

Workshop Agenda
Post 2012 Energy Efficiency Portfolio Planning Schedule:
Options and Implications
February 16, 2011

This workshop will generate a collaborative and non-binding discussion for parties to explore the options of the post 2012 portfolio planning and bridge funding. Following this workshop, the Commission will issue a ruling requesting written comments on issues raised in the white paper and workshop.

Session 1

Timeline of Post 2012 Portfolio Planning: Options and Implications

10 am	Energy Division Introduction Discussion of straw man timelines (see attached documents) for portfolio planning, and guidelines for a “third option”	30 min
10:30	IOU panel IOUs will discuss responses to questions posed in white paper and propose recommendations for third option	30 min
11am	Intervenor party panel Intervenor parties will discuss responses to questions, respond to IOU’ recommendations and offer alternative proposals	30 min
11:30	Discussion	45 min
12:15-1:15	lunch	1 hr

Session 2

Mechanics of Portfolio Extension and Bridge Funding

1:15	Energy Division introduction Discussion of previous bridge year funding process; panels will follow the same structure as in Session 1	15 min
1:30	IOU panel on mechanics of bridge funding	30 min
2 pm	Intervenor panel on mechanics of bridge funding	30 min
2:30	Discussion	45 min
3:15-3:45	break	30 min

Session 3

Procedural Schedule to Approve Bridge Funding

3:45	Energy Division introduction	5 min
3:50	IOU panel on bridge funding approval process	20 min
4:10	Intervenor party panel on bridge funding approval process	20 min
4:30	Discussion	30 min

Questions to Guide Session Discussion

Session 1

Timeline of Post 2012 Portfolio Planning: Options and Implications

1. Are the pros and cons associated with Option A accurate and complete? If not, why not?
2. Are the pros and cons associated with Option B accurate and complete? If not, why not?
3. Is the preliminary list of guiding principles for an Alternative Path reasonable? If not, what should be modified, added or subtracted?
4. What specific alternative(s) should the Commission consider that simplify the portfolio planning process and facilitate continuous portfolio improvements in an efficient and effective manner?

Session 2

Mechanics of Portfolio Extension and Bridge Funding

A. Public review process for mid-term portfolio adjustments

5. If the IOUs were to provide a bridge funding request as they did in 2009, what key information should they submit to facilitate the parties' review, ensure transparency and substantiate any needed adjustments?
6. Should one or more workshop to review the progress of IOU program portfolios be held? What specific information should the IOUs present?
7. What specific adjustments, if any, are needed to the fund-shifting rules pursuant to D.09-09-047 and/or to the EE Policy Manual?

B. Update Cost Effectiveness and Ex-Ante Values

8. Is it feasible to update ex-ante values that consider 2006-2008 EM&V results in the portfolio adjustments submitted in a bridge funding request, based on the schedule in Appendix A?
9. If ex-ante values for 2006-2008 were to be used to inform changes to the program portfolios, what steps would be necessary to accomplish this task?

C. Goals and Savings Attributions for Bridge Period

10. Please elaborate on the basis for attributing savings to goals during the bridge period.
11. By when would the Commission need to adopt utility-specific goals for the bridge period? (i.e., Is this guidance necessary in a decision that would precede the bridge funding request?)
12. Annual Budget
13. What should annual budgets during the bridge period be based on?
 - a. 2012 expenditures
 - b. 2010-2012 average expenditures
 - c. 2012 expenditures plus growth rate
 - d. Other

14. Should unspent funds from 2010-2012 be applied to bridge period, potentially reducing the level of new collections required? Why or why not?

D. IOU Contracts with Program Deliverers and Local Government Programs

15. Do parties have any specific concerns or proposals with regard to extending bridge funding contracts for each of the following types of programs? Do these concerns or proposals require Commission action? If so / not, why / not?

- a. Local Government Partnerships
- b. Other third-party programs

16. Should there be specific criteria to determine which programs to extend, ie. track record of performance, or cost-effectives or profile of energy savings being achieved?

Staff Straw Proposal on Procedural Schedule

17. Does the straw proposal on the procedural schedule for bridge funding request and approval seem reasonable? What adjustments, if any, should be made?

18. Do the IOUs' bridge funding proposals need to be submitted as an advice letter, application, motion or other procedural vehicle? What are the pros and cons?