

Rolling Portfolio & Business Plan Overview

June 15, 2016

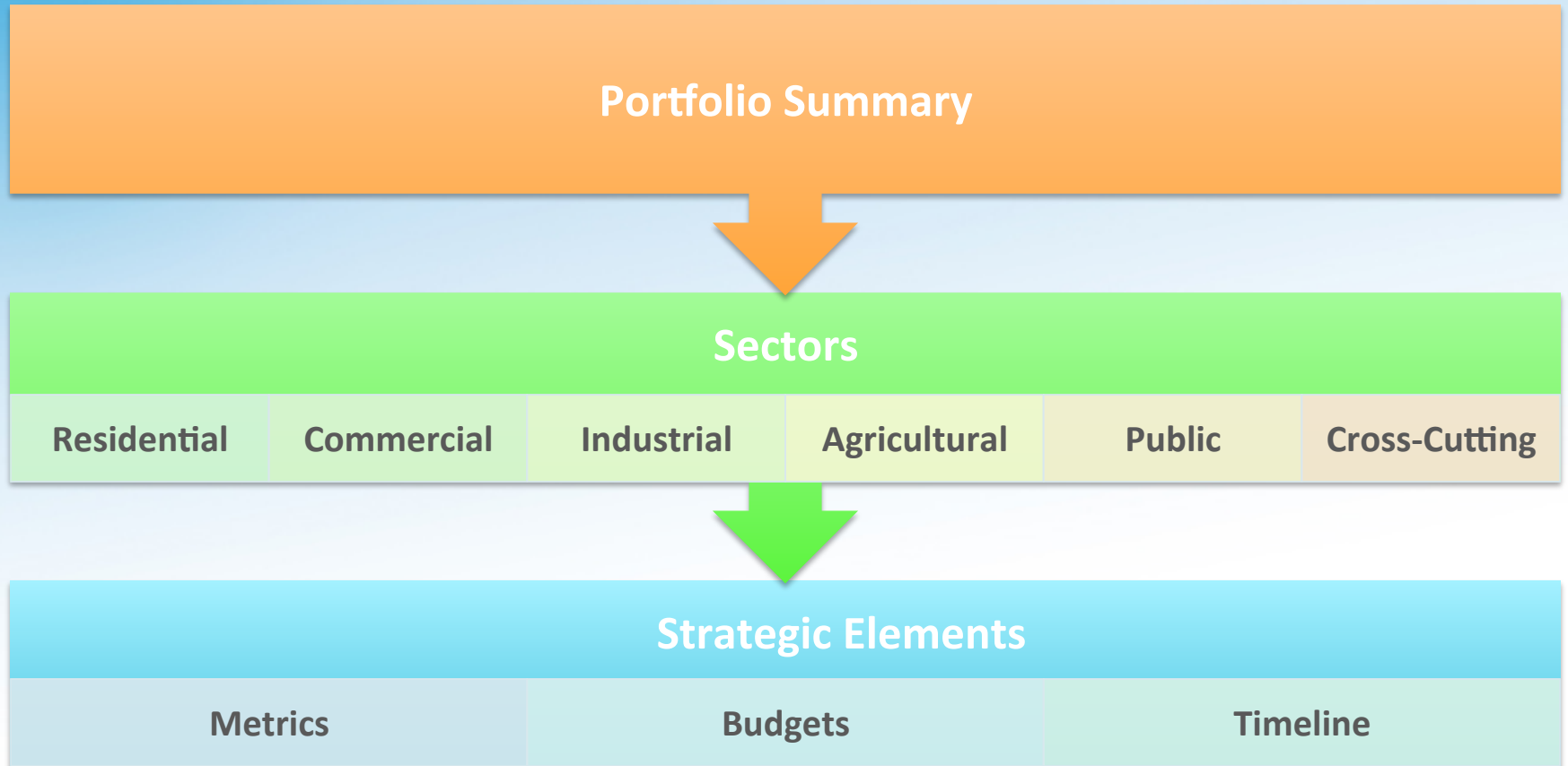


R.13-11-005

Decision Re Energy Efficiency Goals for 2016 and Beyond and Energy Efficiency Rolling Portfolio Mechanics

- “The joint proposal contemplates a ‘business plan’ **filed** with the full Commission **every five years**” – p.42
- “Business Plan – PA and stakeholder developed, PAs file periodically via application for Commission review; explains at a high level of abstraction **how PAs will achieve the goals of the Commission’s strategic plan**; leads to a Commission guidance decision adopting the business plan and setting budget expectations to be more fully developed in annual budget filings” – p.43
- “After the initial filing, PAs must file **revised business plans** only when a **‘trigger’ event** happens; PAs may also file revised business plans whenever they choose to do so” - p.46

Business Plan Structure



Business Plan Content

Business plans shall contain the following:
(R.13-11-005)

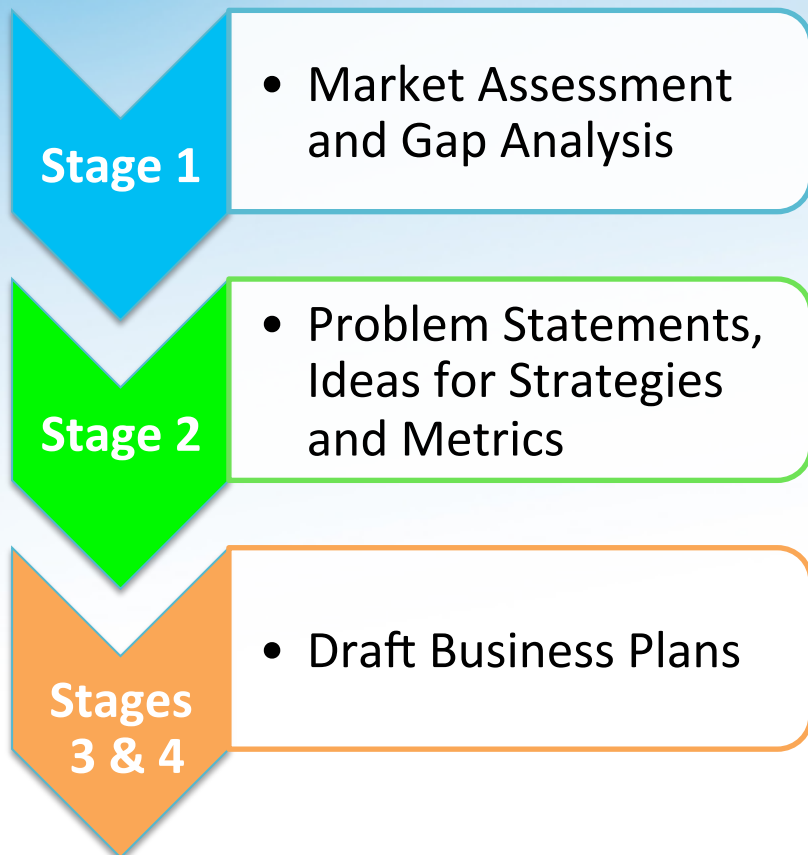
- **Portfolio summary** and description of application intervention strategies
- A chapter for each of **six sectors** (residential, commercial, industrial, agriculture, public, cross-cutting)
- Portfolio and sector level **metrics** for regulatory oversight (GWh, MW, Therms, cost-effectiveness, and other metrics where applicable), including performance metrics for non-resource programs
- Portfolio and sector-level **budgets** that meet portfolio savings and cost effectiveness requirements
- Separate **milestones with associated timelines** to track PA programs in a sector, that are not formally reported

Sector-Specific Content

- PA's overarching **goals, strategies, and approaches**
- Sector-specific **intervention strategies**
- How **each approach advances** strategic plan goals, strategies, and objectives
- Which and how **strategies are coordinated statewide and regionally** among PAs and/or with other demand-side options
- How **cross-cutting "sectors"** are addressed
- **Pilots** contemplated or underway for the sector

Business Plans and Commission Guidance

Business plans will be filed with the CPUC no earlier than November 2016 to describe the strategy for supporting the state's energy efficiency goals and seek funding approval



Stakeholder Input



Business Plan Timeline



How to Get Involved

- Become a Coordinating Committee member
- Join Constant Contact email list
- Attend meetings / public comment
- Join a subcommittee (started February 2016)
- Provide comments to publicinput@CAEECC.org

**Email Lara Ettenson (NRDC)
if you are interested in getting involved
lettenson@nrdc.org**

Thank You!

Questions?