

Energy Division understands that the four IOUs have had a series of meetings in recent months to prepare materials to comply with the directives given in D.09-09-047 to prepare measurable objectives and performance metrics for statewide programs and subprograms and to file the joint Advice Letter on May 28, 2010.¹

A diagram was developed by the IOUs to show the process that IOUs and their consultants used to develop and select performance metrics. [See attached diagram, Program Performance Metric (PPM) Selection Process, which was emailed to Energy Division and IOU staff by Carol Yin on May 5, 2010.] The last step in the diagram indicates that the “statewide regulatory team” would “select” the “final performance metrics” from those submitted to them by IOU program managers.

Energy Division requests the complete set of work products and deliverables submitted by **each utility’s** program staff, program managers and their consultants to the statewide regulatory team in **all** the steps prior to the final step in the diagram. **We are interested in the different perspectives that the four utilities might have had in developing the performance metrics; therefore, we request that each utility independently prepare a response to this data request without consulting the other utilities.**

Energy Division has placed numbers by each of the steps in the process illustrated in the diagram. [See attached diagram.] For ease of understanding, Energy Division referred to these numbers in the itemized list of data requested below in question #2(a-i). Please use these same numbers when answering the data request so that it is clear to which tier the information provided pertains. Energy Division has also used the same nomenclature in the diagram to detail this data request.

1. Please list the members of the "SW Regulatory Team" indicated in the Program Performance Metric (PPM) Selection Process diagram referenced above. For each member, please indicate the utility affiliation (i.e., utility staff or consultant), title and/or position, and list of utility energy efficiency programs managing, if applicable.
2. Please provide the work products and deliverables created by program staff, program managers and their consultants for each statewide program and subprogram as indicated in the diagram describing the performance metrics selection process:
 - a. Tier 1: “Focus on Outcomes (not Activities) in Sub-program and SW Program Logic Models; List Strategic Plan Outcomes (Goals) Supported by the Program; List Program Improvements Suggested by 2006-2008 Evaluation Recommendations.”

¹ Southern California Edison Company Advice Letter 2476-E; Pacific Gas & Electric Company Advice Letter 3120-G/3675-E; Southern California Gas Company Advice Letter 4114; and San Diego Gas & Electric Company Advice Letter 2172-E/1951-G;

- b. Tier 2: “Identify Interim Milestones for Outcomes, if Outcomes are Not Easily Achieved; Identify Interim Milestones for Outcomes, if Outcomes are Not Easily Achieved; Identify Outcomes (and Milestones if Necessary) of Adopting Recommendations.”
- c. Tier 3: “ Create PPM Candidates, and Label Source of PPM (Logic Model, Strategic Plan, or Evaluation Recommendation)”
- d. Tier 4: Provision of work products, etc. from this tier is optional
- e. Tier 5: “Review List of PPMs to Develop Balanced Sets of PPMs while Avoiding Redundancy or Tangentially Related Measures; Roll up or combine PPMs wherever feasible; ED likes PPM for training or bonuses (additional incentives, “kickers”, sweeteners”)
- f. Tier 6: “Set Aside PPMs for Issues that Will Undergo Impact Evaluation; Set Aside PPMs for Issues that Will Undergo Process Evaluations; Set Aside PPMs for Issues That Will Require Market Assessment;
- g. Tier 7: “Populate Performance Indicator Worksheet with Suggested PPMs.”
- h. Tier 8: Program Managers Set **Achievable** and **Cost-effective** SW or IOU-Specific Program Goals.”
- i. Tier 9: “**SW Regulatory Team Selects Final PPMs.**” To the extent that information from this tier was not included in the Advice Letter filing, please include it in your response to this data request.

As requested above, please include the corresponding tier number with all information provided. Provide the information in chronological order, based on the tiers in the process diagram.

Provide this data in electronic format