

From: Besa, Athena  
Sent: 3/31/2010 4:27:27 PM  
To: 'Clinton, Jeanne' (jeanne.clinton@cpuc.ca.gov); 'Osman, Ayat E.' (ayat.osman@cpuc.ca.gov)  
Cc: Ramaiya, Shilpa R (/o=PG&E/ou=Corporate/cn=Recipients/cn=SRRd); Yamagata, Joy C. (JYamagata@semprautilities.com); 'don.arambula@sce.com' (don.arambula@sce.com); 'cyin@yinsight.net' (cyin@yinsight.net); [Redacted]  
[Redacted] 'marian.brown@sce.com' (marian.brown@sce.com); McKinley, Kevin C. (KMckinley@semprautilities.com); 'Premo, Anne W.' (anne.premo@cpuc.ca.gov); 'Tapawan-Conway, Zenaida G.' (zenaida.tapawan-conway@cpuc.ca.gov); 'Carol.Yin@sce.com' (Carol.Yin@sce.com)

Bcc:

Subject: RE: SDG&E and SoCalGas Comments on the PPM Template

We have given this more thought and evaluated the 76 metrics against the guidelines provided in Appendix 2 (pages 2-3) of D.09-09-047. We present our evaluation in the attached file for your consideration. We provide comments, clarifications or some questions regarding each of the metrics. This could be used as a discussion piece to address our question about how do we make decisions on the number of metrics that each program should have.

With regards to finding time to discuss the metrics together, perhaps after the program evaluation debriefs on lessons learned we could then spend the rest of the meeting time discussing the types of metrics for each program and some guidelines/expectations then we can go off to work on them. I'm not sure we would be able to have full discussions on how we would change the programs in response to the "lessons learned" on the spot, besides letting you know if we had already implemented some changes.

-----Original Message-----

From: Clinton, Jeanne [mailto:jeanne.clinton@cpuc.ca.gov]  
Sent: Friday, March 26, 2010 8:35 AM  
To: Besa, Athena; 'Osman, Ayat E.'; Clinton, Jeanne  
Cc: Yamagata, Joy C.; Don.Arambula@sce.com; SRRd@pge.com; cyin@yinsight.net; Tapawan-Conway, Zenaida G.; Carol.Yin@sce.com; McKinley, Kevin C.; 'Premo, Anne W.'; Marian.Brown@sce.com; [Redacted]  
[Redacted]  
Subject: RE: SDG&E and SoCalGas Comments on the PPM Template

Athena -- you raise some good questions and helpful points. I anticipate that we will huddle internally to organize feedback for you and the other utilities.

Re; expectations for possible ED involvement with the utilities in developing metrics together, post the "Lessons Learned" meetings, this had been an idea we all discussed on Feb 25 when we last discussed PPMs as a group. Then we hoped to have the Lessons meetings the second half of March, after early March internal debriefs w/ eval consultants. As you know now, this schedule got stretched out, leaving less time for successor exchanges prior to the current filing dates for PPMs and program changes dictated by eval findings.

We are open to hearing your thoughts on a good balance across activities, schedules, + human resources to achieve the most productive outcomes for effective and "smart" programs this cycle.

Jeanne

-----Original Message-----

From: "Besa, Athena" <ABesa@semprautilities.com>

To: "Osman, Ayat E." <ayat.osman@cpuc.ca.gov>; "Clinton, Jeanne" <jeanne.clinton@cpuc.ca.gov>

Cc: "Yamagata, Joy C." <JYamagata@semprautilities.com>; "Don.Arambula@sce.com"

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"Tapawan-Conway, Zenaida G." <zenaida.tapawan-conway@cpuc.ca.gov>; "Carol.Yin@sce.com"

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Redacted

Sent: 3/26/10 6:41 AM

Subject: SDG&E and SoCalGas Comments on the PPM Template

Ayat, thank you for forwarding the information to us. We have reviewed this internally and offer the following comments/questions assuming that the other statewide program PPMs are expected to be at the same level as the PPMs laid out for RNC in this example:

\* The RNC template contained about 76 program metrics. This is an inordinate amount of metrics for just one subprogram in one SW program. If this is the expected metrics, then the total number when extracted for the entire portfolio becomes unreasonable, impractical, and potentially cost prohibitive. What is the process for determining the final and appropriate list of metrics by program, are the guidelines in the decision the means by which this will be done?

\* One of the criteria in the decision attachment states that trade-offs between quality of metrics versus cost should be considered. Should up front cost estimations be done to provide this information for decision making.

\* It may also be useful to determine who would benefit from knowing the metric on a regular basis. For example, would the following information be meaningful to managers, policy makers and other relevant stakeholders when collected on a regular basis or is it sufficient to document this in a process evaluation or EM&V report on the program?

\* Number of Marketing Materials that have information on CAHP as well as NSHP.

\* Number of new training courses at Energy Centers resulting from RNC efforts.

\* Number of meeting with local governments to expedite permitting processes for CAHP.

\* Some of the metrics in the template can be easily collected and reported as part of process evaluations or the LI evaluations as in the example above. It is important that these considerations be made when determining what should be tracked by the IOUs or accomplished through EM&V. This would also determine the regularity of reporting the metrics.

\* For market transformation metrics, we urge that metrics be selected on the basis of the commitment to continue tracking these metrics for the long-term and not just this cycle.

\* At the upcoming meetings, it appears that much time will be dedicated to sharing "lessons learned" from the 2006-2008 EM&V studies, is there an expectation that IOUs and ED will work together to develop the final metrics at these meetings or some time later?

We look forward to meeting with you all in the upcoming weeks.

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From: Osman, Ayat E. [<mailto:ayat.osman@cpuc.ca.gov>]

Sent: Monday, March 15, 2010 3:39 PM

To: Carol.Yin@sce.com; cyin@yinsight.net

Cc: Yamagata, Joy C.; Don.Arambula@sce.com; SRRd@pge.com; Besa, Athena; Tapawan-Conway, Zenaida G.; Clinton, Jeanne

Subject: PPM Template

Hi Carol, all

Please see the attached PPM documents; included are two documents:

1. Blank PPM Template (three taps)
2. Illustrative example (RNC program) using the template (three taps)

Please make sure to read the "data dictionary" tab first as it includes definitions and examples and clarifications on how to fill the PPM table..

Please review and let me know if you have any questions/comments..

Kindest Regards,

Ayat Osman, PhD  
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California Public Utilities Commission  
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