, the discussions were limited to areas of disagreement, thus shortening the need for multiple long meetings.

The information in this attachment provides a data dictionary of what is included in each column of the Straw person tab within Excel spreadsheet, describes the Excel file format (with similar descriptions by column or groups of columns), and finishes with steps to take to fill out the file. It is a companion to the meeting where Grounded Research presented the file and talked about how to fill it in.

Data Dictionary

Line items highlighted in yellow are the columns to be filled in. Otherwise, the column is informational only. The non-highlighted columns are locked and cannot be changed.

Column in Excel	Column Label	Description	How to use
A	PA	Program Administrator name	Fill in cell A3
B	Index	Metric Index	Information from current Common Metrics table
C	Business Plan Att A Description	Metric Description	Information from current Common Metrics table
D	Metric		Information from current Common Metrics table
E	Sector	Sector for metric	Information from current Common Metrics table
F	Updated Metric Type (to allow higher level discussions of what has been kept/dropped, Original in Column W, Metric Type)	Metric type that is broader than original metric type	Information to help see broad categories of metrics
G	Areas to consider	Comments for your consideration	Read
H	Keep / Amend / Shift / Drop	Category for what to do with the metric	Read and decide if you agree or disagree with what is here
I	Original type (metric or indicator) based on Decision	Metric or Indicator	Read and decide if you agree or disagree with what is here
J	Proposed type (metric or indicator) - leave blank if no change from original	Proposed metric type (if amending)	Read and decide if you agree or disagree with what is here
K	If shifted, where will data now be available	Proposed location of where data will reside (if shifting)	Read and decide if you agree or disagree with what is here
L	Details on amend, shift, drop (reasons)	Reason why a change is proposed	Read and decide if you agree or disagree with what is here
M	Agree or disagree with any part of the straw person	Drop down menu for Agree or Disagree with anything in columns H-L	Choose for every line item (all 330)
N	Keep / Amend / Shift / Drop	Your proposal for how to handle the metric	Fill in if relevant
O	Proposed type (metric or indicator) - leave blank if no change from original	Your proposal for type of metric	Fill in if relevant
P	If shifted, where will data now be available	Your proposal for where data would reside	Fill in if relevant

Column in Excel	Column Label	Description	How to use
Q	Details on amend, shift, drop (reasons)	Your proposal for why making a change	Fill in if relevant
R	Any PA notes	Your general comments	Fill in if relevant
S	Att A Page	Page in the original decision attachment A	Information from current Common Metrics table
T	Att A Order	Order within the original decision attachment A (e.g., PL1, A1, C2, etc.)	Information from current Common Metrics table
U	Method Code	Code for method (e.g., G, S1, etc.)	Information from current Common Metrics table
V	Units of Measurement	Metric measurement unit (e.g., MT CO2eq, First year annual kW gross, etc.)	Information from current Common Metrics table
W	Metric Type	Detailed listing of the type of metric (e.g., S1: Energy Savings, S3: DAC savings, etc.)	Information from current Common Metrics table
X	Methodology	Metric Methodology	Information from current Common Metrics table
Y	Key Definitions	Any comments on the metric	Information from current Common Metrics table
Z	Proxy Explanation	More comments on the metric	Information from current Common Metrics table

This file has three tabs

- Straw person – the tab for each PA to review and make changes. It includes a filtering capability
 - DO NOT EVER sort the table when there is a filter in place (it will cause misalignment of the data)
 - You can tell when a filter is in place because the numbers on the far left of the file that designates row are blue (at least they turn blue on my machine when I have filtered my data)
 - It may be easier to filter by updated metric type (column F, see below) to group the multiple lines associated with a specific type of metric
- Straw person PIVOT – a pivot table of the Straw person tab
- D.23-06-055 Indicators – a listing of the equity and market support indicators from the decision (for information when there is reference to a specific indicator from that decision)

For the Straw person tab...

- **Do not change these columns.** The Straw person tab has several columns of information that should not be changed by the PA (line one in the file states DO NOT CHANGE where relevant)
 - Columns B-E provide information from the original Common Metrics describing each metric (i.e., index, Business Plan Att A Description, Metric, and Sector)
 - Column F is an updated metric type (categorizing the metric type) to enable ease of counting the proposed changes
 - Column G is a set of notes in some of the line items for the PA to consider as they read the proposed adjustments
 - **Columns H-L are the straw person proposed adjustments to each Common Metric**
 - H is the proposed adjustment category (keep, amend, shift, drop)
 - I is the original labeling of the line item as a metric or an indicator
 - J is the proposed adjustment of the line item IF column H is “amend”, otherwise it is blank, and no adjustment is proposed
 - K is where the information would now be located IF H includes “shift”, otherwise it is blank and no adjustment is proposed (i.e., the line item would remain in the annual Excel file)
 - L is the reason for the change. Suggest that the PAs use similar reasons to enable easier discussion of changes and why they are made within the Advice Letter.
 - Columns S-Z are also information from the original Common Metrics describing each metric (e.g., unit of measurement, methodology and key definitions, etc.).
- **Change these columns.** There are 7 columns for each PA to potentially enter information
 - Column A is where you indicate which PA you are
 - Column M is where each PA indicates agreement or disagreement with the information in columns H-L. This is a pull down with no ability to indicate “partial agreement” If the PA fully agrees, then no need to fill out anything else.
 - Columns N-R if the PA disagrees with any column H-L, put the updated information here.
 - N is where you would put in a value that is not identical to H
 - O is where you would put in a value that is not identical to J
 - P is where you would put in a value that is not identical to K
 - Q is where you would put language that is not identical to L
 - R is an open column for any notes that you want to make
 - If you make a change to N (category of adjustment), make sure that you also place a reason for the change in column Q

- If you are OK with the category of adjustment, but want to propose different language for the reason of the adjustment, just fill in column Q

Steps 2 and 5 have details on the information above but are included here to summarize.

Step 1: Enter your PA name in A3 (it will self-propagate for the other lines)

Step 2: For each line item, review columns G-L, using columns B-F and S-Z to help orient you as needed

Step 3: For each line item, fill in column M (agree/disagree).

Step 4: For any line item where column M is “disagree”, fill in the appropriate columns N-Q

Step 5: If you want to make a general comment (regardless of agreement status), fill in column R

Step 6: Perform QA on your data

- Ensure that column M has no blanks
- Ensure that if column M is “disagree” that all other appropriate columns N-Q is filled in (see the “change these columns” above)

Step 7: Save the file with your PA name and date in the file name and send to Grounded Research (mary@grounded-research.com) **by January 24, 2024.**

Once we have all the data, we will collate and synthesize the data. We will bring out the areas of disagreement for discussing during the next meeting (scheduled for February 1).

Attachment 2: Summary of Results from Homework

Information provided in advance of the meeting on 2/1/24. Note that the initial discussions of how to handle the common metrics used the words “keep, amend, shift, drop”. These were later combined into “removal or modification” to match the decision language.

The high level results indicate the following:

- The PAs are in full agreement for about 1/3 of the metrics (drop 101 out of 330).
- Discussions in a handful of areas would be beneficial to clarify an additional 131 metrics (see Table 3).
- The group should discuss how to handle the areas of disagreement for the remaining 98 metrics. (See Table 4)

Areas of full agreement

SDG&E is proposing to drop all 330 common metrics, so there can only be full agreement (i.e., all 10 PAs responding to the Common Metrics homework) when the other 9 PAs also agree to drop a metric. All PAs recommend dropping 101 metrics that are spread across 19 metric types as shown below.

- Drop all metrics in the metric type (# dropped)
 - Cost per unit saved (42)
 - Depth of interventions (27)
 - D1: Depth of interventions: Per downstream participant (3)
 - D1: Depth of interventions: Per midstream participant (3)
 - D1: Depth of interventions: Per upstream participant (3)
 - D2: Depth of interventions by project (3)
 - D3: Depth of interventions per building (6)
 - D4: Depth of interventions per property (3)
 - D5: Depth of interventions: per square foot (6)
 - New participation (3)
 - Penetration (8)
 - P2: Penetration of energy efficiency programs in terms of square feet of eligible population (2)
 - P3: Penetration of energy efficiency programs in the eligible market – DAC (3)
 - P4: Penetration of energy efficiency programs in the HTR market (3)
 - Savings Tracing (3)
 - Satisfaction (2)
 - Energy Intensity
 - Energy Intensity per MF unit (1)
 - Energy Intensity per MF unit square foot (1)
 - Energy intensity per public sector building (1)
 - Energy intensity per SF household (1)
- Drop some of the metrics in the metric type
 - S2: Percent Overall Sectoral Savings – drop anything that is lifecycle (12 out of 24 metrics)

Areas of disagreement that could be discussed on 2/1/24.

The table below indicates nine points for potential discussion on 2/1/24. Reaching agreement on these would affect 131 metrics. *The initial memo included detailed tables to facilitate discussion. However, these tables are not included herein due to length. These detailed tables showed all 330 metrics and the count of PAs by proposed change (i.e., keep, amend, shift, drop).*

Table 3. Potential Discussion Points for 2/1/24

Point	Metric Area	Specific Metrics	Discussion Points
1	Energy Savings	Any lifecycle kW	<p>Discuss dropping because is not a useful metric (i.e., reason is that kW is not cumulative, so multiplying the first year value by EUL doesn't make sense).</p> <p>Currently, between 5 and 7 PAs want to drop this, depending on the metric. Many want to amend (to be an indicator) and shift to CEDARS.</p> <p>If all agree to drop, would drop another 23 metrics</p>
2	Energy Savings	Residential SF/MF	<p>Continue to separate SF and MF or combine into a single residential sector? (43-113)</p> <p>If combined, would drop 36 MF metrics (and would need to agree on how to handle the remaining 12 that are now just SF).</p> <p>If combined, would need to decide where common area savings end up (as residential savings?) There are 12 common area metrics that do not show up in SF.</p>
3	Depth of Interventions	D1: Per opt-out (3 metrics)	<p>All 10 PAs recommend dropping all other depth of intervention metrics</p> <p>Discuss dropping or keeping these metrics (62-64) – half want to keep these three metrics and half want to drop them.</p> <p>Note that 1 of the 3 metrics is a lifecycle kW metric which is noted in point #1, so discussion may be about only 2 of the 3 metrics (if the group already decided to drop lifecycle kW).</p>
4	Penetration	Percent of penetration by sector (P1 only – 13 metrics)	<p>Need to discuss whether to drop these 13 metrics altogether or keep but amend to being an indicator.</p> <p>4 of 9 PAs want to drop all 13 metrics 2 or 3 PAs want to keep, amend, or shift all 13 metrics</p> <p>Also, all 9 PAs recommend dropping all other penetration metrics (i.e., P2, P3, and P4)</p>
5	NMEC (commercial)	All 2	<p>Keep or drop?</p> <p>2 say keep, 7 say drop for one of the two metrics (% of total projects utilizing NMEC)</p> <p>2 say keep, 1 says amend, 6 say drop for one of the two metrics (% of total savings derived from NMEC analysis)</p>
6	Water	All 4	<p>Keep or drop?</p> <p>3 say keep, 6 say drop</p>
7	Benchmarking	All 9	SCE is OK dropping all but feels should not. All other PAs want to drop
8	Emerging Technologies	All 23	<p>Should just SCE/SoCalGas make recommendations here since they are the lead PAs for ETP?</p> <p>If so, SoCalGas would drop all of these 23 metrics and SCE would keep 16, drop 3 and amend/shift 4</p>
9	Codes & Standards	Advocacy (6) Compliance Improvements (8) Reach Codes (1)	C&S is a special group of metrics. C&S Advocacy (6 metrics, 285-290) is a statewide effort with PG&E as the lead. The IOUs are responsible for three of the compliance improvement metrics (292-294), the RENs are responsible for the other five of the compliance improvement metrics (296-300), and

Point	Metric Area	Specific Metrics	Discussion Points
			both are responsible for the remaining reach codes metric (291).
			Note that 295 (a REN metric) was in the homework but has been dropped for this analysis since BayREN and 3C-REN already filed to remove this metric back in 2020.
			The group should discuss how to make choices for these metrics. PG&E wants to keep the advocacy metrics, three IOUs want to keep their compliance improvement metrics (SDG&E wants to drop them), the RENs are mixed on how to handle their compliance improvement metrics and there is also a mix of how to handle the one reach codes metric.

Remaining Areas of Disagreement

The PAs have various opinions on how to handle the remaining 98 metrics as shown below in Table 4.

Table 4. Areas of Disagreement by PA Recommended Adjustment

Keep	# of PAs that want to				Metrics
	Amend	Amend/Shift	Shift	Drop	
	8			2	2 metrics WE&T (304 and 306)
		7		3	74 metrics Portfolio Level GHG (1) Energy Savings S1: Energy Savings first year annual savings (53) S3: first year annual DAC (10) S4: first year annual HTR (10)
	7			3	6 metrics S2: Percent overall sectoral savings (248-253) in the industrial sector
			7	3	1 metric 303, WE&T, Percent of participation relative to eligible target population for curriculum
			6	4	1 metric 187 – percent of total investments made by ratepayers and private capital (commercial sector)
		6	1	3	3 metrics GHG metrics (200, 235, 272) for Public, Industrial, and Ag sector
6	1			3	4 metrics Three WE&T metrics (301, 302, 305) one Investment in EE metric (219 – total program-backed financing distributed to Public Sector customers requiring repayment)
		6	2	2	1 metric 163 - commercial GHG
	5		1	4	6 metrics Energy Savings S2: Percent of Overall Sectoral Savings Percent of first year annual savings (151-156) for commercial sector

Attachment 3: Single Family / Multifamily Metrics

Information provided in advance of the meeting on 2/12/24. The initial memo included a table of all SF/MF common metrics and the change status of each that is not included herein due to length.

For the metrics still remaining to be discussed (see Table 1), the working group may want to consider SF/MF common metrics in terms of consistency by metric first before deciding on moving to a single residential value over SF and MF values. Specifically:

- **Benchmarking and GHG metrics** - SF/MF metrics would first be consistent with what the group determines for any non-SF/MF metric (i.e., keep, amend, shift, or drop). If other sectors are not dropped, then the group considers whether to consolidate SF/MF into residential.
- **Penetration** – the group has already chosen to drop P1 penetration metrics in the other sectors. For consistency, it seems that the SF/MF sector metrics should also be dropped.
 - Note that the new equity segment indicators are asking for counts by SF/MF, so the numerator of any penetration metric will most likely continue to need to be tracked.
 - There is another equity segment indicator for the percent of equity target participants in the equity segment. This indicator will need a denominator. While not yet finalized, that working group is leaning towards using the total participants as the denominator. As such, it would not be the same denominator as was originally envisioned for the P1 penetration metrics.
- **Energy Savings** – there are four categories of energy savings. S1 is energy savings at the portfolio and sector level, S2 is percent overall sectoral savings for commercial and industrial only, S3 is DAC savings at the portfolio level, and S4 is HTR savings at the portfolio level.
 - For separating SF/MF metrics, only S1 is relevant.
 - The group has not yet discussed these S1 metrics in total, so this one may take more time and may be more specific to SF/MF because the other sector energy savings are simply by sector (i.e., commercial, public, industrial, agricultural, C&S) and available in the claimed data on CEDARS (so could be amended to be indicators and shifted to be seen within CEDARS).
 - The building type variable in CEDARS has Residential Single family. Keeping SF separate from MF seems possible within CEDARS and so these metrics could be amended to be indicators and shifted to be seen within CEDARS if the group decides to take that approach.
 - However, the S1 energy savings metrics for MF are separated into in-unit, master metered, and common area. The building type variable in CEDARS has Residential Multi-family and Residential Multi-family Common Area, but not master metered. Options to consider are:
 - Combining master metered into either in-unit or common area and use CEDARS to track savings
 - Continue to track MF in-unit, master metered, common area energy savings within the common metrics table that is currently within the annual report
 - Request adding a new building type option of Residential Multi-family master metered to the existing Building Type variable within CEDARS and shifting this information to CEDARS.
 - None of the new equity indicators ask for savings by sector. However, the indicator of bill-savings would use energy savings within any calculation of bill savings. As such, energy savings will need to be known for SF/MF.
 - Note that MF is not separated into in-unit, common area, or master metered within the equity indicator. Combining energy savings across these three areas does not seem to get to what stakeholders may be interested in (i.e., in-unit tenant bill savings), but this issue has not been discussed within that working group (and most likely will not be discussed give the timing of the meetings).

Below are tables showing the SF/MF common metrics and information about the equity/market support metrics.

SF/MF in Common Metrics

Of the 96 SF/MF common metrics, all PAs have agreed to drop 49 (based on the previous homework or discussions amongst the PAs in the 2/1/24 meeting). The remaining 47 metrics for discussion are shown in Table 5.

Table 5. Remaining SF/MF Metrics for Discussion

Metric	# SF/MF Metrics Remaining	Notes
Benchmarking	2	Benchmarking overall (with 9 metrics in total) has not yet been discussed by the group
GHG	2	GHG overall (with 7 metrics in total) has not yet been discussed by the group
P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	3	The group has already agreed to drop the other 10 P1 metrics that cover penetration in other sectors. The three remaining metrics are: <ul style="list-style-type: none"> SF % of participation relative to eligible population MF % of participation relative to eligible population by property and by unit
Energy Savings	40	See the full list of these in [Table 4 in the original memo, but not included herein for length], but the metrics not yet decided on are: <ul style="list-style-type: none"> SF first year gross and net kWh, kW, and therm savings SF lifecycle gross and net kWh and therm savings MF first year gross and net kWh, kW, and therm savings for in-unit, master metered, and common area MF lifecycle year gross and net kWh and therm savings for in-unit, master metered, and common area

To understand if the choices are consistent within the SF/MF sector, the table below provides the list of SF/MF common metrics that the group has already agreed to drop.

Table 6. SF/MF Metrics already Agreed to Drop

Metric	# SF/MF Metrics Dropped	Notes
Cost per unit saved	12	SF and MF - PAC and TRC levelized costs (\$/kW, \$/kWh, \$/therm)
Depth of intervention	21	SF - Average lifecycle ex ante net kW, kWh, Therm savings per participant for opt-in (downstream), opt-in (midstream), opt-in (upstream), and opt-out MF – lifecycle ex ante net kW, kWh, therm savings per project (building), per project (property), per square foot
Energy intensity	3	SF – average electric and gas usage per household MF – average electric and gas usage per unit and per square foot
Energy savings	8	SF – lifecycle ex ante gross and net kW MF – lifecycle ex ante gross and net kW for in unit, master metered, and common area
Penetration	5	SF - % of participation in DAC and HTR MF - % of participation in DAC and HTR, % of square foot of eligible population participating (by property)

New Equity and Market Support Indicators

While discussions are ongoing as to whether the new indicators will be separated into SF and MF (or simply be residential), for now the new equity and market support indicators include SF and MF indicators, as shown in Table 7. These indicators are a work in progress.

Table 7. New SF/MF Equity and Market Support Indicators

Indicator	Notes
Equity Indicators for SF and MF sectors	
1. Count of equity target participants in equity segment	
3. Count of equity target participants in market support segment	An equity target participant is a program participant that meets CPUC-adopted criteria for being hard-to-reach, located in a disadvantaged community, or underserved. The participant can be in an Equity, Market Support, or Resource Acquisition segment program.
4. Count of equity target participants in resource acquisition segment	
2. Sum of equity target participants' expected first-year bill savings	Emerging consensus of the EMSWG is that the denominator for the percent indicator is the total number of program participants
10. Median of equity target participants' expected first-year bill savings in equity segment	
13. Percent of equity target participants in equity segment	
11. Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector	This is all HTR in equity, market support or resource acquisition programs. Emerging consensus of the EMSWG is that the denominator for this indicator is the total number of program participants.
12. Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector	This is all DAC in equity, market support or resource acquisition programs. Emerging consensus of the EMSWG is that the denominator for this indicator is the total number of program participants.
Market Support Indicators that include sector	
16. Total projects completed/measures installed and dollar value of consolidated programs by sector	The EMSWG has not yet reached agreement on the definitions of #16 and 17 (and has not discussed whether sector for these indicators means SF/MF or just residential versus commercial)
17. Ratio of ratepayer funds expended to private capital leveraged by sector	
14. Number of unique participants by sector that complete training	

Attachment 4: Reasons for Change

Information provided in advance of the meeting on 3/5/24 with the agreed upon language based on the meeting of 3/5/24. The initial memo provided prior to the 3/5/24 meeting included a summary that is not shown here because we already provide the summary at the front of this memo.

When categorizing reasons for change, the information below uses the terms “removal” or “modification” from D.23-06-055.³

- **Modification** means that the PAs will track the metric in the future, but that the metric may be slightly different or provided in a different location.
- **Removal** means that the PAs will not track the metric in the future, including metrics that have been superseded by the new equity and MS indicators.

The memo has three tables with information:

- Table 8 – lists the overarching reasons for proposed changes to a common metric
- Table 9 – lists the grouped common metrics, the number of metrics proposed for modification or removal, and the reasons for the change (using Table 8 categories and additional information where relevant)
- Table 10 – lists all 330 common metrics and whether each is proposed to be modified or removed

Matrix of Reasons for Removal or Modification

There are seven broad categories of why the PAs recommend removal or modification of a common metric. (Table 8 shows the metric for which a reason is generally associated, the category of change, reasons for that change and relevant notes. Table 9 applies these reasons and shows recommendations for changes that are grouped by type of common metric.

Table 8. Matrix of Broad Reasons to Remove or Modify Common Metric

Common #	Metric(s)	Category of Change	Reasons for Change	Notes
1	Any	Removal	The PAs believe that these are no longer useful or a judicious use of ratepayer funds.	PAs expect that there will be useful information from the new equity and market support indicators. The PAs plan to track important resource acquisition indicators (as shown below).
2	Energy savings metrics	Modification	Do not duplicate data. Data is already available within CEDARS.	Shift where the information will be found from the annual report to CEDARS. For those that are metrics, change the metrics category from a metric to an indicator (i.e., no targets). In some cases, CEDARS needs work to pull relevant data from CEDARS for specific indicators so that stakeholders can easily follow changes within any indicator.
3	Metrics that have equity or market support indicators	Removal	The new equity and market support indicators now provide the most	Remove all market support or equity indicators or metrics from the common metrics. The equity and market support

³ The decision also included the term “suspension”, but this term was not used when the PAs discussed proposed changes to the various metrics, so is not used here.

Common #	Metric(s)	Category of Change	Reasons for Change	Notes
			current, appropriate information to track.	indicators should establish what information is currently needed in these segments.
4	Energy savings metrics	Modification for most Removal for some (See reason #5)	Goals are now on TSB, not energy savings.	Change the metrics category from a metric to an indicator (i.e., no targets).
5	Any metric that references lifecycle kW	Removal	Drop any lifecycle kW as kW are instantaneous, so there is no meaningful way to calculate kW lifecycle savings	
6	Metrics associated with statewide programs – ETP, WE&T (statewide only), C&S	Removal for some Modification for some	The new equity and market support indicators now provide the most appropriate information to track.	Any statewide program should be reported by the lead PA only. Remove any common metrics associated with the statewide programs (ETP, WE&T, C&S) not also within the equity or market support metrics. Remove all market support or equity indicators or metrics from the common metrics. The equity and market support indicators should establish what information is currently needed in these segments.
7	Other	Removal or Modification		See Table 9 for other reasons

Additionally, for any single family / multifamily metrics that are modified (i.e., not removed), the PAs recommend further modification from the existing common metrics categories (e.g., in-unit, common area, master metered) to the existing building type variables already assigned in the claims (i.e., Residential Multifamily, Residential Multifamily Common Area, Residential Single Family). This allows these indicators to be tracked using CEDARS data.

Proposed reasons to change the categories of metric types are shown in the table below.

Table 9. Reasons to Remove / Modify Metrics by Metric Type

#	Metric Type	# of Metrics	# to remove	# to modify	Reason to change							Additional notes regarding reason
					#1	#2	#3	#4	#5	#6	#7	
1a	Energy Savings – S1	111	28	83		✓		✓	✓			<ul style="list-style-type: none"> • Removal (reason #5) and choices made for SF/MF metrics • Modification (reasons #2 and #4)
1b	Energy Savings – S2 – Percent of sectoral savings	24	24	-	✓				✓		✓	<ul style="list-style-type: none"> • Removal - for reasons #1 and #5 and that values are very small (e.g., hundredths or thousandths of a percent) and so are not useful.
1c	Energy Savings in DAC – S3	12	2	10		✓		✓	✓			<ul style="list-style-type: none"> • Removal (reason #5) • Modification (reasons #2 and #4) – reason #3 does not apply as equity segment indicators capture energy savings for the equity segment, not specifically for DAC. However, CEDARS has a flag for DAC
1d	Energy Savings in HTR – S4	12	2	10		✓		✓	✓			<ul style="list-style-type: none"> • Removal (reason #5) • Modification (reasons #2 and #4) - reason #3 does not apply as equity segment indicators capture energy savings for the equity segment, not specifically for HTR. However, CEDARS has a flag for HTR.
2	Cost per unit saved	42	42	-	✓							<ul style="list-style-type: none"> • Removal for reason #1 and the reasons shown below <ul style="list-style-type: none"> ○ Program costs are artificially spread based on the electric or gas benefits so does not provide a useful indicator. ○ This is also misleading metric because program achievements are split across three savings units but costs are (in many cases) are unable to be cleanly/clearly allocated to savings units. ○ This should be abandoned for similar reasons that the CPUC changed to TSB goal.
3	Depth of interventions	30	30	-	✓				✓		✓	<ul style="list-style-type: none"> • Removal for reasons #1, #5, and reasons shown below <ul style="list-style-type: none"> ○ Remove upstream and midstream values as the information is already available on the eTRM ○ Remove per square foot values as the data point is very difficult to obtain and leads to poor data quality (and metrics that are not useful) ○ Remove per project values since buildings have different opportunities (based on size and configuration)
4	ETP	23	23	-			✓			✓	✓	<ul style="list-style-type: none"> • Removal (reasons #3 and #6) and of the 3 savings tracing metrics that are market support indicators (318-320) because

#	Metric Type	# of Metrics	# to remove	# to modify	Reason to change							Additional notes regarding reason
					#1	#2	#3	#4	#5	#6	#7	
												they use a method based on ED study that does not occur annually.
5	Penetration	21	21	-	✓							<ul style="list-style-type: none"> • Removal for reason #1 and the denominator data is unreliable and differs from year to year.
6	Benchmarking	9	9	-								<ul style="list-style-type: none"> • Removal for reasons below <ul style="list-style-type: none"> ○ Unknown who is using this data ○ Uncertain if any programs are providing benchmarking ○ The data is very cumbersome to obtain and report
7	C&S Compliance Improvement	9	5	4	✓					✓	✓	<ul style="list-style-type: none"> • Removal (reasons #1 and below REN only metrics) <ul style="list-style-type: none"> ○ Note that 295 had been dropped in 2020 (by BayREN and 3C-REN) due in-part to the difficulty of obtaining and tracking permit data across hundreds of jurisdiction (after exploring how to capture this data) ○ Removal of 296, 297, 300 as not every REN C&S program may choose to code compliance support to specific buildings or host an Energy Policy Forum, so it does not make sense for these to be a common metric • Modification (reasons #6 and below) <ul style="list-style-type: none"> ○ Modification of indicator language (298-299, REN only) <ul style="list-style-type: none"> ▪ 298 - In 2020, BayREN and 3C-REN modified this to be “Number of organizations directly engaged in C&S activities” ▪ 299 – In 2020, BayREN and 3C-REN modified this to be “Percent of Jurisdictions directly engaged in C&S activities” ○ Modification of 292-294 from a metric to an indicator (IOU only)
8	C&S Advocacy	6	6	-						✓		<ul style="list-style-type: none"> • Removal (reason #6)
9	C&S Reach Codes	1	1	-	✓							<ul style="list-style-type: none"> • Removal (reason #1)
10	GHG	7	-	7		✓		✓				<ul style="list-style-type: none"> • Modification (reasons #2, and #4, includes index 0, originally labeled as “NEW: Energy Savings”)
11	WE&T	6	6	-	✓		✓			✓		<ul style="list-style-type: none"> • Removal – (301, 302) (reason #1 and #6) • Removal – (303-306) (reasons #3 and #6)
12	Energy intensity	4	4	-	✓						✓	<ul style="list-style-type: none"> • Removal – reason #1 and somewhat useful if seeking to understand if consumption is going up or down, but since consumption has so many other variables, not a good indicators for EE program interventions

#	Metric Type	# of Metrics	# to remove	# to modify	Reason to change							Additional notes regarding reason	
					#1	#2	#3	#4	#5	#6	#7		
13	Water	4	4	-	✓							✓	<ul style="list-style-type: none"> • Removal for reason #1 as well as multiple PAs have been unable to track
14	New participation (industrial sector only)	3	3	-								✓	<ul style="list-style-type: none"> • Removal for these reasons <ul style="list-style-type: none"> ○ Going back multiple years to ensure non-participation may be difficult if the companies had name changes and not worth the cost ○ This would be difficult information for RENs and CCAs to collect
15	Investment in EE	2	2	-	✓		✓						<ul style="list-style-type: none"> • Removal (219) (reason #1) • Removal (187) (reason #3)
16	NMEC	2	2	-	✓							✓	<ul style="list-style-type: none"> • Removal for reason #1 and because NMEC is now becoming more mainstream, and it is no longer as relevant to show that is in use.
17	Satisfaction	2	2	-	✓							✓	<ul style="list-style-type: none"> • Removal for reason #1 and reasons shown below <ul style="list-style-type: none"> ○ Satisfaction often depends on extraneous information (i.e. rates). ○ Difficult and costly to obtain annually. ○ Self-reporting trade ally satisfaction doesn't seem like a reliable "indicator" or useful.
<i>Total</i>		<i>330</i>	<i>215</i>	<i>115</i>	<i>136</i>	<i>124</i>	<i>12</i>	<i>124</i>	<i>34</i>	<i>41</i>	<i>111</i>		<i>Note that a single metric may have more than one reason for change, so the totals shown by reason are larger than the number of metrics.</i>

Original Categorization of Metrics within Homework

D.23-06-055 used the terms metric “removal, suspension, or modification” when discussing the common metrics, but the work done by the PAs used the four different terms bulleted below to categorize any possible adjustments.

- Keep if the PAs indicated no change to any part of the metric and a continuation of providing the metric within the current Excel file that is part of the annual report
- Amend if the PAs adjusted one part of the metric (e.g., change from a metric to an indicator)
- Shift if the PAs acknowledged that the metric would be available as originally indicated in D.18-05-041, but in a different dataset (e.g., instead of an Excel file of metrics within the annual report, the data would show up on CEDARS within quarterly claims)
- Drop if the metric was to be dropped altogether

A metric could be amended, shifted, or both

Only two of the decision terms map to the above terms:

- Removal → Drop in the homework category
- no similar term included for Suspension
- Modification → Amend or Shift on the homework category

Common Metrics and Removal / Modification Choice (Final)

The table below shows the proposed change by common metric, along with the reason for the change.

Table 10. All Common Metrics and the Proposed Change

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
0	GHG	NEW: Energy Savings	CO2-equivalent of net annual kWh savings	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
1	Energy Savings	S1: Energy Savings	First year annual kW gross	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
2	Energy Savings	S1: Energy Savings	First year annual kW net	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
3	Energy Savings	S1: Energy Savings	First year annual kWh gross	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
4	Energy Savings	S1: Energy Savings	First year annual kWh net	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
5	Energy Savings	S1: Energy Savings	First year annual Therm gross	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
6	Energy Savings	S1: Energy Savings	First year annual Therm net	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
7	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross	Portfolio Level (PL)– All Sectors	Removal	#5 - lifecycle kW is not meaningful
8	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net	Portfolio Level (PL)– All Sectors	Removal	#5 - lifecycle kW is not meaningful
9	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
10	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
11	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
12	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
13	Energy Savings	S3: DAC Savings	First year annual kW gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
14	Energy Savings	S3: DAC Savings	First year annual kW net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
15	Energy Savings	S3: DAC Savings	First year annual kWh gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
16	Energy Savings	S3: DAC Savings	First year annual kWh net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
17	Energy Savings	S3: DAC Savings	First year annual Therm gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
18	Energy Savings	S3: DAC Savings	First year annual Therm net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
19	Energy Savings	S3: DAC Savings	Lifecycle ex-ante kW gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Removal	#2 - do not duplicate data; #4 - goals now on TSB; #5 - lifecycle kW is not meaningful
20	Energy Savings	S3: DAC Savings	Lifecycle ex-ante kW net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Removal	#2 - do not duplicate data; #4 - goals now on TSB; #5 - lifecycle kW is not meaningful
21	Energy Savings	S3: DAC Savings	Lifecycle ex-ante kWh gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
22	Energy Savings	S3: DAC Savings	Lifecycle ex-ante kWh net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
23	Energy Savings	S3: DAC Savings	Lifecycle ex-ante Therm gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
24	Energy Savings	S3: DAC Savings	Lifecycle ex-ante Therm net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
25	Energy Savings	S4: Hard to reach markets	First year annual kW gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
26	Energy Savings	S4: Hard to reach markets	First year annual kW net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
27	Energy Savings	S4: Hard to reach markets	First year annual kWh gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
28	Energy Savings	S4: Hard to reach markets	First year annual kWh net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
29	Energy Savings	S4: Hard to reach markets	First year annual Therm gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
30	Energy Savings	S4: Hard to reach markets	First year annual Therm net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
31	Energy Savings	S4: Hard to reach markets	Lifecycle ex-ante kW gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Removal	#2 - do not duplicate data; #4 - goals now on TSB; #5 - lifecycle kW is not meaningful
32	Energy Savings	S4: Hard to reach markets	Lifecycle ex-ante kW net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Removal	#2 - do not duplicate data; #4 - goals now on TSB; #5 - lifecycle kW is not meaningful
33	Energy Savings	S4: Hard to reach markets	Lifecycle ex-ante kWh gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
34	Energy Savings	S4: Hard to reach markets	Lifecycle ex-ante kWh net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
35	Energy Savings	S4: Hard to reach markets	Lifecycle ex-ante Therm gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
36	Energy Savings	S4: Hard to reach markets	Lifecycle ex-ante Therm net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	Modification	#2 - do not duplicate data; #4 - goals now on TSB
37	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Portfolio Level (PL)– All Sectors	Removal	#1 - not useful or judicious use of ratepayer funds
38	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Portfolio Level (PL)– All Sectors	Removal	#1 - not useful or judicious use of ratepayer funds
39	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Portfolio Level (PL)– All Sectors	Removal	#1 - not useful or judicious use of ratepayer funds
40	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Portfolio Level (PL)– All Sectors	Removal	#1 - not useful or judicious use of ratepayer funds
41	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Portfolio Level (PL)– All Sectors	Removal	#1 - not useful or judicious use of ratepayer funds
42	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Portfolio Level (PL)– All Sectors	Removal	#1 - not useful or judicious use of ratepayer funds

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
43	Energy Savings	S1: Energy Savings	First year annual kW gross	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
44	Energy Savings	S1: Energy Savings	First year annual kW net	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
45	Energy Savings	S1: Energy Savings	First year annual kWh gross	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
46	Energy Savings	S1: Energy Savings	First year annual kWh net	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
47	Energy Savings	S1: Energy Savings	First year annual Therm gross	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
48	Energy Savings	S1: Energy Savings	First year annual Therm net	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
49	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross	Residential (RSF)	Removal	#5 - lifecycle kW is not meaningful
50	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net	Residential (RSF)	Removal	#5 - lifecycle kW is not meaningful
51	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
52	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
53	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
54	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
55	GHG	GHG	CO2-equivalent of net annual kWh savings	Residential (RSF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
56	Depth of interventions	D1: Depth of interventions: Per downstream participant	Average lifecycle ex-ante kW net savings per participant - Opt-in - Downstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
57	Depth of interventions	D1: Depth of interventions: Per downstream participant	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Downstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
58	Depth of interventions	D1: Depth of interventions: Per downstream participant	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Downstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
59	Depth of interventions	D1: Depth of interventions: Per midstream participant	Average lifecycle ex-ante kW net savings per participant - Opt-in - Midstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
60	Depth of interventions	D1: Depth of interventions: Per midstream participant	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Midstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
61	Depth of interventions	D1: Depth of interventions: Per midstream participant	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Midstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
62	Depth of interventions	D1: Depth of interventions: Per opt out participant	Average lifecycle ex-ante kW net savings per participant - Opt-out	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
63	Depth of interventions	D1: Depth of interventions: Per opt out participant	Average lifecycle ex-ante kWh net savings per participant - Opt-out	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
64	Depth of interventions	D1: Depth of interventions: Per opt out participant	Average lifecycle ex-ante Therm net savings per participant - Opt-out	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
65	Depth of interventions	D1: Depth of interventions: Per upstream participant	Average lifecycle ex-ante kW net savings per participant - Opt-in - Upstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
66	Depth of interventions	D1: Depth of interventions: Per upstream participant	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Upstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
67	Depth of interventions	D1: Depth of interventions: Per upstream participant	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Upstream	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
68	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
69	Penetration	P3: Penetration of energy efficiency programs in the eligible market - DAC	Percent of participation in disadvantaged communities	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
70	Penetration	P4: Penetration of energy efficiency programs in the HTR market	Percent of participation by customers defined as "hard-to-reach"	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
71	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds
72	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds
73	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds
74	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds
75	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds
76	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds
77	Energy intensity	Energy intensity per SF household	Average electric and gas usage per household	Residential (RSF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
78	Energy Savings	S1: Energy Savings	First year annual kW gross - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
79	Energy Savings	S1: Energy Savings	First year annual kW net - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
80	Energy Savings	S1: Energy Savings	First year annual kWh gross - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
81	Energy Savings	S1: Energy Savings	First year annual kWh net - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
82	Energy Savings	S1: Energy Savings	First year annual Therm gross - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
83	Energy Savings	S1: Energy Savings	First year annual Therm net - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
84	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross - In Unit	Residential Sector – Multi-family (RMF)	Removal	#5 - lifecycle kW is not meaningful
85	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net - In Unit	Residential Sector – Multi-family (RMF)	Removal	#5 - lifecycle kW is not meaningful
86	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
87	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
88	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
89	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net - In Unit	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
90	Energy Savings	S1: Energy Savings	First year annual kW gross - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
91	Energy Savings	S1: Energy Savings	First year annual kW net - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
92	Energy Savings	S1: Energy Savings	First year annual kWh gross - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
93	Energy Savings	S1: Energy Savings	First year annual kWh net - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
94	Energy Savings	S1: Energy Savings	First year annual Therm gross - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
95	Energy Savings	S1: Energy Savings	First year annual Therm net - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
96	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#5 - lifecycle kW is not meaningful
97	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#5 - lifecycle kW is not meaningful
98	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
99	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
100	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
101	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net - Master Metered	Residential Sector – Multi-family (RMF)	Removal	#2 - do not duplicate data; #4 - goals now on TSB
102	Energy Savings	S1: Energy Savings	First year annual kW gross - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
103	Energy Savings	S1: Energy Savings	First year annual kW net - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
104	Energy Savings	S1: Energy Savings	First year annual kWh gross - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
105	Energy Savings	S1: Energy Savings	First year annual kWh net - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
106	Energy Savings	S1: Energy Savings	First year annual Therm gross - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
107	Energy Savings	S1: Energy Savings	First year annual Therm net - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
108	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross - Common Area	Residential Sector – Multi-family (RMF)	Removal	#5 - lifecycle kW is not meaningful
109	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net - Common Area	Residential Sector – Multi-family (RMF)	Removal	#5 - lifecycle kW is not meaningful
110	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
111	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
112	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
113	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net - Common Area	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
114	GHG	GHG	CO2-equivalent of net annual kWh savings	Residential Sector – Multi-family (RMF)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
115	Depth of interventions	D3: Depth of interventions per building	Lifecycle ex-ante kW net per project (building)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
116	Depth of interventions	D3: Depth of interventions per building	Lifecycle ex-ante kWh net per project (building)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
117	Depth of interventions	D3: Depth of interventions per building	Lifecycle ex-ante Therm net per project (building)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
118	Depth of interventions	D4: Depth of interventions per property	Lifecycle ex-ante kW net per project (property)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
119	Depth of interventions	D4: Depth of interventions per property	Lifecycle ex-ante kWh net per project (property)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
120	Depth of interventions	D4: Depth of interventions per property	Lifecycle ex-ante Therm net per project (property)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
121	Depth of interventions	D5: Depth of interventions: Per square foot	Lifecycle ex-ante kW net per square foot	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
122	Depth of interventions	D5: Depth of interventions: Per square foot	Lifecycle ex-ante kWh net per square foot	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
123	Depth of interventions	D5: Depth of interventions: Per square foot	Lifecycle ex-ante Therm net per square foot	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
124	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population by property	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
125	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population by unit	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
126	Penetration	P2: Penetration of energy efficiency programs in terms of square feet of eligible population	Percent of square feet of eligible population participating (by property)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
127	Penetration	P3: Penetration of energy efficiency programs in the eligible market - DAC	Percent of participation in disadvantaged communities	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
128	Penetration	P4: Penetration of energy efficiency programs in the HTR market	Percent of participation by customers defined as “hard-to-reach”	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
129	Benchmarking	MF Benchmarking Penetration	Percent of benchmarked multi-family properties relative to the eligible population	Residential Sector – Multi-family (RMF)	Removal	#7 - Other
130	Benchmarking	Benchmarking of HTR Properties	Percent of benchmarking by properties defined as “hard-to-reach”	Residential Sector – Multi-family (RMF)	Removal	#7 - Other
131	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds
132	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds
133	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds
134	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds
135	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds
136	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds
137	Energy intensity	Energy Intensity per MF unit	Average electric and gas usage per unit	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
138	Energy intensity	Energy Intensity per MF unit square foot	Average electric and gas usage per square foot	Residential Sector – Multi-family (RMF)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
139	Energy Savings	S1: Energy Savings	First year annual kW gross	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
140	Energy Savings	S1: Energy Savings	First year annual kW net	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
141	Energy Savings	S1: Energy Savings	First year annual kWh gross	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
142	Energy Savings	S1: Energy Savings	First year annual kWh net	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
143	Energy Savings	S1: Energy Savings	First year annual Therm gross	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
144	Energy Savings	S1: Energy Savings	First year annual Therm net	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
145	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross	Commercial Sector (C)	Removal	#5 - lifecycle kW is not meaningful
146	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net	Commercial Sector (C)	Removal	#5 - lifecycle kW is not meaningful
147	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
148	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
149	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
150	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
151	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kW gross	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
152	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kW net	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
153	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kWh gross	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
154	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kWh net	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
155	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual Therm gross	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
156	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual Therm net	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
157	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kW gross	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
158	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kW net	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
159	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kWh gross	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
160	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kWh net	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
161	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante Therm gross	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
162	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante Therm net	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
163	GHG	GHG	CO2-equivalent of net annual kWh savings	Commercial Sector (C)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
164	Depth of interventions	D2: Depth of interventions by project	Percent lifecycle gross kW	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
165	Depth of interventions	D2: Depth of interventions by project	Percent lifecycle gross kWh	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
166	Depth of interventions	D2: Depth of interventions by project	Percent lifecycle gross Therms	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
167	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for large customers	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
168	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for medium customers	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
169	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for small customers	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
170	Penetration	P2: Penetration of energy efficiency programs in terms of square feet of eligible population	Percent of square feet of eligible population	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
171	Penetration	P4: Penetration of energy efficiency programs in the HTR market	Percent of participation by customers defined as "hard-to-reach"	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
172	Benchmarking	Square Footage of Commercial Benchmarking Penetration	Percent of benchmarked square feet of eligible population	Commercial Sector (C)	Removal	#7 - Other
173	Benchmarking	Benchmarking Penetration for Commercial Sector	Percent of benchmarked customers relative to eligible population for large customers	Commercial Sector (C)	Removal	#7 - Other
174	Benchmarking	Benchmarking Penetration for Commercial Sector	Percent of benchmarked customers relative to eligible population for medium customers	Commercial Sector (C)	Removal	#7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
175	Benchmarking	Benchmarking Penetration for Commercial Sector	Percent of benchmarked customers relative to eligible population for small customers	Commercial Sector (C)	Removal	#7 - Other
176	Benchmarking	Benchmarking of HTR Properties	Percent of benchmarking by customers defined as "hard-to-reach"	Commercial Sector (C)	Removal	#7 - Other
177	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds
178	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds
179	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds
180	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds
181	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds
182	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds
183	NMEC	NMEC	Percent of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
184	NMEC	NMEC	Percent of total savings (gross kWh and therm) derived from NMEC analysis	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
185	Satisfaction	Satisfaction	Percent Improvement in customer satisfaction	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
186	Satisfaction	Satisfaction	Percent Improvement in trade ally satisfaction	Commercial Sector (C)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
187	Investment in EE	Investment in EE	Percent of total investments made by ratepayers and private capital	Commercial Sector (C)	Removal	#3 - new equity / MS indicators more appropriate

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
188	Energy Savings	S1: Energy Savings	First year annual kW gross	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
189	Energy Savings	S1: Energy Savings	First year annual kW net	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
190	Energy Savings	S1: Energy Savings	First year annual kWh gross	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
191	Energy Savings	S1: Energy Savings	First year annual kWh net	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
192	Energy Savings	S1: Energy Savings	First year annual Therm gross	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
193	Energy Savings	S1: Energy Savings	First year annual Therm net	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
194	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross	Public Sector (P)	Removal	#5 - lifecycle kW is not meaningful
195	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net	Public Sector (P)	Removal	#5 - lifecycle kW is not meaningful
196	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
197	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
198	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
199	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
200	GHG	GHG	CO2-equivalent of net annual kWh savings	Public Sector (P)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
201	Depth of interventions	D3: Depth of interventions per building	Percent annual net kW per project building or facility	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
202	Depth of interventions	D3: Depth of interventions per building	Percent annual net kWh per project building or facility	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
203	Depth of interventions	D3: Depth of interventions per building	Percent annual net Therms per project building or facility	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
204	Depth of interventions	D5: Depth of interventions: Per square foot	Average annual net kw savings per project building floor plan area	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
205	Depth of interventions	D5: Depth of interventions: Per square foot	Average annual net kw savings per project building floor plan area	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
206	Depth of interventions	D5: Depth of interventions: Per square foot	Average annual net Therm savings per project building floor plan area	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
207	Water	Water	Average annual Net kW savings per annual flow through project water/wastewater facilities	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
208	Water	Water	Average annual Net kWh savings per annual flow through project water/wastewater facilities	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
209	Water	Water	Average annual Net Therms savings per annual flow through project water/wastewater facilities	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
210	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of Public Sector accounts participating in programs	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
211	Penetration	P2: Penetration of energy efficiency programs in terms of square feet of eligible population	Percent of estimated floorplan area (i.e., ft2) of all Public Sector buildings participating in building projects	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
212	Water	Water	Percent of Public Sector water/wastewater flow enrolled in non-building water/wastewater programs	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
213	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
214	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
215	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
216	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
217	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
218	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
219	Investment in EE	Investment in EE	Total program-backed financing distributed to Public Sector customers requiring repayment	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds
220	Benchmarking	Public Sector Benchmarking Penetration Calendar Year	Percent of Public Sector buildings with current benchmark	Public Sector (P)	Removal	#7 - Other
221	Energy intensity	Energy intensity per public sector building	Average energy use intensity of all Public Sector buildings	Public Sector (P)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
222	Benchmarking	Public Sector Square Foot Benchmarking Penetration in Calendar Year	Percent of floorplan area of all Public Sector buildings with current benchmark	Public Sector (P)	Removal	#7 - Other
223	Energy Savings	S1: Energy Savings	First year annual kW gross	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
224	Energy Savings	S1: Energy Savings	First year annual kW net	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
225	Energy Savings	S1: Energy Savings	First year annual kWh gross	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
226	Energy Savings	S1: Energy Savings	First year annual kWh net	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
227	Energy Savings	S1: Energy Savings	First year annual Therm gross	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
228	Energy Savings	S1: Energy Savings	First year annual Therm net	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
229	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross	Industrial (I)	Removal	#5 - lifecycle kW is not meaningful
230	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net	Industrial (I)	Removal	#5 - lifecycle kW is not meaningful
231	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
232	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
233	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
234	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
235	GHG	GHG	CO2-equivalent of net annual kWh savings	Industrial (I)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
236	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for large customers	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
237	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for medium customers	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
238	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for small customers	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
239	New participation	New participation	Percent of large customers participating in reporting year that have not received	Industrial (I)	Removal	#7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
			an incentive for the past three years			
240	New participation	New participation	Percent of medium customers participating in reporting year that have not received an incentive for the past three years	Industrial (I)	Removal	#7 - Other
241	New participation	New participation	Percent of small customers participating in reporting year that have not received an incentive for the past three years	Industrial (I)	Removal	#7 - Other
242	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds
243	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds
244	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds
245	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds
246	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds
247	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds
248	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kW gross	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
249	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kW net	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
250	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kWh gross	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
251	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual kWh net	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
252	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual Therm gross	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
253	Energy Savings	S2: Percent Overall Sectoral Savings	Percent first year annual Therm net	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
254	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kW gross	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
255	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kW net	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #5 - lifecycle kW is not meaningful; #7 - Other
256	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kWh gross	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
257	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante kWh net	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
258	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante Therm gross	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
259	Energy Savings	S2: Percent Overall Sectoral Savings	Percent lifecycle ex-ante Therm net	Industrial (I)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
260	Energy Savings	S1: Energy Savings	First year annual kW gross	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
261	Energy Savings	S1: Energy Savings	First year annual kW net	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
262	Energy Savings	S1: Energy Savings	First year annual kWh gross	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
263	Energy Savings	S1: Energy Savings	First year annual kWh net	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
264	Energy Savings	S1: Energy Savings	First year annual Therm gross	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
265	Energy Savings	S1: Energy Savings	First year annual Therm net	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
266	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW gross	Agricultural (A)	Removal	#5 - lifecycle kW is not meaningful
267	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kW net	Agricultural (A)	Removal	#5 - lifecycle kW is not meaningful
268	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh gross	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
269	Energy Savings	S1: Energy Savings	Lifecycle ex-ante kWh net	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
270	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm gross	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
271	Energy Savings	S1: Energy Savings	Lifecycle ex-ante Therm net	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
272	GHG	GHG	CO2-equivalent of net annual kWh savings	Agricultural (A)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
273	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for large customers	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
274	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for medium customers	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
275	Penetration	P1: Penetration of energy efficiency programs in the eligible market: Percent of Participation	Percent of participation relative to eligible population for small customers	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
276	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kW)	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds
277	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/kWh)	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds
278	Cost per unit saved	Cost per unit saved	PAC Levelized Cost (\$/therm)	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds
279	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kW)	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
280	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/kWh)	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds
281	Cost per unit saved	Cost per unit saved	TRC Levelized Cost (\$/therm)	Agricultural (A)	Removal	#1 - not useful or judicious use of ratepayer funds
282	Energy Savings	S1: Energy Savings	Net GWh savings	Codes & Standards (CS)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
283	Energy Savings	S1: Energy Savings	Net MMTherms savings	Codes & Standards (CS)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
284	Energy Savings	S1: Energy Savings	Net MW savings	Codes & Standards (CS)	Modification	#2 - do not duplicate data; #4 - goals now on TSB
285	Advocacy	Advocacy-Building	Number of measures supported by CASE studies in rulemaking cycle (current work)	Codes & Standards (CS)	Removal	#6 - statewide program reasons
286	Advocacy	Advocacy-Building	Number of measures adopted by CEC in rulemaking cycle (indicator of past work)	Codes & Standards (CS)	Removal	#6 - statewide program reasons
287	Advocacy	Advocacy-Appliance	Number of T-20 measures supported by CASE studies in rulemaking cycle (current work)	Codes & Standards (CS)	Removal	#6 - statewide program reasons
288	Advocacy	Advocacy-Appliance	Number of measures adopted by CEC in current year	Codes & Standards (CS)	Removal	#6 - statewide program reasons
289	Advocacy	Advocacy-Federal	Number of federal standards adopted for which a utility advocated (IOUs to list advocated activities)	Codes & Standards (CS)	Removal	#6 - statewide program reasons
290	Advocacy	Advocacy-Federal	Percent of federal standards adopted for which a utility advocated (#IOU supported / # DOE adopted)	Codes & Standards (CS)	Removal	#6 - statewide program reasons
291	Reach Codes	Reach Codes	The number of local government Reach Codes	Codes & Standards (CS)	Removal	#1 - not useful or judicious use of ratepayer funds

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
			implemented (this is a joint IOU and REN effort)			
292	Compliance Improvement	Compliance Improvement	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the the total size (number of the target audience) by sector. (M)	Codes & Standards (CS)	Modification	#6 - statewide program reasons; #7 - Other
293	Compliance Improvement	Compliance Improvement	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the the total size (number of the target audience) by sector. (M)	Codes & Standards (CS)	Modification	#6 - statewide program reasons; #7 - Other
294	Compliance Improvement	Compliance Improvement	Number of participants	Codes & Standards (CS)	Modification	#6 - statewide program reasons; #7 - Other
294	Compliance Improvement	Compliance Improvement	Increase in code compliance knowledge pre/post training	Codes & Standards (CS)	Modification	#6 - statewide program reasons; #7 - Other
295	Compliance Improvement	Compliance Improvement	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	Codes & Standards (CS)	Removal	#6 - statewide program reasons; #7 - Other
296	Compliance Improvement	Compliance Improvement	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Codes & Standards (CS)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
297	Compliance Improvement	Compliance Improvement	Number and percent of jurisdictions with staff	Codes & Standards (CS)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
			participating in an Energy Policy Forum			
298	Compliance Improvement	Compliance Improvement	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Codes & Standards (CS)	Modification	#6 - statewide program reasons; #7 - Other
299	Compliance Improvement	Compliance Improvement	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Codes & Standards (CS)	Modification	#6 - statewide program reasons; #7 - Other
300	Compliance Improvement	Compliance Improvement	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators	Codes & Standards (CS)	Removal	#1 - not useful or judicious use of ratepayer funds; #7 - Other
301	WE&T	Collaborations	Number of collaborations by Business Plan sector to jointly develop or share training materials or resources.	Workforce Education and Training (WET)	Removal	#1 - not useful or judicious use of ratepayer funds; #6 - statewide program reasons
302	WE&T	Penetration	Number of participants by sector	Workforce Education and Training (WET)	Removal	#1 - not useful or judicious use of ratepayer funds; #6 - statewide program reasons
303	WE&T	Penetration	Percent of participation relative to eligible target population for curriculum	Workforce Education and Training (WET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
304	WE&T	Diversity	Percent of total WE&T training program participants that meet the definition of disadvantaged worker.	Workforce Education and Training (WET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
305	WE&T	Diversity	Percent of incentive dollars spent on contracts* with a demonstrated commitment	Workforce Education and Training (WET)	Removal	#3 - new equity / MS indicators more appropriate; #6 -

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
			to provide career pathways to disadvantaged workers			statewide program reasons
306	WE&T	Diversity	Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training	Workforce Education and Training (WET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
307	ETP	Research Prioritization	Number of TPMs initiated (gas and electric combined), including one technology-focused pilot (TFP) TPM	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
308	ETP	Research Prioritization	Number of TPMs updated	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
309	ETP	Projects	Number of projects initiated	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
310	ETP	Outreach	Number of outreach events with technology developers with products <1 year from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
311	ETP	Outreach	Number of outreach events with technology developers with products <5 years from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
312	ETP	Pilots	Number of projects initiated with cooperation from other internal IOU programs associated with each Technology-focused Pilot	Emerging Technologies (ET)	Removal	#6 - statewide program reasons

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
313	ETP	Pilots	Number of Technology-Focused Pilot (TFP) initiated as part of the TFP TPM	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
314	ETP	Measure Tracing	Prior year: % of new measures added to the portfolio that were previously ETP technologies	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
315	ETP	Measure Tracing	Prior Year: # of new measures added to the portfolio that were previously ETP technologies	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
316	ETP	Measure Tracing	Prior year: % of new codes or standards that were previously ETP technologies	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
317	ETP	Measure Tracing	Prior Year: # of new codes and standards that were previously ETP technologies	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons
318	ETP	Savings Tracing	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons; #7 - Other
319	ETP	Savings Tracing	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons; #7 - Other

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
320	ETP	Savings Tracing	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Emerging Technologies (ET)	Removal	#3 - new equity / MS indicators more appropriate; #6 - statewide program reasons; #7 - Other
321	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by PA	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
322	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by National Lab	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
323	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by Manufacturer	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
324	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by Entrepreneur	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
325	ETP	Project Idea Tracing	ETP-T7a Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM	Emerging Technologies (ET)	Removal	#6 - statewide program reasons

Index	Broad Metric Type	Metric Type	Metric	Sector	Proposed Change	Change Reason(s)
			research planning process by PA			
326	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by National Lab	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
327	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by Manufacturer	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
328	ETP	Project Idea Tracing	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by Entrepreneur	Emerging Technologies (ET)	Removal	#6 - statewide program reasons
329	ETP	Statewide Goal Alignment	List of ETP projects aligned with statewide goals that were initiated in the reporting year with specificity as to what aspect of each goal it is fulfilling	Emerging Technologies (ET)	Removal	#6 - statewide program reasons

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ATTACHMENT C

Rates and Regulatory Link to SDG&E Website for
D.18-05-041 Common Metrics Spreadsheet

Due to the volume of data within this excel file SDG&E on behalf of the Joint PAs makes available Attachment C at:

<https://www.sdge.com/rates-and-regulations/regulatory-filing/914/energy-efficiency-filings>