


**DRAFT agenda for November 7<sup>th</sup>, 2011 MTI workshop**

|      |  |                                  |                                     |
|------|--|----------------------------------|-------------------------------------|
| I.   | Introduction and purpose   | ED (Simon Baker)                 | 9:00 -9:15 am                       |
| II.  | <p>Background on how MTIs were created what they are</p> <ul style="list-style-type: none"> <li>a) MTI and PPM process                             <ul style="list-style-type: none"> <li>- Market Transformation 101</li> <li>- Presentation/Questions on Prah-Keating WP</li> </ul> </li> <li>b) CPUC interest in adopting MTIs</li> <li>c) CPUC framework for market transformation indicators</li> </ul>  <p style="text-align: center;">Framework of Indicators for Assessi</p> <ul style="list-style-type: none"> <li>d) NEEA and NYSEDA present examples of policy context, development and application of metrics (1/2 hour each).</li> </ul> |                                  | 9:15 -11:30am                       |
| III. | <p>Presentation of proposed metrics and discussion in preparation for party comments.</p> <p>a) Three Breakout Groups (Non-Residential, Residential, Cross-Cutting*) will review proposed market indicators and report back on two core questions:</p> <ul style="list-style-type: none"> <li>- Are they willing to adopt the metric (MTI)?</li> <li>- If no, why not? What changes would be needed?</li> </ul> <p>If time allows review LTPPM and SPI as well.</p> <p><i>*Metrics covered in each break out are identified in the table following this agenda and called out in the worksheet.</i></p>  | ED (Carmen Best),<br>Facilitator | 11:30 -12:30 pm                     |
|      | -----BREAK FOR LUNCH-----  |                                  | 12:30-1:30 pm                       |
| IV   | <p>Presentation of proposed metrics and discussion in preparation for party comments (continued)</p> <ul style="list-style-type: none"> <li>a) Review points of agreement and disagreement</li> <li>b) Discuss possible ways to address points of disagreement in the short or longer term processes for refining the metrics</li> </ul>   | Facilitator                      | 1:30 - 3:00 pm<br>(break as needed) |
| V.   | Discussion of long term strategy to track market transformation and incorporate into the next portfolio cycle plans and evaluation   | Facilitator                      | 3:00-4:00                           |

| Break Out Group                      | Categories of Metrics Covered:  |
|--------------------------------------|---|
| <b>1) Industrial/Ag/Com (+ HVAC)</b> | <ul style="list-style-type: none"> <li>• Continuous Energy Improvement;</li> <li>• Non-Res Audit; Deemed Incentives;</li> <li>• Calculated Incentives;</li> <li>• Commercial Direct Install;</li> <li>• Commercial SW;</li> <li>• Industrial SW;</li> <li>• Ag SW;</li> <li>• Ag Pump Test and Repair;</li> <li>• New Construction Commercial Savings by Design;</li> <li>• HVAC (all)</li> </ul>   |
| <b>2) Residential (+Lighting)</b>    | <ul style="list-style-type: none"> <li>• Residential SW;</li> <li>• Residential Business and Consumer Electronics;</li> <li>• Res. Advanced Consumer Lighting;</li> <li>• Res. Appliance Recycling;</li> <li>• Res Basic CFL;</li> <li>• Residential Audits;</li> <li>• Res. Home Energy Efficiency Survey;</li> <li>• Res. Home Energy Efficiency Rebate;</li> <li>• MF Residential Energy Efficiency Rebate;</li> <li>• Res. Whole House;</li> <li>• Lighting Market Transformation;</li> <li>• New Construction Residential California Advanced Homes;</li> <li>• New construction Residential Energy Star Mnfct Housing.</li> </ul> |
| <b>3) Cross Cutting</b>              | <ul style="list-style-type: none"> <li>• Codes and Standards (all);</li> <li>• Emerging Technologies (all);</li> <li>• Integrated Demand Side Management (all);</li> <li>• Marketing Education and Outreach;</li> <li>• Workforce Education and Training</li> </ul>   |