



June 21, 2023

2023 SDG&E Energy Efficiency Portfolio

Segment Statewide Lead **Upstream HVAC** Resource Plug Load & Acquisition **Appliance** Market Downstream **Support HVAC QIQM Equity** Codes &

Statewide Funding

Midstream
Water Heating
Food Service
Lighting*

Downstream
Higher Ed
State of CA
Wastewater

Res & Non-Res New Construction
Gas & Electric Emerging Technologies
WE&T Career Connections

WE&T Career & Workforce Readiness

Codes & Standards Advocacy

Regional

Business Energy Solutions, Large Commercial, Industrial, Agricultural, Single Family, Multi-Family, Residential Behavioral, Federal, Local Government, K-12

Universal Audit, Local WE&T, On-Bill Financing, Emerging Technologies, IDEEA

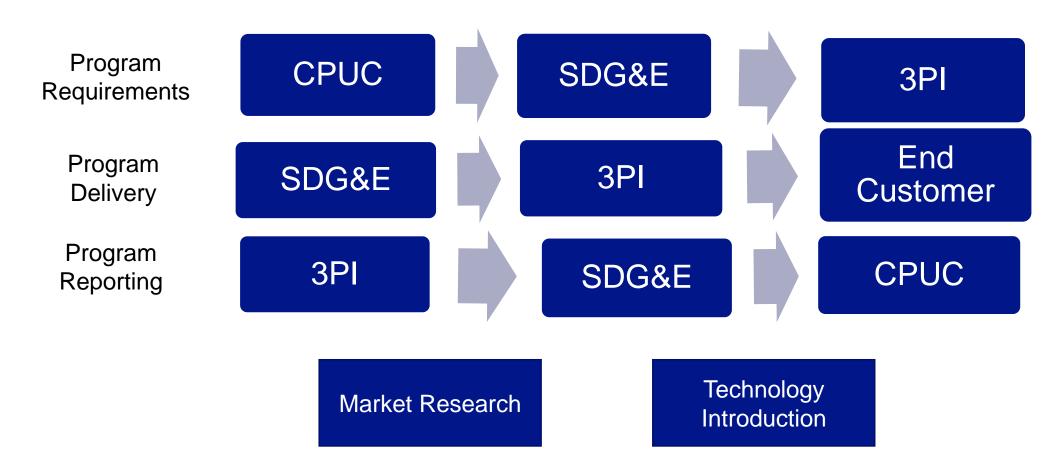
Local Codes & Standards



Standards

How Do We Gather and Use Data?

Management, Maintenance, & Quality Assurance of Program Requirements





Overview of 3PI Quality Assurance Process

Suppliers

3rd Party Implementer (3PI)

Validation Question:

What are the requirements?

Program Requirements:

- CPUC Guidelines
 - Decisions
 - Policy manuals
- Measure Packages
- EM&V Guidelines
- 3PI Contracts
- Implementation Plan
- CPUC Feedback
- CEDARS reporting spec

Inputs

Proposed valid savings claims

Expectation is that 3PI does its own QA ands provides valid savings claims

Processes

Savings Claim Received by SDG&E

Follow QA Sampling Plan

Startup

Ongoing QA Inspection

QA efforts complete

Outputs

Reviewed valid savings claims

CPUC Ex-Ante &

Customers

Ex-Post

CPUC Comments provide feedback loop to the program requirements

Validation Question:

Validation Question:

Can the 3PI program

as designed deliver a

valid savings claim?

Does the 3PI program consistently deliver valid savings claims?

Failures result in a
Corrective and
Preventive Action
Process

Validation Question:

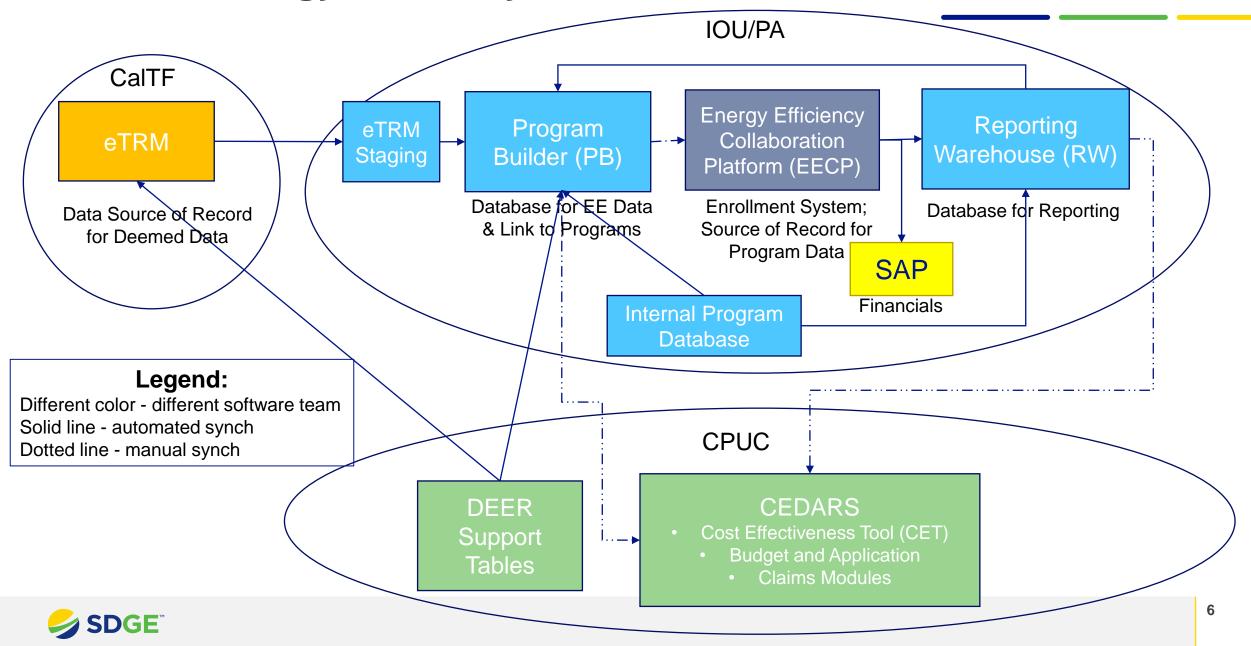
Does the 3PI **do** the Quality Assurance activities that it **says**?

Operational Question:

How do we prevent rather than keep fixing defects?



Energy Efficiency Data Flow for SDG&E



Observations and Areas to Examine

Key IOU Role is Data Governance

Multimillion \$ Investment
In EE Programs

Regulations Specify Reporting Requirements

Reporting Requires
Analysis of Valid Data

Trend is to Collect More Data

IT System Readiness is Essential

Balance Cost of Data Collection Versus Benefit

Upstream/Midstream Challenge

Current Ecosystem Not Well Integrated

Many Systems Managed by Multiple Entities

Systems Don't Seamlessly Connect

Changes in One System Impact Others

Vision/Wish List

Reduce # of Systems; Consolidate Governance

Data Transfer Through
Documented APIs

Connect to Non-EE
Datasets to Add Value





Questions?