

LESSONS LEARNED FOR 2020 PLANNING AND PRIORITIES

▶ **December 18, 2019**

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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**

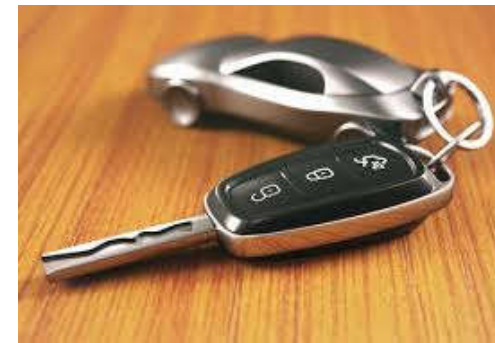
MAINTAIN BRIEFING DOCUMENT AND WORKSHOP PROCESS AND SEEK PA COLLABORATION

- ▶ 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

26 SEP 2017	Residential Planning Workshop #1
	🔗 Official Meeting Notice
	🔗 Agenda
	🔗 Residential Workshop #1 Briefing Document
	🔗 Residential Workshop #1 Presentation
	🔗 Draft Meeting Summary

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**



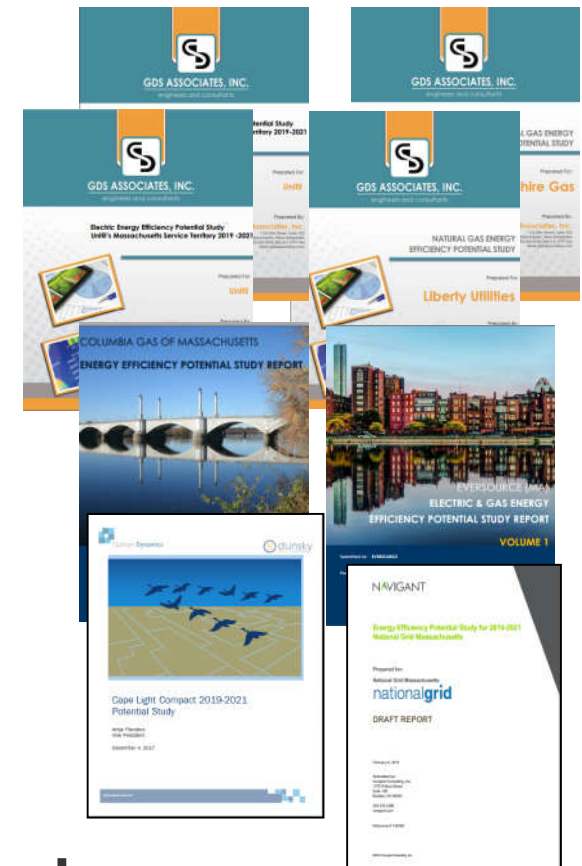
EMPLOY STRATEGIC PLANNING PROCESS FOR PAS AND CONSULTANTS, START EARLY, AND SET TIMELINES & SPECIFIC MILESTONES

- ▶ **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**



IMPROVE PA POTENTIAL STUDY COORDINATION, CLARITY, AND VALUE

- ▶ In 2017, PAs commissioned separate studies a 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



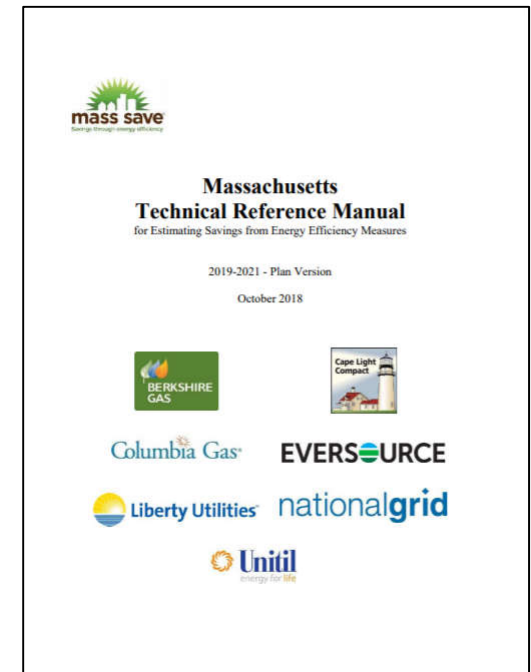
IMPROVE TIMING AND AVAILABILITY OF YEAR-END DATA & BCR MODELS

- ▶ **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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