History of LIEE Standardization Team Projects

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LIEE Program Standardization Project

- IOUs have been working with Energy Division and ORA to **standardize LIEE programs since 1999**.
  - The Statewide LIEE Standardization Project was formed to comply with Commissioner Neeper's **December 29, 1999 ACR** to standardize the LIEE programs.
  - A second **ACR issued March 22, 2000** expanded the scope of the study to include inspections, policies and procedures.
  - **The Standardization Team** (Team) includes representatives from PG&E, SCE, SDG&E, SoCalGas, Energy Division, ORA, and the Team's consultants.

Standardization Phase 1

- Develop recommendations to achieve greater **statewide consistency across LIEE Programs**, including:
  - A common set of statewide **Weatherization Installation Standards (WIS)**
  - A consistent set of **measure selection criteria**
  - A common set of **measure-specific policies and procedures (P&P)**
    - First 2 objectives met
    - 3rd only partially met in Phase 1: P&P for some measures were carried over to Phase 2.

Standardization Phase 1

- **Phase 1 Report filed May 8, 2000.**
  - July 5, 2000: Follow-up filing
    - Additional WIS recommendations in response to Phase 1 comments
- **D.00-09-036** adopted the Team's Phase 1 recommendations.
  - Included additional PY2001 recommendations filed by the LIAB.
  - Instructed the utilities to develop a **Customer Bill of Rights**.

Standardization Phase 2

- Produce **Statewide WIS and P&P Manuals**
  - **Completed Statewide WIS Manuals** for both conventional homes and mobile homes
  - **Developed consistent set of policies and procedures**, except as relates to the following **4 unresolved issues**:
    - CAS Testing
    - Appropriate level of ceiling insulation
    - Eligibility of master-metered units
    - Eligibility of rental units for evaporative coolers

Standardization Phase 2

- **Further development of measure selection criteria was suspended** pending RRM Working Group completion of program evaluation and reporting requirements studies.
- **Phase 2 Report filed September 15, 2000.**
- **September 11, 2000 ACR** focused on the 4 unresolved issues.
  - Instructed Team to **provide pros and cons** of the different options discussed in the Phase 2 Report.
  - **Phase 2 Follow-up report filed October 26, 2000.**

Standardization Phase 2

- **D.01-03-028**
  - Ordered **Phase 3**
    - Ordered **various changes** to Phase 2 and Follow-up recommendations.
    - Ordered the utilities to reconsider and **resolve the outstanding Phase 2 issues**.
  - Ordered **Phase 4**
    - **Natural Gas Appliance Testing (NGAT)**
- **D.01-05-033**: Rapid Deployment
    - Ordered the Team to **develop recommendations for evaluating new RD measures**, including reporting requirements, evaluation methodology, budget and schedule.

Standardization Phase 3

- Draft a **Statewide Low Income Customer Bill of Rights**, complete **P&P**, develop additional **RD WIS sections**
  - **Low Income Customer Bill of Rights** was filed March 9, 2001.
  - **P&P Completed**
    - Ceiling insulation levels, master-metered unit eligibility and rental unit eligibility for evaporative cooling.
  - **WIS Manual sections completed**
    - Duct reconnection, refrigerator replacements, evaporative cooler installation and furnace R&R.
  - New statewide installation standards developed for the **Rapid Deployment measures**.
  - **Phase 3 Report** filed July 2, 2001.

Standardization Phase 4

- **Complete Natural Gas Appliance Safety Testing (NGAT)** (and Cost Effectiveness Measure Assessment; addressed separately)
  - **D.01-03-028** instructed the Team to "conduct a study of natural gas appliance safety conditions and alternative testing procedures" under Phase 4 of the LIEE Program Standardization Project.
- **The NGAT Phase 4 Report** was filed May 5, 2003.
  - No interested parties filed comments.

Standardization Phase 4.5

- D.02-12-019 directed the Team to “file assumptions and methods used to calculate per home installation costs in the cost-effectiveness assessment, including the measure mix”.
- Team filed “Low Income Energy Efficiency Program Measure Cost Effectiveness Study Final Report on June 2, 2003”.

Standardization Phase 4.5

- D.03-11-020:
- Adopted June 2, 2003 LIEE Program Measure Cost Effectiveness Report.
- Adopted new mix of LIEE measures effective Jan. 1, 2004.
- Adopted NGAT recommendations with modifications.
- Directed Team to file CO testing protocols.

Standardization Phase 4.5

- D.03-11-020:
- Directed Team to file a consistent set of CO flue thresholds, by combustion appliance.
- Directed Team to establish a process for considering existing and new measures for inclusion in the LIEE program.
- Directed the Team to propose changes to P&P and WIS manuals.

Standardization Phase 5

- October 22, 2004 ACR adopted Phase 5 scope of work.
- Solicitation process for new LIEE measures.
- Schedule for Proposed changes to P&P and WIS manuals.

Standardization Phase 5

- Jan. 18, 2005 – Team filed P&P and WIS manuals.
- March 25, 2005 ACR directed Team to withdraw P&P and WIS manuals, to solicit public input on proposed changes and refile recommendations pending public input.
- May 2, 2005 – Team filed Report on Assessment of Proposed New LIEE program measures for 2006.

Standardization

- D.05-04-052:
  - Directs Team to evaluate the effectiveness of energy education programs in next measure assessment process.
  - Directs Team to evaluate LIOB's proposal for a pilot air conditioning maintenance measure in its next measure assessment process.

Standardization Phase 5.1

- June 7, 2005 ACR approved Phase 5.1 scope of work.
- Phase 5.1 included public process for P&P and WIS manuals.
- November 1, 2005 Team filed proposed changes to P&P and WIS manuals.

Standardization Phase 5.2

- October 11, 2005 Team filed Phase 5.2 scope of work

- Included a variety of new tasks, some as an outcome of public input.
- Included tasks for assessment of energy education, pilot air conditioning maintenance, Go-back rule, evaluate replacement of furnaces as measure, etc.