



California Technical Forum (Cal TF)
Discussion: Retail Plug Load Portfolio Evaluation Plan
March 20th, 2015
Conference Call

I. Participants

Jenny Roecks, Cal TF staff
Alejandra Mejia, Cal TF staff

Steven Long, TF Member
Srinivas Katipamula, TF Member
Ron Ishii, TF Member
Larry Kotewa, TF Member
Armen Saiyan, TF Member
Jon McHugh, TF Member
George Hernandez, TF Member

Brian Smith, PG&E
Todd Malinick, EMI
Rick Ridge, Ridge & Associates
Peter Franzese, CPUC
Miriam Fischlein, SCE
Ed Reynoso, SDG&E

II. Overview of RPP 2015 Evaluation Plan

Todd Malinick, EMI Consulting—

Power Point Presentation

Jon McHugh— You'd like to leverage the economies of scales and have a larger impact on manufacturers, etc. Some challenges for other products are that ENERGY STAR programs are captives of the manufacturers that they are trying to impact. How does CA maintain its aggressive targets as part of this larger group?

Todd Malinick—I believe the logic model on slide 7 will answer this question.

Jon McHugh—Depending on who your partners are, they may not be willing to be as aggressive as you want to be. I 'm wondering if you have contemplated a tiered structure for partners.



Todd Malinick—Yes, the program design is meant to be extremely flexible. PG&E will choose to focus on certain products; other utilities or partners may work with different product mixes.

Jon McHugh—Ok, that answers my question. One idea that this brings to mind is that this may put the utilities in a good place to push ENERGY STAR standards further.

Jon McHugh—Is this purely an upstream incentive, or does it also require some kind of marketing effort such as product placement in stores?

Todd Malinick—The ultimate intent of this program is to get retailers to alter their product assortment. In the short term, due to retailer buying cycles, we don't expect large shifts in assortments. We only foresee widespread changes in product assortments 3 to 6 years out. So in the short term in order for retailer to sell more program-qualified models, we are absolutely expecting marketing strategies to affect the sales. You'll see that retailers are required to submit marketing plans.

Jon McHugh—Will there be different incentives for particular products?

Todd Malinick—The structure right now is based on a pre-defined incentive amount for each product category.

Armen Saiyan—Will the CPUC EM&V follow this evaluation framework set up by the utilities?

Todd Malinick—My understanding is that the CPUC will be responsible for the final ex post evaluations. This framework is more for informing PG&E's own understanding of their own program design. Since we are so familiar with the program design and market, we hope this evaluation plan will be useful for the CPUC when they decide how to pursue an ex post evaluation.

Peter Franzese—Yes, and since this is in the ETP world now, we will need to see internally how that will be handled.

Brian Smith—The savings claim for PG&E is only possible with the ex post evaluation. This research plan will inform the savings claim that PG&E is going to make, however the results will be subject to verification by the CPUC and their chosen evaluators.



Armen Saiyan—So this is a preliminary utility self-evaluation to support the savings claim?

Brian Smith—Yes, exactly. Impact evaluations are under the control of the CPUC, however we expect as we get further along that we (PG&E) would be working closely with the CPUC's chosen evaluation firm so that they may do their own independent assesement.