

## IOU/ED Meeting with George Tagnipes and Wayne Hauck June 2, 2011

### Attendees:

PG&E Redacted Redacted Redacted Redacted  
Redacted

SCE: Melinda, Laura Kimes, Darren, David

Sempra: Laurie Gomez

ED: George Tagnipes, Wayne Hauck

### Data requests:

- Per George, still on 2006 EEGA site until migrate to new site
- Question: SCE - Any idea why data requests are being submitted with very short turnaround times. IOUs are having to ask for extensions. PGE – now that all the data has been submitted, is it possible for CPUC - EM&V to provide the data?
- How to handle information provided with promise for ED to issue a data request, but it was not done. Can IOUs have ability to upload data request & response? Per George, not now, too expensive to build that in. If it continues to be a problem, he will bring to management to decide if they need to formalize as process/function in EEGA

### Fund Shifting Report

#### PIP Addendum Triggers:

1. Eligibility requirement change definition:
  - change definition, such as size of customers, customer type, such as to expand uptake in program participation
2. Change in prescriptive measures:
  - after approval of work paper and acceptance to data tracking report and implemented
3. Changes affecting incentive levels:
  - more than 50% cumulative from original incentive level
4. Fund shifts
  - Over 15% cumulative per calendar year from one category to another (category to category is at SW program level; subprogram to subprogram does not require advice letter)
  - Question is 15% of operating or authorized budget (ie, carryover)
  - Addendum updates every 90 days, in line with fund shifting report
5. Changes to implementation due to budget
  - Change in program budget, ie, gas sweep

6. Add or eliminate program or subprogram (combine)
  - Preapproved through advice letter (including PIP)
7. Changes to impact table (energy savings) and program target tables
  - Resource programs have program targets
  - Driven by budgetary reasons (ie, after decision of what's frozen, may have to go back and reduce goals)

#### Eliminate Senior Staff Changes

8. Any updates to Logic Model
  - To submit updated logic models
  - To submit changes to logic models
9. Changes to approved PPMs
  - Per conversation with Simon on 6/1, process to be developed
  - Per Jeorge, will clarify if PPMs applies only to SW programs approved through Resolution E-4385, as IOUs request
  - Also need trigger for Pilot Program targets
10. Other Commission directed changes

Per Jeorge – wants an annual confirmation (sign off) one year after PIP updates submitted

- IOUs want Jeorge to confirm no additional addendums to be submitted for year end, not if PIP had no other changes
- IOUs will submit addendum, with no other notification; Wayne & Jeorge will work on automatic notification from EEGA to Jeorge

Body of Addendum form:

- Text of form is ok:
- Jeorge wants to beta test an addendum to decide on a numbering convention so addendums can reference impacts to more than one program. Lena, Darren and Laurie will send Jeorge and Wayne an addendum
- Wayne wants to add bookmarks so they can easily extract data. Wayne will return the form to IOUs so we can submit beta.
- Target for implementation is 3<sup>rd</sup> week of June – Go live officially
- Wayne will also work on EEGA web page presentment for IOUs using Explorer

#### **PPM Lessons Learned**

- Needs to go through evaluation from many parties at ED to provide feedback on PPM report
- Per decision, needs to go into a database, so Jeorge still needs to extract all the data into a database

## MTIs

- Heads up to George re September EEGA upload requirement, per Resolution
- No reporting requirement yet (metric type 3 – TBD)

## Reporting Requirement Manual and Policy Manual Updates:

- Policy Manual update from Laura Kimes to Energy Division by end of next week; will have appendix for reporting requirements
- George is starting to populate the “Guidance Documents” web page in EEGA for reporting requirements: templates, instructions, due dates; Laura to incorporate link to web page in Policy Manual appendix
- **George and Laura will work to finalize list of reporting requirements that will be on the Guidance Doc site at EGAA and Laura will use for Policy Manual**
- George will be adding an IOU program cost template that he will forward to IOUs
- George wants IOUs to let him know of any other reports that should be included here
- No plan to update Reporting Requirement Manual for now – refer to EEGA Guidance Docs.
- **Will explore getting requirement memorialized in a ruling - George**

## Monthly Report Submittal

- Report accuracy is essential because these are public reports
- Any upload issues? Beth said no problems with uploading Monthly Reports, but tried to upload fundshifting report yesterday - file with 3 worksheets but would not allow her to upload – error message; was able to put it up only after she zip filed it; **Wayne will check it out**
- Wayne going through data validation issues
- No “N/A” in workbooks
- ED management asking for SW level, so data from each IOU is being consolidated, so need to ensure data is mapped correctly
- **Monthly reports need to be resubmitted using the new format and the latest updated data by July 1 (PGE- July 2010 thru February 2011; SCE and Sempra – July 2010 thru March 2011);** ok to send to Wayne to upload
- Redacted asking about submitting one-off reports (WE&T Annual Report, LMT Annual Report, Benchmarking Report, IDSM Quarterly Report) – will there be an EEGA upload option; **George will work on page for miscellaneous reports to provide list** – check with Laura Kimes and Alyssa Cherry on Redacted possible LGP Annual Report)
- Redacted asking about using EEGA data request site to also house data requests for DR and DG; George’s priority is EE, but he will look into that

## Static Tables (Standard Tables in EEGA)

- Tracking data submitted quarterly and CPUC uses for evaluation

- Want to define standard list of lookup tables so they can get to a clean data set
- wants Valuation, IOU, DEER, cost effectiveness tools, all to use the same value, IOUs use the same list of building types, etc.
- wants to know how monthly reports are generated.. for PGE and SCE is from tracking data
- Mike: certain programs like Codes & Standards are not included in standard list for tracking data
- Jeorge – question: will quarterly tracking data add up to same as March monthly report? PGE – yes. SCE - No, not necessarily because of any activity during extra month between submitting, but will be close

### **Program Cost**

- Before took E3 calculators and ran cost effectiveness
- Now there is no E3 calculator in current submittals; would like IOUs to use same template to provide cost data
- Table in Guidance Documents has template “CostTable” for resource programs
- For non-resource programs, another template will be developed and posted to EEGA
- Target is by September Q2 submittal. conference calls in June for lookup tables, and then webinars
- **IOUs will submit this new data with tracking data in Sept**

### **Contact List**

- Will provide Energy Division Staff and responsibilities to facilitate direct contact to the appropriate person
- Asking for IOU program staff as well, to do same, and possibly reduce number of data requests
- **Will be up to IOUs to remember to go in and update as necessary**