

Southern California Gas Company

Appendix G

Table of Compliance

Compliance Number	Decision Theme	OP #	FOF	COL	Supporting Text Page # (PDF version)	Requirement	Testimony Chapter, Page /Appendices Reference	PIP - Subprogram (Section) Reference	Date [if not 7/2/12]
1	Energy Savings Goals		1	24		Energy efficiency portfolios as a whole must have a benefit cost ratio greater than one (i.e., the net benefit must be positive).	Appendix D, E	n/a	
2	Energy Savings Goals	2		3		...direct the IOUs to use the new avoided cost calculator (which includes the recommended data inputs) and the after-tax WACC as the Discount rate.	Appendix A	n/a	
3	Energy Savings Goals			3	81	...so utilities will continue to be responsible for interactive effects.	Appendix A		
4	Energy Savings Goals			18		Codes and Standards savings are overestimated in the draft Goals Proposal, and should be adjusted for attribution and realization of verified savings	Appendix A		
5	Energy Savings Goals	4			42	IOUs shall include in their portfolio applications a prospective showing of the estimated Total Resource Cost and Program Administrator Cost ratios for their proposed portfolios.	Appendix A	n/a	
6	Energy Savings Goals	16				IOUs shall endeavor to exceed the behavioral programs participation goal minimum of 5% of the households represented in their program portfolios, by pursuing behavioral programs on a greater scale if they believe this goal underestimates potential in this area.	Chapter 2		
7	Energy Savings Goals	17			95	The goals for the 2013-2014 transition portfolio based on the 2011 Potential Study are adopted.	Appendix D	n/a	
8	Energy Savings Goals/C&S	18				The compliance rates shall remain constant at 85% for appliances and 83% for codes.	Commission	n/a	
9	Energy Savings Goals/C&S	19				Codes and Standards goals are adopted on an adjusted net basis.	Appendix E	n/a	
10	Energy Savings Goals	20			see also 95	IOUs shall be given credit for 100% of evaluated savings from 2006-2008 on that persist into future program cycles, and shall be responsible for making up one half of the decay	Appendix A	n/a	
11	Energy Savings Goals	see also OP 20			95, see also footnote 154	We therefore will adopt only annual goals for the 2013-2014 transition portfolio, with the intention of developing a better understanding of the sustained impact of the utility programs (including decay and market transformation effects).	Appendix D	n/a	
12	Financing				19	For the third set of efforts above, SoCalGas and SDG&E are directed to hire, on behalf of all utilities, an expert financing contractor to assist the utilities, Commission Staff, California Energy Commission Staff, and stakeholders in designing at least four new financing programs to address particular market needs identified below. The contractor shall be hired as soon as possible in 2012, to conduct working groups and help launch statewide pilot programs in 2013, to be scaled up further in 2014.	Chapter 3	Financing-Overview (Section 2)	
13	Financing				110	...we direct the utilities to propose in their portfolios for 2013 and 2014 an OBF program and budget for each year at a level equal to or greater than the amount of OBF funding reserved by non-residential customers in 2012.		Financing-OBF subprogram (Section 8)	
14	Financing				116	We also expect SDG&E/SoCalGas and their consultant to consult with the local governments and their partners with financing program development experience gained in the past few years through PACE and American Recovery and Reinvestment Act funded programs.		Financing-Overview (Section 2)	
15	Financing				116	...we also require the utilities to begin the process, in parallel, of developing for California or possibly in collaboration with a possible national approach, a database of financing-related project performance and repayment data that will become the repository of all of the data agreed-upon in the working group that should be collected and shared.		Financing-Overview (Section 2)	
16	Financing				118	We also articulate the following general principles that should apply to all of the new programs to be designed: <ul style="list-style-type: none"> • Each finance product should be designed for a uniform statewide program, or with standard statewide terms, documents, and procedures. • "Keep it simple and fast" – contractors are the most likely marketing agents and will need to be able to present finance information to the borrower/energy-user to drive transactions. Thus, programs should avoid over-complexity of design or required paperwork, etc. • For the non-residential on-bill repayment, a single servicing agent should be considered who would relay simple finance payment information to the utility bill. • In terms of defining functions and roles, the consultant should assume that a servicing agent will be responsible for all special adjustments, the originator will be responsible for consumer inquiries, and there could be a separate program dispute resolution process for issues with contractors. 		Financing-Overview (Section 2)	
17	Financing				118	The consultant hired by SDG&E/SoCalGas will be expected to identify and define these elements in more detail in 2012 for launching pilots in 2013.		Financing-Overview (Section 2)	
18	Financing				119	...we request utility proposals for the credit enhancement product in their 2013-2014 portfolio applications with discussion of the preferred options and rationale. These details can be further refined over the course of the rest of 2012.		Financing-New Financing Offerings subprogram (Section 13)	

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19	Financing				121	In their 2013-2014 program applications, utilities should propose an administrative structure for the credit enhancements that they believe is most likely to be successful at making financing available to more single-family residential customers.		Financing-New Financing Offerings subprogram (Section 9)	
20	Financing				128	The multifamily financing offerings should: <ul style="list-style-type: none"> • Start with a bill neutrality objective, at least for credit challenged or lower-income populations. • Consider an additional cushion beyond bill neutrality (for example, limiting bill savings to 80% of estimate) to minimize potential negative impact on consumers. • Seek to structure loans and eligible measures to give the owner at least an 11% return. • Start with placing the loan obligations on common meters. A second stage product could work on tying the payment obligation to individual tenant meters. This will require greater attention to notification and disclosure, as well as possibly credit re-qualification by tenants. • Identify specific waivers and/or clearance required from the California Department of Corporations. • Consider possible tariffed service utilizing private capital. • Seek to marry the energy efficiency loan opportunity with solving another problem (such as equipment malfunction, safety, health). • Seek to pair the energy efficiency measure with a home equity loan instead of a stand-alone unsecured energy loan. • For multifamily market-rate rental housing, credit enhancement may be necessary to drive participation. • Offer (and test) with a variety of multifamily types, including high rises and low rises, condos and rentals, and different physical configurations (e.g., central vs. individual building systems). 		Financing-New Financing Offerings subprogram (Section 9)	
21	Financing				130	The question of multiple program participation should be addressed in the utility 2013-2014 applications and further addressed in the program design details developed subsequently.		Financing-New Financing Offerings subprogram (Section 13)	
22	Financing				130	...we direct the utilities to include a proposal in their 2013-2014 program applications to offer at least some form of credit enhancement for non-utility-originated lending to this market segment. As with single-family residential, this credit enhancement may be provided or aggregated by a third party such as CAEATFA or a similar type of entity such as one making small business administration-insured loans.		Financing-New Financing Offerings subprogram (Section 9)	
23	Financing				132-133	In their 2013-2014 program portfolio applications, the utilities should also provide details on the billing system upgrades and/or other information technology costs that may be associated with an on-bill repayment offering for the non-residential market.		Financing-New Financing Offerings subprogram (Section 13)	
24	Financing				133	To help keep these incremental costs to a minimum, we urge the utilities to look into the clearinghouse or aggregator functions proposed by EDF in Attachment C to the January 10, 2012 ALJ ruling on financing, and as further illustrated by Deutsche Bank at the February 10, 2012 workshop.		Financing-Overview (Section 2)	
25	Financing				133	In addition, utilities should propose, as desired, a fee mechanism to negotiate with participating lenders or other financial entities that allows utilities to cover the costs of any ongoing billing expenses and infrastructure upgrades to provide the on-bill repayment service.		Financing-New Financing Offerings subprogram (Section 13)	
26	Financing				133	Finally, as with the continuation of the OBF program, the utilities should include in their applications a discussion of the relationship of the on-bill repayment offering with existing utility programs and their associated rebates or other financial incentives, with the goal of maximizing the cost-effectiveness of the program portfolio in the non-residential markets.		Financing-New Financing Offerings subprogram (Section 13)	
27	Financing				134	In parallel, we direct the utilities to begin the development of a database that will eventually, once confidentiality protocols are worked out, be able to provide anonymous customer data publicly.		Financing-Overview (Sections 2 and 3)	
28	Financing				136-137, 140-141	The utilities shall include the statewide financing programs in their portfolio applications as resource programs and estimate the incremental savings associated with their delivery.		Financing-Overview (Sections 2 and 3)	
29	Financing				137-138	Currently, we anticipate the following timetable for the various activities addressed in this decision related to financing programs: <ul style="list-style-type: none"> • July 2012: Utilities file 2013-2014 energy efficiency program portfolio applications, including: <ul style="list-style-type: none"> o Basic structure of financing programs and budgets planned for 2013-2014, and o Plan for expert consultant hiring and structure of working groups and timeline for 2012. • By end of third Quarter of 2012: Expert financing consultant presents 2013 pilot program design details in written program plan and public workshop. • Fourth Quarter of 2012: Additional Commission direction in response to consultant's program plan, if necessary. • January 1, 2013: Continuation of OBF programs and selected financing programs previously supported by American Recovery and Reinvestment Act stimulus funds. • First Quarter of 2013: Launch of new financing program pilots. 		Financing-Overview (Section 2)	

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30	Financing				136, 140	Thus, we retain the prohibition on utilities requiring that all financed project components be eligible for another utility incentive program, but we leave the finer points of how much of a total project must be eligible for other incentive programs to SDG&E/SoCalGas and their consultant to propose in the future.		Financing-New Financing Offerings subprogram (Section 13)	
31	Financing	21		28	114-115, 134	By no later than August 1, 2012, San Diego Gas & Electric Company and Southern California Gas Company shall hire, on behalf of themselves, Pacific Gas and Electric Company, and Southern California Edison Company, and co-funded by all of the named utilities, an expert financing consultant to design new pilot financing programs for 2013-2014 and to convene working groups on the new program design and data collection needed to support scalable financing programs in the future.		Financing-Overview (Section 2)	8/1/2012
32	Financing	22			3, 19, 107-108	IOUs shall propose a statewide portfolio of financing programs funded at a level of at least \$200 million statewide over the two-year period, consisting of the following components: Continuation of and improvement to the on-bill financing programs currently in the utility 2010-2012 portfolios for non-residential customers; Continuation of successful financing programs that were originally supported by American Recovery and Reinvestment Act stimulus funding in 2011 and 2012 and implemented by third parties, local governments, and/or via the California Energy Commission; and A set of new financing programs to be designed in 2012, and then offered consistently on a statewide basis, in pilot form in 2013, and on a larger scale in 2014.		Financing-Overview (Section 2)	
33	Financing	see also OP 22			112	Thus, we require the utilities to propose in their 2013-2014 program portfolios to set aside a specific amount of funding and administrative support for continuing and augmenting previously American Recovery and Reinvestment Act-funded programs that can help establish this performance record.		Financing-Overview (Section 3)	
34	Financing			26	112	Utilities should choose for continued funding in 2012, as well as in 2013-2014, those programs that best exemplify the following criteria (utilities may also add additional criteria): <ul style="list-style-type: none"> • Potential for scalability to larger target markets • Ability to leverage ratepayer funds (e.g., with reasonable budgets for outreach to prospective borrowers or for modest levels of credit enhancement) with private loan capital. • Ability to test unique and/or new program design and delivery options (i.e., effects of requiring bill neutrality, offering longer loan terms, assessing tradeoffs between rebates and financing, etc.) • Ability to serve previously-unserved or under-served markets (such as multi-family residential, for example) • Ability to offer low interest rates to consumers, including loan programs that make use of "flexible capital" (from foundations, small business sources, etc.) • Effective utilization of total combined ratepayer funding support from all sources-utility programs, local or state government partnerships, third-party programs, and financing (in other words, in the vernacular: "best bang for the buck"). 		Financing-Overview (Section 3)	
35	Financing	23		29	116-117, 131	IOUs shall propose new statewide financing programs in their 2013-2014 portfolio applications for piloting in 2013 and full-scale offering in 2014, to include the following elements: A credit enhancement strategy for the single-family residential market; and any other proposed single-family program approaches operating within existing statutory constraints; A financing program strategy designed specifically for the multi-family residential market that includes both credit enhancement and a possible on-bill repayment option and/or tariff--based energy efficiency improvement reimbursement mechanism that may require legislative change to fully implement; A credit enhancement strategy for the small business market; and An on-bill repayment strategy for all non-residential customers		Financing - Overview (Section 9)	
36	Financing	24				The on-bill repayment strategy for non-residential customers proposed for 2013-2014 shall not require bill neutrality and shall allow for pro-rata allocation of payments between utility bill obligations and loan repayment.		Financing - Overview (Section 9)	
37	Financing	see also OP 24			132, 139	Although we will not require bill neutrality, we will require that an estimate of the bill impacts of the energy efficiency project to be financed be presented to the customer at the time they are making the commitment to the project (usually when they are signing a contract with their contractor).		Financing - Overview (Section 9)	
38	Financing	25			117, 134-135	IOUs shall, beginning in 2012 and in consultation with the expert financing consultant hired by San Diego Gas & Electric Company and Southern California Gas Company and a working group convened by the consultant, develop or contribute to a larger-scale database or databases of financing related data and information, that can be shared publicly after appropriately masking individual customer confidential information, and that consists of the following minimum types of information: <ol style="list-style-type: none"> Customer type; Host site characteristics; Utility payment history; Borrower credit scores and energy project repayment history; Energy project performance data; and Billing impacts comparing pre- and post-installation utility bills. 		Financing-Overview (Section 2)	12/31/2012

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39	Financing	see also OP 25			125	To help build the loan repayment record, we direct the utilities to collect data on the performance of loans receiving credit enhancements and OBF through current programs and build a database of California loan payment history from all sources of energy project loans...		Financing-Overview (Section 2)	
40	Financing	see also OP 25			20	Activities in 2013 and 2014 programs should be explicitly designed to gain program experience and data, particularly with respect to debt repayments and project energy savings, which will attract additional capital resources from interested financial institutions and other businesses. To that end, we also require the utilities to develop a database (or contribute to some larger database effort) and protocol for sharing data.		Financing-Overview (Section 2)	
41	Financing	see also POP 25			108	...we require the utilities to develop a database or contribute to a larger database of financing-related information (including, but not necessarily limited to, credit scores, bill payment history, debt repayment history, estimated and actual energy savings), along with an approach to sharing this information in a manner that will preserve individual customer confidentiality while still meeting the needs of interested financial entities and others for additional data.		Financing-Overview (Section 2)	
42	Financing	26				By the end of the third quarter of 2012, the expert financing consultant hired by San Diego Gas & Electric Company and Southern California Gas Company shall present 2013 pilot program design details in a written program plan and a public workshop.		Financing-Overview (Section 2)	9/30/2012
43	Financing	27			110	No later than January 1, 2013, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall continue to provide On-Bill Financing programs and funding consistently statewide.		Financing - OBF subprogram (Section 1 -13)	1/1/2013
44	Financing	28				No later than August 1, 2012, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall provide funding for selected successful financing programs previously supported by American Recovery and Reinvestment Act funds in 2011 and 2012.		Financing - ARRA subprogram (Section 9)	8/1/2012
45	Financing	29		27	110	IOUs shall address their strategy for maximizing portfolio cost-effectiveness by offering financing programs in coordination with rebate/incentive programs, either by offering financing in lieu of rebates and/or by lower incentives in cases where financing is also provided. The financing programs shall be considered resource programs designed to deliver additional energy efficiency savings beyond those available through other programs.		Financing - OBF subprogram (Section 9); Financing - ARRA subprogram (Section 9); Financing - New Financing Offerings subprogram (Section 9)	
46	Financing	30			136	IOUs shall propose a methodology to estimate incremental savings delivered by the statewide financing programs towards their energy savings goals, while avoiding double-counting of savings from other programs.		Financing - OBF subprogram (Section 9)	
47	Financing	31				IOUs shall not require that all measures supported by financing programs be part of another utility incentive program.		Financing - OBF subprogram (Section 9); Financing - New Offer subprogram (Section 13)	
48	Financing				110	In addition, we invite the utilities to propose any program design or implementation changes they believe will make the program even more successful in 2013-2014 for customers who most need access to capital.		Financing - OBF subprogram (Section 9)	
49	LGP, 3P				23	With regard to government partnerships, we direct the IOUs to continue successful partnerships and expand any partnerships that cost-effectively achieve deep retrofits.		LGP Master PIP (Section 1)	
50	LGP, 3P				143	We direct the IOUs to submit as part of their 2013 – 2014 applications a description of the criteria that should be used to identify successful local government program / partnerships.		LGP Master PIP (Section 1)	
51	LGP, 3P				143	The utilities should reference pertinent evaluation findings, market transformation indicators, energy savings, and other documents that support these criteria, such as the Strategic Plan and the menu of local government strategic plan activities. The utilities should confer with LGSEC and with any other interested local governments to get input on success criteria for local government partnerships.		Strategic Plan Activity referenced in sub-program (Section 6) Partnership Pgm Advancement of Strategic Plan Goals/Objs (Section pgs 41-44)	
52	LGP, 3P				143	The utilities applications shall also include a separate set of PIPs for all local government program and partnerships that meet the local governments' proposed success criteria that were rejected by the utility.	Chapter 2.c.	NA	
53	LGP, 3P				144	...the utilities' applications shall include Program Implementation Plans (PIPs) for all local government programs and partnerships they seek to continue, including a detailed explanation for how each program will meet their suggested success criteria. The utilities' applications shall also include a separate set of PIPs for all local government program and partnerships that meet the local governments' proposed success criteria that were rejected by the utility.		LGP Master PIP (Section 1)	
54	LGP, 3P				144	To provide the Commission with the flexibility to consider local government proposals that were rejected by the utilities, the utilities' applications shall also include a separate set of PIPs for all local government program and partnerships that meet the local governments' proposed success criteria that were rejected by the utility.	Chapter 2.c.	NA	

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55	LGP, 3P				145	The utilities' applications shall include a separate set of criteria for increases in local government programs and should be consistent with our overarching goal of deeper retrofits		LGP Master PIP (Section 1)	
56	LGP, 3P				145	The utilities are directed to confer with local governments and the LGSEC to get input on the expansion criteria. To the extent that the utilities reject any of the suggested criteria, the utility applications shall list those criteria and the rationale for rejecting them.		LGP Master PIP (Section 1)	
57	LGP, 3P				149	Commission Staff and parties should evaluate the proposed pilots to assess which pilots may merit support by ratepayers, and the Commission will determine which, if any, warrant adoption.	Commission	NA	
58	LGP, 3P				149	We encourage the local governments to submit PIPs and budgets for proposed regional pilots in the 2013-2014 applications proceedings, so that Commission Staff and the parties can begin their review as soon as possible. Submitted PIPs for each proposed regional pilot should describe the rationale and benefits of the regional pilot, highlighting its desired characteristics and why it should be selected for the pilot period.	NA	NA	
59	LGP, 3P				155	Footnote 193- The Third-Party Procurement Table and associated purchase orders should include both third-party procurement supporting the IOUs' 20% target and "core" programs.	Appendix F		
60	LGP, 3P				156	While contracts may not be finalized until the Commission approves the IOU portfolio application, any necessary negotiations should be complete by October 1, 2012.	Chapter 3		
61	LGP, 3P				156	In addition, IOUs should identify which existing third-party programs should be discontinued in 2013-2014 and why. They should reference relevant purchase orders from the Third-Party Procurement Table and include both a quantitative and qualitative assessment of why the existing third-party program should, or should not, be extended.	Chapter 3 Appendix F		
62	LGP, 3P				157	The IOU proposals should be informed by the Peer Review Group Report on the 2009-2011 IOU competitive solicitations and developed in coordination with key stakeholders.	Appendix C	3P IDEEA365 Section 2	
63	LGP, 3P				157	Because the programs procured from these solicitations will not begin until 2013, the proposed solicitations should allow for "rolling" programs consistent with Section 17.2 of this Decision.	Appendix C	3P IDEEA365 Section 2	
64	LGP, 3P	32				IOUs shall include a separate set of criteria for increases in local government programs and shall be consistent with the overarching goal of deeper retrofits.		LGP Master PIP (Section 1)	
65	LGP, 3P	33			145	To the extent that Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, or Southern California Gas Company rejects any of the suggested criteria, its 2013-2014 application shall list those criteria and the rationale for rejecting them. The 2013-2014 applications shall also include the Program Implementation Plans (PIPs) of local government programs/partnerships that meet the expansion criteria, and a separate set of PIPs that meet the expansion criteria that were rejected.		LGP Master PIP (Section 1)	
66	LGP, 3P	36			151	IOUs shall contract for selected regional pilots and Commission Staff shall serve as a joint contract manager in the contract.	Chapter 3		
67	LGP, 3P	37			9, 151	IOUs shall identify a minimum of 20% of funding for the entire proposed 2013-2014 energy efficiency portfolio that will be put out to competitive bid to third parties for the purpose of soliciting innovative ideas and proposals for improved portfolio performance	Appendix E	Table 3,4	
68	LGP, 3P				22, 154	D.05-01-055, the Commission established the current standard for funding third-party program implementation: the IOUs will identify a minimum of 20% of funding for the entire portfolio that will be put out to competitive bid to third parties for the purpose of soliciting innovative ideas and proposals for improved portfolio performance. That standard was upheld for the 2010-2012 program cycled by D.07-10-032. This decision directs IOUs to expand their commitment to third-party program implementation, but declines to set a specific numerical target. The Commission supports expanding the number and quality of energy efficiency programs implemented by third parties, but believes the process of soliciting those programs has not consistently led to the stated purpose – the development of innovative ideas and proposals which improve portfolio performance. As such, we believe it prudent to move forward incrementally by extending existing, effective third-party programs, gathering information to better inform future decision making, and directing IOUs to propose a reformed third-party solicitation process to be used for new solicitations beginning in 2013.	Appendix C	3P IDEEA365 Section 2	

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69	LGP, 3P	38			155	IOUs shall file with their 2013-2014 applications a table ("Third Party Procurement Table") identifying all current Purchase Orders (or comparable contracts/agreements) between the utility and third parties funded through energy efficiency balancing accounts. The table shall include: a. The utility's unique purchase order number; b. vendor name; c. detailed description of the procured activity; d. whether procurement supports utility- implemented program(s) or third-party implemented program(s); e. whether the vendor was chosen through competitive solicitation or bilaterally; f. start date; g. end date; h. purchase order amount; i. whether service is provided on a "performance basis" (Yes or No); j. description of performance basis terms and conditions, as applicable; and, k. determination of whether the purchase contributes to the utility's General Order 156 goals. l. Complete Purchase Orders (or comparable contracts/agreements) for every entry identified in the Third-Party Procurement Table.	Appendix F		
70	LGP, 3P	39			156	The 2013-2014 applications of the [IOUs] shall explain which existing third-party programs should be extended in 2013-2014 and why. If renegotiations of third-party implementer contracts will be necessary, the utility shall explain how it will ensure a timely start. In addition, each utility shall identify which existing third-party programs should be discontinued in 2013-2014 and why.	Chapter 3	n/a	
71	LGP, 3P				156	IOU explanations should include the criteria used to determine whether to extend third-party programs. To avoid unnecessary contention in the application review process, the IOUs should immediately coordinate with affected third parties.	Chapter 3		
72	LGP, 3P	40			156	IOUs shall identify additional opportunities to enlist new third party implemented programs through competitive solicitations.	Appendix C	3P IDEEA365 Section 2	
73	LGP, 3P	see also OP 40			157	In their portfolio applications, the IOUs are directed to propose solicitations for new third-party programs to begin in 2013. The IOUs are directed to include details as to how the solicitations would be effectively targeted, overseen, and executed in their proposal.	Appendix C	3P IDEEA365 Section 2	
75	Reducing Complexity				160	The IOUs shall consider moving the HVAC Technology and System Diagnostics and WE&T sub-programs into the statewide Emerging Technologies and WE&T Programs, respectively.	Chapter 2 Section 1 d. Reducing the Number and Complexity of Programs		
76	Reducing Complexity	41			160-161	IOUs shall exclude the separate statewide Heating, Ventilation and Air Conditioning and new construction programs from their transition portfolio applications. However, the cross-sector collaborative activities and information-sharing tools that have been developed through these programs need not be discontinued.	Chapter 3	RNC subprogram (entirety) Res - HVAC subprogram (entirety) Com - HVAC subprogram (entirety)	
77	Reducing Complexity	42			161	IOUs shall identify the elements of the existing statewide Heating, Ventilation and Air Conditioning and new construction programs they recommend maintaining, and the remaining programs in which those activities and tools will be "housed" and funded.		Res - RNC subprogram (Entirety)	
78	Residential				13	...IOUs to propose Residential New Construction program incentive levels to improve the support provided by the program to Title 24 codes and standards updates.		Res - RNC subprogram (Section 4c, ZNE)	
79	Residential				13	The California Energy Commission aims to require "Zero Net Energy" (ZNE) homes (homes that produce all the energy they need) through Title 24 standards by 2020. We direct a review of Residential New Construction program and evaluation policies to support this more targeted program direction as needed.		RNC Section 4c, ZNE	
80	Residential				13	...the IOUs should participate in developing, a Zero Net Energy Roadmap that will identify long-term measure improvements likely needed to achieve Zero Net Energy codes by 2020.		RNC subprogram (Section 4 & 5)	
81	Residential				24-25	We direct the IOUs to explore ways to better integrate plug load and appliance education into the Energy Upgrade California program, and to adopt appropriate market transformation target for 2012-2014.		PLA subprogram (Section 4), WHUP subprogram (Section 10)	

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82	Residential				25	We provide direction on appropriate local governmental roles in the Energy Upgrade California program, and direct the IOUs to work with local governments to ensure that local outreach capacities and networks established with American Recovery and Reinvestment Act funding are continued.		EUC WHUP subprogram (Section 11)	
83	Residential			13	75	We expect all of the IOUs to pursue cost effective potential from behavioral programs with equivalent effort and timeliness. Therefore, we find it reasonable and prudent to set consistent assumptions for program participation at 5% of households, signaling our expectation that behavioral programs should be substantively, but not excessively, represented in IOU program portfolios. Further, the IOUs may apply alternate behavioral programs to achieve their goals if they find other approaches to be more effective. These goals represent a floor, not a ceiling, and we encourage the IOUs to exceed this target by pursuing behavioral programs on a greater scale if they believe we have underestimated potential in this area.		Energy Advisor subprogram (Section 5)	
84	Residential				166	The delivery of the Energy Upgrade California whole house program should be closely coordinated with the delivery of residential plug load/ appliance programs.		WHUP subprogram (Section 11)	
85	Residential				173	Streamlined IOU HVAC Emergency Replacement Energy Upgrade California protocols shall retain appropriate Energy Upgrade California combustion safety testing and other procedures to ensure customer safety.		WHUP subprogram (Section 8)	
86	Residential				179	This workshop shall review Energy Upgrade California evaluation findings relevant to Energy Upgrade California training programs, and seek stakeholder feedback on priority training improvements needed, and identify a timeline to put such improvements into place via both IOU and any local government administered Energy Upgrade California or related training programs. As part of this workshop, the IOUs should also propose ways to coordinate improved Energy Upgrade California trainings with any local government-led Energy Upgrade California or codes and standards (Title 24, 2013) training programs, as discussed later in this decision. The IOUs should aim to create robust, coordinated residential workforce training programs across the Energy Upgrade California, Workforce Education and Training, and other relevant residential programs, in a manner that supports improved, consistent quality installations. The IOUs should consider the training and certification requirements of the Energy Savings Assistance Program as part of this process. "Sector strategies" activities, as discussed in the Workforce Education and Training Section, shall inform this review and coordinate the process.		EUC-WHUP subprogram (Section 10)	
87	Residential				179	In their 2013-2014 applications, the IOUs shall identify contractor and technician training objectives for the Energy Upgrade California program, consistent with Energy Upgrade California's role as a market transformation program, discussed above, and the Market Transformation Indicator guidance provided below.		Res - WHUP subprogram (Section 10 (i) and Section 12)	
88	Residential				184-185	Description of these trials in the Energy Upgrade California PIP shall indicate: (1) the anticipated incentive level and to whom the incentive will be offered (i.e., building owner or contractor); (2) building professional training and/or certification requirements for accessing the incentive; (3) additional outreach or coordination activities that will occur as part of the trial; (4) estimated budget for each trial; (5) hypotheses that the trials would test; and, (6) the anticipated evaluation approach.		EUC-WHUP subprogram (Section 5) Section 11 (d) and LGC PIPs	
89	Residential				25, 189-190	The IOUs shall include a plan and timeline for proposing and implementing a statewide Energy Upgrade California multifamily program in their 2013-2014 transition period applications that addresses the Commission Staff Energy Upgrade California multifamily program recommendations summarized above and as further informed by party comments cited. This plan and timeline shall identify appropriate roles for local government support for multifamily programs, including in the areas of targeted outreach, integrated technical assistance, training and workforce development, and addressing split incentives. The plan and timeline shall also take into account recommendations on multi-family building strategies developed through activities authorized under the Energy Savings Assistance Program rulemaking (A.11-05-017 et. al.).		EUC-WHUP subprogram (Section 9 and Section 10)	
90	Residential				199	The IOUs shall provide low, medium and high customer participation scenarios for 2013-2014 in their applications, a summary of the assumptions underlying these scenarios, and an associated budget for each scenario.		EUC-WHUP subprogram	
91	Residential				202-203	In their 2013-2014 Home Energy Efficiency Rebates PIPs, the IOUs shall identify the steps being taken to ensure that the Home Energy Efficiency Rebates program is in compliance with Title 20 pool pump requirements and that expert stakeholder concerns regarding IOU pool pump rebating practices have been sought out and clearly addressed.		Res - PLA subprogram (Section 11D)	

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92	Residential				210-211	First, we affirm that the unique IOU RNC program approaches needed to support California's aggressive residential Zero Net Energy 2020 goals clearly make this a market transformation program. Long-term market changes that the program should support with this new direction include increased skills development for building professionals and technicians and increased homeowner demand for high efficiency homes.		Res - RNC subprogram (Section 5b, bullets 2 and 3)	
93	Residential				211	...the IOUs shall review policies and programs supporting residential Zero Net Energy programs in other states for potential new and innovative program design approaches to increase homeowner demand and marketplace change, consulting with relevant experts in this area. They shall report at least preliminary results in their 2013-2014 applications, and may report more complete findings of this effort through an Informational Advice Letter served on the application service lists no later than April 1, 2013.		Res - RNC subprogram (Section 5e)	
94	Residential				213	The IOUs shall include in their 2013-2014 Residential New Construction program proposal a budget estimate sufficient to fund these steps.		Res - RNC subprogram (Section 2)	
95	Residential	43			166	IOUs shall reflect a recognition of the Energy Upgrade California program as a market transformation-oriented program.		EUC-WHUP subprogram (Section 9 and Section 12)	
96	Residential	45			167	IOUs shall include in their 2013-2014 Energy Upgrade California proposal strategies to better leverage the program to achieve energy savings from plug loads, appliances, lighting, and/or swimming pools.		Res - PLA subprogram (Section 4) and EUC-WHUP subprogram (Section 10)	
97	Residential	46			24	IOUs shall include in their 2013-2014 applications a proposal for a ten-year stepwise declining incentive structure for the Energy Upgrade California whole house program.		EUC-WHUP subprogram (Section 10)	
98	Residential	see also OP 46			169	...we direct the IOUs to include in their 2013-2014 applications a proposal for a ten-year stepwise declining incentive structure for the Energy Upgrade California whole house program. The proposal should clearly indicate suggested Energy Upgrade California incentive levels and eligible measures for the 2013-2014 period and suggest how incentives would be ramped down during the 2015-2022 timeframe. The proposal shall also indicate how Energy Upgrade California incentives levels should be coordinated with or altered to take into account increased whole house financing levels that may begin if the CAEATFA Clean Energy Upgrade loan program includes such financing, and if ratepayer-supported financing programs are adopted.		EUC- WHUP subprogram (Section 10)	
99	Residential	47			172	IOUs shall include a streamlined Heating, Ventilation and Air Conditioning Emergency Replacement Energy Upgrade California protocol in their 2013-2014 applications, based on the approach provided in Attachment B.		EUC-WHUP subprogram (Section 10); Res HVAC subprogram (Section 1)	
100	Residential	48			172-173	IOUs shall consider in their 2013-2014 applications whether a streamlined Heating, Ventilation and Air Conditioning Emergency Replacement Energy Upgrade California protocol should be available only to top-performing contractors with consistently strong quality assurance records or those with stronger building performance certification credentials.		EUC-WHUP subprogram (Section 9)	
101	Residential	49			173	IOUs shall include in their 2013-2014 applications a "Fast Track" Energy Upgrade California job approval protocol based on the Heating, Ventilation and Air Conditioning Energy Replacement Protocol. This proposal shall apply more generally to the Energy Upgrade California program.		EUC-WHUP PIP (Section 9)	
102	Residential	50			174	IOUs shall propose changes to the Heating, Ventilation and Air Conditioning Upstream Incentives program to bring it into alignment with Senate Bill 454, while preserving it as a cost-effective program.		Res - HVAC subprogram (Section 5)	
103	Residential	51				No incentives for equipment requiring a building permit shall be provided any contractor or customer without that contractor or customer certifying that s/he has complied with all permit requirements and utilized a licensed contractor		EUC-WHUP subprogram (Section 10)	
104	Residential	52				IOUs shall comply with Senate Bill 454 requirements, and all applicable programs shall support Heating Ventilation and Air Conditioning permit acquisition as a matter of course.		Res -HVAC subprogram (Section 5)	
105	Residential	53			175	IOUs shall institute the following changes to support Heating Ventilation and Air Conditioning (HVAC) permit acquisition in conjunction with their HVAC and Energy Upgrade California programs: a. Energy Upgrade California jobs involving HVAC replacements must include submittal of the HVAC permit number and a contractor certification that appropriate permits have been obtained, for inclusion in program records. b. Show in their 2013-2014 applications all programs to which the requirements above apply (and present copies of the incentive/rebate applications or other documentation) evidence that they are in full compliance with Senate Bill 454 and this decision.		EUC-WHUP subprogram (Section 10); Res-HVAC subprogram (Section 5)	
106	Residential	54			177-178	IOUs shall consult with local governments, as well as regional and statewide government entities and include in their 2013-2014 proposals a budget for and a narrative description of the role that these entities shall play in advancing Energy Upgrade California objectives in 2013-2014.		Res - WHUP subprogram (Section 10 and Section 11)	
107	Residential	55			178-179	IOUs shall work with the Commission Staff, the California Energy Commission and others to convene a workshop to review Energy Upgrade California workforce training needs upon completion of Energy Upgrade California process evaluations in 2012.		EUC-WHUP subprogram (Section 10)	TBD
108	Residential	56				IOUs shall identify contractor and technician training objectives for the Energy Upgrade California program, consistent with its role as a market transformation program.		EUC-WHUP subprogram (Section 12)	
109	Residential	57			182	IOUs shall explore changes to the "basic" Energy Upgrade California program pathway to make it more appealing to moderate income households and shall propose these changes in their 2013-2014 applications.		EUC-WHUP subprogram (Section 9 and Section 10)	

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110	Residential	58			182-183	IOUs shall establish Middle Income Direct Install programs in 2013-2014, if they have not yet done so, and shall explore expansion of eligible Middle Income Direct Install measures to improve the program's comprehensiveness.		EUC-WHUP Subprogram (Section 10)	
111	Residential	59				IOUs shall consult with relevant stakeholder groups, experts, and Commission Staff to develop a concrete proposal for implementing voluntary training and outreach partnerships with California's real estate industry in their 2013-2014 applications.		EUC- WHUP subprogram (Section 10)	
112	Residential	see also OP 59			184	We direct the IOUs to consult with relevant stakeholder groups, experts and Commission Staff to develop a concrete proposal for implementing voluntary training and outreach partnerships with California's real estate industry in their 2013-2014 applications. This proposal shall have the objective of training real estate agents to understand and promote Energy Upgrade California program benefits to home buyers. The IOUs shall include in this proposal: (1) development and implementation timelines; (2) proposed outreach/training partners; and (3) proposed outreach/training objectives.		EUC- WHUP subprogram (Section 10)	
113	Residential	60			184	IOUs shall work with local governments and the California Energy Commission to identify jurisdictions wishing to pilot incentives for Whole House Home Energy Rating System II assessments and/or ratings as part of the Energy Upgrade California program.		Res - WHUP subprogram (Section 10 and Section 11)	
114	Residential	61				IOUs shall work collaboratively with the California Energy Commission and other stakeholders to identify approaches to adequately broaden the allowable software under the Energy Upgrade California program while containing costs required for needed Commission Staff reviews.		EUC-WHUP subprogram (Section 10)	
115	Residential	see also OP 61			195-196	We direct Commission Staff and the IOUs to work collaboratively with the California Energy Commission and other Energy Upgrade California stakeholders to identify approaches to adequately broaden allowable software under the Energy Upgrade California program while containing costs required for needed Commission Staff reviews. In this effort, Commission Staff and the IOUs shall consider relevant findings and activities on building energy rating and labeling systems occurring as part of the AB 758 program development process. Commission Staff should report its recommendations on this issue to the service list of this proceeding or its successor, and the service list of the IOUs' 2013-2014 transition applications, as soon as feasible. In their deliberations, Commission Staff and the IOUs shall consider party input regarding whether allowable Energy Upgrade California software: 1) Should be required to meet national NREL Best Test and/or RESNET standards; 2) Include standardized data reporting requirements to ensure that each approved software calculates energy savings in a manner consistent with other software in the program; 3) Support, but not require, integration of code compliance features within the energy modeling software; and 4) Should allow reflection of the occupants' actual energy usage, i.e., should not rely solely on averages.		EUC-WHUP subprogram (Section 10)	confirmed
116	Residential	62				IOUs shall clearly define the "whole house" program in their Program Implementation Plans for the 2013-2014 transition portfolio and include in their 2013-2014 Energy Upgrade California program estimates of the number of single-family homes they plan to participate in the program in the 2013-2014 transition period.		EUC-WHUP subprogram (Section 9)	confirmed
117	Residential	see also OP 62			199	We direct the IOUs to clearly define the "whole house" program in their Energy Upgrade California PIP for the 2013-2014 transition portfolio and include in their 2013-2014 Energy Upgrade California program estimates of the number of single-family homes they plan to participate in the program in the 2013-2014 transition period. The IOUs shall provide low, medium and high customer participation scenarios for 2013-2014 in their applications, a summary of the assumptions underlying these scenarios, and an associated budget for each scenario.		EUC- WHUP subprogram (Section 9)	
118	Residential	63			202	IOUs shall include in their 2013-2014 applications the criteria they use to determine the best delivery channel for any given plug load or appliance incentive or intervention in their plug load and appliance Program Implementation Plans for the 2013- 2014 transition period.		PLA subprogram (Section 10, Table A)	
119	Residential	64			202	IOUs shall clearly identify in their 2013-2014 applications the selected delivery channels for all measures included in the Home Energy Efficiency Rebate and Business and Consumer Electronics programs and identify where synergies allow for more coordinated engagement work with retailers and manufacturers across the Home Energy Efficiency Rebate and Business and Consumer Electronics programs.		PLA subprogram (Section 10)	
120	Residential	65			202	IOUs shall simplify and streamline the plug load and appliance programs in their 2013-2014 applications to maximize synergies with manufacturers and retailers and reduce administrative costs.		PLA subprogram (Sections 9, 10 & 12)	
121	Residential	66				IOUs shall explore how their Business and Consumer Electronics and Home Energy Efficiency Rebate programs can support manufacturers' implementation of voluntary product specifications that support the development of mandatory "horizontal standards" for plug loads and appliances.		PLA subprogram (Section 11d)	
122	Residential	67			203	IOUs shall include in their Home Energy Efficiency Rebate and Business and Consumer Electronics 2013-2014 program proposals a strategic discussion of how they will use these programs to advance market transformation toward Title 20 codes and standards changes.		PLA subprogram (Section 12)	
123	Residential	68				IOUs shall include a reoriented Appliance Recycling Program in their 2013-2014 transition period proposals, and shall take all feasible steps to minimize costs associated with this program while maximizing savings.		PLA subprogram (Section 10)	

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124	Residential	see also OP 68			206-207	We direct IOUs to include a reoriented ARP program in their 2013-2014 transition period proposals, as outlined below. The IOUs shall minimize ARP program costs while maximizing savings by implementing the following program changes: 1) Add New Appliances: Expand recycling efforts to include clothes washers and air conditioners; 2) Switch to Distribution Center Pick-Ups: Reduce overall program costs by directing retailers to pick up units for recycling. IOU program collections of appliances in the home could be replaced by collections at partner retailer distribution centers. IOUs must avoid duplicating existing efforts with these strategies; 3) Emphasize High Consumption and Secondary Units: Target units with highest savings potential and emphasize collection and recycling of vintage models, secondary units, and extra freezers; 4) Influence Appliance Purchaser's Decision: Use the results of current recycling retailer trials to determine the best approaches to partnering with retailers. These partnerships could seek to cost-effectively capture savings through influencing a new appliance purchaser's decision to retire their old units. IOU retailer partnerships could include delivering new appliances at the same time as collecting old units for recycling. The IOUs should seek to coordinate collection of old units with appliance manufacturers and recyclers; 5) Participants Receive Appliance Incentives upon Surrender of old Appliance: Condition the provision of appliance incentives upon surrender of older units for recycling; 6) Transition of Recycling to Market Actors: Transition the current appliance recycling program to market players by a specific date; 7) Highest Standard of Recycling: Require ARP participating recyclers to comply with highest standards of recycling, including for GHG emissions in refrigerants and foam insulation; and 8) Properly Target Multifamily Residences: Develop new recycling approaches for the multifamily sector, including a bulk exchange approach.		PLA subprogram (Section 10)	
125	Residential	69			210	IOUs shall include in their 2013-2014 applications a timeline by which increased levels of incentives supporting the more efficient building codes expected to be adopted in Title 24 can be incorporated into their Residential New Construction programs.		RNC subprogram (Section 4)	
126	Residential	see also OP 69			210	We direct the IOUs to include in their 2013-2014 applications a timeline by which increased levels of incentives supporting the 30% more efficient building codes expected to be adopted in Title 24 can be incorporated into their Residential New Construction program. The date proposed for inclusion in the Residential New Construction program of higher incentives supporting the increased Title 24 efficiency levels should be no later than March 1, 2013. The IOUs shall consult with the California Energy Commission, Commission Staff, builders and other stakeholders regarding appropriate incentive levels for this increased building efficiency performance. The incentive design and increased incentive levels identified in this process should encourage the early adoption of base and reach (Title 24) codes.		RNC subprogram (Section 4)	3/1/2013
127	Residential	70			211	IOUs shall identify in their 2013-2014 applications (1) market barriers to achieving residential Zero Net Energy homes by 2020 and (2) the mechanisms that their proposed Residential New Construction programs will employ to address any such barriers starting in 2013.		RNC subprogram (Section 5)	
128	Residential	71			211	IOUs shall identify in their 2013-2014 applications potential pilot projects or trials to test new program designs that would improve marketplace innovation and engagement and homeowner awareness within the 2013-2014 timeframe.		Various CalSPREE PIP subprogram local initiatives.	
129	Residential	72				IOUs shall participate in efforts to develop a Zero Net Energy Roadmap that identifies efficiency measures which are likely to be adopted in the Title 24 Residential New Construction Standards in 2017 and 2020, for inclusion in their Residential New Construction program cycles beginning in 2015.		RNC subprogram (Section 4)	
130	Residential	see also OP 72			212-213	We, therefore, direct IOUs to collaborate with the California Energy Commission, Commission Staff, and other expert stakeholders to develop a Zero Net Energy Roadmap that identifies efficiency measures likely to be adopted into Title 24 Residential New Construction Standards in 2017 and 2020 for inclusion in future IOU Residential New Construction program cycles. This collaboration shall start within a timeframe relevant to support Title 24 2017 code cycle development activities, but shall, at a minimum, begin no later than June 2014. This Zero Net Energy Roadmap collaboration would be led by Commission Staff and the California Energy Commission, or their designees, and would include the IOUs and other stakeholders. IOUs shall bring to the collaborative effort proposals for appropriate ways that the roadmap might include elements beyond Title 24, as well as proposals and/or a study plan to develop best estimates for cost-effective combinations of onsite renewable energy and energy efficiency for the range of building types included in this roadmap.		Res - RNC subprogram	
131	Commercial				225	...we direct the IOUs to explain whether or not their audit tools incorporate the ex ante savings referenced by SDG&E/SoCalGas in their applications.		Ag Energy Advisor subprogram (Section 4); Ind Energy Advisor subprogram (Section 4)	

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132	Commercial				225	Further we direct the IOUs to file in their applications how they will use the return on investment approach at the time of an audit to present the business case to customers.		Com - Energy Advisor subprogram (Intro, Section 6d Innovation; Section 4a Describe Program; and Section 5c Program Design to Overcome Barriers)	
133	Commercial	73			218	The implementation plans in the 2013-2014 applications of Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall detail how the Direct Install and Deemed Incentive programs can utilize and coordinate with the Local Government Partnership Programs, and Business Improvement Districts. Their Program Implementation Plans shall include a showing how they will utilize Business Improvement Districts to engage customers.		Com -Direct Install subprogram (Section 5) Com - Deemed subprogram (Section 6 Statewide IOU Coordination)	
134	Commercial	74			218	IOUs shall examine the effects of an audit requirement on customers implementing three or more measures. They shall set forth the results of this examination in their 2013- 2014 applications.		Ag Deemed subprogram (Section 6); Ag Energy Advisor subprogram (Section 4); Industrial - Deemed subprogram (Section 6); Industrial - Energy Advisor subprogram (Section 4); Com - Deemed subprogram (Section 6d Innovation); Com - Direct Install subprogram (Section 6)	
135	Commercial	75			219	IOUs shall propose to pilot the Building Energy Asset Rating System tool in their 2013-2014 applications.		Com-Energy Advisor (Section 4)	
136	Commercial	76			220-221	IOUs shall file Program Implementation Plans in their 2013-2014 applications that reflect raised incentive levels for Emerging Technologies in the 2013-2014 period.		Ag, Ind and Com - footnote to incentive tables; Agriculture - Calculated subprogram (Section 6); Industrial - Calculated subprogram (Section 5); Industrial - Deemed subprogram (Section 6)	
137	Commercial	77			223	IOUs shall include in their 2013-2014 applications proposals to improve the measurement, retention, and use of performance data.		Commercial- Intro (Section 4a Describe Program); Com-Intro (Section 5c Program designed to Overcome Barriers); Com - Calculated subprogram (Section 5c Program Design to Overcome Barriers)	
138	Commercial	78			224-225	IOUs shall incorporate new approaches for their commercial programs to achieve deeper energy retrofits and packages of measures.		Com - Intro (Section 5c Program Design to Overcome Barriers and Section 6d Program Implementation); Com - Intro (Section 4a Describe Program); Com - Energy Advisor subprogram (Section 4a Describe Program), Com - Calculated subprogram (Section 6a Statewide IOU Coordination and Section 6a Program Implementation); Com - Deemed subprogram (Section 6d Innovation)	
139	Commercial	79			227	IOUs shall propose programs focused on overcoming the split-incentive barrier in multi-tenant buildings		Com - Intro (Section 5c Program Design to Overcome Barriers); Com - Calculated Savings subprogram (Section 5c Program Design to Overcome Barriers); Com - Direct Install subprogram (Section 5c Program Design to Overcome Barriers)	

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140	Commercial	80			227	IOUs shall submit an approach for dealing with split incentives that includes incentives for sub-metering and plug load control technologies for both owner and non-owner occupied buildings.		Com - Intro (Section 5c Program Design to Overcome Barriers)	
141	Lighting				233	In their applications, the utilities shall provide detailed testimony and workpapers if necessary, to demonstrate how their proposed basic Compact Fluorescent Lamps program complies with this limitation. The utilities are expected to target specialty Compact Fluorescent Lamps through appropriate program designs to capture the remaining potential in these applications	n/a	n/a	
142	Lighting				243	...we direct the IOUs to propose upstream rebates for dimmable linear fluorescent ballasts in the new Primary Lighting subprogram.	n/a	n/a	
143	Lighting	81			233	IOUs shall propose upstream rebates in the Basic Lighting subprogram for basic Compact Fluorescent Lamps to capture the remaining market potential of Compact Fluorescent Lamps...	n/a	n/a	
144	Lighting	82			235	IOUs shall include a Statewide Lighting Program in their 2013-2014 applications.	n/a	n/a	
145	Lighting/ET	83			236	IOUs shall continue supporting the technology assessment of pre-commercialized lighting measures in the Emerging Technology Program in their 2013-2014 applications.	n/a	n/a	
146	Lighting	84			236	IOUs shall propose a Lighting Innovation subprogram to support advanced lighting technologies aimed at early adopters.	n/a	n/a	
147	Lighting	85			237	IOUs shall propose a Basic Lighting subprogram in the Statewide Lighting Program for the purpose of supporting lighting measures that have reached a greater level of commercialization.	n/a	n/a	
148	Lighting	86			238	IOUs shall propose a Lighting Market Transformation subprogram within the Statewide Lighting Program.	n/a	n/a	
149	Lighting	87			242	IOUs shall only propose rebates for general service screw base Light Emitting Diodes products that are consistent with the quality standards developed by the California Energy Commission.	n/a	n/a	
150	Lighting	88				IOUs shall only propose rebates for Light Emitting Diodes products that have a United States Department of Energy Lighting Facts label.	n/a	n/a	
151	Lighting	89			243	IOUs shall propose upstream rebates for specialty Compact Fluorescent Lamps products, with the exception of dimmable Compact Fluorescent Lamps products, in the new Basic Lighting subprogram.	n/a	n/a	
152	Lighting	90			243	IOUs shall propose upstream rebates for dimmable linear fluorescent ballasts in the new Basic Primary Lighting subprogram.	n/a	n/a	
153	C&S				250	... direct all the IOUs to include in their codes and standards program implementation plans a detailed description for such a statewide program, including program objectives, strategies, and expected outcomes, as well as program budgets.		C&S - Intro (Section 2-6)	
154	C&S				256	Once identified, the IOUs should propose a pilot program in their applications, if merited, to be conducted during the 2013-2014 period, to test the use of incentives to support code compliance. Commission staff should evaluate the effectiveness (through pilot EM&V studies) of this approach.		C&S - Compliance Improvement Subprogram (Section 6)	
155	C&S				257	In the 2013-2014 transition period, we further emphasize the importance of code compliance by introducing new elements to the codes and standards program, such as training of the workforce to provide them the knowledge required for proper installation and maintenance of code compliant measures and systems, and partnering with the California Energy Commission		C&S - Planning and Coordination & Compliance Improvements Subprograms (Section 6)	
156	C&S	91				IOUs shall include a detailed description for the statewide "Planning and Coordination Subprogram" that implement the "integrated dynamic approach." The program implementation plan should include an outline of the relevant roles of each of the Codes and Standards sub-programs relative to other IOUs programs and non-IOUs initiatives, as well as program objectives, strategies, expected outcomes, and program budgets.		C&S - Planning and Coordination Subprogram (Section 6)	
157	C&S/WE&T	92			252, 253	IOUs shall propose expansion of their Codes and Standards programs through coordinated initiatives with the statewide Workforce Education and Training programs. This shall be a non-resource program with the primary objective of providing technical training and certification programs for contractors and technicians, specifically, targeting new and advanced technologies that are candidates for adoption into future Reach Codes, Building Codes and Appliance Standards.		C&S - Planning and Coordination Subprogram (Section 6)	
158	C&S	93			253	IOUs shall partner with the California Energy Commission to support their outreach/education activities to improve compliance with codes and standards.		C&S - Planning and Coordination, Reach Codes, & Compliance Improvements Subprograms (Section 6)	

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159	C&S	94			255	IOUs shall examine and propose pilots to test the use of incentives to support critical improvement code compliance consistent with the following threshold criteria: • Existing (adopted) codes and standards with documented and verified low compliance rates and a minimum two-year gap between the date the standard has been adopted and its effective date; • Existing (adopted) and/or new Reach Codes; and • Future codes and standards that have yet to be adopted by the California Energy Commission but have undergone technology assessment through the Emerging Technologies Program, and for which Codes and Standards Enhancement studies have been prepared.		C&S - Compliance Improvement Subprogram (Section 6)	
160	C&S	95			255	IOUs shall work with the California Energy Commission and Commission Staff to obtain recommendations on (a) potential local jurisdictions to target for Reach Code adoption, and (b) specific areas of low code compliance based on documented/verified low compliance rates for existing codes, for the purpose of exploring the use of incentives to augment code compliance.		C&S - Compliance Improvement Subprogram (Section 6)	
161	ET				265	In their applications, the IOUs should demonstrate how their program expenditures and other activities generate new energy savings for ratepayers.		ET Overview (Section 4)	
162	ET				265	The ETP should be designed to strategically balance the selection of projects and execution of program activities through a defined timeline to ultimately meet the Commission's energy efficiency savings goals as well as long-term strategic plan goals.		ET - Overview (Section 3)	
163	CS/ET				249, 270	ETP should work closely with CEC's Codes and Stds program to support the advancement of emerging technologies and approaches into future codes.		C&S - Planning and Coordination Subprogram (Section 8) ET - Intro (Section 6)	
164	ET				270	ETP should focus part of its efforts to accomplish reductions in plug loads and advancing integrated building design and operation solutions to achieve Zero net Energy goals.		ET - Intro (Section 5 & 6)	
165	ET				271	The IOUs should include program components to demonstrate technologies that are candidates (as identified by the CEC and IOU Codes and Stds program) for adoption in upcoming codes and standards.		ET - Intro (Section 6)	
166	ET	96			265-266	IOUs shall leverage findings from existing research, as well as findings from current evaluation and the Commission Potential and Goals studies, to obtain robust market potential estimates on targeted technologies and systems.		ET - Intro (Section 5)	
167	ET	97			266	IOUs shall utilize enhanced market behavioral research to address customer and end-users acceptance and adoption of new technologies, in particular for technologies that are being considered for transfer into the energy efficiency portfolio.		ET Intro (Section 4)	
168	ET	98			267-268	IOUs shall include in their Emerging Technologies Program implementation plans in their 2013-2014 applications the following: b. For each of the three program goals, provide a detailed plan (program activities) on how the six program elements will be utilized to meet the goals (including updates to the quantifiable targets (objectives), timeline, and budgets) while addressing the various market sectors and end-uses; c. Provide a planning budget allocation by market sectors and end-use for each program element. d. Provide a budget for the following key market sectors: Residential, Commercial, Industrial and Agricultural, and for the following key end-uses: Heating Ventilation and Air Conditioning advanced technologies, Plug-Loads and controls, Lighting, Integrated building design and operation, and Other; e. For each program element, provide a planning budget allocation for short-term projects (within the program-cycle) versus long-term projects (projects that will exceed three years). f. For Technology Assessments, provide a planning budget allocation for assessing new advanced and/or unproven technologies versus emerging and/or under-utilized technologies.		ET PIP and ET Attachment 1	
169	ET	99				IOUs shall coordinate with the Codes and Standards program and the California Energy Commission's Codes and Standards programs to (a) support the advancement of emerging technologies and approaches, including demonstration of technologies, that are candidates for adoption into future codes and standards as well as Reach Codes, and (b) identify critical early planning workforce training needs for advanced technologies.		ET - Intro (Section 6)	
170	ET	100				IOUs shall establish a "Collaborative" membership category in the Emerging Technologies Coordinating Council.		ET - Intro (Section 6)	
171	ET	101				IOUs may further develop and expand the Technology Resource Incubator Outreach program trial solicitation.		ET - Technology Implementation Support subprogram (Section 5)	
172	ET	102			271	IOUs shall include an Appendix to the Emerging Technologies program implementation plan in their 2013-2014 applications that details approaches and specific projects for transitioning new technologies from major external initiatives into the utility programs.		ET - (Attachment 4)	
173	ET	103				IOUs shall revise and update their Emerging Technologies program implementation plan to address the directives included in this Decision, including details on its programmatic initiatives that will accomplish the reductions in plug loads and advancing building integrated design and operation solutions to achieve the Zero Net Energy goals of the Strategic Plan.		ET - Intro (Section 5 & 6)	
174	ET	104				IOUs shall develop Residential and Commercial roadmaps that encompass existing building retrofit and new construction programs for Commission Staff's review by the end of the fourth quarter of 2013, in preparation for their inclusion in their 2015 and later energy efficiency portfolios.		ET - Intro (Section 5)	

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175	ET	see also OP 104			272	We direct the IOUs to develop Residential and Commercial roadmaps that encompass existing building retrofit and new construction. The IOUs should include in their 2013-14 PIPs a scope of work, budget and process for including input key stakeholders, including Commission Staff and the CEC in the development of these roadmaps. The roadmaps should include detailed strategies, activities (such as assessments, pilots, demonstrations, etc.) and timelines that the IOUs propose to implement to expedite the assessment and deployment of advanced technologies. The roadmaps should be completed and submitted for Commission Staff's review by the end of the fourth quarter of 2013.		ET - Intro (Section 5)	
176	WE&T				281	We encourage the utilities to coordinate their mainstream energy efficiency sector strategies development with the Energy Services Assistance Program in order to develop data and knowledge regarding how increased training and skill standards may impact quality installations, customer participation and program budgets across similar programs. [see also ESAP PD OPs]		WET-Centergies Subprogram (Section 6)	
177	WE&T				281	The utilities shall explore partnership opportunities resulting in shared resources and/or co-funding and describe these arrangement in their PIPs.		WET-Centergies Subprogram (Section 6.2)	
178	WE&T				281	The utilities shall include a list of workforce training courses and programs they propose to offer in the 2013-2014 program period using the template provided in Appendix C of this decision.		WET-Attachment 2 (referenced in Centergies Subprogram Section 6.1)	
179	WE&T				281	The utilities shall include training programs related to Energy Savings Assistance Program when populating this table.		WET-Attachment 2	
180	WE&T				281	The utilities shall submit proposed budgets for 2013-14 applications that are commensurate with statewide workforce education and training programs goals and objectives.		WE&T PIP (Section 2 table 1)	
181	WE&T				281	The utilities are directed to work with the Commission Staff on the workforce education and training taskforce to develop a data request template to be submitted by Staff as needed for periodic updates on the status of the utility's Sector Strategies activities.		WET-Planning Subprogram (Section 6.3)	
182	WE&T				281	the IOUs shall indicate how they currently address safety concerns regarding energy efficiency installations (e.g., lead paint and asbestors removal and natural gas combustion safety) through training education, certification, participating contractor requirements or other appropriate measures and how they plan to address these issues in 2013-14.		WET-Centergies Subprogram (Section 6.1)	
183	WE&T				281-282	IOUs should provide data to characterize the current state of installation contractor safety qualifications associated with energy efficiency programs.		WET Centergies Subprogram (Section 6.1)	
184	WE&T				282	The utilities shall include additional information related to their 2013-1014 WE&T program plans in response to an upcoming Staff guidance transmittal to the service list discussed in the "Next Steps and the Process for 2013-14 Utility Portfolio Applications and Review" Section of this decision.		WET-Attachment 1 (referenced in Centergies Subprogram Section 6.1)	
185	WE&T	105			278-279	IOUs shall propose continued support of the California Advanced Lighting Controls Training Partnership sector strategy in the 2013-2014 transition period.		Centergies Subprogram (Section 6.2)	
186	WE&T	106			279	IOUs shall explore partnership opportunities that will result in shared resources and/or co-funding and describe these arrangements in their program implementation plan as it applies to the California Advanced Lighting Controls Training Partnership program.		WET Centergies Subprogram (Section 6.2.)	
187	WE&T	107				IOUs shall submit a plan to test the sector strategy approach for Heating Ventilation and Air Conditioning, beginning with the non-residential sectors.		WET Centergies Subprogram (Section 6.1)	
188	WE&T	see also OP 107			280	The utilities shall submit in their 2013-14 applications a plan to test the sector strategy approach for HVAC, beginning with the non-residential sectors. Toward this end, the IOUs should develop a HVAC sector strategy pilot in concert with the statewide HVAC Commercial Quality Installation program..Development of this sector strategy plan should commence during 2012 as part of the aforementioned advice letter process. (see p. 275 re: AL on WET Needs Assessment)		WET Centergies Subprogram (Section 6.1)	2012
189	WE&T	108				IOUs shall endeavor to have skills standards for Heating, Ventilation and Air Conditioning installations established by the end of 2013.		WET-Centergies Subprogram (Section 6.1)	1/1/2013
190	WE&T	109				IOUs shall develop a Heating Ventilation and Air Conditioning sector strategy pilot in concert with the statewide Heating Ventilation and Air Conditioning Commercial Quality Installation program.		WET-Centergies Subprogram (Section 6.1)	
191	WE&T	110			281	IOUs shall address any and all recommendations made in Workforce, Education and Training Needs Assessment.		WET-Planning Subprogram (Section 6.3)	
192	WE&T	111				IOUs shall include information regarding Heating Ventilation and Air Conditioning quality installation, California Advanced Lighting Controls Training Partnership certified installations, and any other sector strategy-induced skill standards set forth in this decision.		WET-Centergies Subprogram (Section 6.2.)	
193	WE&T	see also OP 107			283	we direct the utilities to include in their applications the following information regarding HVAC quality installation, CALCTP-certified installations, and any other sector strategy-induced skill standards identified by then: (1) data or estimation of the incremental customer cost, if any, of requiring skill standards; (2) data or estimation of the average and range of permitting/compliance costs across permitting jurisdictions in the IOUs' service territories; (3) data or estimation of impacts, if any, mandatory skill standards would have on program participation rates; (4) data or estimates of the incremental energy savings and customer cost savings over the life of the equipment; and (5) any other potential benefits associated with higher standards, such as fewer call-backs, lower frequency of customers over-riding control systems, lower life-cycle costs, and increased consumer uptake of measures based on higher quality and certainty.		WET-Centergies Subprogram (Section 6.2)	
194	WE&T	112				IOUs shall explore and, if appropriate, propose to pilot mandatory and/or voluntary incentive-based approaches to promoting high-road skill standards in the 2013-2014 program period.		WET-Centergies Subprogram (Section 6.2)	

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195	WE&T	138				IOUs shall include strategies in their 2013-2014 applications to actively engage workforce education and training sector strategy efforts.		WET-Core, Centergies, Connections, Planning Subprograms	
196	WE&T/Continuation of 2010-12	see also OP 138			319	We direct the utilities to include strategies in their 2013-2014 applications to actively engage workforce education and training sector strategy efforts. The costs associated with funding these efforts should be shared between the Continuous Energy Improvement and the Workforce Education and Training Statewide Program budgets.		Ag CEI subprogram (Section 6); Ag Energy Advisor subprogram (Section 6); Ind - CEI subprogram (Section 6); Ind - Energy Advisor subprogram (Section 6), WET-Centergies subprogram (Section 6.1)	
197	Water/Energy	113			288	IOUs shall include proposals in their 2013-2014 applications to increase targeting of agricultural and industrial customers.		Ind Energy Advisor subprogram (Section 5)	
198	Water/Energy	114			288	IOUs shall propose to continue to offer measures and services to the water sector through their calculated energy efficiency savings programs in the 2013-2014 portfolio, as they currently do.		Ind Calculated Incentives (Section 5), IndDeemed Incentives subprogram (Section 6)	
199	Water/Energy	115			288-289	IOUs shall propose 2013-2014 efforts (either through limited, water sector focused pilot programs or through targeted efforts within the existing calculated savings programs) that go to leak-loss detection and remediation, and pressure management services for water entities that are utility customers.		Ind Calculated Incentives (Section 5), IndDeemed Incentives subprogram (Section 6)	
200	Water/Energy				286	Several of the existing water-energy nexus programs should continue without modification; many of the programs captured in custom projects have large ancillary water benefits and we encourage the IOUs to document these savings to help better understand their benefits. In addition, several agricultural programs target the water-energy nexus, and these program should continue or be expanded.		Industrial, Calculated Sub,Sec. 5.a.iv.;Agriculture, Calculated Sub, 6.a.iv.	
201	Water/Energy				288	we ask the IOUs to note ways to accelerate the expansion of cost-effective water-energy nexus programs where possible. Depending on the applications, the Commission may be able to accelerate the timeframe during the transition period of some of the programs.		Industrial, Calculated Sub,Sec. 5.a.iv.;Agriculture, Calculated Sub, 6.a.iv.	
202	Water/Energy				288	The IOUs should focus their outreach to target small and medium sized water and wastewater utilities, since they are the least likely to make system improvements without IOU-assisted intervention.	Chapter 2. k. Appendices C&G	Ind Calculated Incentives subprogram (Section 5); Agr Overview (Section 4)	
203	Water/Energy				289	These programs (or projects) should be designed to calculate reductions in water consumption, quantify embedded energy savings, and capture water and energy avoided costs to support cost-effectiveness determinations.		Industrial, Commercial, and Agricultural Calculated Sub, Section f. Integration across resource types (energy, water, air quality, etc)	
204	ME&O				14	The utilities are directed to utilize unspent funds from the Engage 360 campaign towards expenditures for Energy Upgrade California ME&O, web portal maintenance, and limited augmentation of programs related to Energy Upgrade California during 2012. Remaining statewide ME&O funds from 2010-2012 shall be returned to ratepayers.		TBD	2012
205	ME&O				300	for the remainder of 2012 and then for the 2013-2014 application on statewide ME&O, we direct the utilities to focus on transforming the Energy Upgrade California brand from the name of one program to more of an umbrella brand which residential consumers and small businesses can come to associate with learning about energy use information and taking energy efficiency and/or other demand-side management actions		EUCA-WHUP subprogram (Section 9)	August 2012
206	ME&O				301 - 302	we expect the utilities to craft a coordinated and leveraged approach that can offer separate program referrals depending on the desired actions by the customers.		TBD	August 2012
207	ME&O				302	Our intent is to eliminate duplicative and potentially contradictory spending on separate marketing by utility or by program type. To the extent that the utilities still believe that program-specific and/or utility-specific marketing is warranted, they should explain, in any budget proposals, how the narrower marketing budget and approach relates to the general Energy Upgrade California umbrella approach		TBD	
208	ME&O				303	we would like to have CCSE serve as the statewide implementer for the ME&O program in 2013-2014		TBD	August 2012
209	ME&O				303 - 304	we will also continue to need a utility to serve as the statewide ME&O coordinator and contracting agent, on behalf of all utilities whose ratepayers fund the statewide ME&O activities...we require PG&E to take over coordination of and contracting for the statewide ME&O campaign effectively immediately upon the adoption of this decision.		TBD	2012
210	ME&O				304	CCSE should have a budget of at least \$500,000 for 2012 startup and will likely then need to subcontract with marketing firms and web providers to conduct the actual campaign efforts and create the marketing materials for 2013-2014		TBD	August 2012
211	ME&O				306	we authorize the utilities to spend no more than \$5 million on brand maintenance and transition for Energy Upgrade California in 2012. This includes the amount of funding already authorized via an ACR from Commissioner Ferron issued January 31, 2012 on the Energy Upgrade California web portal expenditures, which are further discussed below		TBD	August 2012
212	ME&O				306	decision does not disturb the directives in the January 31, 2012 ACR, which essentially require SDG&E to contract to cover web portal expenses for the remainder of 2012; we affirm that direction in this decision and clarify that SDG&E has flexibility to choose the most expeditious contract path to ensure that the Energy Upgrade California web portal functionality is maintained in 2012 and that the expenses do not exceed \$588,000		TBD	2012

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213	ME&O				306	In funding Energy Upgrade California marketing and outreach expenditures both for the web portal and the transition toward utilizing Energy Upgrade California as an umbrella brand in 2012, the utilities should consult closely with CCSE, the California Energy Commission, Commission Staff, and the local government entities running the Energy Upgrade California programs now funded by American Recovery and Reinvestment Act to ensure continuity and avoid any confusion			August 2012
214	ME&O				309 - 310	We clarify that nothing in this Section is intended to prevent utilities from continuing to conduct local and targeted marketing that is service territory and/or program-specific...In their August 3, 2012 applications for statewide marketing and outreach, the utilities should describe their expected roles and complementary strategies for statewide and local marketing efforts			August 2012
215	ME&O		112		381	To be effective, a statewide ME&O campaign must be coordinated with all of the other local and program-specific ME&O messages targeted at residential and small commercial consumers.			August 2012
216	ME&O	118				IOUs may spend a maximum of \$5 million in 2012 out of the 2010-2012 statewide marketing, education, and outreach energy efficiency budget on Energy Upgrade California marketing and outreach to transition to a larger umbrella for the statewide campaign in 2013-2014.		TBD	August 2012
217	ME&O	119			112, 306-307	IOUs shall spend a minimum of \$5 million and a maximum of \$10 million in 2012 out of the remaining 2010-2012 statewide marketing, education, and outreach budget on augmenting programmatic activities associated with the Energy Upgrade California programs run by the utilities, the California Energy Commission, and local governments, including associated financing and/or workforce, education, and training programs. These utilities shall developed criteria, in coordination with Staff of this Commission and the California Energy Commission, to offer additional funding to the most successful and/or replicable programs.	Chapter 3		2012
218	ME&O	120			307	Unspent 2010-2012 marketing, education, and outreach funds beyond those identified in Ordering Paragraphs 115 and 116 above shall be returned to ratepayers either by reducing energy efficiency balancing accounts or utilizing funds already collected to fund new statewide marketing, education, and outreach activities in 2013-2014. (correction to OP 120: should refer to OPs 118 and 119, not to 115 and 116)	Chapter 6		
219	ME&O	126				The January 31, 2012, Assigned Commissioner's Ruling (ACR) on the use of statewide marketing and outreach funds to support the energy Upgrade California web portal in 2012 is affirmed, with the clarification that San Diego Gas & Electric Company is authorized to utilize the most expeditious contractual path to ensure that the web portal is maintained and upgraded as otherwise required in the January 31, 2012 ACR.		TBD	2012
220	ME&O	127			307	The web portal content from Engage 360, including the rebate finder and any other useful content, shall be fully migrated to the Energy Upgrade California web portal, with the Engage 360 web portal decommissioned, by no later than the end of 2013.		WE&T Planning Sub-program (Section 6)	12/31/2013
221	Continuation of 2010-12				310	Unless otherwise specified, the proposed activity levels in 2013-2014 should be roughly comparable to the approved 2010-2012 levels	Appendix E		
222	Continuation of 2010-12				310	The residential HVAC Quality Installation and Quality Maintenance programs, commercial HVAC Quality Installation and Quality Maintenance programs, and funding for the Western HVAC Performance Alliance are key programs.		Res -HVAC subprogram (Section 5) Com- HVAC subprogram (Section 5)	
223	Continuation of 2010-12				310	SDG&E and SoCalGas should propose to increase the activity levels for these programs commensurate with the other utilities' levels of commitment	(SDG&E/SoCal Gas only)	Res -HVAC subprogram PIP and Budget (Budget Table 1) Com- HVAC subprogram (Budget Table 1)	
224	Continuation of 2010-12				315	Should the utilities find that their Integrated Demand-Side Management pilot offerings are not addressing our guidance on resource comprehensiveness, design characteristics, promotion of emerging technologies, and the testing of integrated cost-effectiveness and evaluation methodologies that support Integrated Demand-Side Management objectives, they shall provide a scope and budget for revamping their Integrated Demand-Side Management programs in the 2013-2014 portfolio via their revised PIP.		IDSM - (Section 4)	
225	Continuation of 2010-12				315 - 316	For 2013-2014, we direct the utilities to propose in their Applications a strategy to have an integrated audit tool for Integrated Demand-Side Management activities. The utilities should harmonize timelines and approaches, to have a similar tool on a statewide basis. We direct Commission Staff to monitor the development of the audit tool.		IDSM - (Section 4)	
226	Continuation of 2010-12				316	if the utility's audit tool is not completed by the time it files its 2013-2014 application, we direct the utility to include in its application a revised Integrated Demand-Side Management PIP with an updated audit tool completion timeline. The revised document shall focus on the business requirements used to select the IOU's audit development vendors and Attachment C of the October 2008 ACR referenced above.		IDSM - (Section 4)	
227	Continuation of 2010-12				316	The revised IDSM PIP should also provide a plan to disseminate and utilize the audit tool, once it is completed, and for incorporating, mid-cycle, any additional data and lessons learned from the 2010-2012 evaluation, when finalized.		IDSM - (Section 4)	
228	Continuation of 2010-12				318	We urge all Integrated Demand-Side Management taskforce representatives to actively participate in the service lists for all applicable proceedings to develop of a record in each proceeding that would aid in developing a policy, funding opportunities, and mechanisms to promote integration of demand-side energy resources.		IDSM - (Section 4)	

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229	Continuation of 2010-12				318	We also urge the utilities to include in their revised Integrated Demand-Side Management 2013–2014 PIP a plan for how they will coordinate and participate in and between demand-side resource proceedings going forward.		IDSM - (Section 4)	
230	Continuation of 2010-12	129				IOUs shall revise their existing Integrated Demand Side Management Program Implementation Plans for the 2013-2014 transition portfolio, and IOUs shall include a clear plan to obtain input from stakeholders and experts on each of the eight tasks identified in Decision 09-090-47.		IDSM - (Section 4)	
231	Continuation of 2010-12	see also OP 129			314 - 315	We direct the utilities to revise their existing Integrated Demand-Side Management PIP for the 2013-2014 transition portfolio, and again require that they include in the PIP a clear plan to obtain input from stakeholders concerning each of the eight tasks (identified in D.09-09-047), including, as necessary, public workshops, reporting, and coordination with Commission Staff and the Integrated Demand-Side Management taskforce. This plan should also actively include interaction with external subject matter experts in Integrated Demand-Side Management taskforce deliberations on a regular basis		IDSM - (Section 4)	
232	Continuation of 2010-12	130			315	IOUs shall include in their revised Integrated Demand Side Management Program Implementation Plans a detailed accounting of the Integrated Demand Side Management pilot programs and projects.		IDSM - (Section 4)	
233	Continuation of 2010-12	131			315	IOUs shall work with Commission Staff to ensure that an adequate level of detail is provided in their reports on Integrated Demand Side Management pilot efforts.		IDSM - (Section 4)	
234	Continuation of 2010-12	133				IOUs shall include in their revised Integrated Demand Side Management Program Implementation Plan a clear plan to pursue integrated marketing in the 2013–2014 program cycles.		IDSM - (Section 4)	
235	Continuation of 2010-12	see also OP 133			316	We direct the utilities to include in their revised Integrated Demand-Side Management PIP a clear plan to pursue integrated marketing in the 2013–2014 program cycles. By "integrated marketing," we mean marketing strategies, messages, and material that simultaneously promotes demand side resources to customers and seeks to educate them about the benefits of pursuing these resources where feasible. This plan should include the development of new marketing collateral and strategies that offer 'bundles' of Demand-Side Management resources/programs targeted to specific customer groups via "one stop" approaches were possible, as well as a statewide integrated marketing plan per Strategic Plan objectives.		IDSM - (Section 4)	
236	Continuation of 2010-12	134			317	IOUs shall include data collection plans in their revised Integrated Demand Side Management Program Implementation Plan in the 2013–2014 portfolio applications that: a. Consider current reporting expectations for each of the Demand-Side Management strategies; b. Identify the common information that is currently collected for Demand-Side Management resources; and c. Propose a strategy for reporting integrated Demand-Side Management information.		IDSM - (Section 4)	
237	Continuation of 2010-12	135				IOUs shall include the demand response, distributed generation, and Advanced Metering Initiative portions of their Integrated Demand Side Management-related costs in the Integrated Demand Side Management budget requests included in their 2013-2014 applications, with justification for why funding should be continued.	Chapter 3, Appendix D		
238	Continuation of 2010-12	*135			318	Demand response portfolio cycle of 2012-2014 and the energy efficiency portfolio cycle of 2013-2014 will be in sync starting in 2015...it is reasonable for the utilities to make their proposals and funding requests for demand-side resource integration activities in their energy efficiency applications. We direct the utilities to include the demand response, distributed generation, and relevant AMI-portions of their IDSM-related costs in the IDSM budget requests included in their applications, with justification for why funding should be continued.	Chapter 3, Appendix D		
239	Continuation of 2010-12	136				IOUs including their proposals and funding requests for demand-side resource integration activities, shall be served on parties in the other relevant energy efficiency proceedings.	Application		
240	Continuation of 2010-12	137				IOUs shall propose to continue to support the Continuous Energy Improvement program in their 2013–2014 portfolios and IOUs shall include a Continuous Energy Improvement Program Implementation Plan in their 2013-2014 applications.		Agriculture - CEI subprogram; Industrial - CEI subprogram	
241	Continuation of 2010-12				319	The PIP should clearly link Continuous Energy Improvement program activities to supporting the statewide Integrated Demand-Side Management programs' goals and objectives, and recognize the Continuous Energy Improvement pilot program as an "integrated pilot" program geared towards these purposes.		Com-CEI subprogram, Ind - CEI subprogram, Ag - CEI subprogram	
242	Continuation of 2010-12	139			320	IOUs shall propose expansion of the Continuous Energy Improvement pilot scope to include mid-sized non-residential customers in the 2013–2014 portfolios in the revised Program Implementation Plans they submit with their 2013–2014 applications.		Ag CEI subprogram (Section 4), Ind CEI subprogram (Section 4)	
243	Continuation of 2010-12	140			320	Once early Continuous Energy Improvement evaluation findings become available, Continuous Energy Improvement Program Implementation Plans shall be revised to describe how the program will be modified mid-cycle in consideration of these findings.		Com - CEI	TBD
244	Continuation of 2010-12	128			310-311	IOUs shall continue their benchmarking activities in 2013-2014.	Chapter 5	Com-Energy Advisor, Ind-Energy Advisor, Ag-Energy Advisor subprograms Overview	
245	Other Direction				14	While we continue to direct the utilities to retain strategic and promising non-resource activities, we also begin to blur this distinction in the 2013-2014 portfolio. We direct the utilities to design a portfolio that can both deliver resources savings and transform markets by finding the synergies between these approaches to maximize opportunities for customers and other actors in the market, and take greater advantage of financing tools, the expertise and commitment of third-party implementers and local governments, and the state's growing "green jobs" sector to offer utility customers cost-effective packages of high-quality energy efficiency measures.	Chapter 1		

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246	Other Direction				26	... and directing the IOUs and Commission Staff to make improvement to the data system which link ex-ante claimed savings estimates and evaluation updates.	Chapter 5		
247	Other Direction				61	We do not expect the utilities to curtail custom measure and project activities due to low gross savings or Net-to-Gross results. They should respond to any such poor results with programmatic changes designed to improve performance. For example, when a customer is found to be likely to carry out a project without incentive support, the program should strive to push the customer to augment its plans to include additional action that would not occur without incentive support, or redesign the incentive structure offered to encourage deeper and more comprehensive retrofit activities as well as aligning the dollar amounts to be commensurate with the level of savings that can be attributed to the program.		Com-Calculated Incentive subprogram Ind - Calculated Incentive subprogram Ag - Incentive subprogram	
248	Other Direction				62	...we increase the commercial and industrial custom project NTG value in the DEER 2011 Update from 0.35 to 0.50.	Appendix B, Appendix D	NA	
249	Other Direction				331	For non-DEER workpapers...To minimize the proliferation of workpapers, though, the IOUs are instructed to use DEER values as starting points and/or apply the DEER methodologies for estimating the non-DEER parameter value for cases in which any of the specific parameters of an IOU installation differ from the assumptions that form the basis of a DEER measure. The utilities will not have the option to replace DEER assumptions and values with their preferred values unless the Commission Staff agrees with their proposal for such replacements.	Appendix B		
250	Other Direction				332	We direct Commission Staff and the utilities to work together to identify each of the [DEER] values that have been updated and develop a clear procedure for applying the updates to relevant non-DEER workpapers. The procedure must follow our intent to utilize DEER assumptions and values in non-DEER workpapers, but we provide Commission Staff flexibility to interpret the details of this requirement in a manner it finds reasonable and practical.	Commission	NA	
251	Other Direction				332	We once again instruct the IOUs to update non-DEER workpapers with the latest information available, including the Commission's 2006-2008 evaluation results, and not wait for future DEER updates before complying with this Commission directive. In the absence of existing DEER values, followed by the utilities shall use the 2006-2008 evaluation results as inputs, when applicable. We leave to Commission Staff to approve the utilities' proposals as to which workpapers require updating.	Appendix B		
252	Other Direction				333	The utilities shall submit their non-DEER workpapers as part of their 2013-2014 transition portfolio applications, and each utility shall upload its non-DEER workpapers to its respective directory in the Workpaper Project Archive on the website: http://www.deeresources.info .	Appendix B		
253	Other Direction				333	direct the IOUs to provide in their applications a "Non-DEER Workpaper Summary List" that identifies those non-DEER measures they forecast to be High Impact Measures.	Appendix B		
254	Other Direction				336	The utilities must cooperate and collaborate with Commission Staff during the review of the non-DEER workpapers so that the Commission is able to fulfill its oversight responsibilities. The process for utility non-DEER workpaper submittal, review and approval shall be as follows: <ul style="list-style-type: none"> • Non-DEER measure ex ante values based upon 2010-2012 IOU workpapers shall be updated with the latest available information, including the Commission's 2006-2008 evaluation results. • Non-DEER workpaper measures that are included in the 2013-2014 DEER update shall be retired in favor of the updated DEER values. Commission Staff with help from the utilities will identify which of the non-DEER workpaper measures are now in DEER and will be retired. • Non-DEER workpapers that are based on DEER values or methods covered by the 2013-2014 DEER update or that include measures not covered by the 2013-2014 DEER update shall be updated, giving priority to High Impact Measures. • If a large amount of non-DEER workpapers are received in the 2013-2014 portfolio applications, such that Commission Staff is unable to review them all in time for approval in the 2013-2014 portfolio applications, any workpapers that are not reviewed will receive "interim approval," and Commission Staff may review any of these in the future and apply any adjustments on a prospective basis. • Commission Staff's review of "interim approval" workpapers or new workpapers submitted mid-cycle shall adhere to the Phase 2 workpaper review process, including the dispute resolution process described herein. 	Appendix B		
255	Other Direction				339 - 340	We expect the utilities, when adding new measures to their portfolios, to utilize due diligence when developing the proposed ex ante values. The ex ante parameters should be developed to represent the expected gross and net savings, costs, and lifetime of the measure. For new measures we expect that the development of ex ante values will entail some research to establish reasonable expected values...The utilities and Commission Staff should collaborate to perform the needed ex ante value research for new measures while those measures are being piloted in the portfolios.	Appendix B		
256	Other Direction				344	[Re: Net-to-gross rates for custom projects] We expect the utilities to respond to Commission Staff reviews by taking steps to change the program activities to improve both gross and net results. To that end, we direct Commission Staff to conduct Net-to-Gross (net of free ridership) screenings as part of its ex ante project reviews process. We encourage the parties to put forward proposals for changes to custom programs during the portfolio development process, which may include proposals for pilot programs, aimed at improving Net-to-Gross and gross realization rates. We note that the net to gross ratio for custom programs has held steady at approximately 0.5 in evaluations since 1998 and expect to see changes in approach that could improve that ratio. Studies conducted over the course of these years have offered multiple strategies to improve program influence and should be considered in proposed changes.	Commission		

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257	Other Direction				344	we direct the utilities to make programmatic changes to their custom programs per the recommendations and findings in recent evaluation studies		Com-Calculated Incentives subprogram Ind - Calculated Incentives subprogram Ag - Calculated Incentives subprogram	
258	Other Direction				344	we retain the current default Gross Realization Rate (GRR) value of 0.90 for use in the 2013-2014 transition portfolio.	Commission		
259	Other Direction				350	it may be possible for the typical baseline performance to require higher energy use than would be expected (if the regulation, code, or standard was correctly followed or adequately enforced) or lower than would be expected (if the regulation, code, or standard was typically exceeded). We are not prepared to direct any changes to the current practice relative to baseline assignments for these cases. However, we direct Commission Staff, with input from the utilities and other parties, to develop recommendations on: (1) whether it is appropriate to replace the regulation, code, or standard baseline with a typical installation baseline for use in calculating energy savings; (2) under what circumstances and based upon what kind of evidence such a change could be made; (3) if the change to a typical installation baseline is made, how the baseline parameters should be established for use in setting ex ante values; and (4) if this change is made what are the time and budget implications for both Commission Staff and utilities for both ex ante and ex post savings development	Commission		
260	Other Direction				350 - 351	to design their energy efficiency activities in a way to lift the market to levels above the minimum code requirements and standard practice, the utilities should identify and make recommendations for ways to aid or support code enforcement activities through their energy efficiency program activities		C&S - Section 6 - Program Goals and Activities, Compliance Improvement, Planning and Coordination (Non-Resource Subprogram), Statewide Collaboration	
261	Other Direction		22			The IOUs should support more strategic, statewide long term energy efficiency programs in the portfolio design.	Chapter 2		
262	Other Direction			7		Similar measures delivered by similar activities should have single statewide DEER values unless recent evaluations show a significant variation between utilities and that difference is supported by a historical trend of evaluation results.	Commission		
263	Other Direction			8		The utilities should not curtail custom measure and project activities due to low gross savings or Net to Gross results.	Appendix E		
264	Other Direction			9	62	The utilities should be allowed to request, in their non-DEER workpaper submissions, that an Emerging Technology measure be assigned a Net to Gross value at or above the 0.85 default value.	Appendix B		
265	Other Direction			10		Heating Ventilation and Air Conditioning interactive effects should be incorporated into DEER.	Commission		
266	Other Direction			11		The inclusion of Heating Ventilation and Air Conditioning interactive effects into DEER places a similar requirement for inclusion of those effects into non-DEER workpapers and custom measures and projects calculations.	Appendix B		
267	Other Direction	10				IOUs shall use the clarifying direction contained in the adopted dispositions for issues in Attachment A to this Decision in ex ante value filings required by this Commission.	Appendix B, Appendix E Table 4.1		
268	Other Direction	12				IOUs shall not curtail custom measure and project activities due to low gross savings or Net-to-Gross results.	Appendix E	Com-Calculated Incentives (Section 6), Ind-Calculated Incentives (Section 6), Ag-Calculated Incentives (Section 6)	
269	Other Direction	141			329	IOUs shall make appropriate adjustments to their participation and incentive calculation rules and update their ex ante value calculations in response to codes and standards changes.		TBD	TBD
270	Other Direction	143				IOUs shall utilize Database for Energy Efficient Resources (DEER) assumptions, methods, and data in the development of non-DEER values whenever appropriate, and shall follow Commission Staff direction relating to the determination of appropriate application of DEER to non-DEER values.	Appendix B, Appendix E Table 1.4		
271	Other Direction	144				IOUs when adding new measures to their portfolios, shall (1) utilize due diligence when developing the proposed ex ante values such that those new ex ante values represent the expected electricity and natural gas savings, costs, and lifetime of the measure; (2) undertake research, in collaboration with Commission Staff, as required, to establish reasonable expected values; and (3) pilot promising new technologies and utilize the results of research undertaken during the piloting period to improve the ex ante values. Commission Staff shall allow new additions to be utilized in the portfolio prior to all necessary research being completed, when appropriate, by approving interim ex ante values.		ET - ETP Goal #2 Objective 2.2	
272	Other Direction	147			342	IOUs shall ensure that custom measure and project calculation tools or methods are consistent with the adopted Database of Energy Efficient Resources values and assumptions as applicable.	Appendix B		
273	Other Direction	150				IOUs shall make programmatic changes to their custom programs per the recommendations and findings in recent evaluation studies.		Com-Calculated Incentives subprogram Ind - Calculated Incentives subprogram Ag - Calculated Incentives subprogram	

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273	Other Direction	152				IOUs shall identify and recommend ways to aid or support code enforcement activities through their energy efficiency program activities.		C&S - Section 6 - Program Goals and Activities, Compliance Improvement, Planning and Coordination (Non-Resource Subprogram), Statewide Collaboration	
274	Evaluation				354	EM&V activities will continue under the guidelines for collaboration, cooperation, and dispute resolution outlined in D.10-04-029 and adopted for the 2010-2012 program cycle	Chapter 5		
275	Evaluation				354 - 355	Commission Staff and the IOUs will update and modify the existing evaluation plan to accommodate significant shifts in budgets or programs in the 2013-2014 portfolios.	Chapter 5		
276	Evaluation				355	Commission Staff and the IOUs should continue their collaborative processes, which includes Project Coordination Groups, monthly Commission Staff -IOU meetings, and quarterly stakeholder meetings, to gather input and share information on evaluation findings...Information from the evaluation activities should be made available to IOUs and interested stakeholders as it becomes available.	Chapter 5		
277	Evaluation				356	direct the utilities to submit in their applications any additional Market Transformation Indicators that they believe are appropriate for evaluation of new 2013-2014 programs	Appendix H		
278	Evaluation				359 - 360	In D.11-07-030, we ordered the utilities to work with Commission Staff to implement this vision of a streamlined tracking database, and we re-state that directive here. We are not asking the utilities to change their systems; however, we are requiring them to continue to improve the current data structure and existing systems based on guidance provided by Commission Staff and through collaborative working groups. Following past precedent, specific reporting requirements for the utilities' submittal of tracking data will be posted to the Energy Efficiency Groupware Application website at http://eega.cpuc.ca.gov . Commission Staff and its consultants will continue to work collaboratively with the utilities in a working group dedicated to data issues to resolve immediate needs and to build toward long-term solutions for implementation in post-2014 portfolios.	Appendix D		
279	Evaluation	154				IOUs shall continue collaborative efforts to gather input and share information on evaluation findings.	Chapter 5		
280	Evaluation	156				Information emerging from the evaluations shall be used to refine and improve programs on an on-going basis, and/or shall be available to assist in portfolio design decisions and revising frozen ex ante savings parameters for the next program cycle.	Chapter 5		
281	Evaluation	157				IOUs shall propose funding for evaluation activities at four percent of the total proposed portfolio budget.	Chapter 5		
282	Evaluation	158				IOUs shall propose that the distribution of the Evaluation budget between them and Commission Staff shall remain at 27.5% and 72.5%, respectively.	Chapter 5		
283	Shareholder Incentive				361 - 362	we direct the utilities to reflect in their applications any relevant guidance that is proposed or adopted before the application filing deadline (e.g., the identification of programs in the portfolio that address harder-to-achieve savings versus those with easier-to-achieve savings).	Chapter 2		
284	Next Steps				362 - 363	for their 2013-2014 portfolio applications, the utilities may present estimates of spillover that may result from the proposed programmatic activities, and may propose the inclusion of spillover effects in their cost-effectiveness analyses and results. This may be provided at either the program or portfolio level. Any such proposals should be vetted with stakeholders and Commission Staff (via workshops or some other transparent process led by the utilities) prior to the application filing. Estimates should be based upon available research and analysis on spillover from programs within the state and possibly from other jurisdictions. We would consider these values during the application approval process.	Appendix I		
285	Next Steps				364	the PIP template for statewide, local and third-party programs may be revised and simplified based on revised PIP templates that Commission Staff shall provide to the service list of this proceedings as soon as feasible, but no later than 30 days after the issuance of this decision.	Commission	See various PIPs.	
286	Next Steps				365	the utilities are required to submit with their applications a prospective cost-effectiveness showing. The showing must provide sufficient detail so that a review can be undertaken of all cost elements of all areas of activities as well as the dollar value benefits arising from the estimated energy savings impacts of those activities. Footnote 508: We require that the utilities' portfolios demonstrate cost-effectiveness when including Codes and Standards advocacy savings and program costs.	Appendix A		
287	Next Steps	1			2	No later than July 2, 2012, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall file applications to establish energy efficiency programs and budgets for 2013 and 2014.	Application		
288	Next Steps	162				IOUs shall identify in their 2013-2014 applications, proposals for programs or initiatives that have been designed to accomplish "market transformation.		See various PIPs.	

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289	Next Steps	see also OP 162			357 - 358	In order to facilitate our review of the 2013-2014 portfolio applications, it is reasonable to require a minimum level of strategic assessment and identification of expected market effects anticipated from specific programs. The IOUs shall identify in their applications, proposals for programs or initiatives that have been designed to accomplish "market transformation." For these programs, the IOUs must effectively articulate the following information through their PIPs: <ul style="list-style-type: none"> • A description of the market, including identification of the relevant market actors and the relationships among them; • A market characterization and assessment of the relationships/dynamics among market actors, including identification of the key barriers and opportunities to advancing demand-side management technologies and strategies; • A description of the proposed intervention(s) and its/their intended results, and specify which barriers each intervention is intended to address; • A coherent program, or "market," logic model that ensures a solid causal relationship between the proposed intervention(s) and its/their intended results; and • Appropriate evaluation plans and corresponding Market Transformation Indicators and PPMs based on the program logic model. (The IOUs should be prepared to start tracking proposed Market Transformation Indicators immediately in order to establish a baseline, and in cases where the logic model calls for metrics to be differentiated in terms of the sequence and timeframe in which they are expected to be relevant – i.e., leading vs. intermediate vs. lagging indicators of change – each metric should be identified as such). 	Appendix H	See HVAC, EUC, RNC, Com-Calculated Incentives, Ind-Calculated Incentives, Ag-Calculated Incentives, and PLA subprogram PIPs	
290	Next Steps	see also OP 162			358	We require this additional information for, at a minimum, the Statewide Lighting Market Transformation program, the Statewide HVAC Quality Installation and Quality Maintenance programs, Energy Upgrade California, Residential New Construction, Savings By Design, Plug Load/Appliances programs, and third-party programs and/or pilots focused on Commercial and Residential Zero Net Energy. Beyond these identified programs, only programs or sub-programs that include the required information should be proposed as "market transformation-oriented" initiatives. The IOUs may propose new programs or initiatives as "market transformation-oriented," for which they should submit the same information as indicated above, in their PIPs.	Appendix H	See HVAC, EUC, RNC, Com-Calculated Incentives, Ind-Calculated Incentives, Ag-Calculated Incentives, and PLA subprogram PIPs	
291	Next Steps	163			360	IOUs shall include a line item in their proposed budgets for meeting the requirements for compliance with standardized tracking data submittals in a manner consistent with guidance provided by Commission Staff.	Chapter 5, Appendix D		
292	Next Steps	164			364-365	The 2013-2014 applications and supporting documentation of Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall follow a common format.	Chapter 2q.		
293	Next Steps	165			366	IOUs shall make a detailed cost effectiveness showing that provides information on the energy savings assumptions and costs that were used to derive the values in the summary tables.	Appendix A		
294	Next Steps	166				IOUs shall supply supporting documentation on the assumptions used to develop the contents of their cost effectiveness calculator submission to facilitate review by Commission Staff and parties.	Appendix A		
295	Next Steps	167			367	IOUs shall include proposals in their 2013-2014 applications to potentially utilize Programs Advisory Groups as a consultative resource for mid-cycle program changes or additions for post-2014 portfolio planning.	Chapter 2		
296	Next Steps	171				IOUs may each file, in addition to a portfolio of energy efficiency programs that is compliant with all of the foregoing ordering paragraphs, one additional alternative energy efficiency program portfolio proposal. Should a utility elect this option, it shall consult with the other utilities to develop a consistent approach across all utilities, to the extent feasible, to the definition of a second scenario. Each utility's application shall include (a) a full cost-effectiveness analysis of the second scenario portfolio, (b) a detailed explanation of the extent to which the additional portfolio does or does not comply with any of the foregoing ordering paragraphs, (c) an itemized summary of the differences between the two portfolios, and (d) a detailed discussion of the rationale for each area in which the two portfolios differ.	Chapter 2B		