



Final Report-Out to WHPA Executive Committee – December 10, 2014

Working Group: Regulatory/IOU Notification & Feedback Working Group (SMART Goal #5)

Description/Mission: To improve communications regarding regulatory and utility processes

Goal #5: The WHPA will develop an efficient broadcast communication platform and processes to provide timely information to WHPA members about important events related to changes to current relevant utility, regulatory and government programs and development of future programs to ensure processes are open and transparent, to maximize engagement by WHPA members and other stakeholder groups, and to the extent possible align with existing regulatory feedback processes.

Milestone	Owner	Deliverable	Due Date	Dependencies	Percentage Complete	NOTES
1. Determine members of working group	WHPA Staff	Working Group Roster	May 30, 2014	Willingness of members to participate in working group	100%	Completed
2. Select Working Group Chair	WHPA Staff	Identified Chair	May 30, 2014	Willingness of member to participate as Chair	100%	Completed
3. Working Group Kick-Off meeting	WHPA Staff	Agenda and Meeting Notes	May 30, 2014	Availability of working group members	100%	Completed
4. Approve Working Group Chair	EC	Approval of Chair	May 30, 2014	Willingness of member to participate as Chair	100%	Completed
5. Review and finalize Working Group Goals for 2014	Working Group Chair	Final Brief	July , 2014	EC approved chair	100%	Completed
6. Development of specifications for a structured communication vehicle / tool / platform and processes for providing notification of regulatory, utility and related government events and processes to WHPA members and to enable and support efficient, limited feedback from readers when needed.	Working Group Members with Support from WHPA Staff	Specifications for communication vehicle/ tool /platform	July 25, 2014	<ul style="list-style-type: none"> • Availability of working group members • Availability of necessary WHPA staff member support • Approval of EC 	100%	Completed Initial Working Group recommendations: <ul style="list-style-type: none"> • Development of Regulatory / Policy Notification Web Page • Topics presented in tabular format • Provide brief synopsis for each topic • Identification of WHPA stakeholders per topic • Semi-Regular updates through newsletters or e-mail blasts.





7. Development of vehicle/tool/platform with corresponding forms, protocols and processes	Working Group Members with Support from WHPA Staff	Pilot communication platform	August 27, 2014	<ul style="list-style-type: none">• Availability of working group members• Availability of necessary WHPA staff member support• Cooperation and potentially timely submissions from IOUs and Government Agencies• Approval of EC	100%	Completed <ul style="list-style-type: none">• WHPA Staff, is looking into the costs associated with the programming of a simple table for the web-page. This table will be able to be modified by WHPA Staff on an as-needed basis.• Several Regulatory/Policy proceedings are captured in tabular form for testing purposes.
8. Pilot communication vehicle	WHPA Staff	Compilation of feedbacks and improvements for full launch shared with EC	November 21, 2014	<ul style="list-style-type: none">• Availability of necessary WHPA staff member support• Approval of EC	100%	Completed <ul style="list-style-type: none">• EC Approved• WHPA Staff, is looking into the costs associated with the programming of a simple table for the web-page.



Participants

A broad group of stakeholder participated in the working group, Chaired by Mike O'Halloran, which included representatives of the California utilities, California Energy Commission, California Public Utilities Commission, ACCA, AHRI, CALBO, HARDI, IHACI, NATE, WCEC and various guests. The most recent roster is listed below:

WHPA Regulatory/IOU Notification & Feedback Working Group (SMART Goal #5) Members (voting)				
ACCA (Air Conditioning Contractors of America)	Charlie	McCrudden	Contractor Association	
AHRI (Air-Conditioning, Heating, and Refrigeration Institute)	Mike	O' Halloran	HVAC Manufacturer Association	Chair
CALBO (California Building Officials)	Mark	Meyers	Codes and Standards Official	
CPUC (California Public Utilities Commission)	Pete	Skala	CPUC	
CPUC (California Public Utilities Commission)	Hazlyn	Fortune	CPUC	
HARDI (Heating, Airconditioning & Refrigeration Distributors International)	Talbot	Gee	Distributor Association	
IHACI (Institute of Heating and Air Conditioning Industries)	Bob	Wiseman	Contractor Association	
NATE (North American Technician Excellence)	Valerie	Briggs	Certifying Body	
PG&E (Pacific Gas and Electric Company)	Justin	Kjeldsen	California IOU	
PG&E (Pacific Gas and Electric Company)	James	Tuleya	California IOU	
SDG&E (San Diego Gas & Electric)	Jeremy	Reefe	California IOU	
SoCalGas (Southern California Gas Company)	Harvey	Bringas	California IOU	
WHPA Regulatory/IOU Notification & Feedback Working Group (SMART Goal #5) Members (non-voting)				
ACCA (Air Conditioning Contractors of America)	Christine	Hazelbaker+	Contractor Association	
SMUD (Sacramento Municipal Utility District)	Ravi	Patel	Publicly Owned Utility	
WCEC (Western Cooling Efficiency Center)	Heinemeier	Kristin	Research Organization	
WHPA Regulatory/IOU Notification & Feedback Working Group (SMART Goal #5) Guests (non-voting)				
Empowered Solutions/WHPA Staff	Shea	Dibble	Other Stakeholder	Staff Support
HARDI (Heating, Airconditioning & Refrigeration Distributors International)	Melchi	Jon	Distributor Association	



Product and Process Overview

The Working Group was tasked with the following:

“Development of specifications for a structured communication vehicle / tool / platform and processes for providing notification of regulatory, utility and related government events and processes to WHPA members and to enable and support efficient, limited feedback from readers when needed.”

The Working Group quickly determined that in order to garner wide support and adoption, a simple platform and process was recommended. Upon those recommendations and approval of the Executive Committee, the Notification Page and process was developed with simplicity and ease of use in mind. The page is broken up into two tables: ‘Regulatory/Policy Activity’ and ‘Regulatory/Policy Resources.’

Regulatory Policy Activity and Resources

This information is provided by the [Regulatory/IOU Notification & Feedback Working Group](#).

To submit information for either of these two tables, send an email with complete information to shea@performancealliance.org.

Regulatory/Policy Activity

Relevance to Stakeholders	Regulatory/Policy Agency ^A	Regulatory/Policy Synopsis
ALL	California Energy Commission	<p>2014 Integrated Energy Policy Report Update Docket # 14-IEP-1</p> <p>Senate Bill 1389 (SB 1389, Bowen and Sher, Chapter 568, Statutes of 2002) requires the California Energy Commission to:</p> <p><i>"[C]onduct assessments and forecasts of all aspects of energy industry supply, production, transportation, delivery and distribution, demand, and prices. The Energy Commission shall use these assessments and forecasts to develop energy policies that conserve resources, protect the environment, ensure energy reliability, enhance the state's economy, and protect public health and safety." (Pub. Res. Code § 25301(a))."</i></p> <p>The California Energy Commission adopts an Integrated Energy Policy Report (IEPR, pronounced eye'-per) every two years and an update every other year. This proceeding, docket # 14-IEP-1, will cover the 2014 Integrated Energy Policy Report Update.</p>
ALL	California Energy Commission	<p>The California Clean Energy Jobs Act (Proposition 39)</p> <p>The California Clean Energy Jobs Act (Prop. 39) changed the corporate income tax code and allocates projected revenue to California's General Fund and the Clean Energy Job Creation Fund for five fiscal years, beginning with fiscal year 2013-14. Under the initiative, roughly up to \$550 million annually is available for appropriation by the Legislature for eligible projects to improve energy efficiency and expand clean energy generation in schools.</p>
ALL	California Energy Commission	<p>Pre-Rulemaking on 2016 Building Energy Efficiency Standards (2016 Title 24)</p> <p>The 2016 Standards will continue to improve upon the current 2013 Standards for new construction of, and additions and alterations to, residential and nonresidential buildings. The updated standards will be proposed for adoption in 2015 with an effective date of January 1, 2017. Click here to see the schedule.</p>

The ‘Regulatory/Policy Activity’ table houses relevant and current information related to regulatory, utility and related government events. It breaks-out information into three categories: ‘Relevance to Stakeholders’; ‘Regulatory/Policy Agency’; ‘Regulatory/Policy Synopsis’. All three columns are sortable and contain links to the source.

The ‘Regulatory/Policy Resources’ table is a list of links to a handful of relevant resources, where members can find information pertaining to those resources regulatory and policy documentation. At this time, this list is not exhaustive.

Regulatory/Policy Resources

Resource

- [Bay Area Regional Energy Network](#)
- [California Energy Commission](#)
- [CPUC Energy Efficiency Website](#)
- [Marin Energy Authority](#)
- [Pacific Gas & Electric Rates and Tariffs Library](#)
- [San Diego Gas and Electric Regulatory Information](#)
- [Southern California Edison Regulatory Information](#)
- [Southern California Gas Company Regulatory Information](#)
- [Southern California Regional Energy Network](#)



Regulatory Policy Activity and Resource Submission and Review Process

In keeping with the notion that simplicity of process will eliminate barriers to participation, the Working Group developed a simple submission and review process for the Notification Page, as seen in its entirety below:

“To submit information for either of these two tables, send an email to shea@performancealliance.org (via webpage or directly) with the following information:

For Regulatory/Policy Activities:

- 1. Regulatory/Policy Agency Name (e.g. California Energy Commission)*
- 2. Regulatory/Policy URL (e.g. http://www.energy.ca.gov/2014_energy_policy/index.html)*
- 3. Relevant Stakeholders (e.g. All, Sheet Metal Workers, Utilities, Contractors)*
- 4. Synopsis of Regulatory/Policy activity (e.g. A Brief Sentence or cut/paste paragraph)*

For Regulatory/Policy Resources:

- 1. Regulatory/Policy Agency Name (e.g. California Energy Commission)*
- 2. Regulatory/Policy URL (e.g. http://www.energy.ca.gov/2014_energy_policy/index.html)*

Once received, WHPA Staff will:

- 1. Verify data provided*
- 2. Review the*
 - a. Regulatory/Policy Activity*
 - b. Regulatory/Policy Resource*
- 3. Verify and format or develop a short synopsis*
- 4. Determine posting expiry*
- 5. Provide posting to web-team*
- 6. Upload/Program on webpage*
- 7. QA/QC webpage*
- 8. Notify Staff of completion*
- 9. Develop information blast to WHPA and send to members”*

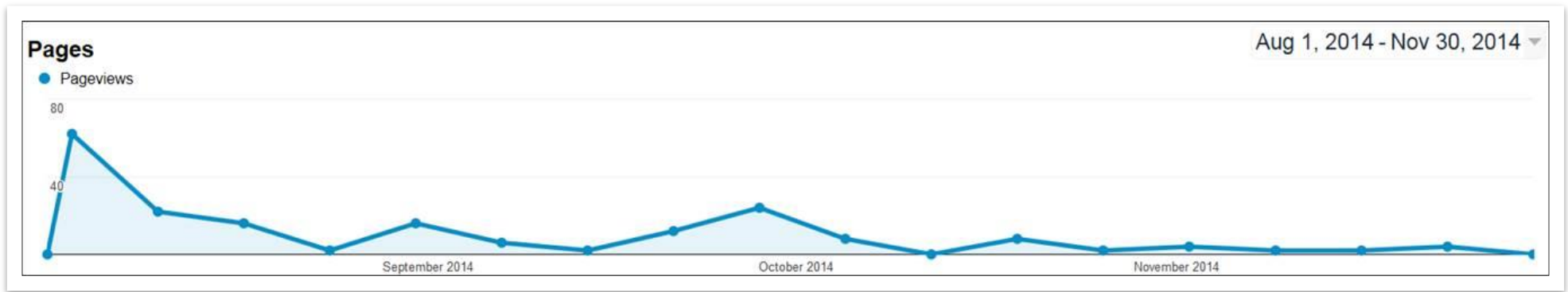


Results

Page analytics from the inception date of Aug. 2014 through Nov. 2014 show that the initial launch of the page drew the largest amount of participation with diminishing page hits as the information was consumed. This is a typical curve for informational pages. Spikes in page hits represents the advertisement of the page in WHPA newsletters, performancealliance.com front page and the addition of new information.

- 192 pageviews by 60 visitors
- 39 of those 60 visitors were located in California.
- Average session duration for the page is 10:43min, 441% over that of the performancealliance.org site average
- California visitors spent an average of 10:30 minutes on the page, primarily driving the average session duration average, despite outlier times (e.g. Arizona 53:27min)
- CA visitors were located across 17 different cities.

Region ?	Acquisition	
	Sessions ? ↓	Avg. Session Duration ?
Visited Regulatory Policy	55 % of Total: 0.94% (5,853)	00:10:43 Site Avg: 00:01:59 (440.89%)
1. California	39 (70.91%)	00:10:30
2. Illinois	4 (7.27%)	00:06:13
3. Colorado	3 (5.45%)	00:22:54
4. Ohio	2 (3.64%)	00:00:01
5. Texas	2 (3.64%)	00:01:56
6. Virginia	2 (3.64%)	00:00:30
7. Arizona	1 (1.82%)	00:53:27
8. Washington	1 (1.82%)	00:27:28
9. Wisconsin	1 (1.82%)	00:00:57





Recommendations

Overall, the Working Group has accomplished its goals within the timeline given, despite a late approval to proceed. Per informal communications and via webpage analytics, the page appears to be successful, based upon the initial criteria set before it.

The following recommendations are hereby given for consideration:

- Continue the WHPA Staff support of the page, as funded by the IOUs.
- Improve upon the cross pollination of information found throughout performancealliance.com (e.g. link to WO32 page).
- Staff should continue to engage utilities, CPUC, CEC and others to provide timely information and updates to existing information.
- Survey WHPA membership on a semi-annual basis for recommendations on how to improve the page and process.
- Bring legislation information into notification page.