**Task 6 - Recommendations for Streamlining the Custom Review Process**

Improving custom review process:

1. Huge projects identified by a PI, BES, etc: PA sets  up a “team” that follows project from early inception to implementation. Team includes EAR or ex-post evaluation CPUC contractor, IOU EE EM&V, BES, PI, PM, field engineers/CIT as necessary. Intent—to help identify what aspects of the project were incremental EE, agree on what baseline to use, project type, confirm influence along the way, and basically, have a good savings estimate for that project upon implementation. Only ex-post evaluation (if any) would simply confirm that equipment is still operational a year later. **[related to Task 6, Issues 7, 8, 10]**
2. All other semi-large projects: Ensure Project Development Process (PDP) is followed by PI—CIT confirms this—and provides feedback to PI as necessary. EAR or ex-post impact evaluators brought in to weigh in as necessary on either M&V or influence issues (e.g., akin to early opinion today—but allowing ex-post impact evaluators to provide opinion—instead of just EAR team). Early opinion has limited time period to respond or ask for more details. Can suggest project be canceled (but need to provide evidence why). **[related to Task 6, Issues 7, 8, 10]**
3. EAR process—put timelines to it. PI sends project details to PA who submits to list. EAR has 2 weeks to select it for review and then 2 weeks to offer preliminary findings. PI/PA have 2 weeks to respond to EAR comments. EAR has 2 weeks to review replies and provide disposition. If PI/PA disagree with EAR findings, they can take to an independent, expert group of 1-3 people for dispute resolution final decision. If parties need more time than the 2 weeks, they need to ask the other party to agree to an extension and explain why. If other party agrees, then extension is given. **[related to Task 6, Issue 8]**
4. Key for the EAR process is that clear timelines need to be defined for each stakeholder. A cool-off period may be enforced; an escalation and rejection process needs to be in place if a party doesn’t meet criteria set forth. **[related to Task 6, Issues 8]**

Also important that there be more congruence between EAR and ex-post evaluation teams; especially on “influence”. Need to expand how “influence” occurs—to fully embrace information, endorsement, as well as the traditional focus on $ incentives. Also—need to allow vendors to “sell” the project on NEBs and not just focus on EE. **[related to Task 6, Issue 6]**