**ENERGY EFFICIENCY PROGRAMS**

Implementation Plan Template Guidance

**Energy Efficiency Energy Division**

**California Public Utilities Commission**

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Implementation Plan Template Guidance 1

1. Introduction 1

2. When a Revised Implementation Plan is Required 2

3. Process for Posting an Implementation Plan 3

Appendices 4

Appendix A: Implementation Plan Template (3.0) 5

Appendix B: Strategic Energy Management (SEM) Program Implementation Plan Checklist 11

Appendix C: Implementation Plan Management 13

Appendix D: Guidance for the Implementation Plan Change Summary Form 14

# Implementation Plan Template Guidance

## Introduction

This updated Guidance document replaces the Implementation Plan Template Guidance v.2 (May 2020) to reflect subsequent California Public Utilities Commission (CPUC) directives. Beginning March 1, 2025, this Guidance applies to all Energy Efficiency (EE) Programs, including all programs resulting from the Investor-Owned Utility (IOU) third-party solicitation process required by CPUC Decision (D).18-01-004.

This Implementation Plan Template will be revised and updated, as appropriate, at least every four years, in line with the EE application cycle. If changes to relevant policy or CPUC guidance occur between template updates, the Portfolio Administrator (PA) is responsible for ensuring that these changes or new requirements are incorporated into new Implementation Plans.

Implementation Plans are commonly drafted by the Program Implementer, who works with the PA to finalize an Implementation Plan that is appropriately aligned with this Guidance document, accurately reflects the program contracted, and fully complies with CPUC requirements. All CPUC requirements for PAs to maintain and submit Implementation Plans remain in effect.

This document is publicly available on the California Energy Efficiency Coordinating Committee (CAEECC) website, the California Energy Data and Reporting System (CEDARS) website[[1]](#footnote-2) and provided to all California ratepayer-funded EE PAs, including the Investor-Owned Utilities (IOUs), Regional Energy Networks (RENs), and Community Choice Aggregators (CCAs).

CEDARS is the referential data system for EE programs, tracking claims and annual program budget filings. Each program has a dedicated page showing program details, including Implementation Plans. The PAs shall upload all Implementation Plans in PDF format to the appropriate program pages on CEDARS. Additional guidance is provided to the PAs in Appendices C and D for submitting and maintaining Implementation Plans.

This update does not require the replacement of current Implementation Plans but does apply to new revisions of older Implementation Plans. Section 2 of the Guidance covers triggers for revising and updating Implementation Plans. This Guidance includes the following Appendices for PAs and Program Implementers to utilize in developing and updating Implementation Plans:

* Appendix A: Implementation Plan Template (3.0),
* Appendix B: Strategic Energy Management (SEM) Program Implementation Plan Checklist
* Appendix C: Implementation Plan Management, and
* Appendix D: Implementation Plan Change Summary Form

New programs not covered in an existing Implementation Plan should utilize Appendices A, C, and, if applicable, B.

Revising Implementation Plans will trigger use of Appendices A, C, and D and might require use of Appendix B depending on the nature of the program changes. Section 2 will explain revision triggers. Section 3 addresses the requirements and process for posting and updating Implementation Plans in CEDARS.

## When a Revised Implementation Plan is Required

Some program changes necessitate that an update be made to the posted Implementation Plan, which should be completed before market-facing changes are rolled out. The following triggers require the PAs to upload a revised Implementation Plan:

### Program Triggers

1. Changes to total program budget[[2]](#footnote-3)
2. Addition or elimination of sub-programs
3. Change in prime Implementer
4. Changes in portfolio segmentation[[3]](#footnote-4)
5. Changes in customer sector(s) that will be served by the program
6. Changes to eligibility rules
7. Changes in program approach or design
8. Changes in contracted program performance metrics or targets[[4]](#footnote-5)
9. Addition or elimination of measure packages that are critical to the program performance[[5]](#footnote-6)
10. Changes to Program Theory/Logic Models
11. Relevant policy or CPUC-directed changes

### Update and Posting of Implementation Plans Guidance

The PAs are directed to ensure that when new or revised Implementation Plans are posted the data in their Implementation Plans are consistent with the cost-effectiveness inputs and application filings, true-up advice letters, mid-cycle review advice letters, and, in some cases, Program Definition Table data.

The PA is responsible for reviewing the Implementation Plan Template (see Appendix A) to ensure that a revised Implementation Plan has all relevant sections that connect to the program’s changes.

Upon revision of the Implementation Plan, the PA will post both clean and redlined documents of the Implementation Plan on CEDARS along with the Implementation Plan Change Summary Form Order (see Appendix D). Older versions will be archived by the system automatically, and the current version will be displayed on the program’s page on CEDARS.

## Process for Posting an Implementation Plan

The PAs are required to upload Implementation Plans on CEDARS. The PAs are directed to follow the process outlined in Appendix C for posting and maintaining Implementation Plans in CEDARS. PAs shall post updated Implementation Plans in a timely manner to encourage program transparency and allow program oversight. The PAs may change and post updated Implementation Plans as needed without Energy Division review and approval. To ensure transparency, the version on the publicly available CEDARS web page will always be current. The PAs will catalog any changes and file a list of the changes annually.[[6]](#footnote-7)

The process for maintaining Implementation Plans in the CEDARS system is as follows:

1. Logon to CEDARS using your PA login and navigate to the filing dashboard for the appropriate program;
2. Click the link to download the Change Summary Template, click Replace Implementation Plan, and upload the following three documents in PDF format:
   1. A “clean” version, which will become the current official Implementation Plan version.
   2. A red-lined version of the Implementation Plan containing all changes since the program was first introduced; and
   3. A completed Implementation Plan Change Summary form (See Appendix D).

# Appendices

Appendix A: Implementation Plan Template (3.0)

Appendix B: Strategic Energy Management (SEM) Program Implementation Plan Checklist

Appendix C: Implementation Plan Change Management

Appendix D: Implementation Plan Change Summary Form

## Appendix A: Implementation Plan Template (3.0)

For consistency, Implementation Plans should follow the structure and fully address all instructions and prompts below, where they are applicable. It is also important that the Implementation Plan accurately reflects and communicates the attributes and functions of the specific program being described. Where a row or section in the template below is not applicable to the program, please state this and why. If a prompt or instruction does not fully address or apply to the program as written, please modify your content to provide relevant information in that section that does apply to the program.

### Program Overview

Provide a brief description of the program (3-5 sentences).

### Program Budget and Savings

| **Table 1: Program Budget and Savings** | | |
| --- | --- | --- |
| 1 | Program Name |  |
| 2 | Program ID number |  |
| 3 | Program Implementer |  |
| 4 | Portfolio Administrator |  |
| 5 | Program Implementer Type (IOU Core, Third-Party Solicited, REN/CCA) |  |
| 6 | Portfolio Segment (Resource Acquisition, Equity, Market Support, or Codes and Standards)[[7]](#footnote-8) |  |
| 7 | Total Program Budget |  |
| 8 | Program Budget by Year |  |
| 9 | Program Duration (Start Date - End Date) |  |
| 10 | Total System Benefit (TSB)  (Total Program TSB and TSB by Program Year) |  |
| 11 | CO2 (Lifecycle, First Year, Net, Gross) |  |
| 12 | KW (First Year, Net, Gross) |  |
| 12 | KWh (Lifecycle, First Year, Net, Gross) |  |
| 13 | Therms (Lifecycle, First Year, Net, Gross) |  |
| 14 | Program Cost Effectiveness: Total Resource Cost (TRC): (Total TRC and TRC by Year) |  |
| 15 | Program Cost Effectiveness: Program Administrator Cost (PAC): (Total PAC and PAC by Year) |  |
| 16 | Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public or cross-cutting) If multi-sector, provide estimated % of the total budget for each sector) |  |
| 17 | Program Type (i.e., Non-resource, Resource) |  |
| 18 | Delivery Type(s) (i.e., Upstream-Manufactured, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install,[[8]](#footnote-9) Codes & Standards)[[9]](#footnote-10) |  |
| 19 | Intervention Strategies (e.g., Strategic Energy Management (SEM), Market Access Program (MAP), Direct Install, Incentive, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach, etc.) |  |
| 20 | M&V Methods (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other (if applicable, describe Other M&V method)) |  |

### Implementation Plan Narrative

The Implementation Plan shall include the following narrative description for each program (and sub-program, if applicable):

1. **Program Description:** Describe the program, its primary purpose (resource acquisition, equity, market support, or codes and standards), rationale, and objectives.
2. **Performance Tracking:** List the contractual targets and the associated numeric values used to quantify and track program progress and success. This includes TSB for all relevant programs. The contractual targets may include the common metrics,[[10]](#footnote-11) equity and market support indicators,[[11]](#footnote-12) and for RENs, unique value metrics,[[12]](#footnote-13) as relevant.
3. **Program Delivery and Customer Services:** Describe how the EE program will deliver offerings to the market, including program strategies/tactics, delivery types, and targeted market/customer group; how it will reach customers, including those in CPUC-defined underserved, hard-to-reach, and/or disadvantaged communities[[13]](#footnote-14) (if applicable). Describe the timeline and strategy for customer acquisition. Describe all services, incentives and tools that are provided to participants. If applicable, describe planned coordination between this program and other EE programs administered by other PAs in the same sector or segment.
4. **Program Design and Best Practices:** Describe the specific program strategies/tactics to reduce the identified market barriers for the targeted customer group and/or market actor(s) to achieve program goals and objectives. Describe how the program approach constitutes “best practices” and/or incorporates “lessons learned.” Include descriptions of key software tools that are significant to program strategy and implementation, including audit tools. Provide references where available.
5. **Innovation:** (Required for all IOU EE programs designed and implemented by a third party.)[[14]](#footnote-15) Describe the innovative elements that have been incorporated into the program, i.e., advancing a technology, marketing strategy, or delivery approach in a manner different from previous efforts.[[15]](#footnote-16) Explain how these will improve program outcomes and if relevant, minimize lost opportunities for promoting other integrated demand side management (IDSM) energy reduction efforts. Describe how the performance of these innovative elements will be measured or assessed.
6. **Pilots:** If applicable, describe any pilot elements or projects that are part of this program, including what is being tested and why and addressing the potential for successes to be identified, replicated and scaled more broadly. Describe how lessons learned in the pilot will be gathered, applied, and shared.
7. **Workforce Education and Training:**[[16]](#footnote-17) (Applicable to WE&T programs only.) Describe how the program will support workforce, education, and training to:
8. Expand/initiate partnerships with entities that do job training and placement;
9. Require placement experience for any new partners in the workforce, education, and training programs and new solicitations;
10. Require “first source” hiring from a pool of qualified candidates before looking more broadly, beginning with self-certification; and
11. Facilitate job connections by working with implementers and contractor partners, and utilizing energy training centers.
12. **Workforce Standards:**[[17]](#footnote-18) Identify all relevant workforce standards that the Implementer deems applicable to the program, including any specific skills certification and/or broader occupational training and experience for the following:
13. HVAC Measures
    * 1. Installation, modification, or maintenance of non-residential HVAC measures with an incentive of $3,000 or more are required to be installed by workers or technicians that meet one of the following criteria:
         1. Enrolled in and/or completed an accredited HVAC apprenticeship
         2. Completed more than five years of work experience at the journey level per California Department of Industrial Relations definition, passed competency tests, and received specific credentialed training
         3. Has a C-20 HVAC contractor license issued by the California Contractor’s State Licensing Board
14. Advanced Lighting Control Measures
15. Installation of non-residential lighting control measures with an incentive of $2,000 are required to be installed by installation technicians who have completed an International Association of Lighting Management companies (NALMCO) Certified Lighting Controls Professional (CLCP) certification.
16. **Disadvantaged Worker Plan:**[[18]](#footnote-19) (Applicable for programs that directly involve the installation, modification, repair, or maintenance of EE equipment.) Describe how the program will provide Disadvantaged Workers with improved access to career opportunities in the EE industry and the method that will be used for tracking this population in order to satisfy metric reporting requirements.
17. **Market Access Programs:** (Applicable tomarket access programs only.) Describe how the market access program interacts with the rest of the PA’s EE portfolio. Describe the possible impacts with downstream retrofit programs.[[19]](#footnote-20)
18. **Additional information:** Describe additional information required by CPUC decision, resolution, or ruling, as applicable. Indicate decision, resolution, or ruling and page numbers.

### Supporting Documents

Attach the following documents (in PDF format):

1. **Program Manuals and Program Rules** (See below).
2. **Program Theory and Program Logic Model:**[[20]](#footnote-21) Program Theory and Logic Models should visually represent and explain the underlying program design and theory of change, supporting the program intervention approach and strategies and demonstrating how these lead to outcomes.
3. **Process Flow Chart:** Provide a process flow chart that describes the administrative and procedural components of the program. For example, the flow chart might describe how a customer submits an application, how the Implementer screens the application, the application approval/disapproval process, verification of purchase or installation, incentive processing and payment, and any quality control activities.
4. **Measures and Incentives:** For deemed measures, provide a summary table of measures and customer incentive levels, along with links to the associated CPUC-approved measure packages.[[21]](#footnote-22) For programs utilizing custom or meter-based methods, list the measures expected to provide the majority of program savings and percent TSB achieved of each.
5. **Diagram of Program:** Provide a one-page diagram of the program visually illustrating the program’s relevant direct linkages to areas such as:
6. Statewide and local IOU marketing and outreach
7. Workforce Education & Training programs
8. Emerging Technologies and Codes and Standards
9. Integrated efforts across demand-side management programs
10. **Program Measurement & Verification (M&V):** (Applicable and required for all programs except those solely utilizing NMEC methods, which are addressed in item 7 below.) Describe M&V efforts that the program will execute to evaluate program progress, ensure accurate and compliant assessment and reporting, and provide critical documentation to support ex-post evaluation (EM&V), including:
11. Data collection strategies embedded in the design of the program or intervention to support near-term feedback, and internal performance analysis during deployment.
12. Methods that will be used to quantify and report against the program’s performance metrics.
13. Process evaluation, additional data collection and/or other planned efforts supporting future EM&V of the program by independent evaluators.
14. New downstream Resource Acquisition retrofit programs targeting the residential or commercial sectors that will not utilize a meter-based M&V method (i.e., NMEC, SEM M&V, Randomized Control Trial or other meter-based method) must justify why meter-based methods are not used for feasibility or cost-effectiveness reasons.[[22]](#footnote-23)
15. **Normalized Metered Energy Consumption (NMEC) Program M&V Plan:** If NMEC is applicable, provide a detailed Program-level M&V plan, with required content as specified in the most recently updated NMEC Rulebook.
16. **Multi-DER IDSM Pilots only:[[23]](#footnote-24)** Provide the specific ex ante approach, tools, and methodologies to ensure evaluability.
17. **SEM Programs only:** Provide additional supporting documents as described in the SEM Program Implementation Plan Checklist (Appendix B).

### Program Manuals

All programs must have manuals uploaded in CEDARS to clarify the eligibility requirements and rules of the program for Implementers and customers. Program rules must comply with CPUC policies and rules. At minimum, manuals should include:

1. **Eligible Measures or measure eligibility, if applicable:** Provide requirements for measure eligibility or a list of eligible measures.
2. **Customer Eligibility Requirements:** Provide requirements for program participation (e.g., annual energy use, peak kW demand, NAICS code).
3. **Contractor Eligibility Requirements:** List any contractor (and/or developer, manufacturer, retailer or other “participant”) or sub-contractor eligibility requirements (e.g. specific required trainings; specific contractor accreditations; and/or, specific technician certifications required).
4. **Participating Contractors, Manufacturers, Retailers, Distributors, and Partners:** For upstream or midstream incentives and/or buy down programs indicate, if applicable.
5. **Additional Services:** Briefly describe any additional sub-program delivery and measure installation and/or marketing & outreach, training and/or other services provided, if not yet described above.
6. **Audits:** Indicate whether pre- and/or post-audits are required, if there is funding or incentive levels set for audits, eligibility requirements for audit incentives, which demand side resources will be included within the audit’s scope and who will perform the audit.
7. **Program Quality Assurance Provisions:** Please list quality assurance, quality control, including accreditations/certification or other credentials.
8. **Other Program Metrics:** List all documentation and data used to calculate Program Metrics.

## Appendix B: Strategic Energy Management (SEM) Program Implementation Plan Checklist

### Purpose

This Appendix contains additional requirements for SEM program Implementation Plans.

For all SEM programs the following must be included in the respective Implementation Plans. The SEM requirements will be either added to existing sections or in a standalone section within the Implementation Plan, as referenced below.

The inclusion of the program elements outlined below are essential to the SEM allowance of a Net-To-Gross of 1.0 and existing conditions baseline. To continue to support alignment with the SEM Guides and the associated benefits, specific program elements listed below should be included in the Implementation Plan. No personal, confidential or proprietary information is needed as part of the inclusion of these additional. Implementation Plan descriptions. These SEM specific Implementation Plan descriptions are necessary to demonstrate how the program adheres to the California SEM Design Guide (Design Guide)[[24]](#footnote-25) and the SEM M&V Guidebook.[[25]](#footnote-26)

### Narrative Requirements

**The Implementation Plan Narrative** should include the following details for SEM programs:

**A general description of potential measures and projects** to be included in customer treasure hunts and opportunity registers such as behavioral, retro-commissioning, and operational (BRO), deemed, and custom capital measures. (Incorporate content in Implementation Plan Narrative Section 1. Program Description.)

**A detailed narrative of the SEM activities, milestones, and objectives** to be pursued as portrayed in the Design and M&V Guides.[[26]](#footnote-27) These activities, milestones, and objectives should align with those included in the SEM program timeline (described in the Supporting Documents section below). (Incorporate content in Narrative Section 1: Program Description.)

**List of roles and responsibilities** for the portfolio administrator, program implementor, and participant roles, including the Data Owner, Energy Champion, Energy Team, and Executive Sponsor. (See the Design Guide for an example.) Describe the plan for filling and communicating these roles to the customer participants, including a clear description and expectation of the commitment involved in participating in a long-term SEM engagement. (Incorporate content into Narrative Section 3. Program Delivery and Customer Services.)

**List of market sectors and/or sub-sectors** that will be targeted in the Implementation Plan. (Incorporate content into Narrative Section 3: Program Delivery and Customer Services.)

**Participation Cohort objectives:** Include the estimated range of the number of participants/customers targeted to take part in each cohort, and how many cohorts are anticipated for the program. (Incorporate content into Narrative Section 3: Program Delivery and Customer Services.)

**A “Tailored Program” section** to provide a list of program design divergences, including shorter term engagements, from the Statewide SEM Guides. Include corresponding references for each item on this list`, and/or the guidebook. The divergence descriptions should include why the divergence is needed and how the program will still adhere to the most current SEM guidebooks in order to demonstrate compliance with D.23-02-002. (Incorporate content in Narrative Section 11. Additional Information.)

### Supporting Documentation

**Supporting Documents:** The following should be included in the supporting documents section of the Implementation Plan:

**A program logic model** with corresponding SEM program performance metrics. An example can be found in the Section 4.2.2 of the SEM Design Guide. Note: These logic models will be used for evaluation purposes to help determine that SEM objectives and activities have been incorporated in the program design. (Incorporate content into Supporting Documents Attachment 2. Program Theory and Logic Model.)

**A table identifying the potential types of incentives that will be considered for each type of measure** that may be applied (e.g., SEM and Non-SEM capital/custom incentives, deemed rebates, SEM milestone payments, etc.). (Incorporate content in Supporting Documents Attachment 4. Measures and Incentives.)

**An M&V and reporting activities section** as described in the most recent version of the SEM M&V and Design Guides. Overlay key reporting submissions as points along the program timeline calendar referenced above. (Incorporate content in Supporting Documents Attachment 6. Program M&V)

**A program timeline** that documents all SEM activities and milestones that will be pursued throughout each SEM program cycle. (See the Design Guide Table 1, Table 6, and Table 13 for an example). Note that timeline activities may change and therefore the program timeline is non-binding but should be revised as necessary in the Implementation Plan posted on CEDARS. Note: The timeline is not required to show specific dates. (Provide content in Supporting Documents Attachment 9. SEM Programs.)

**A schedule and description of educational modules,** including when they will be provided within the program timeline described above. These descriptions should describe the curricula, the educational objectives, and tools used to support these objectives, including IDSM and GHG educational components as described in the Design Guide in Sections 2.1.3 and 2.1.4. (Provide content in Supporting Documents Attachment 9. SEM Programs.)

## Appendix C: Implementation Plan Management

Pursuant to D.15-10-028, the PAs are required to maintain current Implementation Plans on CEDARS. The following information provides guidance to the PAs for Implementation Plan submission and change management. This document will also be posted on CEDARS.[[27]](#footnote-28)

### Managing Implementation Plans on CEDARS

CEDARS displays each program on its own webpage, controls versioning, and alerts the Energy Division and subscribers and when an Implementation Plan changes. CEDARS is designed to show the current Implementation Plans on each program’s webpage.

The PAs may change Implementation Plans as needed without further Energy Division review; CEDARS issues a notification to Energy Division staff and other subscribers, when changes are made.

The process for maintaining Implementation Plans in the CEDARS is as follows:

1. Log on to CEDARS using your PA login and navigate to the filing dashboard for the appropriate program.
2. Click the link to download the Change Summary Template. Click Replace Implementation Plan and upload the following three documents in PDF format:
3. A “clean” version, which will become the current official Implementation Plan version.
4. A red-lined version of the Implementation Plan containing all changes since the program was first introduced, and
5. A completed Implementation Plan Change Summary form (see Appendix D).

CEDARS will not accept Implementation Plan revisions unless all three PDF files are uploaded. The Energy Division staff and other subscribers will receive a system-generated notification when Implementation Plan changes have been uploaded, but they are not required to approve the documents in the system.

## Appendix D: Guidance for the Implementation Plan Change Summary Form

The Energy Division developed the Implementation Plan Change Summary Form to accompany all Implementation Plan changes uploaded to CEDARS. This online form is available on CEDARS and should be used to document any required changes to the Implementation Plan and uploaded to CEDARS as a PDF file.

**General Program Information**: Complete the top section of the form. If the Implementation Plan belongs to a subprogram, use the subprogram budget for the “Current Program Budget.”

|  |  |  |  |
| --- | --- | --- | --- |
| **Program Name** |  | **Date** |  |
| **Subprogram Name(s)** |  | **PA Name** |  |
| **Program ID** |  | **PA Program Contact** |  |
| **Current Program Budget** |  | **Prior Program Budget (if applicable)** |  |

**Triggers requiring a change to the Implementation Plan:** Select the triggers requiring a change to the Implementation Plan.

1. Changes to total program budget[[28]](#footnote-29)
2. Addition or elimination of sub-programs
3. Change in prime Implementer
4. Changes in portfolio segmentation[[29]](#footnote-30)
5. Changes in customer sector(s) that will be served by the program
6. Changes to eligibility rules
7. Changes in program approach or design
8. Changes in contracted program performance metrics or targets[[30]](#footnote-31)
9. Addition or elimination of measure packages that are critical to the program performance[[31]](#footnote-32)
10. Changes to Program Theory/Logic Models
11. Relevant policy or CPUC-directed changes

**Driver of change:** Content for change driver(s) should be specific and succinct.

**Description of change:** Change descriptions should clearly indicate what area(s) of program implementation is changing, such as program financial/budget detail, logic models, eligibility rules, marketing plans, target sectors, etc.

*IMPORTANT*: Some changes will require updates to cost-effectiveness inputs and the Program Details Table. D.15-10-028 requires consistency among these filings. It is the PA’s responsibility to keep that information current in order for the system to accept program savings claims.

**Budget change:** Budget change should indicate any other program budget(s) involved in the fund shift (money shifted from one program to another), measure incentive/rebate changes, changes to PA budgets or other budget items, and other relevant budget details.

**Implementation plan section and/or wording changed or replaced:** Cite specific Implementation Plan section(s) to be changed or replaced.

**Replacement language or information:** Summarize replacement content or relevant information within this change version.

**Revised TSB and energy savings (if any):** Indicate revised TSB, energy savings, and demand reductions associated with the change(s).

**Other Implementation Plan changes required:** Identify if the implementation changes require changes to the Program Details Table or cost-effectiveness inputs.

1. https://cedars.cpuc.ca.gov/documents/standalone/list [↑](#footnote-ref-2)
2. As reflected in CPUC filings or program contract amendments [↑](#footnote-ref-3)
3. D.21-05-031, page 14 and Ordering Paragraph 2 [↑](#footnote-ref-4)
4. These metrics and targets may be different from the metrics and indicators adopted in D.23-06-055 [↑](#footnote-ref-5)
5. See California Electronic Technical Reference Manual (eTRM) [↑](#footnote-ref-6)
6. D.15-10-028, page 63 [↑](#footnote-ref-7)
7. D.21-05-031 Ordering Paragraph 2 [↑](#footnote-ref-8)
8. https://cedars.sound-data.com/deer-resources/deemed-measure-packages/guidance/ [↑](#footnote-ref-9)
9. Database for Energy Efficiency Resources (DEER) 2026 Delivery Types [↑](#footnote-ref-10)
10. D.18-05-041, Attachment A [↑](#footnote-ref-11)
11. D.23-06-055, pages 59-65, Conclusion of Law 36 [↑](#footnote-ref-12)
12. D.19-12-021, pages 2, 23 [↑](#footnote-ref-13)
13. D.23-06-055, Sections 7.2-7.3 and Conclusion of Law 30-33 [↑](#footnote-ref-14)
14. D.16-08-019, Section 5.2 and Conclusion of Law 26 [↑](#footnote-ref-15)
15. See “Innovation and Integrated Demand Side Management (IDSM) References” document at https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/demand-side-management/energy-efficiency/rolling-portfolio-program-guidance [↑](#footnote-ref-16)
16. D.18-05-041, pages 20-21 and Ordering Paragraph 7 [↑](#footnote-ref-17)
17. D.18-10-008, Ordering Paragraph 1-2 and Attachment B, Section A-B, page B-1 [↑](#footnote-ref-18)
18. D.18-10-008, Attachment B, Section D, page B-9 [↑](#footnote-ref-19)
19. D.23-06-055, Ordering Paragraph 26 [↑](#footnote-ref-20)
20. The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004 [↑](#footnote-ref-21)
21. See California Electronic Technical Reference Manual (eTRM) [↑](#footnote-ref-22)
22. D.23-06-055, Ordering Paragraph 20 [↑](#footnote-ref-23)
23. D.23-06-055, pages 77-80 [↑](#footnote-ref-24)
24. SEM Design Guide is located: https://pda.energydataweb.com/#!/documents/2647/view [↑](#footnote-ref-25)
25. SEM M&V Guidebook is located: https://pda.energydataweb.com/api/view/2648/CA\_SEM\_MV\_Guide\_v3.02.pdf [↑](#footnote-ref-26)
26. A list of M&V and reporting activities can be found in the Design Guide section 4.1 and M&V Guide section 14.1 [↑](#footnote-ref-27)
27. https://cedars.cpuc.ca.gov/documents/standalone/list/ [↑](#footnote-ref-28)
28. As reflected in CPUC filings or program contract amendments [↑](#footnote-ref-29)
29. D.21-05-031, page 14 and Ordering Paragraph 2 [↑](#footnote-ref-30)
30. These metrics and targets may be different from the metrics and indicators adopted in CPUC Decision D.23-06-055 [↑](#footnote-ref-31)
31. See California Electronic Technical Reference Manual (eTRM) [↑](#footnote-ref-32)