



HESCHONG MAHONE GROUP, INC.

11626 Fair Oaks Blvd. #302, Fair Oaks, CA 95628 (Sacramento area)

Phone (916) 962-7001 E-mail: mahone@h-m-g.com

AB 1103 Working Group – Meeting Notes

Friday, June 26, 2009 – 1:00-2:15 pm

Attending:

California Association of Realtors: Elizabeth Gavric

California Energy Commission: Martha Brook, Robin Mayer, Matt DalSanto, Joe Loyer

California Public Utilities Commission: Jordana Cammarata

Environmental Protection Agency: Tracy Narel, Peter Flippen

Heschong Mahone Group: Doug Mahone, Amy Barr, Julieann Summerford

Lawrence Berkeley National Laboratory: Paul Mathew

Sempra: John Cullum

Southern California Edison: Steve Galanter, Bob Levine, Matt Evans

1. Tentative schedule for AB1103 draft regulations and rulemaking order
 - a. July 10 - Legal office draft regulations
 - b. July 14 - Working group review of draft regulations
 - c. July 15 (at CEC Business Meeting) - Order instituting a rulemaking
 - d. July 16 - Rulemaking web site
 - e. July 16 - Workshop notice posted & mailed
 - f. July 21 - CEC review of draft regulations
 - g. July 23 (3 weeks before workshop) - Final draft regulations posted to rulemaking web site
 - h. August 6 - CEC staff presentation for workshop posted
 - i. August 13 (9-noon) - Workshop on draft regulations

2. Drafting guideline document
 - a. Guidance is an opportunity to provide resource for those affected by bill: explain the law, what to do, best practices, flow charts, forms, policy, etc
 - i. Similar to user's manual
 - ii. Separate material; gets adopted separately from regulations

- iii. Format: chronological sequence of events
- b. Guidance document brainstorming: Outline
 - i. Definition of terms/Glossary
 - ii. Overview of requirements
 - 1. Benefits of benchmarking - for owners as well as for CA energy policy
 - 2. What needs to be done when - in terms of a financial transaction (general overview)
 - iii. Building owner chapter
 - 1. When does the law apply - whole building, phasing schedule
 - 2. How to benchmark your building - what to do at CEC site, what to do at PM site, what to do at utility benchmarking sites
 - 3. How to disclose your benchmarking data - CA Energy Performance Disclosure Form
 - 4. Link between AB1103 disclosure and other real estate transaction disclosures - what is practically going to happen
 - 5. Special situations - multi-tenant, building types, partially occupied buildings, what happens if you can't benchmark your building
 - 6. What happens after building benchmarked
 - 7. How to update your benchmark data
 - 8. Suggestions - how to improve your energy performance, general benchmarking resources
 - 9. What can you do with your benchmarking data - can't disclose details, but can disclose what AB1103 requires
 - iv. Utility chapter
 - 1. What is utility role in AB1103
 - 2. How to establish yourself as an energy service provider
 - 3. How does the customer request data - standard release form developed for IOUs (with statement that may be different for every utility)

4. How do you supply the electronic data to PM - ABS approach, Excel spreadsheet approach, how to aggregate data
 5. Suggestions - encouraging customers to continue benchmarking tracking, ongoing uploading of data so benchmark remains current has benefits to utility in terms of energy efficiency portfolios, customer service
- v. Industry Professionals Chapter (buyer, financier, lender, lessee, etc)
1. What you can expect to be disclosed to you - what are they giving you and what use is it to you
 2. What you need to do once you have the disclosure - obligation to not disclose data further
 3. Nondisclosure agreements
- vi. ENERGY STAR® Energy Performance Rating
1. What does your score mean - explanation of scope, scale, etc
 2. What it explains and what it doesn't explain - incorporates asset and operational efficiency
- vii. California Building Energy Performance Rating
1. What does your score mean - explanation of scope, scale, etc
 2. What it explains and what it doesn't explain - incorporates asset and operational efficiency
 3. Additional sources of benchmarking information
- c. Who writes
- i. HMG offers to put together as draft if utility sponsors agree
3. Upcoming working group schedule
- a. Following meetings for July 10th and 24th to discuss guidelines