

From: Baker, Simon
Sent: 12/13/2010 2:50:24 PM
To: Michelle.Thomas@sce.com (Michelle.Thomas@sce.com)
Cc: Ramaiya, Shilpa R (/o=PG&E/ou=Corporate/cn=Recipients/cn=SRRd); Fogel, Cathleen A. (cathleen.fogel@cpuc.ca.gov); don.arambula@sce.com (don.arambula@sce.com); Clinton, Jeanne (jeanne.clinton@cpuc.ca.gov); Redacted
Redacted Besa, Athena (ABesa@semprautilities.com); laura.kimes@sce.com (laura.kimes@sce.com); Redacted
Julie.Rowey@sce.com (Julie.Rowey@sce.com); Brian.Kopec@sce.com (Brian.Kopec@sce.com); Sylvia.Cortes@sce.com (Sylvia.Cortes@sce.com)
Bcc:
Subject: RE: CPUC request to IOUs re EUC organizational structure

Michelle - Thanks for getting back to us.

All - This is very welcome news. Thanks for conferring amongst yourselves to designate a point person for this very important program.

Best,

Simon Eilif Baker

Supervisor, Energy Efficiency
Planning

Climate Strategies Branch

California Public Utilities Commission -
Energy Division

seb@cpuc.ca.gov

415-703-5649

From: Michelle.Thomas@sce.com

[mailto:Michelle.Thomas@sce.com]

Sent: Monday, December 13, 2010 1:32 PM

To: Baker, Simon

Cc: Ramaiya, Shilpa R;

Don.Arambula@sce.com; Clinton, Jeanne; Fogel, Cathleen A.; [Redacted]

[Redacted] Julie.Rowey@sce.com; Sylvia.Cortes@sce.com; Brian.Kopec@sce.com;

Laura.Kimes@sce.com; Besa, Athena

Subject: Fw: CPUC request to IOUs re EUC organizational structure

Simon-

I wanted to follow up regarding your request for an IOU regulatory lead on the EUC program. The IOU policy teams talked last week and agreed that for now SCE would take the lead role, given that we are the lead utility for both the statewide ME&O and Residential programs. That said, I will be the point of contact going forward, however, all efforts will remain in lock-step with PG&E, SDG&E, and SoCalGas.

Also, SCE is working on the contractor list for Mimi, which is slated to go out by COB today.

Please let me know if you have any follow up questions or concerns.

Thank you!

Michelle Thomas
Southern California Edison - Energy
Efficiency
Regulatory, Policy,
& Compliance
626.633.3478
PAX 43478

From: Baker, Simon [mailto:simon.baker@cpuc.ca.gov]

Sent: Monday, December 06, 2010 12:51 PM

To:

ABesa@semprautilities.com; Don.Arambula@sce.com; Ramaiya, Shilpa R

Cc:

Fogel, Cathleen A.; Clinton, Jeanne; [Redacted] [Redacted]

Amri.Christianto@sce.com; Julie.Rowey@sce.com;

Sylvia.Cortes@sce.com

Subject: CPUC request to IOUs re EUC organizational structure

Don, Athena, Shilpa,

Thank you for your quick response to my query last week regarding the EUC program. It was very helpful. We had a productive meeting with the CEC, and, amongst other things, shared the IOU DR directly with

them.

As a result of that meeting and other factors, CPUC will be moving to scale back our direct involvement in ensuring EUC communication and coordination. As program administrators of the EUC program, we request at this time that IOUs move to step up your direct engagement with the CEC and its contractors on the EUC program. The CPUC will remain involved in EUC program roll-out in some areas, but we will look to you and your program staff to providing the basic leadership to ensure that the needed coordination/communication with the CEC occur and that responses by the IOUs are made to the CEC in a timely fashion. See below for a specific request for information on contractors that the CEC's contractor (Renewable Funding) has made to your program managers; we would expect that the requested information be provided by the requested date and that IOU staff lead subsequent coordination work on this issue as needed directly with RF.

Secondly, we would like to request that a single manager or regulatory lead at one IOU be responsible for ensuring timely and appropriate IOU EUC coordination across the board. That person could be the same one identified as the EUC SW lead contact on the ED-IOU "roster," or someone else as you see fit.

A manager or regulatory level lead seems to be needed due to IOU internal structures where EUC marketing staff do not report to EUC program managers, or, necessarily, to Engage 360 marketing staff, and delays and lack of coordination have occurred as a result. We ask that this new EUC manager/regulatory level lead be responsible for ensuring: a) coordination between IOU EUC and Engage 360 marketing efforts, and coordination of both of these marketing campaigns with EUC program manager implementation issues and timeframes; b) leadership by the IOUs in engaging with CEC/CEC contractors to ensure appropriate coordination of IOU Engage 360/EUC and CEC-funded EUC marketing campaigns and websites, including arranging meetings and any needed mechanics of coordination; and, c) IOU-CEC discussions as needed on technical issues such as data transfer for ARRA reporting, and QA/QC.

CPUC staff WILL stay engaged in stakeholder coordination meetings arranged by the CEC on the EUC, we will simply not expect to convene these as a matter of course as has been the case in the last year nor to play such an active role in ensuring that IOU marketing is internally coordinated. Rather, now that the program is largely launched, we will look to IOU staff for leadership in that function in your role as program administrators.

Could you please indicate to me by the end of this week who the single IOU manager/regulatory level lead on EUC will be to undertake the above coordination and supervisory functions? We will pass on that name to the CEC at that time.

In the meantime, could you please ensure that your staff respond to the CEC/CEC-contractor request below in a timely fashion.

Thanks!

<<120210

EUC_Contractor_Data_Transfer_Request.doc>>

Best,

Simon Baker

Supervisor, Energy Efficiency Planning

CPUC Energy Division

-----Original Message-----

From: Mimi Frusha [<mailto:mimi@renewfund.com>]

Sent: Thu 12/2/2010 8:13 AM

To: Amri Christianto; Cynthia Swaim; [Redacted]
[Redacted]; Bruner, Nathan J
Cc: Jack Clark; Rod Nash; Daniel Etra; cara Guynup;
Fogel, Cathleen A.; Panama Bartholomy; CCollopy Collopy; annie Henderson; Bob Aldrich
Subject: Qualified Contractor

Hello all,
I hope that this finds you well and that you had an enjoyable Thanksgiving.
As I have mentioned to many of you, we intend to launch the site on 1/17. We will have several demos as well as testing opportunities prior to launch. I have also asked Michelle Cook to gather feedback from all the program managers and marketing team members to make sure that we have captured all the IOU concerns prior to launch.
In preparation for testing and launch, I am writing to request from each of you your current list of qualified contractors for both basic and advanced projects. We will use this list to populate the Energy Upgrade California Contractor Directory. I have attached the initial data that we are seeking on each contractor. Once we have received this information from you, we will invite the contractor to add additional information about the areas that they serve so property owners can have a more refined search when looking for contractors. Any information that you give us will not be editable by the contractor.
This list will be updated on a regular basis based on your records. Ideally, we would like to do it weekly. We would of course like to identify the best method and contact person for receiving the list going forward.
Could you please provide your list of qualified contractors by 12/10?
If you have any questions or concerns, please do not hesitate to contact me.
Best,
Mimi

Mimi Frusha
Chief Operating Officer | Renewable Funding
1746 Broadway, 3rd Flr | Oakland, CA 94612
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Note new address as of December:
155 Grand Ave, 3rd Flr | Oakland, CA 94612

Simon Eilif Baker
Supervisor, Energy Efficiency Planning
Climate Strategies Branch
California Public Utilities Commission - Energy
Division
seb@cpuc.ca.gov
415-703-5649
-----Original Message-----
From: Baker, Simon
Sent: Friday, November 26, 2010 3:31 PM
To: 'ABesa@semprautilities.com';

'Don.Arambula@sce.com'; 'SRRd@pge.com'

Cc: Fogel, Cathleen A.; Clinton, Jeanne;

Redacted Amri.Christianto@sce.com';

'Julie.Rowey@sce.com'; 'Sylvia.Cortes@sce.com'

Subject: IOU positions on EUC issues for 12/2

CPUC-CEC meeting

Importance: High

Hi All,

On 12/2, Cathy Fogel and I will be meeting with CEC management folks to discuss EUC implementation issues, including: (a) requirements / use of HERS II / EnergyPro on performance jobs in the short-term (months) and long-term (years); (b) "EUC job database" and data transfer for ARRA reporting; (c) co-marketing and process for webportal content updates, review, and management; (d) FYP rebate finder database administration and interface with EUC website; (e) post-2012 funding and long-term program sustainability implications (for webportal, etc.) once ARRA expires.

We expect a meeting with broader participation from IOUs, local governments, and CEC contractors (Renewable Funding, etc.), and possibly home performance contractors to discuss some or most of these issues will occur in combination with the planned 12/6 meeting on EUC marketing and/or at some point soon. In the meantime, it would be very helpful to us, when meeting with the CEC next week, to have clearly articulated positions of the IOUs on these and any other matters of concern.

Below please find string of emails between Cathy and Jeff Gleeson (copying other IOU whole-house program leads) which begins to develop IOU positions on (a) and (b) above. I have also seen notes from Cathy indicating the IOUs have some asks in regards to (c) above. I have seen emails between Julie Rowey (SCE, ME+O) and CEC folks indicating there are / were some differences in regards to (d) above. I am personally interested in hearing the IOUs views on (e) above. CPUC is particularly interested in understanding whether specific components of the "EUC program" have implications for cost and/or administrative complexity. While CPUC strongly supports the whole-house program, we want to ensure it is being implemented most cost-effectively.

Can you please send us a summary of IOU positions on (a) thru (e) above (and any other related concerns) by noon 12/1? Joint IOU responses are preferable, but individual IOU responses are also acceptable. If you don't have time to respond to all of the above, it is most important to get us something by noon 12/1, even if incomplete.

Hopefully, this won't be too hard to pull together as there has already been dialogue on these subjects. Thanks!

I also copy a few of the IOU whole-house program managers (please forward to Cynthia Swaim, Nathan Bruner and any others), and IOU ME+O folks.

Best,

Simon Baker

Supervisor, EE Planning

CPUC Energy Division

From: Redacted

Sent: Friday, November 12, 2010 3:15 PM

To: Fogel, Cathleen A.

Subject: RE: Clarifying "asks" on HERS II issues

I believe you are right, that our implementers will hire QA folks who are BPI and HERS II certified, but the number of people needed for those jobs will not nearly employ the 100s of trained folks. Assuming a

verifier can check 2 homes per day, I can't imagine each implementer hiring more than 5 to 7 verifiers in the short-term.

My IOU colleagues were out today so we weren't able to check-in and clarify any asks for you. My guess is that these issues will persist for a few weeks, so let me know if you would like me to circle back with everyone to get you a more coherent response.

From: Fogel, Cathleen A. [mailto:cathleen.fogel@cpuc.ca.gov]

Sent: Friday, November 12, 2010 3:12 PM

To: [Redacted]

Subject: RE: Clarifying "asks" on HERs II issues

It was delayed and I am on it right now at until 4:30, so any additional input you have at this point is relevant.

From: [Redacted]

Sent: Friday, November 12, 2010 3:11 PM

To: Fogel, Cathleen A.

Subject: FW: Clarifying "asks" on HERs II issues

Cathy,

We were out all day yesterday - I'm sorry I missed your noon deadline. Is there any follow-up from your call with the CEC that is of note to us?

Thanks, [Redacted]

From: Fogel, Cathleen A. [mailto:cathleen.fogel@cpuc.ca.gov]

Sent: Wednesday, November 10, 2010 2:18 PM

To: [Redacted] Cc: Amri.Christianto@sce.com; Swaim,

Cynthia M.; Bruner, Nathan J

Subject: Clarifying "asks" on HERs II issues

Thanks [Redacted]

To all, I'm sorry, but I think I need to ask you all collectively to really zero in on your "asks" for me here. I need to make sure I am getting the "must have" requests from you as opposed to the "nice to have" requests regarding the issues that Jeff and I corresponded on below.

There is more to this than I had originally realized.

For instance, due to the CEC emphasis on HERs II, if you recall, there are now about 100 certified HERs II raters waiting/hoping to get work applying HERs II as part of the EUC model... So, this is a complex multifaceted issue that goes beyond the data transfer protocols to the HERs II Provider database which is currently eating up at least some of your precious time. It seems that IOUs could still urge your QA providers to hire HERs II certified raters, when they are available and have the other necessary qualifications, right? So that could be one other pathway to jobs for those now-trained raters.

Could I ask you all to collectively refine your "ask" for me by Friday at noon building on the below (feel free to change the format as needed; what I wrote is in Times New Roman, Jeff's refinements in Arial).

I speak with the CEC at 2 pm Friday so being clearer on this by then would be helpful. Please distinguish, as I said to the extent you can, between "must have" and "nice to have" requests.

Thanks much,

Cathy

From: [Redacted]

Sent: Tuesday, November 09, 2010 6:27 PM
To: Fogel, Cathleen A.
Subject: RE: EnergyPRO Files
Just some minor additions included below:
From: Fogel, Cathleen A. [mailto:cathleen.fogel@cpuc.ca.gov]
Sent: Tuesday, November 09, 2010 5:46 PM
To: [Redacted]
Subject: RE: EnergyPRO Files
If you don't mind, let me send one more email.

We seem to have 3 issues:

- 1) ARRA reporting needs: ideal is IOUs report directly to DOE for both CEC and Better Buildings programs. Fall back is negotiate delay in sending job data to HERs II until sometime next year. Third choice is NDAs with SEP recipients on a one by one basis. Option 3, multiple NDAs, would be extremely difficult. But not impossible? That is what was currently being worked on by IOUs, right?
- 2) Program rapid ramp up to create jobs and savings: ideal is to allow BestTest software across the state, not just CEC HERs II compatible approved. If we can ensure (through bestest) that we are generating consistent results, it does seem best to contractors and customers decide which tools are most helpful to them. Again, consistency is key.
- 3) HERs II build up: ideal is to delay sending job data to HERs II provider until some unspecified time next year (spring?) when the program begins to stabilize. Ideal is to dispense with attempts to coordinate IOU and HERs II QA/QC because IOU QA teams can perform water QA if needed.

The water QA is certainly one of the snags, but another is the overall HERs II infrastructure. The IOUs would have to take on verification that is outside of the BPI protocol to verify HERs II items (please clarify what this is exactly; is it the distinction between "installed" and "installed correctly"? Can the IOU QA teams perform the water QA?), and the CEC would want that data pushed to the registries (especially if a rating is provided)

4) Website: ideal is to.... ?

It must be easier for the contractor lists to be streamlined between IOU programs and all of the varying regional programs that place requirements on top of the IOU contractor requirements. Also, the co-branding piece for contractors through EUC seems to be helpful.

I would also add that it is not, in any way, my intention to deter the CEC's efforts to expand the HERs II rating system. I think it is extremely important to long-term goals in CA and I do not want to negatively impact our working relationship with them, as I think HERs ratings will eventually be integral to Whole House programs.

Would you alter the above in any way?

Cathy

-----Original Message-----

From: [Redacted]
Sent: Tue 11/9/2010 5:42 PM
To: Fogel, Cathleen A.
Subject: RE: EnergyPRO Files

Fortunately, the folks at NREL have covered that for us with BESTEST. They make sure that each software tool hits a consistent mark, although they don't specify how your model has to get there. We haven't compared all of the tools on one site, simply because it was unclear as to whether

or not we would be able to continue utilizing the other tools under the full contract.

From: Fogel, Cathleen A. [mailto:cathleen.fogel@cpuc.ca.gov]
Sent: Tuesday, November 09, 2010 5:33 PM
To: [Redacted] Subject:
RE: EnergyPRO Files

Thanks,

Another question, since you all are using Recurve and TREAT software in the pilot, I assume that both of those can provide a "before" and "after" site (kwh, therms, kw) savings estimate? Has there been any work done to check all 3 model's calibration on the same job? Do they give similar/same results? I understand that much/most of the uncertainty lies in the inputs to the models...

Cathy

-----Original Message-----

From: [Redacted]
Sent: Tue 11/9/2010 5:15 PM To: Fogel, Cathleen A.
Subject: FW: EnergyPRO Files
FYI:

From: Scott Fable [mailto:sfable@bki.com] Sent:
Tuesday, November 09, 2010 5:08 PM To: Gleeson, Jeff
Subject: RE: EnergyPRO Files

Jeff,

Yes, as a matter of course, we collect the building files from each simulation, both at the pre- and post-retrofit stage for Advanced/performance jobs.

Regards,
Scott

Scott Fable Project Manager Bevilacqua-Knight, Inc
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