LESSONS LEARNED FOR 2020
PLANNING AND PRIORITIES

December 18, 2019
INTRODUCTION

► The 2019-2021 planning process included several large shifts in the energy efficiency plans, including:
  - A dramatic reduction in claimable residential lighting savings
  - A focus on multiple goals including an all-fuels savings goal
  - Several new initiatives such as active demand reduction, energy optimization, and residential program design enhancements

► To help guide the next planning process, we identified several “lessons learned” from 2019-2021 planning and we provide recommendations for 2022-2024

► Lessons and recommendations included in a forthcoming Consultant Team memo
MAINTAIN BRIEFING DOCUMENT AND WORKSHOP PROCESS AND SEEK PA COLLABORATION

► In previous terms, EEAC hired a facilitator to lead series of workshops on considerations of next term

► For workshop process, Consultants put together briefing documents on workshop topics

► Councilor feedback on the briefing documents and workshops was very positive

► For 2022-2024, will be helpful for the PAs to contribute to have some formal role in briefings/workshops
FOCUS ON SPECIFIC KEY DRIVERS SOONER AND WITH CLEAR EXPECTATIONS ABOUT EXCHANGING DATA

► Purpose of “key drivers” process to exchange and discuss information on important planning assumptions

► Discrete topics rather than broad ones lend themselves best to key drivers

► Availability and timeliness of data needed sometimes a challenge

► Hope that KPIs established during the last Plan will provide helpful data for the next key drivers process

► If uncertain assumptions in April draft, revised BCR models in July would be helpful for assessing key drivers
EMPLOY STRATEGIC PLANNING PROCESS FOR PAS AND CONSULTANTS, START EARLY, AND SET TIMELINES & SPECIFIC MILESTONES

- Developing major program redesigns and addressing some issues can be slower than expected
- Big shift in C&I lighting expected in 2022-2024
- Recommend that Consultants and PAs engage in strategic planning process on this topic
  - Develop clear milestones, timelines, and expectations prior to the start of the 2022-2024 planning process
- Strategic planning meetings may also be a good forum for discussing other issues
In 2017, PAs commissioned separate studies with separate timelines and scopes.

DPU Order on 2019-2021 Plan said PAs should:
- Coordinate potential studies to present findings such that results are comparable
- Establish a common study deadline to submit results
- Include testimony and exhibits addressing how findings of study used during planning

We suggest all PAs provide a complete potential study draft by 12/2020.

Recommend 2020 Council Priorities include potential studies to ensure full coordination, comparability of results, and value for planning.
IMPROVE TIMING AND AVAILABILITY OF YEAR-END DATA & BCR MODELS

► One of the best sources of information during planning process is outcomes from recent years

► During planning process, we were largely limited to one year of data from the current plan
  - We receive fourth quarter data in February, but doesn’t include measure level data
  - Evaluated results with BCR models have not been available until August

► Having more granular data, sooner, would be instrumental in supporting the planning process
PROVIDE FOR EASIER, MORE TARGETED REVIEW OF TRM

► Previously, Consultants received redline PDF version of the Technical Reference Manual (TRM) showing changes from previous version

► As TRM has transitioned to an online version, it has become more difficult to identify, track, and review changes

► Having a PDF version sooner, or at least the list of changes, would allow for more targeted review of the TRM
SEEK TECHNICAL SESSIONS WITH DPU TO REVIEW AND DISCUSS SOME ISSUES

► In the past, the DPU held technical session on topic such as:
  - Data tables (08-50 tables),
  - Reporting requirements and formats,
  - DPU "streamlining" issues,
  - Mid-term modifications and MTM triggers
  - Assessment methods for customer bill impacts

► Technical sessions were useful for communicating and discussing the thinking, and for refining specific topics included in earlier Plans

► To the extent PAs seek new program, technical, or reporting elements in 2022-2024, we recommend that the PAs (with EEAC support) seek technical sessions with the DPU
THANK YOU

Questions?

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