

PPMS FOR STATEWIDE PROGRAMS AND SUBPROGRAMS

Note: “IOU proposed” = IOUs’ September 30 submittal in response to ED’s preliminary proposed PPMS
 “IOU proposed as is” = ED proposes no further changes to IOUs’ September 30 submittal
 “IOU proposed as modified” = ED proposes modifications to IOUs’ September 30 submittal

| SW Program / Sub-Program | PPM | Type/ Baseline | Notes |
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| COMMERCIAL / INDUSTRIAL / AGRICULTURAL COMBINED | | | |
| * Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural) | | | |
| | *1. <u>Number and percent (relative to all eligible customers) of commercial, industrial and agricultural customers participating in sub-programs (NRA, Deemed, Calculated, and CEI) by NAICS code, by size (+/- 200 kW per yr or +/- 50K therms per yr), and by Hard to Reach (HTR)**</u> ** “HTR” is as defined in the EE Policy Manual | 2a/no | ED accepts IOU proposed as modified: (a) clarified for consistency with similar metrics for C & A, and (b) add % Per 10/14 meeting, agreed to combine former PPMs#1 and 2 for C / I / A into this new combined metric. Combined metric (a) includes HTR (from Commercial PPM #1) and (b) all four subprograms for consistency. |
| Continuous Energy Improvement | *1. <u>Number and percent of commercial, industrial, and agricultural CEI participants that meet short-term (2010-2012) milestones as identified by their long term energy plans.</u> | 2a/no | ED accepts IOU proposed as modified: (a) consolidate common C/I/A subprogram PPMs, and (b) add %, |
| | *2. <u>Lessons learned, best practices, and plan to ramp up the CEI program are developed. (Y/N metric.)</u> | 2a/no | ED accepts IOU proposed as is |
| | *3. <u>Number and percent of commercial, industrial and agricultural customers that created an energy plan via CEI will be tracked by program.</u> | 2a/no | ED accepts IOU proposed as modified: (a) consolidate common C/I/A subprogram PPMs |
| Non-Residential Audit Program | *1. <u>Number and percent of commercial, industrial, and agricultural customers receiving non-residential audits by NAICS and SIC code.</u> | 2b/no | ED rejects IOU comment to move metric to IDSM. Retain this metric b/c it refers to <u>all</u> non-residential audits, not just integrated audits. ED accepts IOU proposed as modified: (a) consolidate common C/I/A subprogram PPMs, (b) clarify “participation rate” and (c) clarify “customer class” (See IOUs NRA-IDSM PPMs for reference) |
| | *2. <u>For commercial, industrial, and agricultural customers who received audits, the number and percent of adopted audit-recommended technologies, processes and practices,</u> | 2b/no | ED rejects IOU comment to move metric to IDSM. Retain this metric b/c it refers to <u>all</u> non-residential audits, not just integrated audits. |

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| | <p><u>(Report disaggregated data by type of audit - Basic, Integrated, and RCx audit).</u>**</p> <p>**Data sources for reporting will come from (a) program tracking databases and (b) process evaluation to refine estimates.</p> | | <p>ED accepts IOU proposed as modified: (a) consolidate common C/I/A subprogram PPMs, (b) clarify “adoption rate” and (c) report disaggregated data (See IOUs NRA-IDSMS PPMs for reference)</p> <p>Added ** per agreement at 10/14 meeting.</p> |
| Deemed Incentives | <p>*1. Number and percent of new, improved, or ETP measures** installed in the <u>commercial, industrial and agricultural</u> programs.</p> <p>** “ETP measure” defined as ET measures first introduced into the EE portfolio since January 1, 2006</p> | 2a/yes | <p>ED accepts IOU proposed as modified: (a) add % (b) clarify that “in the program” means “installed” and not merely “offered,” (c) consolidate common C/I/A subprogram PPMs, and (d) delete “as available” which is superfluous.</p> <p>Added ** per agreement at 10/14 meeting. 2006 is the beginning of the new policy framework.</p> |
| Calculated Incentives | <p>*1. Number and percent of new, improved, or ETP measures installed in <u>completed calculated projects</u>.</p> | 2a/yes | <p>ED accepts IOU proposed as modified: (a) add %, (b) reflect ED-IOU agreement at the PPM meetings</p> |
| | <p>*2. Number, percent, and ex-ante savings from <u>commercial, industrial and agricultural</u> sector of projects with ETP measures** included. (<u>Report disaggregated savings by measure and number of installations by measure.</u>)</p> <p>** “ETP measure” defined as ET measures first introduced into the EE portfolio since January 1, 2006</p> | 2b/yes | <p>ED accepts IOU proposed as modified: (a) add %, (b) delete “when available” which is superfluous, (c) report disaggregated data</p> <p>Added ** per agreement at 10/14 meeting. 2006 is the beginning of the new policy framework.</p> <p>Agreed to combine PPM #3 (measure ex-ante savings) into this PPM #2</p> |

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| COMMERCIAL | | | |
| Deemed Incentives (Commercial only) | <p>2. Number and percent of <u>participating commercial customers</u> receiving the Integrated Bonus</p> | 2b/no | <p>ED accepts IOU proposed as modified: (a) add number as well as percent, and (b) clarify “participants” not all commercial customers</p> |
| Direct Install | <p>1. Number and percent of Direct Install participants that participate in other resource programs or OBF.</p> | 2a/no | <p>ED accepts IOU proposed as modified: (a) delete “non-resource” programs b/c energy savings is primary focus and participation in a non-resource program is vaguely defined.</p> <p><u>Note:</u> PG&E requires co-pay, but other IOUs do not (True? If so, where is the SW consistency?)</p> |
| | <p>2. Number of <u>and percent of</u> participants that are hard to reach (HTR).**</p> <p>** “HTR” is as defined in the EE Policy</p> | 2a/no | <p>ED accepts IOU proposed as modified: (a) add %</p> |

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| INDUSTRIAL | <p>1. The number <u>and percent</u> of first time** participants in energy efficiency programs. (<u>Report disaggregate data by sub-program</u>)</p> <p>**"First time" means customer has not participated in energy efficiency programs since December 31, 2005.</p> | 2a/no | <p>ED accepted IOU proposed as modified: (a) add %, (b) consistency with similar metric for agriculture, and (b) report disaggregated data</p> <p>Added ** per agreement at 10/14 meeting.</p> |
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| AGRICULTURE | <p>1. Number <u>and percent</u> of first-time** participants in energy efficiency programs. (<u>Report disaggregate data by sub-program</u>)</p> <p>**"First time" means customer has not participated in energy efficiency programs since December 31, 2005.</p> | 2b/no | <p>ED accepts IOU proposed as modified: (a) add %, and (b) report disaggregated data</p> <p>Added ** per agreement at 10/14 meeting.</p> |
| <i>Pump and Test Repair</i> | <p>1. Percent of agricultural pump tests that lead to a repair or replacement.</p> | 2b/n | <p>Agreed to at joint IOU/ED PPM meeting</p> |

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| RESIDENTIAL | <p>By targeted populations (homeowners, renters, property owners/managers), percent increase in the level of:</p> <p>(a) EE awareness (b) EE knowledge (c) EE attitude...(i.e., AKA)</p> | 2b/yes | <p>ED accepts IOU proposed as is</p> |
| <i>Home Energy Efficiency Survey</i> | <p>1. Percentage of HEES participants that enroll in (a) <u>whole house</u> and (b) <u>other resource programs</u></p> | 2b/yes | <p>IOUs accepted ED proposed metric. ED now proposes to limit reporting to conversion rates in whole house and other resource programs, rather than <u>all</u> residential programs.</p> |
| <i>Home Energy Efficiency Rebate</i> | <p>1. Percentage of program rebates made through the POS mode relative to all rebates</p> | 2a/no | <p>ED accepts IOU proposed as is</p> <p>Per 10/14 agreed to change to 2a</p> |
| | <p>2. Percentage of participating stores located in hard-to-reach (HTR)** zip-codes relative to all program participating stores.</p> <p>** "HTR" is as defined in the EE Policy Manual</p> | 2a/no | <p>ED accepts IOU proposed as is.</p> <p><u>Note:</u> IOUs defined HTR as per the Policy Manual (See commercial PPM #1)</p> <p>Per 10/14 meeting, agreed to change to "no" baseline, and clarified language.</p> |

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| Multi-Family Energy Efficiency Rebate | 1. Percentage of non-lighting measures as compared to the total EE measures adopted in the MFEER program. (KWh for single-commodity IOU and BTU for mixed-commodity IOU.) | 2a/no | ED accepts IOU proposed as is. |
| Business Consumer Electronics | 1a: Number of participating retailers and other resellers receiving training. 1b: Number of participating retailers receiving detailing | 2a/no | ED accepts IOU proposed as is. |
| | 2. The numbers and names of specific types of market actors (retailers, buying groups, manufacturers, and distributors) participating in the program <u>and the approximate percent of all potential market actors that this represents</u> <u>[Refer to matrix, as modified to include approximate percentages]</u> | 2b/no | ED accepts IOU proposed as modified: (a) add %, and (b) refer to and include IOU proposed matrix. Per 10/14 meeting, agreed to change to “2b” because market studies are needed to establish the number of “potential market actors” |
| Advanced Lighting | 1. Percent kW/kWh/Qty of incented products under the Advanced Lighting program as compared to the Basic Lighting program, <u>by product type.</u> | 2a/no | ED accepts IOU proposed as modified: (a) report disaggregated data. |
| | 2. Percent of products incented under the Advanced Lighting Program by distribution channel* <u>and by hard-to-reach (HTR)** zip-codes.</u> *Distribution channels” are as defined in 06-08 Upstream Lighting Study **“HTR” is as defined in the EE Policy Manual | 2a/no | ED accepts IOU proposed as modified: (a) clarify that distribution channel data should address low-income and HTR populations Added * and ** per agreement at 10/14 meeting. |
| Basic CFL | 1. During 2010-2012, implement marketing efforts and/or campaign to encourage prompt installation of CFLs as required in D-09-09-047 (Y/N metric) | 2b/no | ED accepts IOU proposed as is. |
| | 2. Percent of products incented under the Basic Lighting Program by distribution channel* <u>and by hard-to-reach (HTR)** zip-codes.</u> *Distribution channels” are as defined in 06-08 Upstream Lighting Study **“HTR” is as defined in the EE Policy | 2a/no | This metric was jointly developed at PPM meetings, and seems to have been inadvertently deleted by the IOUs. Per 10/14 agreed to change to make this metric consistent with ALP PPM #2 |

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| | 3. Percent kW/kWh/Qty of incented products under the Basic CFL program as compared to the Advanced Lighting program | 2b/no | New metric to correspond with new IOU-proposed objective. This is the inverse of ALP PPM #1. For consistency, modify to include percent. |
| Appliance Recycling | 1. Level of program participants' AKA toward the appliance recycling subprogram. | 2b/yes | ED accepts IOU proposed as is |
| | 2. Number of program appliance units by year, appliance type, <u>model # (as available)</u> , age (estimated), and size. | 2a/yes | ED accepts IOU proposed as modified: (a) include model # b/c unit efficiency can be derived. Per 10/14 meeting, agreed to parenthetical qualifications. |
| Whole House Retrofit | 1. Number of homes treated in the program for 2010-2012. (Report by prescriptive and performance program.) | 2a/no | IOUs accepted ED proposed. |
| | 2. Number of enrolled contracting firms participating in the program | 2a/no | IOUs accepted ED proposed. |
| | 3. Average Ex-ante savings per home as reported (average, kWh, therms, kW) for both performance and prescriptive programs by climate zone | 2a/no | ED accepts IOU proposed as is |
| | 4. Average and range of evaluated energy savings per home (prescriptive and performance programs) | 2b/yes | IOUs accepted ED proposed. |
| | 5. Number and percentage of homes not passing QA/QC review, by IOU | 2a/no | IOUs accepted ED proposed. Per 10/14 meeting, consider eliminating. IOUs interpret this to mean those (probably) few customers who refuse to rectify and retest, if they fail for whatever reason. |

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| LMT | 1. Develop a lighting technology roadmap (i.e., what's new and available by when (MM/YY), using available information from all IOU and external parties) by January 2011 and update bi-annually. (Y/N metric) | 2b/no | ED accepts IOU proposed as is Per 10/14 meeting, agreed to change to "no" baseline |
| | 2. Develop a communication plan, by March 2011, to make the lighting technology roadmap, pipeline plans, and technology resource information from this program available on the statewide MEO portal by July 2011, | 2b/no | ED accepts IOU proposed as is Per 10/14 meeting, agreed to change to "no" baseline |

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| | and update annually. (Y/N metric) | | |
| | 3. Number of recommended projects initiated and completed, with findings and recommendations (i.e., this is a tracking of lighting related projects for ET, Advanced Lighting and 3 rd parties), by project type: (a) work papers, (b) white paper, (c) pilot project (d) strategy document. | 2b/no | ED accepts IOU proposed as is |
| | 4. Number of EE lighting measures added, removed, or updated as a result of LMT activities and influence, and reported in annual LMT June Report | 2a/no | ED accepts IOU proposed as is |

| NEW CONSTRUCTION | | | |
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| California Advanced Homes Program | 1. Number and percentage of committed CAHP participant homes (applied and accepted) with modeled, ex ante savings exceeding 2008 T24 units (SF and MF) by 15%-19%, by 20%-29%, 30%-39%, 40+% | 2a/no | ED accepts IOU proposed as is |
| | 2a. Percentage of (current year SF CAHP program paid units)/ (SF building permits within service territories from the previous year) 2b. Percentage of (current year MF CAHP program paid units)/ (MF building permits within service territories from the previous year) | 2a/no | ED accepts IOU proposed as is |
| | 3. Number and percentage of CAHP participant new homes: (a) <u>verified by IOUs</u> as built exceeding Title 24 (SF and MF) by 15%-19%, 20%-29%, 30%-39%, 40%-70%. | 2b/no | ED rejects IOUs comments, and retains original ED language. "Installations" should be counted based on verification (and not, e.g., applications filed) |
| Residential ENERGY STAR® Manufactured Housing | Number of manufactured housing units sold in IOU service territories (via retailers and/or manufacturers) participating in program | 2a/no | ED accepts IOU proposed as is |
| | Number and percentage of participating projects utilizing: (a) whole house incentive for gas heat; (b) whole house incentive for electric heat | 2a/no | ED accepts IOU proposed modifications to jointly developed metric. |
| Commercial Savings by Design | 1. Average site energy install, ex-ante (kBtu/sq ft-yr and demand (kW/sq ft) | 2b/no | IOUs accepted ED proposed metric |

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| | for participating CNC by building type and climate zone | | |
| | 2. Percentage of committed participating Whole Building Approach projects that are expected to reach a minimum of 40% less energy than 2008 T24 codes requirements | 2b/no | ED accepts IOU proposed as is |

| CODES AND STANDARDS | | | |
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| <i>Building Standards Advocacy</i> | 1. Number of draft Residential and Commercial CASE Studies, as defined in Building Standards Objectives 1 & 2, developed to target efficient technologies, practices, and design in the areas of: lighting; HVAC; envelope; water heating; and/or cross-cutting measures in support of ZNE goals within authorized budget. | 2a/no | ED accepts IOU proposed as is Per 10/14 meeting, agreed to delete and treat as Type 1 metric |
| | 1. Number of Residential and Commercial CASE studies, as defined in Building Standards Objectives 1 & 2 for which adoption by the CEC is anticipated by the IOUs, targeting efficient technologies practices and design in each of the following areas: lighting; HVAC; envelope; water heating; and cross-cutting measures in support of the following: (a) Integrated Design, including data management and automated diagnostic systems, with emphasis on HVAC aspects of Whole Building, (b) ZNE technologies, practices, and design in Residential Sector, (c) Peak efficient technologies including plug loads and HVAC technologies, (d) Advanced Lighting Technologies | 2b/no | ED accepts IOU proposed as is |
| <i>Appliance Standards Advocacy</i> | 1. Number of draft CASE Studies, as defined in Appliance Standards Objective 1, developed as mutually agreed upon by the CEC and IOUs in support of plug loads, refrigeration, advanced lighting, and/or other technologies that are adopted by the CEC, within authorized budget. | 2b/no | ED accepts IOU proposed as is |
| | 2. Number of U.S. DOE rulemakings | 2a/no | ED accepts IOU proposed as is |

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| | supported by IOU's Codes and Standards Program [through advocacy activities such as letters, comments, laboratory testing, and other technical research and analysis] in support of plug loads, HVAC, advanced lighting, and other technologies, subject to DOE discretion. | | Per 10/14 meeting, agreed to delete and treat as Type 1 metric |
| Compliance Enhancement | 1. Number of role-based, Title 24, training sessions delivered. | 2a/no | ED accepts IOU proposed as is |
| | 2. Number of local governments that received best practices report. | 2a/no | ED accepts IOU proposed as is Per 10/14 meeting, agreed to delete and treat as Type 1 metric |
| Reach Codes | 1. Number of jurisdictions in IOU Service territories implementing Reach Codes in residential and/or commercial sectors as a result of the RC sub-program activities. | 2b/no | ED accepts IOU proposed as is |

| RESIDENTIAL and COMMERCIAL HVAC | | | |
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| Upstream HVAC | 1. kW/ton incentivized in the program. (Note: Decrease in metric indicates positive progress), combined with the number of units that are incentivized in the program vs. units over 5.4 tons shipped to California as tracked through AHRI shipment data. (Assuming the availability of AHRI data.) | 2a/no | ED accepts IOU proposed as is |
| | 2. The distributor stocking percentage of units eligible for program. (Assuming the availability of individual distributor data and/or aggregated data from HARDI.) | 2b/no* | ED accepts "new" IOU proposed metric *Need EM&V to determine, but not actually a baseline study |
| Residential Energy Star Quality Installation | 1. Percentage of HVAC contracting companies that are participating in statewide residential QI program as a share of the targeted market (TM = C-20 licensed HVAC contracting companies in CA). | 2a/no | ED accepts IOU proposed as is |
| | 2. Average percentage of "certified" HVAC technicians within each contracting company that participates in the residential QI program. | 2b/no | ED accepts IOU proposed as is |
| Commercial Quality | 1. Percentage of HVAC contracting companies that are participating in | 2b/no | ED accepts IOU proposed as is |

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| Installation | statewide commercial QI program as a share of the targeted market (TM = C20 licensed HVAC contracting companies in CA). | | |
| | 2. Average percentage of “certified” HVAC technicians within each contracting company that participates in the commercial QI program. | 2b/no | ED accepts IOU proposed as is |
| Quality Maintenance Development | 1. Measured progress towards specific milestones provided in the project GANTT chart indicating the development/finalization of this IOU program based on Quality Maintenance standards. | 2a/no | There appears to be agreement on this metric, but needs further discussion with IOUs to settle on final language. |
| Technologies and System Diagnostics | 1. Status of progress towards completion of roadmap (i.e., plan and recommendations) to support the development of a national standard diagnostic protocol (activities, concrete actions taken). | 2a/no | ED accepts IOU proposed as is |
| Workforce Education & Training | Status of progress towards completion (activities, concrete actions taken) of detailed WE&T roadmap (plans, goals, timelines and recommendations). | 2a/no | ED accepts IOU proposed as is |

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| EMERGING TECHNOLOGIES | 1. The number of new "proven" ET measures adopted* into the EE Portfolio. | 2b/no | ED accepts IOU proposed as is |
| <i>Note:</i> IOUs accept apriori if ED decides to eliminate some subprogram PPMs | * “Adoption” means measure is available to end-use customers through IOU programs. Adoption of a measure may be attributed to one or more ET sub-programs | | <i>Note:</i> Used IOU proposed definitions of “adoption” from the objectives section. |

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| | <p>2. Potential energy impacts* (energy savings and demand reduction) of the adopted ET measures into the EE portfolio.</p> <p>* Potential energy impacts to be reported based on ET project findings and estimated market potential (reported through quarterly ET database updates)</p> | 2b/no | <p>ED accepts IOU proposed as is</p> <p><u>Note:</u> Used IOU proposed definitions of “potential energy impacts” from the objectives section.</p> |
| Technology Assessment | <p>1. Number of ETP measures <u>which have undergone TA</u> that are adopted* into the EE portfolio, including but not limited to each of the following:</p> <p>(a) Advance HVAC technologies (b) High efficiency plug loads and appliances (c) Advanced lighting technologies</p> <p>* “Adoption” means measure is available to end-use customers through IOU programs.</p> | 2b/no | <p>ED accepts IOU proposed as modified: (a) clarify that what matters is whether this specific subprogram is successful at bringing ETP measures into the EE portfolio, and (b) deleted “adoption of measures may be attributed to one or more ET subprograms” for the same reason.</p> <p><u>Note:</u> Used IOU proposed definitions of “adoption” from the objectives section.</p> |
| Scaled Field Placement | <p>1. Number of ETP measures <u>that have undergone SFP and</u> are adopted* into the EE portfolio.</p> <p>* “Adoption” means measure is available to end-use customers through IOU programs.</p> | 2b/yes | <p>ED accepts IOU proposed as modified (a) clarify that what matters is whether this specific subprogram is successful at bringing ETP measures into the EE portfolio, and (b) deleted “adoption of measures may be attributed to one or more ET subprograms” for the same reason.</p> <p>Per 10/14 meeting, agreed to simplify without changing the meaning, by removing “new or existing” and “underutilized.”</p> |
| Demonstration Showcases | <p>1. Self-reported increase in knowledge by randomly selected sample of targeted stakeholders who either 1) visited the DS or 2) were informed about the DS in a workshop about benefits of the DS.</p> | 2b/no | <p>IOUs accepted ED proposed metric</p> |
| Market and Behavioral Studies | <p>1. Self-reported increased in knowledge among internal ET stakeholders <u>about the technologies targeted by the M&B studies</u> .</p> | 2b/no | <p>ED accepts IOU proposed as modified: (a) clarify that the intent is to measure stakeholder’s knowledge of the technologies, not the report itself.</p> |
| Technology Development Support | <p>1. Number of new performance specifications and/or Use Case* produced <u>as a result of TDS sub-program</u>.</p> <p>* “Use Cases” describe the need for a technology or application.</p> | 2b/no | <p>ED accepts IOU proposed as modified (a) clarify that what matters is whether this specific subprogram is successful at bringing ETP measures into the EE portfolio, and (b) deleted “adoption of measures may be attributed to one or more ET subprograms” for the same reason.</p> |

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| | <p>2. Number of new performance specifications and/or Use Cases presented to manufactures/private industry for possible action.*</p> <p>* “Possible action” means that the manufacturer/private industry considered TDS results in their product development efforts.</p> | 2b/no | IOUs accepted ED Metric |
| Technology Resource Incubation and Outreach | <p>1. Percent of attendees who voluntarily respond and self-report increased understanding on how to do business with utilities.</p> | 2b/no | IOUs accepted ED proposed metric |
| Technology and Testing Center | <p>1. Number of ETP measures evaluated at the TTCs in support of ET Assessments Sub-Program that are adopted* into the EE portfolio (and/or available in the market).</p> <p>* “Adoption” means measure is available to end-use customers through IOU programs.</p> | 2b/no | <p>ED accepts IOU proposed as modified: (a) clarify that what matters is whether this specific subprogram is successful at bringing ETP measures into the EE portfolio, and (b) deleted “adoption of measures may be attributed to one or more ET subprograms” for the same reason.</p> <p><u>Note:</u> Used IOU proposed definitions of “adoption” from the objectives section.</p> |

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| IDSMS | <p>1. Awareness and knowledge among relevant IOU program staff (to be specified – e.g. account reps, engineers that administer the audit (3rd party); program designers and managers) regarding how IDSMS relates to and impacts their efforts and programs</p> | 2b/no | Jointly developed metric agreed to at PPM meetings |
| | <p>2. Complete and make available integrated audit tools (on line and on-site) to residential and non-residential customers in all IOU programs that provide audits (and include EE, DR, DG recommendations). (Y/N metric)</p> | 2b/no | IOUs accepted ED metric with modifications |
| | <p>3. Number and percentage of integrated audits provided to each customer class <u>and NAICS code.</u></p> | 2b/no | <p>Accept IOU proposed as modified: (a) deleted “large” b/c integrated audits should be available to all customers, (b) clarified customer class or NAICS code for industrial and agricultural.</p> <p><u>Note:</u> See IOUs’ NRA-IDSMS tables (specifically PPM #2) reflecting consensus to move reporting of sector-level integration-related activities to IDSMS. Data would be gathered from the sectors / programs and reported here.</p> |

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| | | | <p><u>Note:</u> Non-integrated audits are being tracked and reported in the C/I/A Combined NRA section.</p> <p><u>Note:</u> ED also added a MTI to account for the fact that the IOUs are still providing other non-integrated audit options</p> <p>Per 10/14 meeting agreed to change to 2b.</p> |
| | <p>4. A status report that identifies how well “integrated” (EE, DR, DG) all IOU demand-side energy program offerings and components are (e.g., CEI, Commercial, Ag, Industrial, Residential, Audits) including lessons learned, best practices, improvement plans, and how the program portfolio is addressing strategic planning goals / objectives and D.09-09-047 directives regarding integration, as well as the IDSM program objectives <u>specified in the PPM Worksheet</u>. The report will review how the IOUs have developed internal and external frameworks that support integration of IDSM programs and technologies. (Y/N metric)</p> | 2b/no | <p>ED accepted IOU modifications to jointly developed metric. Clarified that the objectives are ones specified in the PPM Worksheet associated with this summary PPM table.</p> |
| | <p>5. Number and percent of integrated audit participants (identify NRA participants) in all customer classes (Res, Industrial, Commercial, Ag) that implement recommended DSM measures / participate in other DSM programs (EE, DR, DG – Track which categories implemented / participated in) or other recommended technical process and practice improvements. (If possible, identify whether participants received incentives or not.)**</p> <p><u>**Data sources for reporting will come from (a) program tracking databases and (b) process evaluation to refine estimates.</u></p> | 2b/no | <p>IOUs did not comment on jointly developed metric (at PPM meetings), but they did produce similar metric in their NRA-IDSM tables (see PPM #4).</p> <p>Per 10/14 meeting, agreed to identify data sources (consistent with NRA PPM #2)</p> |
| | <p>6. Program participant awareness of IDSM practices in each of the market sector subprograms.</p> | 2b/yes | <p>ED accepted IOU proposal to move reporting of this metric to IDSM from the market sector programs.</p> |

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| ME&O | 1. Awareness and knowledge of key elements of the Engage360 brand among customer groups specifically targeted by grassroots and social networking phase of the program. | 2a*/no | ED accepts IOU proposed as is * Paid for out of EM&V dollars, unless the implementation contract already includes annual surveys of brand awareness |
| | 2. Awareness and knowledge of energy efficient actions promoted by the program among customer groups specifically targeted by grassroots and social networking phase of the program. | 2b*/yes | ED accepts IOU proposed as is * Paid for out of program dollars |
| | 3. The number and type of energy efficient actions self-reported by customer groups specifically targeted by grassroots and social networking phase of the program. | 2b/yes | ED accepts IOU proposed as is |

| WORKFORCE EDUCATION AND TRAINING (WE&T) | | | |
|--|---|-------|--|
| Centergies | Percent increase in educational collaboration with partners from 2011 baseline. (<u>Tracked and reported by educational level, and by number of partners operating in Title-1 communities.</u>) * Educational “collaboration” is defined as: seminars, outreach events and consultations as needed. These collaborations include exchanges of monetary or in-kind support and services (i.e., sharing meeting facilities, marketing/promotional services, etc.). | 2b/no | ED accepts IOU proposed as modified: (a) report disaggregated data which is meaningful to SP objectives. <u>Note:</u> Used IOU proposed definition for “educational collaboration” from objectives section. This is consistent with what was agreed to at the PPM meetings. <u>Note:</u> Title-1 is low-income |
| | 2. Percent increase in educational collaboration with organizations serving disadvantaged communities * Educational “collaboration” is defined as: seminars, outreach events and consultations as needed. These collaborations include exchanges of monetary or in-kind support and services (i.e., sharing meeting facilities, marketing/promotional services, etc.). | 2b/no | ED accepts IOU proposed as is. <u>Note:</u> Used IOU proposed definition for “educational collaboration” from objectives section. This is consistent with what was agreed to at the PPM meetings. |
| | 3. # of IDSM educational classes with substantial IDSM (EE, DR, and DG) content. | 2b/no | ED accepts IOU proposed metric as modified: (a) clarify that IDSM means all three (EE, DR, and DG). |

PPMS for STATEWIDE PROGRAMS and SUBPROGRAMS

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|--------------------|--|--|---|
| | * "Substantial" is defined as approximately 50% or more of class content must address IDSM subject matter | | <u>Note:</u> Used IOU definition for "substantial" from objectives section which was agreed to at the PPM meetings. |
| Connections | <p>1. Percent increase in educational collaboration with partners. (<u>Tracked and reported by educational level, and by number of partners operating in Title-1 communities.</u>)</p> <p>* Educational "collaboration" is defined as: seminars, outreach events and consultations as needed. These collaborations include exchanges of monetary or in-kind support and services (i.e., sharing meeting facilities, marketing/promotional services, etc.).</p> | 2b/no | <p>ED accepts IOU proposed as modified: (a) report disaggregated data which is meaningful to SP objectives.</p> <p><u>Note:</u> Used IOU proposed definition for "educational collaboration" from objectives section. This is consistent with what was agreed to at the PPM meetings.</p> <p><u>Note:</u> Title-1 is low-income</p> |
| | 2. Percent of K-12 WET Connection program participants that are from Title-1 schools | 2a/no | ED accepts IOU proposed as is |
| | <p>3a. Complete <u>baseline study to determine the current number of partnerships.</u>(Y/N)</p> <p>3b: # of high school continuing education outreach partnerships in WET Connection</p> | <p>2a*/no</p> <p>*</p> <p>Starting 2011.</p> | ED accepts IOU proposed as modified: (a) clarify that part A is to complete a baseline study |
| | 4. <u>IDSM subject matter (EE, DR, and DG) comprises at least 25% of course content.</u> (Y/N) | 2a/no | <p>ED disagrees with IOU modifications. Language agreed to at the PPM meetings is retained.</p> <p>Per 10/14 meeting, agreed to delete b/c too subjective and may give perverse incentive for the IOU to develop / donate curriculum (which is prohibited) that meets this standard.</p> |