

*Honest criticism is hard to take, particularly from a relative, a friend, an acquaintance, or a stranger. -Franklin P. Jones*



## Actionable Recommendations

- Build on lessons learned
- Best available information
- Continuous Improvement

## Portfolio/Program Plans

- Logic connected with market conditions and other activity
- Current savings assumptions
- Reporting/Data requirements



## Evaluation Plans

- Long Term Research Plans
- Prioritization / Targeting
- Public Input

What do we need to know?

Who cares?

Are we there yet?

## Evaluation Outputs

- Tiered for variable audience
- Multiple sources of information
- Review and feedback

Annual Report

Evaluation Summary Reports

Detailed Technical Evaluation Reports

Detailed Measure-Level Tracking Data

Evaluation Oversight Functions – Energy Efficiency

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**Actionable Recommendations** are detailed in the evaluation reports:

- IOUs and PAs are **required to follow up** on these recommendations per Commission Direction

- **Detailed feedback** on the issues came in "60-day" reports

- Recommendations sometimes are inserted in Commission Decisions to give more visibility to the expected action by the PA.

Framework for the portfolio is all **on line** and has **public review** process:

- Approved **savings estimates**

- **Reporting requirements**

- Submissions from IOUs and PAs

- Planned and Actual Program Plans and status of implementation (provided monthly)

*In which areas do we NOT have transparency and need it?*

*In which areas do we have processes for transparency but have not executed well?*

Evaluation Reports are all available on line:

- **Detailed project reports** available to program administrators

- **Annual report synthesizes** outputs from multiple reports to give status by **sector and portfolio**

- Links to ALL reports provided

- **Detailed measure specific data** available on line to "drill down" on changes from reported → evaluated

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All Evaluation Reports and Products have public review processes:

- Drafting, review, and finalization of plans and draft reports

- Master Evaluation Plan available 24/7

- Includes all projects, budgets, rationale

- updated every 6 months to show changes

- EM&V Spend status update available every 2 weeks on line for every project

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are **on line** and

**public comments**

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