

Workshop: Market Transformation Indicators

Nov 7 2011, 9:00 am to 4:00 pm

CPUC, 505 Van Ness Street- Courtyard Room

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Purpose of the Workshop:

Energy Division was called upon by the Commission to oversee and support the IOUs in vetting, and further refining, an initial list of market transformation indicators presented to parties in Appendix B of **Resolution E- 4385**. This workshop will be used to frame the topic of market transformation in the CPUC regulatory context, share and review the subset of metrics that have been identified, and discuss revisions proposed by other stakeholders.

This workshop also meets the requirements in **Decision 10-10-033** to further refine the market transformation logic of the portfolio, develop, vet and add new indicators where gaps have been identified, and adapt to portfolio guidance or the orientation of the next program cycle programmatic objectives. A process for reviewing and updating metrics for the long term should also be developed and adopted by the Commission through this evaluation plan, which will be submitted concurrently with the next portfolio applications.

Workshop agenda:

I.	Introduction and purpose	ED (Simon Baker)	9:00 -9:15 am
II.	Background on how MTIs were created what they are a)MTI and PPM process - Market Transformation 101 - Presentation/Questions on Prah1-Keating WP b) CPUC interest in adopting MTIs c)CPUC framework for market transformation indicators NEEA and NYSERDA present examples of policy context, development and application of metrics (1/2 hour each).		9:15 -11:30am
III.	Presentation of proposed metrics and discussion in preparation for party comments. a)Three Breakout Groups (Non-Residential, Residential, Cross-Cutting*) will review proposed market indicators and report back on two core questions: - Are they willing to adopt the metric (MTI)? - If no, why not? What changes would be needed? If time allows, review LTPPM and SPI as well. <i>*Metrics covered in each break out are identified in the table following this agenda and called out in the worksheet.</i>	ED (Carmen Best), Facilitator	11:30 -12:30 pm
	-----BREAK FOR LUNCH-----	-----	12:30-1:30 pm

IV.	Presentation of proposed metrics and discussion in preparation for party comments (continued) a) Review points of agreement and disagreement b) Discuss possible ways to address points of disagreement in the short or longer term processes for refining the metrics	Facilitator	1:30 - 3:00 pm (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

Attendance:

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Focus for day:

- Understand the MTI framework, background and applications
- Review proposed MTI indicators
- Collaborative thinking about the indicators for residential , non-residential, cross cutting
- Prepare participants for written comments

Presentations:

KEN KEATING AND RALPH PRAHL

California has slipped from the vanguard of market transformation for energy efficiency. In recent years California has once again begun to incorporate market transformation into its portfolio of policy objectives and tools. The question is: **what are the potential implications of the industry’s broader experience with these activities for California, and particularly for the Market Transformation Indicator (MTI) process that is currently in progress?**

Market transformation is a strategic objective for California (Strategic Plan, Section 1.3). Everyone agrees that market transformation (MT) is good, but not everyone agrees about what it is. Here is a classic definition of market transformation in Eto, Prahl, and Schlegel (1996): “... a reduction in market barriers resulting from a market intervention as

evidenced by a set of market effects, that lasts after the intervention has been withdrawn, reduced, or changed.”

According to the California Evaluation Protocols market effects are: “A change in the structure of a market or the behavior of participants in a market that is reflective of an increase in the adoption of energy-efficient products, services, or practices and is causally related to market interventions...” where a “market” is defined as “the commercial activity (manufacturing, distributing, buying and selling) associated with products and services that affect energy usage.”¹

However, MT is basically seen as a policy goal, and one to which every program in every sector can, and should, contribute. Within each sector and cross-cutting area of the SP, suggestions are made for seeking MT as a result of the efforts of many parties. Still this casts a wide net and can lead to very varied interpretations of what will represent a transformed market.

Strategic MT requires:

- The market be defined clearly enough to be targeted;
- That the market be characterized so that program administrators can understand the opportunities and barriers as well as the relationships in the market;
- That a baseline for the targeted measure or practice be identified, and be trackable over time;
- That the market/product nexus will produce large enough savings if successful to justify the resources;
- That there is a coherent market and program theory usually captured in a logic model, that connects the expected actions with the desired outcomes; and,
- Consideration of whether there is a better approach to capturing the potential energy savings such as an acquisition program.

Lessons Learned

1. Effective planning and evaluation of market transformation initiatives requires regular, ongoing research into the status of the market – from the initial planning/baseline phase, through every stage of implementation, and even after programming has ended.
2. Attribution of observed market changes to programs generally involves establishing a preponderance of evidence as to whether the “story” found in the initial program theory is borne out by experience.
3. Effective evaluation typically requires a combination of leading/interim and lagging/long term market indicators.
4. Evaluation of the effectiveness of market transformation initiatives can typically be done only qualitatively -- but this is generally enough to meet information needs.
5. While market effects evaluations can be and often are performed on programs not specifically designed as market transformation initiatives (or on programs containing both resource acquisition and market transformation elements), such efforts face particular challenges.

Potential Implications of These Lessons for California’s MTI Process

1. There is some tension between the standard industry approach that has evolved for the evaluation of market effects (focused on specific markets and market transformation initiatives, driven by program theory, and planned and implemented

- in a bottom-up fashion) and California's desire to let the California Energy Efficiency Strategic Plan (CEESP) drive the metrics in a top-down fashion.
2. The metrics themselves will not be sufficient to guide the evaluation of specific market transformation initiatives.
 3. It can be confusing to assume that every program will lead to market transformation, especially if the program theory and the exact market were not established before the program was designed.
 4. Whatever market-related metrics are established, this will need to be an iterative process, with periodic updating.

Post Presentation Discussion:

- Phil Kelip with Navigant: Market transformation in one state larger, so it's almost 4 states, so what are criteria for how MTI can be transferable to other states such as Wisconsin?
- Ken Keating: NEEP, coordinated program efforts and joint research is key. CA has worked with the Northwest on major initiatives. It's an institutional issue that needs to be worked on.
- Phil Kelip, Navigant: asking on transferability of all aspects.
- NEEP: translation will be an issue, but program designs are transferrable and lessons learned on how we share data. Will present later and address this.

- James Tilia, HVAC program area, PG&E: What do you mean by programs there? Are we talking about a broader program regarding all actors? Or just IOU programs?
- Ralph Prael: Talking about 2 aspects of market transformation and non MT, should be targeted for all market actors
- Ken Keating: May involve multiple markets

- Ed Vine, CIEE: MTI is optimal when there is an objective. Doesn't mean other programs shouldn't be addressed if they do not have a market transformation strategy incorporated in those plans, than non MT and if it is not as explicit.
- Ken Keating: that is what we are suggesting.
- Ralph Prael: Initiatives that are designed to transform specific markets, not everything can be a market transformation program, but everything can be an acquisition program and look for market effects.
- Ken Keating: we are not arguing that you should not do MT studies, we are just suggesting people to be careful.

- Duane Larson, PG&E: along with clothes washers and windows, CFL and others are in the 5 biggest EE savings. Is this a MTI as a result of energy savings that is MTI?
- Ken Keating: Where are people going to spend money on their effort? Pick different target.
- NEEA: On the topic of television, it is important to measure the actual effect, the risk of being able to measure the influence without any degree of certainty.

- Lisa Paulo, CPUC: These MTI programs should be focused on the larger market structure. The key question with that approach is how, how do we target the larger market sector with limited resources the best way to use sector strategies?
- Ralph Prael: Market assessment would address that.
- Ken Keating: Resource issues are tied to limiting the market.

- Lisa Paulo: strategic plan was an effort to address big pieces and identifying those lessons learned and where does the effort need to be tweaked?
- Navigant: In the Northwest, the windows market was changed according to how businesses did it.
- Chris, DRA: Is it possible for resource acquisition programs to actually be harmful for the market? Do you have any examples?
- Ralph Prahl: Yes, in theory. The acquisition programs cause markets to drop money on technologies, and not allow the market to move. Want the acquisition strategy to address the market.

ROBERT RUSSELL, NEEA

History and Context

- Northwest Power and Conservation Planning Act of 1980 authorized states of ID, OR, MT and WA to form an “interstate compact” (Northwest Power & Conservation Council or “The Council”)
- Directed The Council to develop a resource plan for energy every 5 years.
 - “The Plan” would call for the development of the *least cost* mix of resources
 - Would consider *conservation (energy efficiency) its highest priority resource* equivalent to generation with a 10% cost advantage over power generating resources
- Mandated *public involvement* in Council’s planning process
- Stakeholders recognized inherent value in market-based and aggregated regional approach as most cost-effective way to accomplish energy efficiency programs

NEEA is a voluntary collaboration based on perceived value to all participants who create an upfront, multi-year (5 years) funding based on approved Business Plan. It is a rarity that is funded by all NW utilities, and is Inclusive, interactive, collaborative: Brought IOUs and Publics together for first time. NEEA is supported by the 4 state governors and recommended by NWPC. It is autonomous and accountable.

Market transformation as defined by NEEA: Is “the process of strategically intervening in a market to create lasting change in customer behavior by removing barriers...”

There are three main challenges to implementing NEEA’s mandate of Market Transformation:

- choosing the right indicator, changing indicators over time and managing misleading indicators

Conclusions: define the “difference” you intend to make before you develop MTIs. Your difference should relate to market barriers that you intend to remove. That “difference” will define your baseline and your tracking requirements. Once you identify the market barriers that you intend to remove, the next step is to plan for the data collection necessary to compare actual with intended outcomes.

Post Presentation Discussion:

- Duane Larson, PG& E: Fantastic presentation. The difference in resource acquisition programs, we measure them differently than you do. We measure resource, NEEA measures market effects.
- Rob Russell: International.

- PG&E: what it is you are trying to achieve, slide 23, how did you know that working with EPA would be a post program evaluation?
- Rob Russell: We have a codes program that supported initiative. Always part of program logic.

- Conrad Asper, CBCA: how important are contractors as stakeholders? And how did you implement them in this initiative?
- Rob Russell: Depends on initiative. There is an iterative process, it depends on barriers, and initiatives.

- Ed Vine, CIEE: when do you know when the market has been transformed and you can switch to something else. Where have the incentives gone away, or are you still transforming your market.
- Rob Russell: Good question, there is a time period when NEEA dollars are effective, if intervention went away, what is your intention, what is it that you would do? Then stop support. This should not be a surprise. Example, desktop power supply, became part of the market, so NEEA stopped being crucial.

- Lara Edison, NRDC: How all the players work together, what is the interaction to get the final product.
- Rob Russell: Expectation management to help reach resource acquisition goal. Depends on the initiative and can be contentious.

- Jason, NEEA: We have evaluation groups, decide which programs go forward and which need more work. There is a lot of collaboration that goes on.

JOHN WILLIAMS AND JENNIFER MEISSNER, NYSERDA

New York policy context for NYSERDA: 2009 State Energy Plan which defined five public policy objectives

1. Assure reliable energy and transportation systems
2. Support energy and transportation systems that significantly reduce greenhouse gas emissions
3. Address affordability and improve economic competitiveness
4. Reduce health and environmental risks of energy production and use
5. Improve energy independence and fuel diversity

Ideas and methods for tracking and evaluating market transformation:

- Program Tracking Databases
 - Basic output measurements, early indicators
- Program Partner Data Trends
 - Primary sales data can be invaluable if it can be reliably obtained over time

- Industry Data Trends
 - Purchased or publicly available data can be useful to benchmark progress
- Market Characterization
 - Building stock, firmographics, energy use
 - Prevailing supply chain, technical service delivery channels, business cycles
 - Market penetration estimates
 - Secondary data (e.g., DOE energy consumption surveys, Dodge, industry associations, etc.)
- Market Assessment
 - Market perceptions, awareness, knowledge, practices, decision making processes, etc.
 - Primary data collection, surveys/interviews
 - Longitudinal analysis

Key Lessons learned by NYSERDA

- Program Design
 - Effective tracking of program progress/outputs
 - Weigh tradeoffs of requiring primary sales data or other trade ally data from participants
- Evaluation Planning
 - Program Theory and Logic Model is an important early step
 - Longitudinal analysis requires careful planning (indicator data sources, survey question development, etc.)
- Assessing Progress
 - Early, intermediate and long term indicators
 - Qualitative story and evidence of progress along the “innovation chain” rather than a quantitative answer
 - Identify decision points/levels that indicate when to move on or change strategy

Post Presentation Discussion:

- Carol Yin, Yinsight: Can you give us an idea of how you worked with program partners in energy innovation change, what you did and what was good. How did you work in each of those steps.
- John Williams: Are you referring to what is the nature of the steps?
- Carol Yin: Who worked with whom, who provided sales data, etc?
- John W.: It can be a very involved process, when you are working to create a partnership with upstream individuals, it’s an ongoing partnership, there has to be discussion of the value proposition. We do have programs with various management actors. We have to demonstrate customer satisfaction, customer loyalties, and sales data. But getting to review new data already collection, it’s an ongoing challenge with the program. Once partnership is put in place, it involves negotiation. It’s very much a dialog that needs to be established, and a continuous relationship and partnership with various market actors.
- Chris Ann: Thanks for the presentation, how does NYSERDA track market transformation progress towards its goal?
- Jennifer M.: it’s a whole suite of indicators, many MT programs, we are looking for more changes in awareness, perception, practices by consumers and by mid-market actors. Over

time at NYSERDA when programs split to resource acquisition and market transformation so a broad range of indicators that captured traditional market indicators affects to quantify energy savings as a result.

- John W.: Until recently, the level of program activity in NY state vs. the entire state and growth rates experienced in the last 10 years, there is minimum growth, so was not highest priority in NY. But now aggressive near term growth, program activities and approaches have changed, policy changed, works with NY ISO, with utilities, companies, so when measuring impacts, measuring with high level of statistical rigor that is high and being realized in this system. Can talk off line re protocols.

Breakout Groups report

Three Breakout Groups (Non-Residential, Residential, Cross-Cutting) reviewed proposed market indicators and reported back on two core questions:

- 1) Are they willing to adopt the 4385 metrics now?
- 2) If no, why not? What changes would be needed? If time allows review LTPPM and SPI as well.

Residential – Carmen

Short list of indicators.

1) Are you willing to adopt 4385 now?

- Yes generally, but not overwhelming yes or no.
- Overarching feedback on indicators, a lot of indicators look at demand side indicators and NEEA’s look at supply side indicators. Could not pin point what the source of this was, possibly the portfolio.
- What’s the point of looking at any of these at the end of the cycle? Good question, the takeaways from previous conversations should center around where we want to attack the market and as an add on, it is a challenge.
- What we would like to see for the bridge year, we want to be more specific about which programs that address Market Transformation. And further understand how they work together or don’t work together. For the next portfolio cycle, it would be good to have studies in place that does some of the market characterization work and have evaluation strategies built into that.

Name	Organization
Linda Joyner	PG&E
Brenda Gettig	SDG&E/SoCalGas
Ralph Prah	ED Consultant
Andy Fessel	PG&E
Lara Ettenson	NRDC
Chris Lingson	DRA
Marian Brown	SCE
Michelle Thomas	SCE

Non- Residential – Valerie

- We are assuming that the first questions, some of the MTIs were reworded versions so we answered that in first question. There was general agreement that the MTIs themselves may not be sufficient, e.g., if the number came back 33 it will not tell you the market transformation itself, it is a data point, there has to be additional analysis or interpretation of what it means. One of the metrics itself was not answering the question why, and the why is really important for determining if market transformation was addressed.

Name	Organization
Valerie Kao	CPUC – ED
Shae Dibble	PECI
Edwin Huestis	PG&E
James Tuleya	PG&E
Laura Kimes	SCE
Vanessa Anderson	PG&E
Robert Kasman	PG&E
Christine Torok	Itron
Valerie Richardson	Kema

- Some of the data collection itself was a concern, questioned measurement accurately and can it be closely guarded.
- Overarching comment was on HVAC, there are 4 MTIs, they all survived yes, some can be adopted, but few specific edits, suggest making it tighter and more meaningful in the context of HVAC.
 - general agreement yes with understanding that results are data points,
 - Specific validity changes that would make it more useful.

Cross-Cutting – Devla

Has only 1 MTI.

- Yes, but may be not applicable
- Number of jurisdictions in IOU. Service territories implementing
- CEC reach codes in res major commercial building
- Questions for further discussion in another venue:

Name	Organization
Carol Yin	Yinsight Inc.
Ted Howard	CPUC
Devla Singh	CPUC
Ken Keating	ED Consultant
Derek Jones	PG&E
Linda Lopez	PG&E
Brenda Hopewell	PECI
Renee Lafrenz	Alliance to Save Energy
Jo Tiffany	Alliance to Save Energy
Laura Ettenson	NRDC

- rethink MTIs within the clarified concepts of LTPP and MTI differences beyond MTIs discussed today
- Need guidance on how MTIs should or shouldn't be linked to IOU programs. How evaluated?

Edits to framework discussion

How to fill gaps? Bridge cycle and evaluation plans that call for a strategy for MTIs.

- Carol Yin, Yinsight: ED should start a study group on MT.
- Chris, CPUC: What are the MT for the bridge year and possibility the next cycle. That way we have to flush out the indicators. It will be less challenging if we dissect and categorize. CPUC recommends MT's early in the year, break MTI from resource acquisition.
- Carol Yin, Yinsight: WE need to talk about long term indicators, NEEA and NYSERDA uses different languages, NEEA Market transformation indicators, and NYSERDA uses business results and that might have an effect on CA users.
- Ken Keating: Keep your mind open to other aspects that NEEA does and actually doing, which is the research and development aspect of your portfolio and infrastructure. There are programs and operations that are being covered by current portfolio that are addressing acquisition programs and MT programs. If you try to force everything into just MT or acquisition, there will be issues.
- Jason: If there is something additional that the utilities or the Commission needs that will help in this process, we would be willing to do that.
- Chris Ann: Is it within the realm of possibility that these indicators are going to be linked to energy savings. Not the programs, the indicators.
- Carmen Best: At this time, I don't think anybody has been focusing on that.
- Rob Russell, NEEA: I don't think we would ever do that at Northwest, but I understand why people would want to do that. MT wants to know if change is good and sustainable.
- Chris Ann: Whole chunk of savings in the state presumably occurring due to market and price effects. If we can't save it transforming markets that is contributing to effects that are being observed in demand forecasts, but I am surprised that these linkages are not made. We should try to forge this link.
- Ken Keating: Before you can approve a program, we need to know what the savings will be in a mature market cost. And they are in fact counted against the forecast and against the targets for efficiency in that forecast. Linking each of your progress indicators to a specific amount is different from linking from a successful and mature MT in filling a gap in your need, which is being done.
- Carmen Best: We can initiate in the discussion, the information in tracking that is coming out in MTI will presumably flow back in analysis of goals and potential which is a big piece of future demand forecast. That could be a potential interplay of where that could happen.
- Chris Ann: Another column in that spreadsheet, if we transform this market by a certain year by 1% percent etc. I understand that is not perfect. Just one column.

- Carmen Best: I would love to see an updated spreadsheet in your comments. Procedurally, it will not happen in the resolution. D.10-10-033 will discuss load forecasting. Any other discussion of how we can imbed indicators?
- Ken Keating: Market Sector, not really market.
- Jo Tiffany, Alliance to Save Energy: Are you suggesting what you are trying to lay out is during the bridge period? That makes sense to me because the programs in the EM&V ideally would be the other way around. Programs need to be developed and designed in a way that needs to be evaluated.
- Carmen Best: Evaluations like to mull over the programs and design programs from the opposite way you were talking about. We are obliged to submit a plan, not sure how detailed yet.
- Jo Tiffany: Some way it ties into what Ken was talking about, the program adapts itself to the indicators or the other way around. I think at least it makes most sense that the indicators are there first and the programs are designed to reach indicators.
- Marianne Brown, Edison: Where are the opportunities where the market transformation indicators will make sense.
- Rob Russell: Adaptive management makes sense. New indicators should be in the plan as we know more. WE are a learning organization and we adapt to achieve.
- Chris, DRA: Market transformation programs are not really geared for measurements, but rather more technologies, Rob could you comment on that?
- Rob Russell: if you define a market sufficiently, then can be done successfully.
- Chris, DRA: Let's say market was tenants of multi unit residential buildings in EE. Is that enough of a segment.
- Rob Russell: Do the tenants reference each other in terms of EE.
- Chris, DRA: don't know
- Rob Russell: if the tenants reference each other, than yes. Jeffrey Moore model, reference of each market, as long as it's done carefully. Needs to be a referencable market.
- Lisa Paulo: Ken mentioned this morning the history of market transformation in CA, for NEEA, have you guys done any analysis or is anything out there that helps us put a value on the MT itself?
- Rob Russell: Best work in progress where NEEA has been working with McKinsey to determine different value markets, the energy savings are not attributed to us, is it still useable? Yes, we are struggling with right now.
- Carmen Best: We spoke earlier this morning about working on MT cost effectiveness.

- Carol Yin: Where do we find out about that?
- Simon Baker, CPUC: Internal within CPUC, but there is an October 24th scoping memo, 11-09-04, 2 phase cost effectiveness update that will affect bridge. For phase 2, ruling on process of ED to come up with a proposal that will come out for comment on 4th quarter of this year, and accept comment for market transformation benefits, this will come out 2nd quarter of next year. Navigant is the consultant working on this. Internal briefings will occur this week.
- Chris, DRA: question for NEEA, would you say the ultimate value for market transformation will occur after intervention is completed? Stop intervention and continue going.
- Rob Russell, NEEA: The case of building operator certification, we have stopped funding the 2 providers in the region to track certifications. Net certification for savings. May end up supporting the program according to initiatives. Want to still be involved with retailers, and this relationship is based on long term incentive payment.

Next Steps

1. Summary of workshop + slides and documents
2. Written submittal of comments, try to extend to 11-21-11
3. Edits to MTIs