

What you need to know: Key updates on hot regulatory topics

We as implementers can ask to open up the process. However what we are seeing is that there is not as much participation in the process. The numbers show that people might be informed but not on how much they need to be involved.

We need to become better implementers.

How does rolling portfolio impact you and your day to day operations?

- Michelle Costello: Manager San Diego Gas and Electric Co.
 - IOU, great approach to working with local governments
 - Surprised to see so many in here.
 - Not a regulatory person, pull some high level in things together to understand what rolling portfolio is.
 - CAKE website
 - Regulatory Guidance_ Joint proposal represents biz plan filed every 4 years.
 - PA and stakeholder developed.
 - Not just investor owned utilities.
 - Putting it forward in transparent and staged approach to build a biz plan.
 - Hopes that by the time we file biz plans there should be no surprises.
 - Providing forum for the discussions to happen that we haven't had before.
 - High level strategic thinking about how we are going to put forth the plan.
 - Less about tactics, more about strategies.
 - Ultimately to reach EE in the state.
 - Allows for revisions:
 - Significant changes in marketplace, policies, etc.
 - File
 - What are you going to see?
 - Portfolio Summary
 - Sectors (Residential, Industrial, Ag, Cross Cutting, etc.)
 - For the first time, "Public"
 - Strategic Elements.
 - Metrics, budgets, timeline
 - Yes we will be filing these for 10 years, but we also have to file annual plans each year. In Sept. you will see us filing, in Nov. we will file long-term.
 - 1 is detailed,
 - 1 is an overview.
 - We've been working with coordinating committee
 - Lots of input from stakeholders
 - Stage 1- looked at everything happening in our 6 sectors
 - Gap Analysis and Market Assessment
 - Stage 2- Understanding your market & the Gaps;
 - Problem statements, ideas for strategies for how you will overcome those barriers

- Stage 3&4- Draft business plans.
 - In Aug- dialogue about biz plans
 - All of stakeholder input- eye-opening for us & then
 - Timeline (see slides)
 - How to get involved.
 - Join a committee
 - Sign up for email
 - Attend meetings/public comment
 - publicinput@CAEECC.org
 - CAEECC (“Cake”)
- Hope this was informative and gives you information about the filing process.
- Courtney Kalashian
 - Being involved in the CAEECC level is hard, meetings are in urban areas that are hard for the rest of us to get to.
 - Helping LGs, program admins
 - Please follow steps and get involved
- Hanna Grene
 - Snr. Government Affairs Director, center for sustainable energy
 - Diverse crowd- LGs, people who have said what is this and why should I care. Good representation
 - CSE- support sustainable energy
 - Benchmarking
 - Process of measuring building energy use, to compare to a standard.
 - Shine a light on opportunities for upgrades
 - Best practice
 - Area in which LG have been tip of the spear.
 - Model for market transformation for EE
 - In CA-
 - AB 802.
 - Data Access
 - Meant to overcome that hurdle w/ 1103 that building owners were struggling to get information about how their properties were functioning.
 - Understanding energy use over time.
 - Part of an active docket.
 - Benchmarking
 - Meant to cover largest buildings rather than a swath of buildings.
 - You can track towards that.
 - Meaningful exercise to track future performance
 - Rulemaking
 - Ways to get involved-
 - CA Benchmarking Collaborative.

- Provide comments yourself on the docket.
 - Lead by example: Opportunity for LGs to pass policies that align w/ the states or go beyond.
 - There are opportunities to be a leader.
 - Benchmark your public sector buildings
 - Make data public.
 - Provide Training and Technical Assistance.
 - San Diego region- flyers on resource table.
 - Port of San Diego- utility usage ordinance. Provided hands on help center for tenants. Offer hands on training and walk through the process.
- Courtney- represent 67 LGs
 - Excited that they are taking an interested in how they use energy
 - Inspires quantifiable benefits of Energy Efficiency
 - We've seen benchmarking change hesitance to action
- Alex Porteshawver- Michael Baker
 - Commitment to rural government and California
 - Interest for those invested in
 - 2 hats-
 - contract staff for city of Benicia
 - Michael Baker- develop CAPs and EAPs
 - I've been working to strengthen relationship between city and private sector
 - Specifically works w/ economic development project
 - No cost energy and waste assessment
 - PACE financing
 - Interested in what's the tipping point?
 - One example of how I envision- Mayor of Riverside
 - Commercial Sub Committer
 - One in person meeting and webinar. The participants varied
 - Some of the high level comments we received are things that you have probably heard before.
 - Tie back to other incentives- what's the tipping point?
 - Small biz- \$5000 mark
 - Tried really hard to get biz involved in this.
 - Hosted a webinar but no one outside of program admin attended
 - Short survey- commercial?
 - Are LG staff in room interested in taking a short survey?
 - Jean Clinton- interesting research papers and presentations
 - Dense
 - Focus on strategies that highlight value added.
 - How do loan officers perceive benchmarking
 - Parcel level energy data

- Identify where the high users are
 - Performance based initiatives
 - Marin Clean Energy
 - Expanding energy assessments to address other issues- air quality, etc.
 - Integrated design site management
 - Code readiness
 - Contingency budget approach.
 - Also testing out w/ Marin clean energy.
 - Leveraging relationship e/ for profit companies.
 - Next meeting is Jul 13th. Please review the draft.
 - Variety of sectors
- Courtney-
 - Michelle- excellent job on CAEECC, check that off on my things to do.
 - Public sector has been interesting- new standalone sector.
 - Everything that public sector wants to do moving forward, hand tied by TRC- need to find a way to take this up.
 - Hope that people working to solve these issues have ability to do it.
 -
- Q&A:
 - Jessica, City of Culton
 - None of the businesses knew that these regulations were happening, besides our session. Who is responsible>
 - Hanna- Thank you for saying that, because the regulations are still in development, there's a lot still to be determined as far as who exactly they will effect in terms of industrial facilities. On the one hand, this is part of the messiness. When I s the right time to do public outreach. Early outreach is critical. I think there's a tension between developing rule set. Get them engaged to get their feedback.
 - I would like to see more outreach and engagement. I would encourage all LGs here to be a voice.
 - John, are there standards in place for how the different IOUs are expected to respond?
 - Hanna- those standards & the request for access. The more standards the better. Sensitive to smaller PUDs different backend and billing systems. First step is for PUDs to be ready for that Jan1 deadline. Few steps where consistency is desired.

- Where do we need consistency for customers & how to make it as easy as possible to gather data from Utilities. Please do speak up and let your utility know what you are looking for.
- Hazel, I wanted to thank for description of CAEECC process.
 - How can we better support LG participation in the CAEECC?
 - State employee, not LG. Still clarifying but important to address.
 - Huge technical task w/ privacy concerns.
 - Here's a snapshot of the county or the state and what we're doing.
 - The CEC
 - SB350 & other water, E, & transportation goals.
- Hanna- encouraging when we have regulators in the room like CEC
 - 3 panelists are great for advice and clarifications.
- Next Panelists- Local government implementers-
- Not called out b/c they are the only ones doing good work.
- Peer to peer- utility partners have listened to us. See Lena and Courtney for SoCal Edison advice.
- How to better deliver EE in Rural Communities.
- Finding a way to engage rather than being stuck in operations
- Qs from Courtney:
 - Why are you a member of the CAEECC coordinating committee, Lena?
 - Find out what is going on the streets, gather information and see what it is going to mean in our communities.
 - We're going to have to form a program to achieve our EE goals.
 - CAEECC is starting to become more coherent now, this will be even more clear when the business plans are released.
 - Lou provided guidance and mentorship for other IOUs. How do you prioritize all the components and still be actively engaged?
 - Passionate about what you are doing. Look at Critical paths in relationship to timelines & prioritizing based on those timelines. Building a good team- prioritizing really means look at the capacity of my team. How are going to move forward and actually take action? Perfection is not the gate to getting something done. The 80/20 rule- sacrifice quality to actually get something done. How many people actually wear 2-3 hats in their roles? What I am saying is look at resources w/in your own shop as well as reach out to stakeholders w/ shared interests- Courtney and Jon
 - Team in SLO came together w/ our residential design folk to present shared comments. Across other Local Governments, etc. benefit larger swaths of California
 - Courtney- How do you maintain the passion?
 - Sharing experience, Jon is relatively new to CA, what is EDAC?
 - Provides data to people requesting data. Energy Data Access Committee.

- Create streamlining process as well as protect privacy.
- Originally only one LG representative (SF) now there's 2 (Chula Vista). The county of SLO was doing an update to inventory and our CAP. We were meeting our obligations to our BOS but in the process of doing so we used a new process. There were rules but they were pretty significantly different. We work with multiple utilities, IOUs are interpreting things differently. Affecting data quality, quantity. Etc. CAP protocol. Communities may not have complete and accurate data. From community and business standpoint, we have to get involved.
- Trojan horse to LGs to get information from them and to them.
 - There was actually input put into what we said we would do as implementers. It is really important that we follow through. I'm at the frontline where energy policy and implementation meet. Back up so you can have broader perspective.
- The value this has brought to your partnership- how is this benefitting your local governments?
 - Lou- We need to see where the conversation is going. We're the boots on the ground folk. We need the global prospective on what it is to be a PA or regulator. If we don't understand where we all meet together we are never going to be able to push the envelope and I see that as critical to the process. I like to be proactive rather than reactionary.
 - We certainly want to collaborate and group partnerships with other LG, to share, to trade documents I certainly welcome it.
 - Jon echoed Lou, need for sharing wheels already built. Our responsibility- we work in the public sector and most of our info is public. Not everyone has capacity to seek it out but we need to make it easy to work together.
- Courtney- we are all over taxed. I do my job better because of the partnerships I made with the people on the stage today. We are better implementers and stewards of rate payer dollars when we work together. Get involved and find a way.