

**CALIFORNIA ALTERNATIVE ENERGY AND  
ADVANCED TRANSPORTATION FINANCING AUTHORITY**

***Request to Approve Members for the Working Group to Develop Criteria for a  
Comparative Assessment of Energy Efficiency Financing Programs  
Available in California***

**Tuesday, March 15, 2016**

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**REQUEST**

Staff are requesting approval of members for the working group to develop criteria for a comparative assessment of energy efficiency financing programs available in California pursuant to a legislative directive in the 2015-16 Budget Package.

**SUMMARY**

**Legislative Directive**

As part of the 2015-16 Budget Package, the California Legislature tasked the California Alternative Energy and Advanced Transportation Financing Authority (“CAEATFA”), in consultation with the California Public Utilities Commission (“CPUC”), with creating a working group to “develop criteria for a comparative assessment of energy efficiency financing programs available in California,” including Property Assessed Clean Energy (“PACE”) financing, legacy utility on bill financing (“OBF”), and the California Hub for Energy Efficiency Financing (“CHEEF”) pilot programs. (Supplemental Report of the 2015-16 Budget Package, Item 0971001-0528.)

**Public Process for Developing Comparative Criteria**

CAEATFA staff has planned a public process to encourage stakeholder participation and input in developing the criteria for comparative assessment. CAEATFA is hosting a series of educational public workshops featuring presentations from stakeholders on various metrics for evaluating energy efficiency programs. The first workshop was held on February 10, 2016, and featured a presentation by staff from Lawrence Berkeley National Laboratory (“LBNL”) on their report *Making it Count: Understanding the Value of Energy Efficiency Financing Programs Funded by Utility Customers*. The second workshop is scheduled for March 22, 2016, and will include a presentation on CHEEF and OBF evaluation efforts. The third educational workshop, tentatively scheduled for March 29, 2016, will focus on the evaluation of PACE financing programs. Throughout the process, CAEATFA is also accepting written public comments on potential comparative criteria.

Working Group

The workshop series will culminate with a public meeting of the working group. At this meeting, the working group will lead the discussion on a proposal of comparative criteria, which will be developed based on discussions and comments from the previous workshops. Although the working group will be leading the discussion on the proposal, members of the public will also have the opportunity to provide comments at the meeting.

CAEATFA staff reached out to stakeholders and developed a list of 41 working group members, which includes representatives from several key stakeholder groups:

<u>Name</u>	<u>Organization</u>
Paul Blagbrough	Union Bank
Matthew Brown	Harcourt Brown and Carey
Daniel Buch	Office of Ratepayer Advocates
Megan Campbell	Opinion Dynamics
Richard Chien	City and County of San Francisco
Howard Choy	LA County Office of Sustainability, Internal Services Department
Jeanne Clinton	California Public Utilities Commission
Charles Cormany	Efficiency First - California
Susan Davison	CalCERTS, Inc.
Jeff Deason	Lawrence Berkeley National Laboratory
Jane Elias	Sonoma County Energy Independence Program
Laura Franke	Public Financial Management, Inc.
Al Gaspari	Pacific Gas & Electric
Sandy Goldberg	Governor's Office of Planning and Research
Matt Golden	Open Energy Efficiency
Charles Goldman	Lawrence Berkeley National Laboratory
Kevin Gould	California Bankers Association
Peter Grabell	Figtree Financing
Angela Hacker	Community Services Department, County of Santa Barbara
James Hamill	California Statewide Communities Development Authority
Alex Hill	Dunsky Energy Consulting
David Ismailyan	California Energy Commission
Jewel James	Renovate America
Courtney Jensen	California & Nevada Credit Union Leagues
Chris Kramer	Energy Futures Group
Mike Lemyre	Ygrene Energy Fund
Joseph Livaich	Renew Financial
Barbara Lloyd	California Clean Energy Fund
Van Mattison	Sacramento Municipal Utility District
Ari Matusiak	Renovate America
Pat McGuckin	Cadmus, Energy Services Sector
Ralph Prah	California Public Utilities Commission, Energy Division

Dennis Quinn	Joule Assets
Diane Schrader	THIRDact
William Shady	Sustainable Design & Project Management
Frank Spasaro	Southern California Gas Company
Barbara Spoonhour	Western Riverside Council of Governments
Jennifer Svec	California Association of Realtors
Mark Tsimanis	Energy Loan Network
Wayne Waite	California Housing Partnership
Jenine Windeshausen	County of Placer

**Tentative Timeline.**

All of the future dates below are tentative and subject to change.

February 10, 2016	First public workshop with presentation from LBNL on <i>Making it Count</i> . The public may submit written comments on criteria that should be discussed during the series for 7 business days.  CAEATFA will accept general written comments on potential comparative criteria on a rolling basis.
February 17, 2016	Deadline for people to notify CAEATFA of interest in participating as a working group member.
February 22, 2016	Public comment on topics and criteria that should be discussed during the series due.
March 15, 2016	Board considers and approves working group members.
March 22, 2016	Second public workshop with presentations on CHEEF and OBF.
March 29, 2016	Third public workshop with presentations on PACE financing.
April 13, 2016	Draft proposal of comparative criteria noticed to the public. Public may submit written comments on the proposed criteria for 7 business days.
April 22, 2016	Public comment on the proposed criteria due.
April 27, 2016	Meeting of the working group to discuss proposal of criteria for a comparative assessment of energy efficiency programs.
June 21, 2016	CAEATFA will publish a summary of the issues discussed and recommendations made by the working group.

**Recommendation.** Staff recommends adoption of a resolution to approve the proposed list of working group members for developing criteria for a comparative assessment of energy efficiency financing programs available in California.

**RESOLUTION OF THE CALIFORNIA ALTERNATIVE ENERGY AND  
ADVANCED TRANSPORTATION FINANCING AUTHORITY APPROVING  
MEMBERS FOR THE WORKING GROUP TO DEVELOP CRITERIA FOR A  
COMPARATIVE ASSESSMENT OF ENERGY EFFICIENCY FINANCING  
PROGRAMS AVAILABLE IN CALIFORNIA**

March 15, 2016

WHEREAS, Item 0971-001-0528 of the Supplemental Report of the 2015-16 Budget Package tasked the California Alternative Energy and Advanced Transportation Financing Authority ("Authority") with creating a working group that includes key stakeholders to develop criteria for a comparative assessment of energy efficiency financing programs available in California; and

WHEREAS, in response to this directive, the Authority is hosting a series of public workshops that include presentations from stakeholders on potential criteria for a comparative assessment of energy efficiency financing programs, culminating with a public meeting of a working group; and

WHEREAS, at this public meeting, the working group will discuss a proposal of potential comparative criteria that will be drafted based on the previous workshop discussions and written comments received.

NOW, THEREFORE, BE IT RESOLVED by the California Alternative Energy and Advanced Transportation Financing Authority as follows:

Section 1. The proposed list of working group members, on file with the Authority, is hereby approved.

Section 2. This resolution shall take effect immediately upon its approval.