

Commercial Statewide Program

	Mission
SW Program: Commercial	[Insert mission]

CA EESP Goals/Strategies Addressed by SW <u>Program</u> :	CA EESP Ref. pp. #
2-1: Ensure all State-Owned and Leased Buildings are Retro-commissioned	SP p38, PIP (SCE p231)
2-3: Ensure compliance with minimum Title 24 codes and standards for building renovations and expansion.	SP p38, PIP (SCE p190; PGE p48)
2-5: Develop tools and strategies to use information and Behavioral strategies, commissioning, and training to reduce energy consumption in commercial buildings.	SP p38, PIP (SCE p190; PGE p48)
2-7: Develop business models that deliver integrated energy management solutions; comprehensive energy management retrofits.	SP p38, PIP (SCE p190; PGE p48)
2-8: Improve use of plug load technologies; support PIER, Office of the Future by developing new, additional incentives.	SP p38, PIP (SCE p190; PGE p48)

Short-term (2010-2012) "SMART" <u>Program</u> Objectives:	Source (SP, AL, DR, PIP, or Staff)*	Comments
1. By 2012, retrofit at least 375,000,000 sq/ft of participating existing commercial space by 15 % beyond current Title 24 (2008).	SP p 31	<p>Team Recommendation: By 2012, retrofit at least X sq/ft of existing commercial space by X% beyond Title 24 (2008).</p> <p>Baseline study required to determine 15% and capturing square footage in</p>

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		fashion. Xs to be determined by stu
2. By 2012, the percent of participation among small or hard-to-reach customers will increase by X/Y/Z%	DR, IOUs, Staff	Team Recommendation: By the end of 2012, the participatio (less than 200kW or 50K therms) an (HTR) as defined by Policy Manual v for Deemed, Customized and CEI.
3. By 2012, the percent of participant awareness of IDSM opportunities will increase by X%. From iDSM team o Studied and given back to market segments	Staff, PIPs (SCE p293, PG&E p36)	Team Recommendation: Moved to IDSM
4. By 2012, the percent of participant awareness of Continuous Energy Improvement steps will increase by X%.	IOUs, Staff	Team Recommendation: Removed, phase and therefore this metric is b Term metric, see long term section.
5.		Team Recommendation: By the end of 2012, the number of j participants in the energy efficiency be tracked. Moved from Deemed and Calculated and combined.

Short-term Program PPMs: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	Comments
1. Square footage of participating existing commercial space retrofitted 15 % beyond current Title 24 (2008). Hard to determine What is 15% - the entire building performance, the systems you impacted,	SP, Staff	2a (utility says 2b because of need for studies to determine if	Y but need to collect sq/ft for cycle.	Team Recommendation: M to Long Term Baseline study required to determine feasibility of 15% and capturing square foota

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<p>Sq footage data isn't collected for deemed. Probably a type 2b metric because it requires studies to get both square footage and determining if 15% was met is tougher If you use ex-ante numbers – would this help determining if you exceed 15% of Title 24 – Utility response – no really Estimate of proportion of progress you're making – progress of deeper market penetration (e.g., energy intensity)</p>		15% above Title 24 is met)		in an accurate fashion
<p>1. Participation rate among small or hard-to-reach customers in each of the following subprograms: (a) Continuous Energy Improvement (b) Non-Residential Audits (c) Deemed Incentives and (d) Calculated Incentives</p>	IOUs, Staff	1	N	Team Recommendation: Number of customers participating in programs (Deemed, Customized and per small (less than 200kW 50K therms) and Hard to Reach (HTR) as defined by Policy Manual
<p>2. Participant awareness of IDSM practices in each of the following subprograms: (a) Continuous Energy Improvement (b) Non-Residential Audits (c) Deemed Incentives and (d) Calculated Incentives.</p> <p>From iDSM</p> <ul style="list-style-type: none"> o Studied and given back to market segments 	PIPs	2b	Y	Team Recommendation : Move this PPMs to IDSM
<p>3. Participant awareness of Continuous Energy Improvement steps in each of the following subprograms: (a) Non-Residential Audits (b) Deemed Incentives and (c)</p>	IOUs, Staff	2b	Y	Team Recommendation: M this PPM to Long Term indicator

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Calculated Incentives.				
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*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

**Metric type: 2a = reported annually, 2b = reported by end of cycle.

Long-Term (2013-2020) "SMART" Program Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Comments
1. By 2020, retrofit at least 3 billion sq/ft of existing commercial space in California by 15% beyond current Title 24 (2008).	SP, p. 31	<p>Team Recommendation: By the end of 2020, retrofit at least X sq/ft of existing commercial space in California by X% beyond current Title 24 (2008).</p> <p>Baseline study required to determine feasibility of 15% and capturing square footage in an accurate fashion.</p> <p>Xs to be determined by study and defined by the end of 2012.</p>
<p>2. By 2015, the percentage of participants in each of the following subprograms who go on to implement a long-term energy plan under the Continuous Energy Improvement subprogram will exceed the following thresholds:</p> <p>(a) Non-Residential Audit – X% (b) Calculated Incentives – Y% (c) Deemed Incentives – Z%</p>	IOUs, Staff	<p>Team Recommendation: <i>By the end of 2020, percent of commercial participants who go on to implement a long-term energy plan will reach X%.</i></p> <p>Define X by end of 2012, based on a baseline study completed during this cycle.</p>

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

Long-Term MT Indicators: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and	Source (SP, AL, DR, PIP, or	Metric Type (3)**	Baseline Study Required	Comments
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Agricultural programs)	Staff)*		(Y/N)	
1. Square footage of existing commercial space in CA retrofitted 15 % beyond current Title 24 (2008).	Staff, SP	3	Y	Team Recommendation: Square footage of existing commercial space in CA retrofitted X % beyond current Title 24 (2008). X to be determined by study and defined by the end of 2012.
2. Percent of participants in each of the following subprograms who go on to implement a long-term energy plan under the Continuous Energy Improvement program: (a) Non-Residential Audit, (b) Calculated Incentives and (c) Deemed Incentives	IOUs, Staff	3	N	Team Recommendation: Percentage of participants in the Commercial programs who go on to implement a long-term energy plan.

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

**Metric type: 3 = data collection, tracking, and reporting [by IOUs, CPUC staff, and/or other entities] to be determined later.

Commercial – Continuous Energy Improvement Subprogram

	Mission
SW Program: Commercial	Continuous Energy Improvement (CEI) is a consultative service aimed at helping large commercial and industrial customers engage in long-term, strategic energy planning. Corporate energy management is not currently part of normal business operations for the majority of utility customers and with current economic pressures forcing customers to reduce costs and focus more on their core business, it is likely to be further marginalized. CEI proposes to reintroduce the importance of energy management through a comprehensive approach that addresses technical opportunities and organizational change with a commitment from the executive level.
SW <u>Sub-program</u> : Continuous Energy Improvement	

CA EESP Goals/Strategies Addressed by SW <u>Sub-program</u> :	CA EESP Ref. pp. #
2-1: Ensure all State-Owned and Leased Buildings are Retro-commissioned	SP p38, PIP (SCE p231)
2-5: Develop tools and strategies to use information and Behavioral strategies, commissioning, and training to reduce energy consumption in commercial buildings.	SP p38, PIP (SCE p231)
2-7 Develop business models and supplier infrastructure to deliver integrated and comprehensive "one-stop" energy management solutions	SP p38, PIP (SCE p231)

Short-term (2010-2012) "SMART" <u>Sub-program</u> Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	C
1. By IDSMS eliminated this bc this is already incorporate in overarching statewide	Staff, PIPs (SCE p236, PG&E p84)	Team Recomm Moved to IDS
2. By 2012, CEI Participants meet their short term energy goals as identified in their long-term energy plans. - good to track but not set a goal - number is so small (10-15 customer for SCE)	PIPs (SCE p228, PG&E p76), Staff	Team Recomm By the end of of commercial that meet sha 2012) milesto

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<p>If set high, then tend to not work with customer that are on the border</p> <ul style="list-style-type: none"> - How is "successful" defined - CEI → 50 total customers across the state! Utilities can have standard reporting format with report making recommendation for future program - One report with individual segments - CEI should be housed in → in industrial or wherever the dominant sector 		<i>will be tracked</i>
<p>3. By 2012 lessons learned, best practices, and plan to ramp up the CEI Program (if desirable) will be developed (y/n metric)</p> <p>AGREEMENT – this will be re-written by the industrial utilities sector</p> <ul style="list-style-type: none"> - industrial thought this could be re-phrased - industrial doesn't think this should be in commercial - need a report/plan from CEI with section on lessons learned by sector - <u>CEI is more like a pilot (iDSM is more of an approach)</u> - <u>Change "ramp up" to "recommendation for all future" (ask Jeanne)</u> 	PIPs (SCE p230, PG&E p77,83), Staff	Team Recommendation By the end of 2012 of CEI participants implement a plan will reach The number of end of 2012 visibility on
<p>4. By iDSM eliminated this bc this is already incorporate in overarching statewide</p>	PIPs (SCE p236, PG&E p84), Staff	Team Recommendation Moved to iDSM

Long-Term (2013-2020) "SMART" <u>Sub-program Objectives:</u>	Source (SP, AL, DR, PIP, or Staff)*	C
<p>1. By 2015, the participants who go on to implement a long-term energy plan under the Continuous Energy Improvement program will be X%.</p>	PIPs (SCE p228 , PG&E p77), Staff	Team Recommendation By the end of 2015 of CEI participants implement a plan will reach The number of end of 2015 visibility on

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		available.
2. By 2015 commercial customers who have or are implementing a long-term energy plan via the CEI program without IOU support will increase by X%.	Staff	Team Record Remove obj
3. By 2015 the number of CEI Participants who achieve longer-term milestones as identified in their long-term energy plans increases by X%.	Staff	Team Record By the end of of CEI partic milestones a long term en reach X. The number end of 2012 visibility on available.
4. X% of CA corporations integrate clean energy solutions (EE, DR, and DG) into long-term energy plans.	PIPs (SCE p236, PG&E p84), Staff	Team Record Move to IDS
5. X% of CA corporations will include GHG reduction measurement, monitoring, and reduction strategies in their long-term energy plans.	PIPs (SCE p228 , PG&E p76), Staff	Team Record By the end of of customer reduction m monitoring, strategies in energy plan

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	Comments

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1. Participant awareness of IDSM opportunities.	PIPs	2b	Y	Team Recommendation: Move this PPM to IDSM
2. Number of CEI participants meeting (per utility supplied definition) their short-term milestones ACTION ITEM → Utilities Define what does short-term goals mean	PIPs, Staff	2a	N	Team Recommendation: Number of CEI participants meeting short-term 2010-2012 milestones from their energy management plan
3. Yes/No - lessons learned, best practices, and plan to ramp up the CEI Program are developed	PIPs, Staff	2a	N	Team Recommendation: Lessons learned, best practices, and recommendations to ramp up the CEI Program (if applicable) will be developed (Y/N)
4. Percent of participant awareness of IDSM opportunities as a result of participating in the CEI Program	PIPs, Staff	2b	Y	Team Recommendation: Number of commercial customers who created an energy plan via CEI

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**Metric type: 2a = reported annually, 2b = reported by end of cycle.

Long-Term Sub-program MT Indicators (delete terms "utility CEI" terms):	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (3)**	Baseline Study Required (Y/N)	
1. Percent of commercial customers statewide who adopt and implement a long-term energy plan. - people can "implement" but do they persist	PIPs, Staff	3	Y	Team Recommendation: Number of CEI participants who achieve milestones

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<p>ACTION ITEM → Utilities define: what is meant by “implement”, come up with a checklist what it means to implement over time, do they need to check milestones to see if there is persistence</p> <ul style="list-style-type: none"> - Plans are tailored to facilities - Combine with #2 - Done through evaluation 				<p>identified in their energy plans</p>
<p>2. Percent of commercial customers in the IOUs service territories who continue to implement a long-term energy plan via the CEI program without IOU support. [Change per above]</p>	<p>Staff</p>	<p>3</p>	<p>Y</p>	<p>Team Recommendation Remove</p>
<p>3.</p>	<p>Staff</p>	<p>3</p>	<p>N</p>	
<p>4.</p>	<p>PIPs, Staff</p>	<p>3</p>	<p>Y</p>	
<p>5.</p>	<p>PIPs, Staff</p>	<p>3</p>	<p>N</p>	

Commercial - Non-Residential Audit Subprogram

Mission	
SW Program: Commercial	The Non-Residential Audits (NRA) sub-program is designed to deliver a coordinated statewide integrated demand side management activity that promotes energy efficiency, demand response, distributed generation and emerging technologies.
SW <u>Sub-program</u> : Non-Residential Audits	

CA EESP Goals/Strategies Addressed by SW <u>Sub-program</u>:	CA EESP Ref. pp. #
2-1: Ensure all State-Owned and Leased Buildings are Retro-commissioned	SP p38, PIP (SCE p176; PGE p31)
2-5: Develop tools and strategies to use information and Behavioral strategies, commissioning, and training to reduce energy consumption in commercial buildings.	SP p38, PIP (SCE p176; PGE p31)

Short-term (2010-2012) "SMART" <u>Sub-program</u> Objectives:	Source (SP, AL, DR, PIP, or Staff)*	Comments
<p>1. By 2012 the number of onsite audits that are integrated will exceed X%. (stay as an objective but not as a PPM, refer to iDSM)</p> <ul style="list-style-type: none"> - customer awareness of integration - all integrated tracked through idsm and reported back to the segments - Punt to iDSM section – this objective/metric was eliminated in other section - NRA will be tracked through idsm program - All on-site audits will be integrated by 2012. - Audit team will get number of integrated audits and then parse out results by segment (CD, online, phone, etc..) - On-site tool and on-line tool integrated by 2012 - From integrated standpoint, focus is on on-line tool integrated across programs (not just EE, has dg, solar, dr) 	PIPs (SCE p 181, PG&E p29) / D.09-09-047 (p. 215), Staff	Team Recommendation: Moved to IDSM

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<p>2. By 2012 NRA participants that also participate in another IOU sponsored EE, DR, or DG program exceeds X%. (if you succeed in #2 you would not be as successful in #3 below)</p> <p>From idsm team</p> <ul style="list-style-type: none"> o 2a metric o IOUs will specify what can be tracked online v. onsite (huge difference to track) o By 2012 can track what was implemented onsite o Output of audit are opportunities across program areas o Caveat for onsite → for NRA (onsite participants) o Not using percentages, o Not a specified goal 	<p>D.09-09-047 (p. 215), PIPs (PG&E p29)</p>	<p>Team Recommendation: Moved to IDSM</p>
<p>3. By 2012 X% of NRA participants implement recommended measures without needing an IOU Incentive.</p> <p>This is small so do not dwell – you can track but do not have a goal (a number and percent but no improvement on number) Customer participates in audit, but does not participate in IOU rebate program. How is this tracked? Re-visit or phone survey</p> <p>Hard to do for evaluation. Did something in 02-03, 04-05. Calling participants of the audit to see if they implemented any of the recs. Not easy to say if a certain percent will do measures.</p> <p>Not recommended would be spillover</p>	<p>PIPs (SCE p 181, PG&E p35) / D.09-09-047 (p. 215), Staff</p>	<p>Team Recommendation: Moved to IDSM</p>
<p>4. By 2012 the number and percent of customer class receiving non-residential audits. [will increase by X%]</p> <p>Edits from iDSM team</p>	<p>PIPs (SCE p173, PG&E p26), Staff</p>	<p>Team Recommendation: Moved to IDSM</p>

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ACTION ITEM: utilities give feedback on this by next week		
<p>5. By 2012 the % of customers who received audits, that adopt audit recommended programs, technologies, processes, & practices. [will increase by X%].</p> <p>Edits from iDSM team</p>	PIPs (SCE p174, PG&E p 29), Staff	Team Recommendation: Moved to IDSM

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	Comments
1. . (refer to iDSM)	PIPs, Staff	2a (data request, 1)	N	Team Recommendation: Moved to IDSM
<p>2. Participation rate of NRA (on-site) participants in another IOU EE , DG, or DR program.</p> <p>Reported via iDSM</p> <p>See iDSM section</p>	PIPs, Staff	2a	N	Team Recommendation: Moved to IDSM
<p>3. P .</p> <p>Hard to obtain</p> <p>Will not go up</p> <p>iDSM got rid of this PPM</p>	PIPs, Staff	2b	N	Team Recommendation: Moved to IDSM and subsequently removed

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<p>4. Participation rate of non-residential audits by customer class.</p> <p>Unchanged by iDSM section Of all audits what percent fell into different customer segments Or a market penetration From industrial #4 and 5 would be combined in a report about onsite, online and all customer class information.</p> <p>Number of customer part in audit compared to # of cust in year x → market penetration/saturation ACTION ITEM To utilities → what is your purpose for doing the audit? Objective for NRA program, how would you define that, then use that for red-line edits</p> <p>If 2 segments are participating, utils can find out why are these segments missing</p>	PIPs, Staff	2b	N	Team Recommendation: Move to IDSM.
<p>5. Adoption rate of audit-recommended technologies, processes and practices.</p> <p>If you told them 100 recommended technologies, when were technologies adopted, 6 months later for lighting for example.</p>	PIPs, Staff	2b	N	Team Recommendation: Move to IDSM.

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

**Metric type: 2a = reported annually, 2b = reported by end of cycle.

<p>Long-Term (2013-2020) "SMART" Sub-program Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)</p>	<p>Source (SP, AL, DR, PIP, or Staff)*</p>	<p>Comments</p>
<p>1. By 2015, the percent of audit program participants who go on</p>	<p>IOUs, Staff</p>	<p>Team Recommendation: Move to IDSM.</p>

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to implement a long-term energy plan Review and make this similar to other metrics		
2. By 2015, X percent of NRA recipients go on to implement long-term energy plans	PIP p. 27 – CEI Section	Team Recommendation: Move to IDSM.

**SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]*

Long-Term Sub-program MT Indicators: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (3)**	Baseline Study Required (Y/N)	Com
1. Percent of audit, calculated incentive and deemed incentive program participants who go on to implement a long-term energy plan under the Continuous Energy Improvement program.	IOUs, Staff	3	N	Team Recommendation: Move to IDSM.

**SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]*

***Metric type: 3 = data collection, tracking, and reporting [by IOUs, CPUC staff, and/or other entities] to be determined later.*

Commercial – Deemed Incentives Subprogram

	Mission
SW Program: Commercial	The Statewide Commercial Deemed Incentives sub-program provides rebates for the installation of new energy efficient equipment. Deemed retrofit measures have prescribed energy savings and incentive amounts and are generally intended for projects that have well defined energy and demand savings estimates (i.e., T12 to T8 replacements). Main two objectives: <ul style="list-style-type: none"> • Reduce the initial purchase costs of such equipments, and • Reducing the inconvenience of participating in utility rebate programs by offering simple application process
SW <u>Sub-program</u> : Deemed Incentive	

CA EESP Goals/Strategies Addressed by SW <u>Sub-program</u> :	CA EESP Ref. pp. #
2-3: Ensure compliance with minimum Title 24 codes and standards for building renovations and expansion.	SP p38, PIP (SCE p204; PGE p62)
2-5: Develop tools and strategies to use information and Behavioral strategies, commissioning, and training to reduce energy consumption in commercial buildings.	SP p38, PIP (SCE p204; PGE p62)
2-7: Develop business models that deliver integrated energy management solutions; stretch goal reward (iBonus) with integration; comprehensive energy management retrofits.	SP p38, PIP (SCE p204; PGE p62)
2-8: Improve use of plug load technologies; support PIER, Office of the Future by developing new, additional incentives.	SP p38, PIP (SCE p204; PGE p62)

Short-term (2010-2012) “SMART” <u>Sub-program</u> Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	C
1. By 2012, the percent in the number of installed measures that are ETP relative to baseline will increase by X%. See PPM #1 from Calculated section	PIPs (SCE p208; PG&E p67)	Team Recomm By 2012, the r improved, or deemed prog X% relative to

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		2008). Must define n ETP measures to determine research, colla determine X b
<p>2. By 2012, the percent of participants receiving the Integrated Bonus (iBonus)¹ will exceed X%.</p> <p>These are a subset of #5 DR shuts down participants if it meets its load targets ACTION ITEM: utilities suggest a meaningful target (not 5%) and report back next wed</p>	PIPs (SCE p 212, PG&E p70)	Team Recomm By 2012, part the Integrated will be tracke
<p>3. By 2012, X% of targeted commercial customers will be aware of the Incentive Programs. Move to Overall Commercial statewide objective level rather than Deemed</p>	PIPs (SCE p209, PG&E p 65)	Team Recomm Moved to ove
<p>4. By 2012, the supply of will increase by X%.</p> <p>Punt to WET See calculated discussion</p>	Staff, SP	Team Recomm Moved to WE
<p>5. By 2012, customer implementation of integrated opportunities (e.g., EE, DR, waste saving measures, etc.) will increase by X%.</p> <p>Move to Overall Commercial statewide objective level rather than Deemed. Reported by iDSM</p>	IOUs, PIPs (SCE p221, PG&E p70)	Team Recomm Moved to IDS

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	Comments
<p>1. Participant adoption rate of installed measures that are ETP relative to baseline. see calculated PPM but ignore measure type "b" discussion. All</p>	PIPs	2a	Y	Team Recommendation: Number of ETP, new, and improved measures in program as available..

¹ Integration Bonus (iBonus is a new incentive mechanism to promote greater integration of DSM resources. Available for customers:1) Sign up or are already signed up for a DSM program 2) Purchase, install, and/are eligible to receive a rebate for an energy saving device.

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deemed are "a"				
2. Percent of commercial customers receiving the Integrated Bonus (iBonus) utils haven't implemented yet SW team has to work with deemed team and DR teams first	PIPs	2b	N	Team Recommendation: Percent of commercial customers receiving the Integrated Bonus if applicable

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

**Metric type: 2a = reported annually, 2b = reported by end of cycle.

Long-Term (2013-2020) "SMART" Sub-program Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Comments
1. By 2020, the percent of deemed incentive program participants who go on to implement a long-term energy plan. See discussion under calculated	IOUs, Staff	Team Recommendation: Remove, redundant. Covered by long term overarching commercial objective #2.
2. By 2015, and every three years thereafter, all measures determined to be "standard practice" are moved out of the incentive program, and replaced by ETP. See discussion under calculated	Staff	Team Recommendation: By 2015, and every three years thereafter, measures determined to be "standard practice" are phased out at various levels of the program (depending on the technology within the customer class) and replaced by new, improved ETP measures. Utilities to define 'standard

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		practice' by the end of 2011.
<p>3. By 2015, 100 percent of HVAC units being installed will meet existing code.</p> <ul style="list-style-type: none"> - program wouldn't install unit just meeting code, it would exceed code, - refers to the installation quality not the level of equipment - should go to HVAC objectives 	SP, Staff	Team Recommendation: Move to HVAC
<p>4. By 2015, 50 percent of HVAC systems installed will be optimally maintained.</p>	SP, Staff	Team Recommendation: Move to HVAC

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Long-Term Sub-program MT Indicators: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (3)**	Baseline Study Required (Y/N)	Comments
1. Percent of Deemed Incentive program participants who go on to implement a long-term energy plan.	IOUs, Staff	3	N	Team Recommendation: Remove. Covered under overall term MT indicator #2
2. Measures determined to be "standard practice" are moved out of the program, and program focused on ETP (Y/N)	Staff	3	N	Team Recommendation: <i>Measures determined to be "standard practice" are moved out of the program at various levels of the program (depending on the type of customer) and replaced by new, improved measures. (Y/N)</i>
3. P Defer to HVAC results	SP, Staff	3	N	Team Recommendation: Move to HVAC

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4. P Defer to HVAC results.	SP, Staff	3	N	Team Recommendation Move to HVAC
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**Metric type: 3 = data collection, tracking, and reporting [by IOUs, CPUC staff, and/or other entities] to be determined later.

Commercial – Calculated Incentives Subprogram

	Mission
SW Program: Commercial	<p>The Statewide Commercial Calculated Incentives sub-program provides customers technical and calculation assistance, as well as incentives based on calculated savings, to influence the design and installation of energy efficient equipment and systems in both retrofit and added load applications.</p> <p>The Calculated Incentives sub-program is utilized for projects where a rebate is not available through the Statewide Deemed program, where project conditions require customized calculations to provide the most accurate savings estimates, or where project has interactive effects that are best captured through whole building or whole system modeling. Because calculated savings estimates are based on actual customer operating conditions, pre-inspections (for retrofit projects) and post-inspections are typically required as part of each utility’s project documentation.</p>
SW <u>Sub-program</u> : Calculated Incentive	

CA EESP Goals/Strategies Addressed by SW <u>Sub-program</u> :	CA EESP Ref. pp. #
2-3: Ensure compliance with minimum Title 24 codes and standards for building renovations and expansion.	SP p38, PIP (SCE p190; PGE p48)
2-5: Develop tools and strategies to use information and Behavioral strategies, commissioning, and training to reduce energy consumption in commercial buildings.	SP p38, PIP (SCE p190; PGE p48)
2-7: Develop business models that deliver integrated energy management solutions; comprehensive energy management retrofits.	SP p38, PIP (SCE p190; PGE p48)
2-8: Improve use of plug load technologies; support PIER, Office of the Future by developing new, additional incentives.	SP p38, PIP (SCE p190; PGE p48)

Short-term (2010-2012) “SMART” <u>Sub-program</u> Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	C
1. By 2012, the percent in the number of installed measures that are ETP or “advanced technology” relative to baseline will increase by X%.	PIPs (SCE p193; PG&E p52)	Team Recommendation <i>By the end of</i>

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		<i>of completed that include a will be tracked baseline (200</i>
<p>2. By 2012, X% of measured savings from calculated projects will come from emerging technologies.</p> <p>Utils: 60% is high Program Tracking Level: are you talking ex-post, what vintage (2002-2003, 2004-2005, 2006-2008)?,, plus at the custom/calculated level the system approach would make hard to tease out (rob's comment) ED CLARIFICATION: utils determine to what extend there can be an ETP db that says which are ET measures starting at a certain date. Utils would hone that in the next week.</p> <p>Is there a report that show how much ETP touches diff sectors: in ETP report says Rick</p>	Staff, PIPs (SCE p193; PG&E p52)	Team Recomm <i>By the end of of ex-ante sav commercial s coming from technologies embedded in be tracked.</i>
<p>3. Increase adoption of plug load technologies from PIER funded projects.</p> <p>Plug load more in deemed</p>	PIPs (SCE p193; PG&E p52)	Team Recomm Remove base
<p>4. By 2012, X% of targeted commercial customers will be aware of the Calculated Incentives Program.</p> <p>For small mom and pop does it matter where they heard of the program from? Want to test if they know that there are these calc and deemed programs Move to overall commercial level What does "aware" mean?</p>	PIPs (SCE p192, PG&E p53)	Team Recomm Moved to ove
<p>5. By 2012, the supply of will increase by X%.</p>	Staff, SP	Team Recomm Moved to WE

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<p>PUNT TO WET → Highly skilled energy management specialists in PIPs WET trains these specialists → but wet doesn't get a "highly skilled". More at low-income or high school workers. In the short term the lower skilled specialists are being targeted Calc program does not train specialists</p>		
<p>6. By 2012, customer implementation of integrated opportunities (e.g., EE, DR, waste saving measures, etc.) will increase by X%. Short term → more about "awareness" and later on implementation Track commercial sector wide - move to overall commercial level</p>	<p>IOUs, PIPs (SCE p195,197, PG&E p53)</p>	<p>Team Recommendation Moved to IDS</p>

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	Comments
<p>1. Participant adoption of installed measures -- where measure (a) count the savings (ex-ante), and (b) for the systems approach says if it a component in a system -- that are ETP relative to baseline.</p> <p>Define what does "advanced tech" mean? Impossible because of 18 different defs Focus on ETP and how ETP maps to the programs (from inception to C&S) When to start clock on ETP (do we start w/06-09 or wait for 10-12 – although there may not be much)</p> <ul style="list-style-type: none"> • Utils find out what portion of 06-09 are well defined • ETP emv underestimate how many technologies migrated to programs • Do utils have independent way of identifying ETP measures – PGE does not have a thorough tracking. If we have a list then PGE can find it. FUTURE ACTION ITEM <p>Is adoption rate a percent increase? Does calculated incentive program track ET measures – you have to go to calc</p>	<p>PIPs</p>	<p>2a (utils would like this to be 2b)</p>	<p>Y</p>	<p>Team Recommendation: # of Projects with ETP measures included, when available.</p>

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<p>incentive database with a list of ET measures</p> <p>Tracking – do you want to see how many are coming into port or how many are being implemented (adoption rate – not just how many are coming over)</p> <p>PGE proposed (Rob said not really) – 1. what systems contain any ET tech, 2. large system but part contain ET, can you pull out the ET savings (which could be small compared to the total system savings)</p> <p>Where do we track this: ETP or at the calculated incentive level? ED – you want to track in the program where they are paying for the rebates (or sector).</p> <p>How do you get adoption; if part of whole performance the extract out that ET portion that contributes to the savings.</p> <p>ETP may contribute to code – how do you track that is it ETP or C&S?</p> <p>Calc offers incentives for software</p> <p>Who is responsible for baseline? – consultant doing a study</p> <p>GENERAL UTILITY QUESTION: Does adoption rate include measures that are reinvigorated measures and not just new technologies. – ET commercially available, some have 0 penetration, some are mature but still low penetration in one market (i.e., daylighting → low pen in schools).</p> <ul style="list-style-type: none">• By measure• By system• Adoption mean by amount of savings• Adoption means increase in installations• <p>Is objective that ET measure X, Y, Z is adopted somewhere? Or that customers are implementing this measure?</p> <p>What is an ETP measure right now that generates any savings?</p> <p>What is your denominator (percent of what?).</p> <p>If you want to see more ET used by the program → counts are better (variety and how they track)</p> <p>Can we count them? AGREEMENT – Yes we can (but we would lose visibility if ET</p>				
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<p>at the system level).</p> <p>ACTION ITEM: If utils have recs on system level metric then suggest in your comments by next week.</p> <p>Baseline – look at all rebate programs in com and look at ETP, establish commercial baseline in ETP.</p> <p>For (b) if data is not there, this would be a costly. Would be more of an evaluation study.</p>				
<p>2. Amount of ex-ante savings from commercial sector projects coming from emerging technologies that are not embedded in larger systems</p> <p>Plug load more of a deemed ETP as a share of commercial section savings – this is hard because of larger measures that may sway the total commercial savings results Are we counting installations or measures? This gets at what Rob talked about in his “systems” approach discussion This gets costly ET drives their product, calc doesn’t drive ET. Calc Incentive Utils concerned about being measured against another department’s performance. (but utils choose with ET to enter into program)</p> <p>AGREEMENT: The “counting” issue still persists in this PPM – utils can count if program had ET measure, but the savings would be hard. Of the measure that you can count, (a) count the savings (ex-ante), and (b) for the systems approach says if it a component in a systems. For energy savings metric you would only look at (a). For (a) instead of percent, use amount of savings.</p> <p>ACTION ITEM: by next wed utils define what “large system”</p>	PIPs	2a	N	<p>Team Recommendation: Amount of ex-ante savings from commercial sector projects coming from emerging technologies that are not embedded in larger systems.</p>

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*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

**Metric type: 2a = reported annually, 2b = reported by end of cycle.

Long-Term (2013-2020) "SMART" Sub-program Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Co
<p>1. By 2020, the percent of participants who go on to implement a long-term energy plan will be X%.</p> <p>this is for calculated – larger projects would have a plan. A mom and pop shop would not plan what their energy purchases will be next year or the year after. Set a size threshold for customers (greater than 200kW)</p>	IOUs, Staff	Team Recon Remove, re by long term commercial
<p>2. By 2015, and every three years thereafter, all measures determined to be "standard practice" are phased out at various levels of the program (depending on the technology within the customer class and replaced by ETP or "Advanced Technology" measures.</p> <p>Determining of standard practice would be determined later If something is standard you know longer incentivize it Sunset an 'end-use' → maybe T8 down the road This is more trying to get at a deliberate process not the number</p>	Staff	Team Recon By 2015, an thereafter, determined practice" an various leve (depending within the c replaced by Utilities to c practice' by

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

Long-Term Sub-program MT Indicators:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (3)**	Baseline Study Required (Y/N)	Co
<p>3. Percent of program participants who go on to implement a long-term energy plan.</p>	IOUs, Staff	3	N	Team Recon Remove.

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<p>4. Measures determined to be “standard practice” are phased out at various levels of the program (depending on the technology within the customer class), and program focused on ET/Advanced technology (Y/N)</p> <p>Util issue: What is “standard practice”</p> <ul style="list-style-type: none"> - code v. standard practice (plus would they have done this anyway), Replace On Burnout v. Early Replacement - free ridership high in SPC programs - customer class comes into play (corps that span states) <p>Even if you agree “standard practice” maybe the measure should not be retired, which is what this metric implies</p> <p>Look at measures incented in one three year program compared to another program cycle</p> <p>Indicator is a document that show the process for how standard practice measures are decided to continue or not.</p>	Staff	3	N	<p>Covered under term MT indicator</p> <p>Team Recommendation Measures determined to be “standard practice” are phased out at various levels of the program (depending on the technology within the customer class), and program focused on ET/Advanced technology (Y/N) ETP measures</p>
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**Metric type: 3 = data collection, tracking, and reporting [by IOUs, CPUC staff, and/or other entities] to be determined later.

Commercial – Direct Install Subprogram

	Mission
SW Program: Commercial	The Direct Install sub-program delivers free energy efficiency hardware retrofits, through installation contractors, to reduce peak demand and energy savings for commercial customers with monthly demand of less than 100 kW. The program targets very small and small businesses (those with monthly demand of less than 100 kW) in a staged delivery approach that provides program services in specific geographic areas at different times, allowing for a more concentrated, directed, yet comprehensive program.
SW <u>Sub-program</u> : Direct Install	

CA EESP Goals/Strategies Addressed by SW <u>Sub-program</u> :	CA EESP Ref. pp. #
None listed	

Short-term (2010-2012) “SMART” <u>Sub-program</u> Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Comments
1. By 2012, the percent of participant awareness of Integrated Demand Side Management (IDSM) opportunities will increase by X%.	Staff, PIPs (SCE p222, PG&E p95)	Team Recommendation Moved to IDSM
2. By 2012, percent of DI participants who receive (1) an initial referral (then tracking if there was some (2) follow up the program, and finally see if the referral [#2 is a utility internal reporting requirement not submitted to CPUC] (3) resulted in some action (e.g., participate in other resource programs, and/or OBF.). Step 1 → reported at 2a Step 2 → reported internally by utility or 1 Step 3 → reported 2b/evaluation/data tracking issue #3 should be moved to long term	Staff	Team Recommendation By the end of 2011, process to track the participants who referral to another utility and/or follow the additional energy action. Study required to

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<p>[move this to long term →that participate in other resource programs, OBF, and/or put down a co-pay for EE measures.]</p> <p>Target market for DI → small mom and pop stores. Is there any potential left? After customer is done with DI, is there anything else the customer can do (OBF?) ED – trying to push these small mom and pops to do more than just DI via OBF ED - If they don't do more, is it because of lack of potential or unwillingness to pay more out of pocket → this number alone does not answer this ED LGP eval found there should be hard follow up when there were recommendations to other programs Is intent to phase out DI → no, don't invest all the time to get to a business and get them to part in DI and then not follow up with referrals to get them to part in other programs (matt says maybe not programs but some sort of tracking) Train: 1. find customer, 2. make referral, 3. know referral was made, (referrals followed up) 4. find out that customer actually participating 5. find out they made a co-pay 6. efficient technology/project installed/implemented Referrals with no activity → no worthwhile DI should ALWAYS do referrals (leave a brochure) Objective would be to make sure a referral is made but not to make sure customer participated. If they don't take activity, then utils would know to determine if it is a cost effective activity in terms of generating leads. If dead end but \$ → bad.</p> <p>GENERAL AGREEMENT: Utils want to keep track of referrals. For some period of time utils want to know if there are any actions taken, directly from referrals, to determine if this activity is worthwhile.</p> <p>There needs to be a good market study</p>		feasibility of track
<p>3. Increase participation of hard-to-reach businesses (footnote definition of HTR for commercial from policy manual) by X% by 2012.</p>	Staff, PIPs (SCE p219, PG&E p92)	Team Recommen By the end of 201

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<p>What is denominator: is it of all participants of the program. If 100 are HTR, then you need X% of this 100 HTR to participate. Number of HTR customer in your service territory.</p> <p>Need to define touched and untouched Utils suggest leaving out non-english speaking Suggest leaving hard to reach (in policy manual) ACTION ITEM: Utils will have to reference the definition of hart to reach</p>		<p>participants of Ha businesses will be</p>
<p>4. I.</p> <p>PIP makes argument that program would address short term leases (split incentive issue) Utils: this is a subset of HTR Utils target small businesses, small business usually have short term leases (don't distinguish between short term and long term lease customers) Sempra assigns zip codes to low-income and assigns this to HTR PGE identifies HTR by usage (basically small business) → then take this and break out by zip code and use census data to find language spoken by zip code.</p> <p>Definition of HTR did include geography..Jean is suggesting an application to get at this using census data .</p>	<p>PIPs (SCE p218, PG&E p91)</p>	<p>Team Recommen Remove Short Term leases Hard to Reach de therefore this is c metric above.</p>
<p>5. Increase the percent of low income and disadvantaged ²program implementation staff who are employed for more than 6 months in auditing, retrofitting, outreach.</p>	<p>Staff, PIPs (SCE p221, PG&E p94)</p>	<p>Team Recommen Study required, m objective.</p>
<p>6. By 2012, the percent of innovative measures (e.g., solid state lights, T8, DR) as a percent of all measures will exceed 10%.</p>	<p>PIPs (SCE p222, PGE&E p95)</p>	<p>Team Recommen Remove objective Redundant, cover #2 of DI subprogr</p>

² SCE PIP, 221.

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<p>7. By 2012, the percent of targeted commercial customers who understand the information provided by contractors will exceed 30%.</p>	<p>Staff</p>	<p>Team Recommendation Remove objective Need further info determines custo 'understanding', a require a baseline determine X%.</p>
<p>8. By 2012, awareness of the Direct Install Program among targeted commercial customers will exceed 50%.</p>	<p>Staff, PIPs (SCE p220, PG&E p92)</p>	<p>Team Recommendation By the end of 201 the Direct Install targeted commer will be tracked.</p>
<p>9. By 2012, the percent of targeted commercial customers who accept the claimed benefits of energy efficiency will exceed 50%.</p>	<p>Staff</p>	<p>Team Recommendation Remove objective Need further info determines 'accep benefit', also wou baseline study to</p>
<p>10. By 2012, the percent of DI participants that participate in 3P programs will exceed 10%.</p>	<p>Staff</p>	<p>Team Recommendation Remove objective Redundant, cover #2 of DI subprogr</p>

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	Co
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1. Number of DI participants that participate in other resource programs, OBF, and/or put down a co-pay for EE measures.	IOUs, Staff	2a	N	Team Recommendation Number of DI participants in non-resource
2. Percent of participants that are non-English speaking businesses are located in previously untouched zip codes, and low concentrated zip codes. [combine]	IOUs, Staff	2a	N	Team Recommendation Number of participants hard to reach
	IOUs, Staff	2a	N	Team Recommendation PPM

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**Metric type: 2a = reported annually, 2b = reported by end of cycle.

Long-Term (2013-2020) "SMART" Sub-program Objectives: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Comments
1. By 2015, and every three years thereafter, all measures determined to be "standard practice" are moved out of the incentive program, and replaced by ETP or "Advanced Technology" measures.	Staff	Team Recommendation By 2015, and thereafter, determined practice" at various levels (depending within the context replaced by ETP measures

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

Long-Term Sub-program MT Indicators: (Please note that items in BOLD are consistent with proposed objectives in the Statewide Industrial and Agricultural programs)	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (3)**	Baseline Study Required	Comments
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			(Y/N)	
<p>1. Measures determined to be “standard practice” are moved out of the program, and program focused on ET/Advanced technology (Y/N)</p>	Staff	3	N	<p>Team Recommendation <i>Measures determined to be “standard practice” are phased out at various points of the program (depending on the technology and customer class) and replaced by new, improved measures. (Y/N)</i></p>
<p>2. Energy Efficiency is routinely considered by 50% of the targeted market of DI participants when making capital purchases.</p> <p>ACTION ITEM: looking for utilities suggestions on this language</p>	Staff	3	N	<p>Team Recommendation Change 50% to X% Utilities to determine by end of 2015. Request baseline study.</p>

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