

## Joint Utility DEER and Non-DEER Review Process Proposal

Thursday April 1, 2010  
3:30 pm – 5:00 pm

### Topic 1: Custom Workpaper Measures

**Status:** Joint utility high level agreement pending the results and timeliness of the custom review and approval process completed. Next steps now require that E.D. and the Joint IOUs create detailed processes for custom workpaper measures.

**Detailed Process Approval Freeze Date:** 5/31/2010

### Topic 2: Non-DEER Non-HIM Workpaper Measures

**Status:** Joint IOUs have provided all Non-DEER Non-HIM workpapers consistent with the ruling as agreed between Energy Division (E.D.) and the IOUs. IOUs request that E.D. provide a written confirmation of the frozen workpapers.

**Approval Freeze Date for Non-HIM Workpaper Measures:** 4/1/2010 (extended from 3/31/2010 in observance of the Caesar Chavez holiday)

### Topic 3: Non-DEER HIM Workpaper Measures

**Status:** Joint IOUs have provided all Non-DEER HIM workpapers consistent with E.D.'s schedule; however, the IOUs have not received written feedback on the status of the workpapers nor have the IOUs received guidance on next steps.

**Proposed Solution:** E.D. shall approve all Non-DEER HIM workpapers on or before 4/30/2010. In the event that E.D. does not agree with the IOU submitted workpapers, E.D. shall host face to face technical workshop(s) to resolve issues and differences regarding methodology and assumptions that would result in E.D.'s approval of the workpapers, so that the associated measure assumptions can be frozen.

These workshop(s) should be conducted in a timely fashion, whereby the face to face workshop(s) will result in approving the conceptual changes to the Non-DEER HIM workpapers on or before 4/16/2010. If a resolution cannot be reached between E.D. and the IOUs, then the dispute resolution process will be invoked to resolve and finalize the issues on or before 4/30/2010. The IOUs will then complete the agreed upon edits to the workpapers. (*Please see dispute resolution process for more details*).

**Approval Freeze Date:** 4/30/2010

## Topic 4: DEER Fixes & HIM Measures Not Yet Addressed

**Status:** IOUs have provided comments and recommended solutions regarding the DEER fixes made in the lighting and appliance workbooks.

**Proposed Solution:** Based on the information presented by E.D. and its consultants at the DEER technical workshops, the Joint IOUs have agreed to the following as shown below:

- Any changes made by the DEER team that the IOUs have determined as a change in methodology will be held for further review and discussion. Once agreed upon, these changes would be incorporated into DEER 2008 version 3.02 with the earliest implementation in the 2013-2015 program cycle.
- Changes made by the DEER team that the IOUs have determined as “acceptable” errors or new measures that will be implemented in the 2010-2012 program cycle include:
  1. Large office lighting schedule for linear fluorescent technologies
  2. HVAC Package unit updates for Title 24.
  3. General T24 updates (primarily HVAC)
  4. General Lighting updates (primarily Linear Fluorescent)
- Changes made by the DEER team that the IOUs have determined as “acceptable” errors or new measures, but will not elect to implement in the 2010-2012 program cycle include:
  1. DOE2 bug fixes changes
  2. Dishwasher/Clothes washer additions
  3. Multi-family building type additions

The explanation behind not electing to implement the errors or new measures is outlined in the *Mutually Agreed upon Process to Accepting Changes and or Updates to DEER Pre-Screening Form* spreadsheet. Based on the explanation of the spreadsheet, the IOUs recommend that the workbooks be implemented for the 2010-2012 program cycle using the assumptions found in DEER 2008 version 2.05 and not DEER 2008 version 3.02.

**Approval Freeze Date (Bullet #2):** May 28, 2010

## **Topic 5: Dispute Resolution Process**

**Status:** Process not yet developed.

**Proposed Solution:** The IOUs recommend that E.D. collaborate with the IOUs to develop a mutually agreeable dispute resolution process addressing all Non-DEER measures. Depending on the outcome of the Commission's final EM&V decision with respect to Non-DEER measures, a separate but related Energy Efficiency dispute resolution process may be fashioned.

**Dispute Resolution Process Creation Date:** On or before May 1, 2010

## **Topic 6: 2010 First Quarterly Reporting**

**Status:** Currently, anticipated to be due the first week in June of 2010. This date depends on the outcome of topics 1 through 6; therefore, the first quarterly reports may need to be merged with the second quarterly reports due on 9/1/2010.

**Proposed Solution:** The IOUs request merging the first quarterly reports with the second quarterly reports, which are due on 9/1/2010 to account for all the additional changes and decisions made during this collaborative process, which will require significant effort on the part of the IOUs to incorporate.

**Establish Process for Initial Reporting Date:** On or before May 1, 2010

**First and Second Quarterly Reports Due Date:** September 1, 2010

## **Topic 7: Process for Phase II Adding New Measures & Error Corrections**

**Status:** Once the March 31<sup>st</sup>, 2010 deadline has passed, Phase II of the Non-DEER workpaper submittal and approval process will commence on 4/1/2010. A process to reviewing and approving new measures and error corrections has yet to be developed.

**Proposed Solution:** E.D., with the inputs from the IOUs, will initiate and develop a clear written schedule and process to reviewing and approving new measures and error corrections to ensure that the requirements are clearly communicated to all stakeholders. Formal procedures will be established, so that IOUs can do the following:

- Submit new measures
- Flag non contentious errors
- Determine how new measures are delivered by properly utilizing DEER so that they match programmatic needs

**Commencement Date:** 4/1/2010