

# *Rolling Portfolio & Business Plan Overview*

*June 15, 2016*

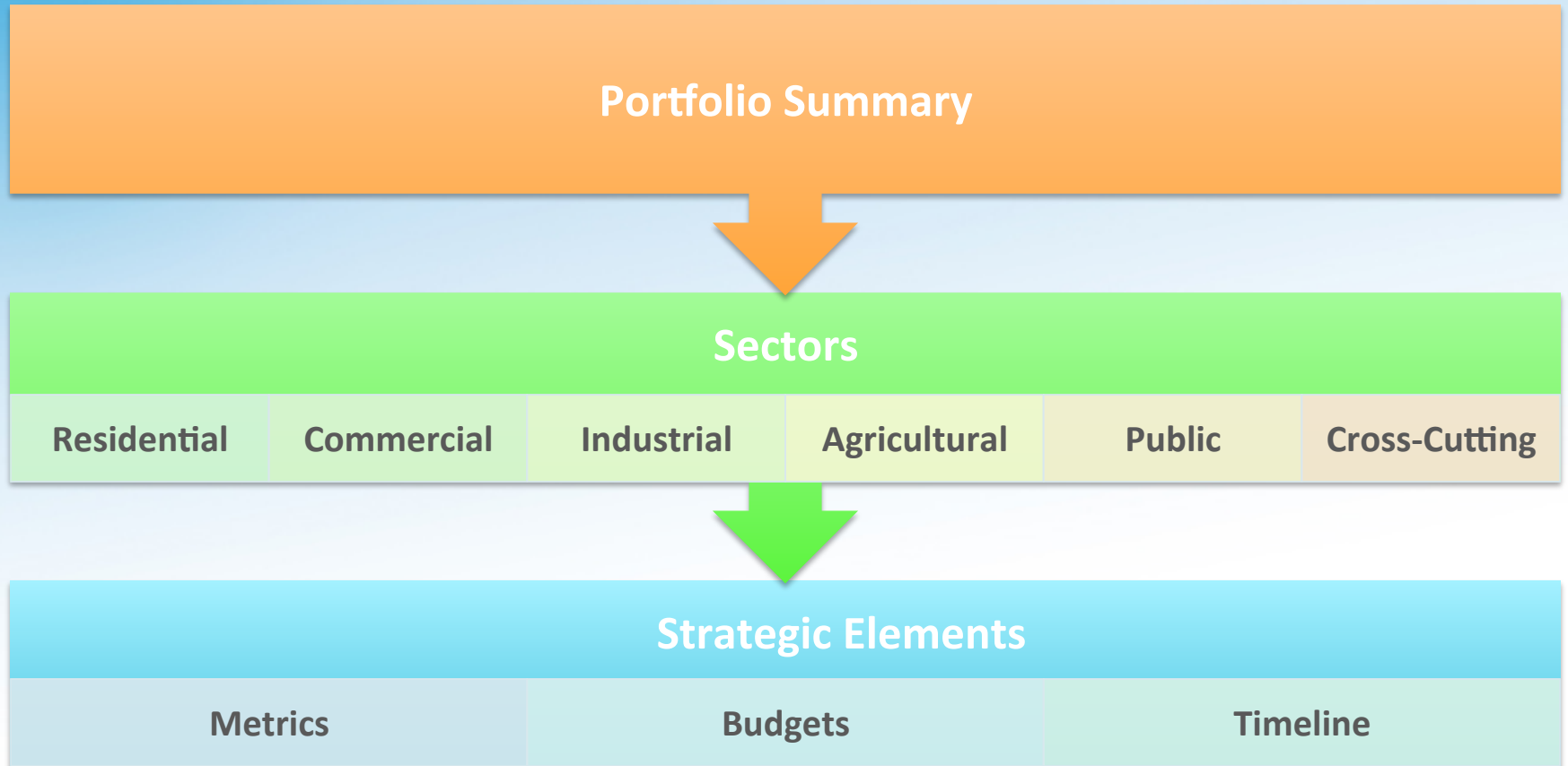


## R.13-11-005

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

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

# Business Plan Structure



# Business Plan Content

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

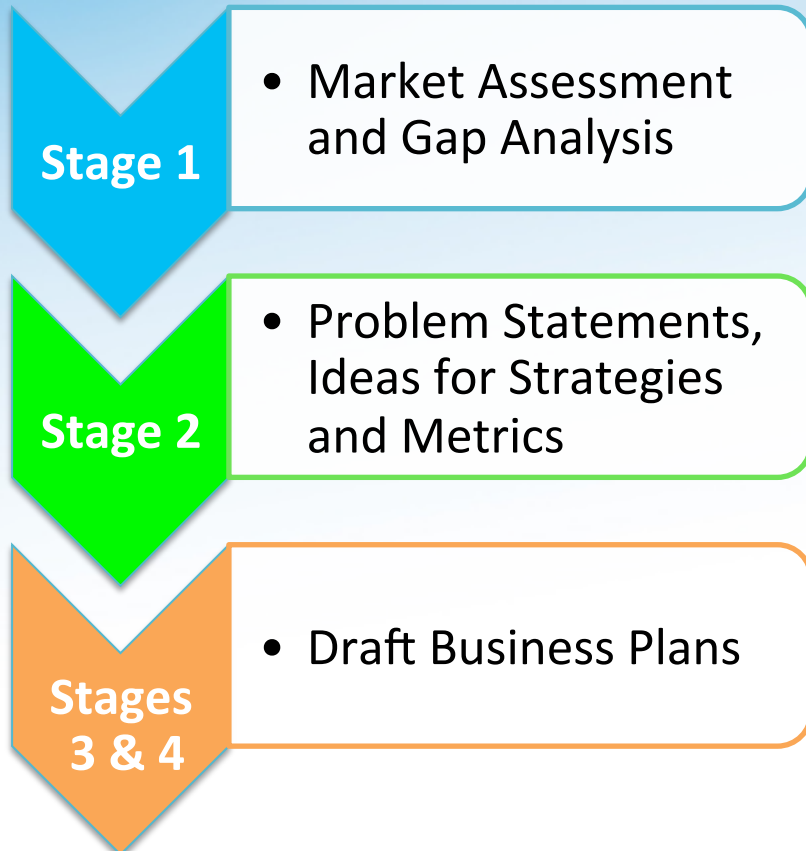
- **Portfolio summary** and description of application intervention strategies
- A chapter for each of **six sectors** (residential, commercial, industrial, agriculture, public, cross-cutting)
- Portfolio and sector level **metrics** for regulatory oversight (GWh, MW, Therms, cost-effectiveness, and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

# Sector-Specific Content

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

# Business Plans and Commission Guidance

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



## Stakeholder Input



# Business Plan Timeline



Market  
Assessment &  
Gap Analysis

• February/March

Problem  
Statements &  
Strategies

• March/April

Full Business  
Plan review

• July/August

Submit  
Business Plan  
to CPUC

• November 1

# ***How to Get Involved***

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

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



# ***Thank You!***



Questions?