

D.12-05-015 OP's related to ex ante:

5. In their review of utility proposed **ex ante values** for new measures, Commission Staff shall balance the need for accurate **ex ante values** with the equally important need to continuously augment the portfolios with new technologies that offer promise.
6. Commission Staff shall strive for uniform statewide Net-To-Gross planning values that represent typical expected results in the Database of Energy Efficient Resources update for the next planning cycle for measures in which the variation between utilities is not significant.
7. Commission Staff shall undertake research in support of Database of Energy Efficient Resources updates when the existing evaluations results, analysis methods and other research literature are found lacking.
8. The proposed **dispositions for issues provided in Attachment A** to this Decision are adopted and Commission Staff shall modify the final Database of Energy Efficiency Resources 2011 release to include all changes in those proposed dispositions.
10. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company **shall use the clarifying direction contained in the adopted dispositions for issues in Attachment A to this Decision in ex ante value filings** required by this Commission.
11. Commission Staff shall provide separate Net-To-Gross values for gas and electric projects that are developed for those types of projects alone, unless the values are sufficiently similar that a single value is warranted.
13. Commission Staff shall track the results of its custom project and measure review activities, as well as related 2010-12 impact evaluation activities, and report any results on Net-to-Gross values in a timely manner so as to inform the adoption of **ex ante update values** for the next program cycle.
14. Commission Staff shall assign a new Net-to-Gross category for Emerging Technology measures with a default Net-to-Gross value of 0.85.
15. Commission Staff shall accept or reject a proposed Emerging Technology measure classification and set any Emerging Technology measure's Net-to-Gross ratio at a higher value than the default value as it deems appropriate.
13. Commission Staff shall track the results of its custom project and measure review activities, as well as related 2010-12 impact evaluation activities, and report any results on Net-to-Gross values in a timely manner so as to inform the adoption of **ex ante update values** for the next program cycle.
141. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall make appropriate adjustments to their participation and incentive calculation rules and **update their ex ante value calculations** in response to codes and standards changes.
142. Commission Staff shall prepare and release a plan for Database of Energy Efficient Resources (DEER) updates that covers the anticipated mid-cycle codes and standard changes and a subsequent DEER updates to be used for planning portfolios 2015 and beyond.

143. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall utilize Database for Energy Efficient Resources (DEER) assumptions, methods, and data in the development of non-DEER values whenever appropriate, and shall follow Commission Staff direction relating to the determination of appropriate application of DEER to non-DEER values.

144. Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company, when adding new measures to their portfolios, shall (1) utilize due diligence when developing the proposed **ex ante values** such that those new ex ante values represent the expected electricity and natural gas savings, costs, and lifetime of the measure; (2) undertake research, in collaboration with Commission Staff, as required, to **establish reasonable expected values**; and (3) pilot promising new technologies and utilize the results of research undertaken during the piloting period to **improve the ex ante values**. Commission Staff shall allow new additions to be utilized in the portfolio prior to all necessary research being completed, when appropriate, by **approving interim ex ante values**.

145. Commission Staff shall review the processes used to derive ex ante values in other jurisdictions and make recommendations for improvements to the Commission's process for consideration prior to beginning the ex ante update for the post-2014 cycle.

146. The custom ex ante review process adopted in Decision 11-07-030 shall continue in the 2013-2014 transition portfolios.

149. Commission Staff shall assign, at its discretion, Net-to-Gross (net of free-ridership) values as part of its ex ante project reviews process.

151. Commission Staff shall, with input from Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Southern California Gas Company, and other parties, develop recommendations on:

- a. Whether it is appropriate to replace the regulation, code, or standard baseline with a typical installation baseline for use in calculating energy savings;
- b. Under what circumstances and based upon what kind of evidence such a change could be made;
- c. If the change to a typical installation baseline is made, how the baseline parameters should be established for use in **setting ex ante values**; and
- d. Assuming the above change, what are the time and budget implications for both Commission Staff and utilities for both ex ante and ex post savings development.

156. Information emerging from the evaluations shall be used to refine and improve programs on an on-going basis, and/or shall be available to assist in portfolio design decisions and revising frozen **ex ante savings parameters** for the next program cycle.