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Bcc:
Subject: RE: proposed appendix - definitions of Administrator/Implementer

Barbara,

We are cutting the appendix down to just the 381.1 text and list of decisions. I am out of time for more additions. You can include in your comments next week.

A final version will be circulated shortly for final sign-off

From: Barbara George [mailto:wem@igc.org]

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Subject: proposed appendix - definitions of Administrator/Implementer

Hi [Redacted]

Please include as an appendix the attached Relevant Definitions of Administrator/Implementer from Commission decisions.

(It is also pasted below for quick reference.)

Thank you,

Barbara

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Relevant definitions of Administrator/Implementer from Commission decisions:

D0111066 Attachment A - Energy Efficiency Policy Manual, p. 6, Definitions:
In this section, we define terms specifying various entities' roles and responsibilities and funding sources for energy efficiency programs: §

Administrator: A person, company, partnership, corporation, association, or other entity selected by the Commission and any Subcontractor that is retained by an aforesaid entity to contract for and administer energy efficiency programs funded in whole or in part from electric or gas public goods charge (PGC) funds.
§

Implementer: An entity or person selected and contracted with or qualified by a program administrator or by the Commission to receive PGC funds for providing products and services to Customers.

D0307034, Attachment A, p. 1, Definitions:

o Administrators - For purposes of implementing Section 381.1, an "administrator" is any party that receives funding for and implements energy efficiency programs pursuant to Section 381.

D0501055, Attachment 1, pp. 1-2

ADMINISTRATIVE FUNCTIONS AND AREAS OF RESPONSIBILITY: COMMON TERMINOLOGY

- o **Policy Oversight:** Determines overall policy direction and priorities, including short- and long-term energy efficiency and procurement goals (e.g., gwh, MW and therm savings from energy efficiency); approves funding for program portfolio and evaluation, measurement and verification (EM&V).
- o **Program Choice:** Develops the portfolio(s) of programs to meet the short- and long-term goals. Solicits and/or develops and selects programs in the portfolio mix; submits general program description and budgets for approval.
- o **Portfolio Management of Energy Efficiency Programs:** Responsible for general administration, and coordination of programs, including tracking program savings and expenditures against program savings goals and budgets; develops reports on individual and comparative program performance; reviews program performance and proposes funding or design changes based upon experience to date; oversees contracting and program implementation process; implements quality assurance tracking protocols; reviews and approves invoices; generates required reports and maintains centralized system for reports to regulators, legislators, advisory groups, and others.
- o **Program Implementers.** Implements programs based on contracts/agreements with portfolio manager; recruits customers, collects data on program milestones and provides periodic reports on progress towards goals; delivers program directly and/or hires contractors/firms to deliver program.

footnote to D0501055 Program Implementer:

Program implementers do perform administrative tasks necessary to manage the delivery of programs for which they are funded, including overseeing their contractors, collecting data, preparing invoices and reports. In fact, for this reasons we refer to program implementers as "administrators" in other Commission decisions related to energy efficiency. However, for the purpose of establishing a common terminology for the key functions and areas of responsibility that we address today, we make a distinction between "implementers" and the administrative functions presented above.