

From: Paulo, Lisa

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monica.ghattas@sce.com (monica.ghattas@sce.com);
SNewsom@SempraUtilities.com (SNewsom@SempraUtilities.com);
RegRelCPUCCases
(/O=PG&E/OU=Corporate/cn=Recipients/cn=RegRelCPUCCases);
To: david@nemtzwow.com (david@nemtzwow.com); ek@a-klaw.com (ek@a-klaw.com);
Gandesbery, Mary (Law) (/O=PG&E/OU=Corporate/cn=Recipients/cn=MAGq);
charlie.buck@energycenter.org (charlie.buck@energycenter.org);
barbara@barkovichandyap.com (barbara@barkovichandyap.com);
Ekelly@MarinEnergy.com (Ekelly@MarinEnergy.com);
bmenten@marinenergy.com (bmenten@marinenergy.com); filings@a-klaw.com
(filings@a-klaw.com); sephra.ninow@energycenter.org
(sephra.ninow@energycenter.org); case.admin@sce.com (case.admin@sce.com);
mrw@mrwassoc.com (mrw@mrwassoc.com); wmc@a-klaw.com (wmc@a-
klaw.com); JLSalazar@SempraUtilities.com (JLSalazar@SempraUtilities.com);
STomkins@semprautilities.com (STomkins@semprautilities.com);
janet.combs@sce.com (janet.combs@sce.com); JPong@SempraUtilities.com
(JPong@SempraUtilities.com); siobhan.foley@energycenter.org
(siobhan.foley@energycenter.org); SHruby@SempraUtilities.com
(SHruby@SempraUtilities.com); sswaroop@marinenergy.com
(sswaroop@marinenergy.com); JWaen@MarinEnergy.com
(JWaen@MarinEnergy.com); kmkiener@cox.net (kmkiener@cox.net);
gwikler@enernoc.com (gwikler@enernoc.com); ramon@ucdavis.edu
(ramon@ucdavis.edu); Cherry, Brian K
(/O=PG&E/OU=CORPORATE/CN=RECIPIENTS/CN=BKC7); Wu, Josephine
(/O=PG&E/OU=Corporate/cn=Recipients/cn=JWWd); Peck, David B.
(david.peck@cpuc.ca.gov); ssmyers@att.net (ssmyers@att.net); rob@clfp.com
(rob@clfp.com); crogers@energy.state.ca.us (crogers@energy.state.ca.us);
hankryan2003@yahoo.com (hankryan2003@yahoo.com); Lawrie, Sandy
(/O=PG&E/OU=Corporate/cn=Recipients/cn=SLDa); hayley@turn.org
(hayley@turn.org); cem@newsdata.com (cem@newsdata.com); elvine@lbl.gov
(elvine@lbl.gov); mgillette@enernoc.com (mgillette@enernoc.com); Gluzgold,
Yevgeniya (/O=PG&E/OU=Corporate/cn=Recipients/cn=YxG4); tom@ucons.com
(tom@ucons.com); bcragg@goodinmacbride.com (bcragg@goodinmacbride.com);
blaising@braunlegal.com (blaising@braunlegal.com); jsanders@caiso.com
(jsanders@caiso.com); Colvin, Michael (michael.colvin@cpuc.ca.gov);
john@clfp.com (john@clfp.com); service@cforat.org (service@cforat.org);
sachu.constantine@energycenter.org (sachu.constantine@energycenter.org);
policy@efficiencycouncil.org (policy@efficiencycouncil.org); Yip, Andrew
(/O=PG&E/OU=Corporate/cn=Recipients/cn=AXY4); James.J.Hirsch@gmail.com
(James.J.Hirsch@gmail.com); Dadras, Shada
(/O=PG&E/OU=Corporate/cn=Recipients/cn=SxDh); Moore, Amanda
(/O=PG&E/OU=Corporate/cn=Recipients/cn=A4MX); ryany@greenlining.org
(ryany@greenlining.org); emibd@emiconsulting.com (emibd@emiconsulting.com);

Paul@KerkorianUtilityLaw.com (Paul@KerkorianUtilityLaw.com);
david@energysavvy.com (david@energysavvy.com); johnwgould@comcast.net
(johnwgould@comcast.net); bperlstein@kpmg.com (bperlstein@kpmg.com); Fitch,
Julie A. (julie.fitch@cpuc.ca.gov); Flagg, Michaela (Michaela.Flagg@cpuc.ca.gov);
Edmister, Todd (Todd.Edmister@cpuc.ca.gov)

Cc:

Bcc:

Subject: Formation of Integrated Demand Side Project Coordination Group

To all parties in R.13-11-005, R.09-11-014, R.07-01-041, A.11-03-001 et al, A.11-05-017, R.
12-11-005, A.11-06-016, and other interested parties:

D.12-11-015 directed Energy Division to jointly create a research and evaluation plan with the four investor owned utilities (IOUs) as a high level blueprint to guide evaluation and study of the \$2 billion 2013-2014 portfolio of energy efficiency programs. The plan is intended to be a living guidance document which is refined and updated bi-annually as needed. The Energy Division and IOUs will share changes with stakeholders, at scheduled quarterly energy efficiency stakeholder meetings, and use public web pages, including the Public Documents Area to gather input on the status of the plan:

[Public Documents Area - Evaluation Roadmap](#)

As demonstrated in the link above, the emphasis in this plan is on research planning by sector/issue area, with more than a dozen chapters that frame recently-completed research and incremental needs for study in each area in the future. We look forward to continued stakeholder engagement as we scope, contract, and implement detailed research plans for studies identified in these sector chapters.

In support of the directives summarized above, Energy Division staff (Staff) is forming a Project Coordination Group (PCG) to help coordinate and assist the Commission in the development of research pertinent to identifying workable strategies and policies for integrating demand- side programs and technologies (energy efficiency, demand response, and distributed generation). Integrated demand side management (IDSM) is one of the study areas included in the evaluation plan described above, also known as the research roadmap. The PCG will fulfill a similar role as the PCGs which have been formed as part of the CPUC's Evaluation, Measurement and Verification (EM&V) of Energy Efficiency programs, which were created for specific topic areas or research objectives as a forum for sharing information

about evaluation priorities, objectives, strategies and outcomes.

Prior to today, Staff has worked with the IOUs and Energy Division consultants to develop and revise the evaluation roadmap for IDSM. We believe we are at a point now where additional stakeholder input is needed in this process. For the first time, we are reaching out to the service lists for the energy efficiency, demand response, and distributed generation proceedings to seek out PCG participants from stakeholders with these backgrounds. These stakeholders have not participated in our IDSM stakeholder discussions in the past and their input is being sought to help inform our IDSM related evaluation efforts. PCGs are meant to be an interface between Staff, consultants, the IOUs, and other stakeholders. The next deliverable we will be seeking PCG input on is a proposal to revise the IDSM evaluation roadmap now that Energy Division consultants are under contract and ready to initiate this work. The PCG may perform any of the following activities related to providing input to the demand-side integration evaluation roadmap activities:

- Brainstorming research gaps and priorities;
- Developing research plans and timelines;
- Study scoping;
- Presenting and discussing research plans and methods;
- Identifying and addressing data needs or issues;
- Discussing and presenting interim and final results, reports, or other work products;
- Advising Staff on the technical accuracy, study methods, and quality of reporting of those work products;
- Discussing how study results could be used for integrated demand-side program design, modification, implementation or approval; and
- Developing plans for follow-up research

The primary responsibility of this PCG is to assist Energy Division Staff (Staff) in implementing the IDSM research roadmap which identifies and summarizes the studies related to demand side integration identified as needed to support the development and design of integrated programs and the policies/actions needed to support them. PCG members will provide input and expertise needed to guide the overall research process over the next year or more. This PCG will likely also oversee some or all of the individual research studies which are carried out as part of the research roadmap. The PCG is also expected to assist Staff in determining when and if particular studies require specialized knowledge such that it would be advisable to form a separate PCG for that particular study.

We are seeking individuals who would like to join this PCG. The PCG is expected to begin its

work in January 2014, and will continue for at least one year. We are seeking volunteers who (1) have some expertise and experience in the subject area of the study, (2) can make a commitment to continued involvement over the a minimum of one year, (3) can attend one or two meetings per month (of one to two hours duration, by phone), and (4) respond within one to two days to email from the group seeking input or information about the relevant studies. Any emails or meeting notices associated with the PCGs' work will be sent only to PCG members. Note that any individual that participates in a working group **will not be permitted to bid on any RFPs** associated with or resulting from the related research efforts. In addition, if an employee of an organization participates in a working group, that organization will not be permitted to bid on any RFPs associated with or resulting from this research effort. Potential volunteers should also note that it is likely, that they will be asked to sign a confidentiality agreement, if any of this work requires access to the details of a study which uses confidential data.

If you would like to participate in this PCG, please submit a brief one page statement of qualifications explaining how your work and experience can contribute to the group. You may also submit a resume and/or references. Each participant must be able to demonstrate his or her basic familiarity with and expertise in: the functioning and types of Energy Efficiency, Distributed Generation, and Demand Response (including Permanent Load Shifting) programs run by California IOUs; current issues, research, and policies/issues related to these programs/technologies such as specific knowledge about demand side energy technologies (energy efficiency, demand response, distributed generation, including PV), smart grid, storage, home area networks, whole building and integrated building energy management systems. To manage the size and productivity of the group, as well as to achieve balance and optimize the benefits of the perspectives and expertise, this PCG shall be made up of representatives from each of the following five categories, although the make-up of the PCG may change based on the response to this invitation:

- Two members from non-profit consumer groups;
- Two members from non-profit energy, environmental, or academic organizations;
- Six members from for-profit service or equipment vendors (two from each industry; energy efficiency, demand response, and distributed generation); and
- Two members from for-profit consulting firms.

In addition, there can be one representative from each electric/gas IOU (each IOU can also nominate an alternate representative). If there are more than two volunteers from any of the above categories, Staff will ask organizations with common interests or perspectives to join together in nominating one person to represent them. Guidelines for communication and clarification regarding roles and responsibilities will be discussed and agreed to at the first meeting of the Project Coordination Group, tentatively scheduled for mid-January. Please

submit your statement of qualifications by **December 31, 2013** to Lisa.Paulo@cpuc.ca.gov.

Due to the multiple service lists utilized for this notification, we apologize for duplicate transmissions that may have occurred.

Lisa Paulo

Energy Division

California Public Utilities Commission

E-Mail: LP1@cpuc.ca.gov

Phone: 415-355-5495