



Semi-Annual 2025 Portfolio Performance Report Review

Hosted by the California Energy Efficiency Coordinating Committee (CAEECC)

Virtually on Zoom

Meeting Date: 11/6/2025 9:30am-3:00pm

Last updated 11/26/2025 to note that updated MCE and SDREN slides are posted separately to the CAEECC meeting page under “Documents Posted after the Meeting”

Agenda

9:30 **Welcome**

Agenda and How to Participate

9:35 **Performance Overview**

Summary of portfolio performance across PAs

9:50 **Southern CA
Performance Review**

I-REN, SoCalREN, SDREN, SCE, SoCalGas, SDG&E

11:35 *Lunch*

12:15 **NorCal Performance Review**

BayREN, NREN, PG&E, MCE

1:25 **Central CA
Performance Review**

3C-REN and CCRREN

2:05 *Break*

2:10 **Key Themes**

*Open Discussion
Summary of Key Themes*

2:45 - 3:00 **Wrap Up**

Overview of Semi-Annual PPRR and Next Steps

Welcome

Semi-Annual Performance Overview

Southern CA Performance Review

NorCal Performance Review

Central CA Performance Review

Key Themes

Wrap Up

Welcome

How to Participate

Lunch

Break



Welcome!

As folks filter in, please
drop your **Name, Pronouns,
and Organization /
Representation** in the chat.

How to Participate



Format for Each PA Presentation

- 1) Portfolio Administrator (PA) Presentation (10 min)
- 2) Questions & Input (5 min)
 - a) First by CAEECC Members, then the Public
- 3) Regional Q&A

There is limited time for Q&A. Unanswered Questions & Input submitted via Slido will be included in the Meeting Summary, and PAs will be asked to respond to as many as possible via Slido and the Meeting Summary

Everyone



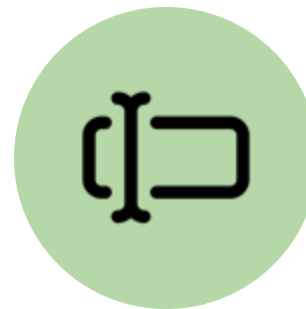
Closed captioning is available



Share your **video** if possible



Mute yourself when you're not speaking.



Rename yourself with your Representation & Pronouns

CAEECC Members Participation:



Rename yourself to “C
- [Name],
[Organization]”



Please **raise your hand** to enter the queue.



If there are many folks with raised hands, please limit yourself to **1-2 questions**. If there’s time, we’ll return to your remaining questions.

*If CAEECC Members have more questions than time allows, please **use the Slido Link** to uplift your remaining questions.*

Please enter your name when using Slido.



Non-CAEECC Member Participation:

Participate in Questions & Input via Slido

slido

Go to [Slido.com](#) and enter code **#1999402**

Questions & Input can be added **at any point** during the PA presentation. There is a 300 character limit. Use replies to add on if you need more space.



Please **add your name/attribution** to your question to support facilitation.



Please **tag** your Questions according to the PA Presenter (i.e. PG&E or SoCalREN), so we can address your questions accordingly.



Questions can be **upvoted** to uplift common questions. **Due to limited time, only a few questions may be addressed during the meeting.**

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Zoom Webinar & Attendee Participation

Non-CAEECC Members are *Attendees* in this Zoom Webinar except *Presenters*

Messaging:

- Cannot Direct Message other Attendees
- ✓ Can chat Everyone
- ✓ Can Direct Message a Facilitator (use only for tech issues)

Member Transparency

- ✓ Lead CAEECC Members renamed with “C - [Name], [Organization]”

Due to time limitations, we may not be able to answer all questions. Unanswered questions will be noted in the Meeting Summary and will be answered offline.

Semi-Annual Performance Overview

Southern CA Performance Review

Lunch

NorCal Performance Review

Central CA Performance Review

Break

Key Themes

Wrap Up

Semi-Annual Performance Overview

Background

Summary of portfolio
performance across PAs

Background

In August 2025, CAEECC hosted the *Annual* 2024 Portfolio Performance Report Review Goals

1

Identify challenges & opportunities

2

Identify who might problem solve (CAEECC, Portfolio Administrator (PA), or other) in a timely fashion

3

Ensure transparent review, tracking, and dialogue of portfolios to maximize cost-effectiveness

Today, CAEECC is hosting the *Semi-Annual* 2025 Portfolio Performance Report Review Goals

1

Highlight trends in PA portfolios

2

Get input from CAEECC on possible course corrections

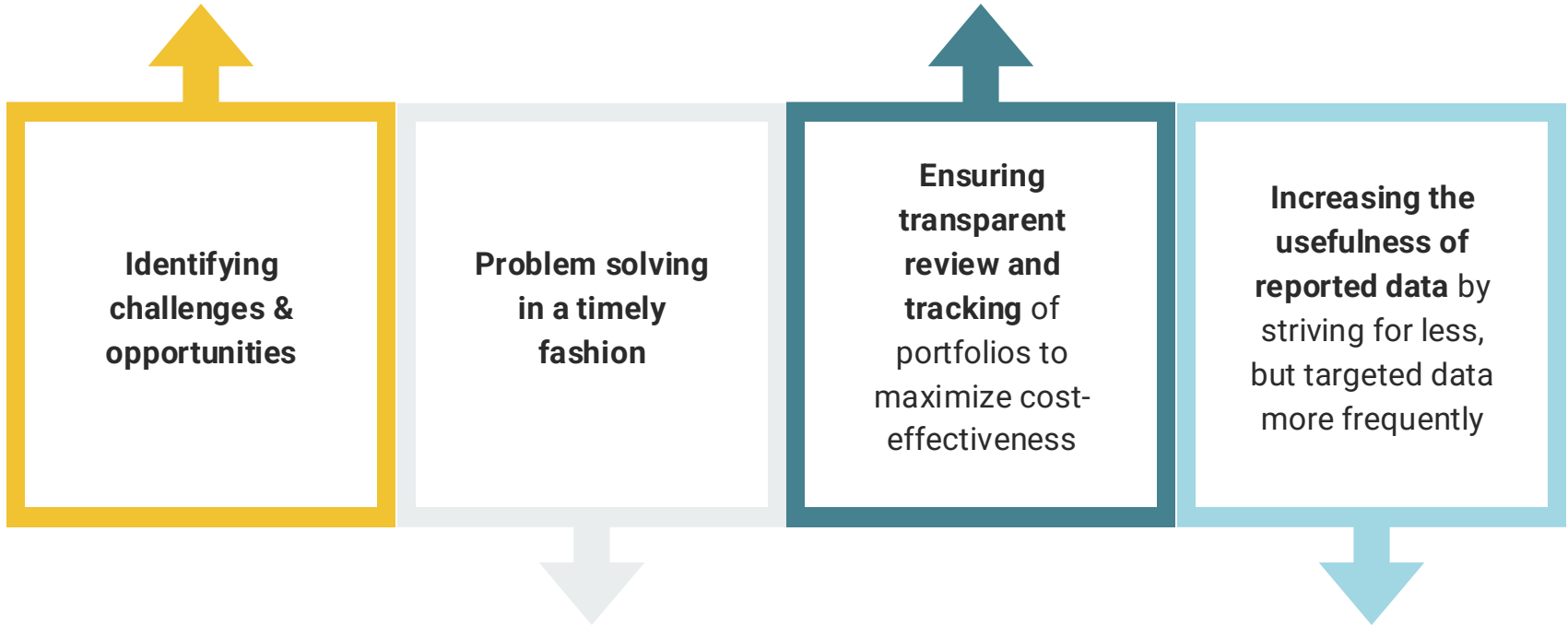
3

Bring PA proposals for discussion (at least 3 months prior to filing)

4

Optional use of Working Groups or Task Forces to tackle challenges raised in the Annual Report

Purpose of CAEECC Engagement in Portfolio Review Process



Semi-Annual Portfolio Performance Overview

Presentation by Energy Division

2025 EE Portfolio Semi-Annual Review

November 6, 2025



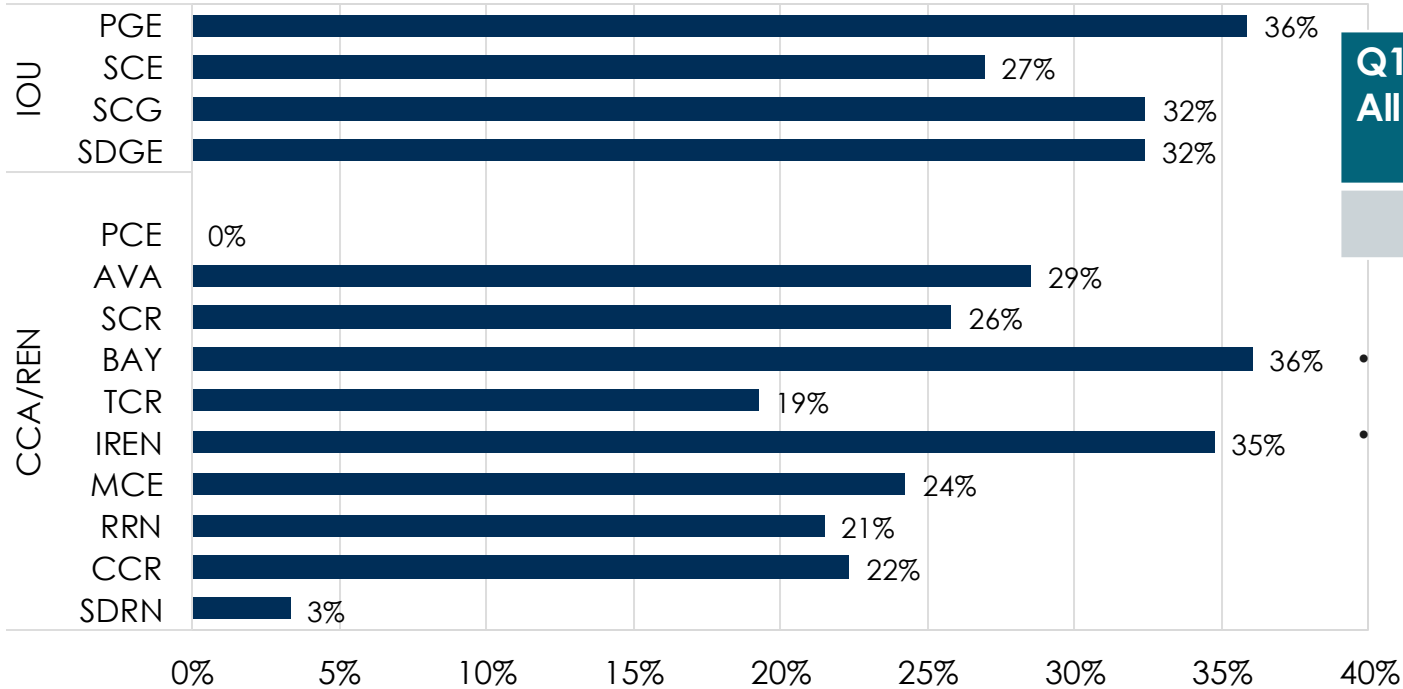
California Public
Utilities Commission

Agenda

- Portfolio Q1-Q2 2025 Review
 - Expenditures
 - Cost Effectiveness
 - TSB Achievement
 - Fuel Substitution
 - Summary

Q1-Q2 2025 Expenditure, as a % of Total Budget

Expenditure as % of Budget



**Q1-Q2 Expenditures,
All PAs combined**

\$271,230,520

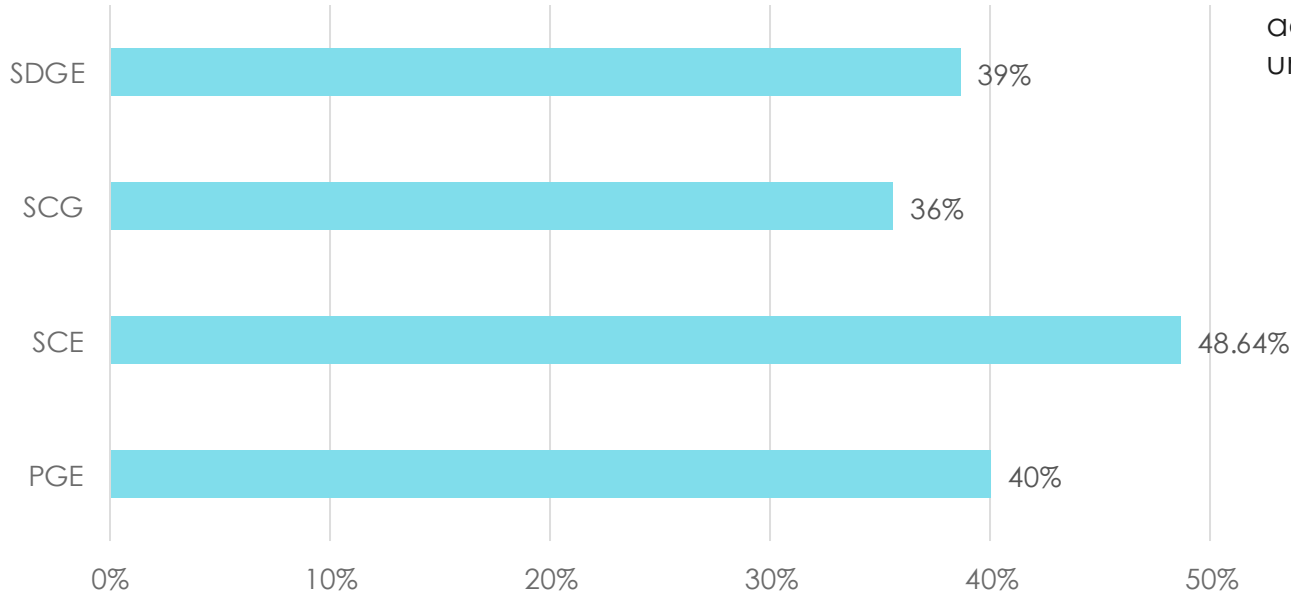
- PCE spent <1% due to a pause in Q1
- SDRN is new and not yet implementing in Q1 & Q2

Excludes: Program Category: Codes and Standards, Energy Savings Assistance
CCAs: Ava, PCE, SCP, SJCE

Source:
Expenditure: [CEDARS 2025 record level claims](#)
Annual Budget: [CEDARS True-Up Budget Filing 2024](#)

Q1-Q2 2025 IOU Total System Benefit (TSB) vs Targets

Achieved TSB as % of Target



- Savings / TSB achievement is typically concentrated in Q3/Q4, so lower achievement in Q1/Q2 is not unexpected.

Q1-Q2 TSB (Million \$)	
SDGE	\$17
SCG	\$67
SCE	\$57
PGE	\$85

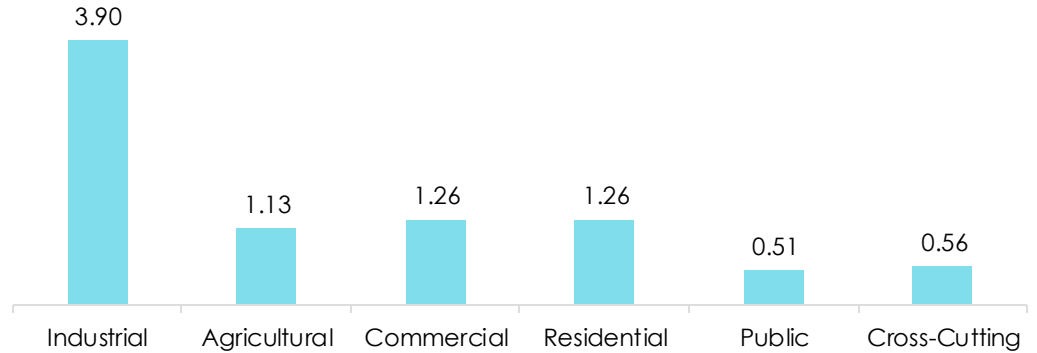
Excludes Program Category: Codes and Standards, Energy Savings Assistance
 Note: This analysis does not include CCA/RENs contribution to IOU TSB achievements.
 Source: 2024-27 Potential and Goals Study; 2025 CEDARS claims data

Q1-Q2 2025 Cost Effectiveness

Resource Acquisition TRC Ratio by PA			
PA	TRC (Forecast)	TRC (Achieved)	
IOUs & CCA	PGE	1.45	1.32
	SCE	1.08	0.95
	SCG	2.11	1.59
	SDGE	1.35	0.93
	AVA	N/A	1.42
	MCE	1.03	0.14
	PCE*	N/A	0.00

*PCE's ETA program was paused at the beginning of 2025

TRC Ratio by Primary Sector ■ 2025



Note: These values only include Resource Acquisition programs.

The high TRC for Industrial is driven by SEM programs, including PG&E's SEM manufacturing program which reported negative costs through Q2.

Source: [CEDARS 2025 record level claims](#), October 2025

Q1-Q2 2025 TSB by IOU and Primary Sector

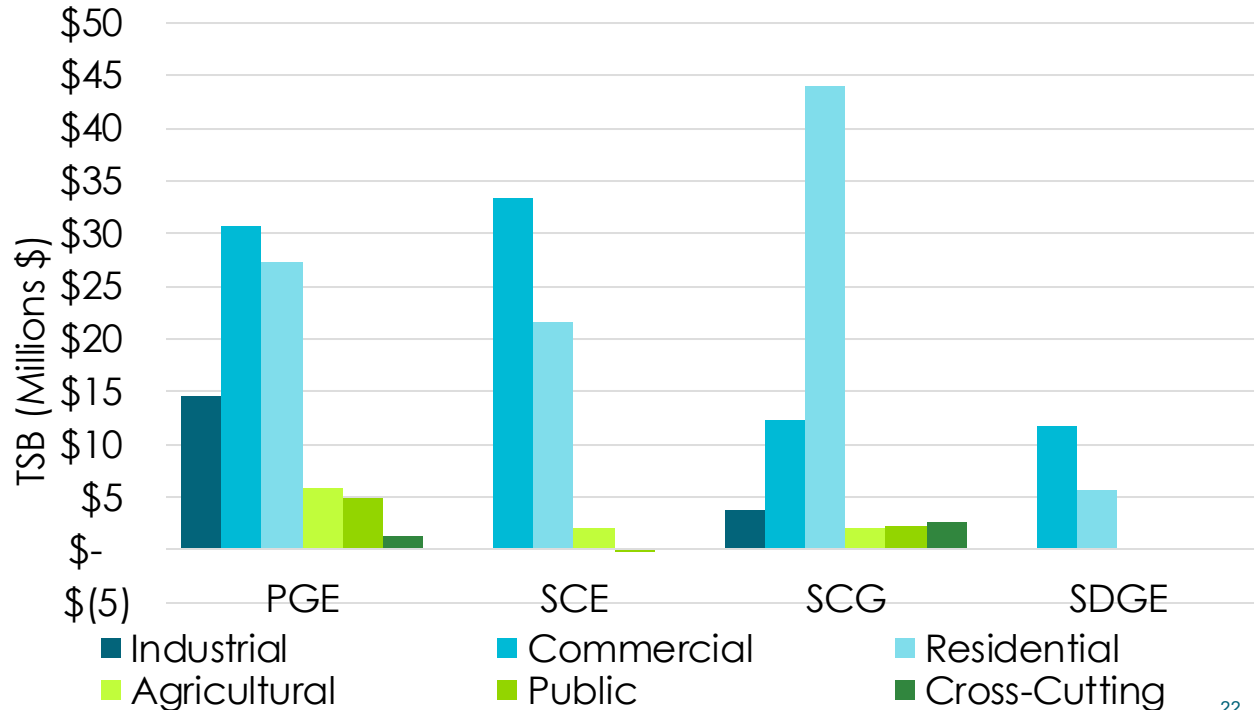
Excludes: Codes and Standards

IOU:

- PGE delivers substantially in Industrial, Com and Res
- SCE delivers the most TSB in the Com sector, driven by Com Water Heating fuel substitution.
- SCG delivers the most TSB in Res

Note: TSB achievements are often in proportion to size of territory.

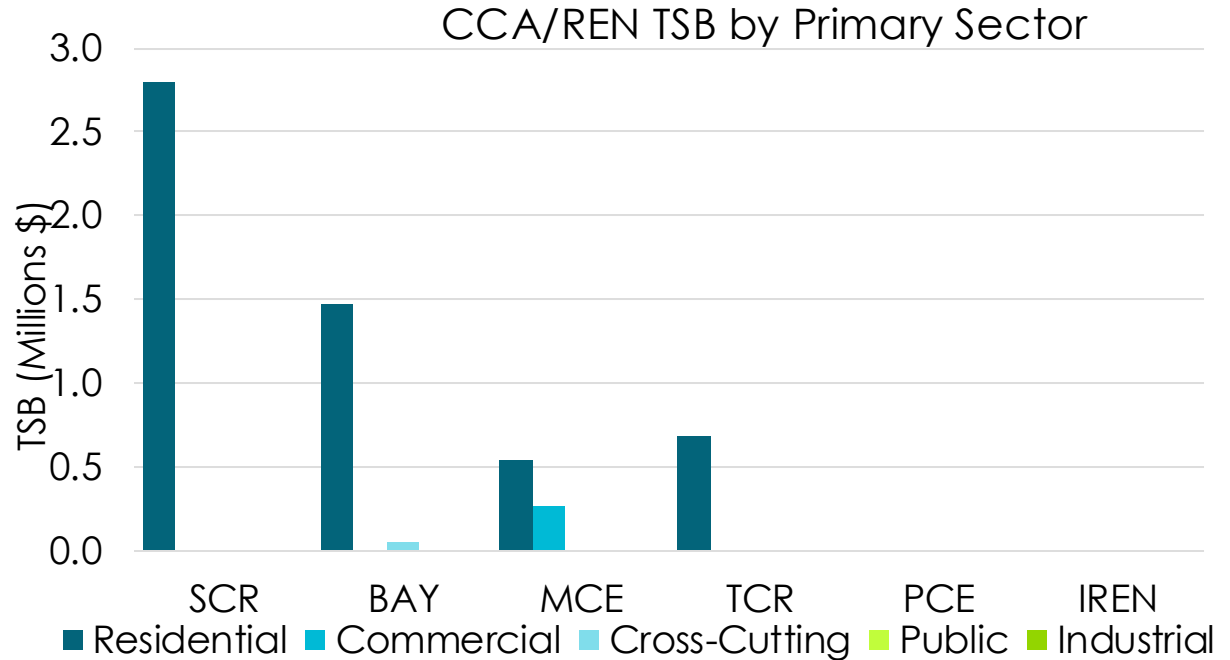
IOU TSB by Primary Sector



Q1 & Q2 2025 TSB by Non-IOU and Primary Sector

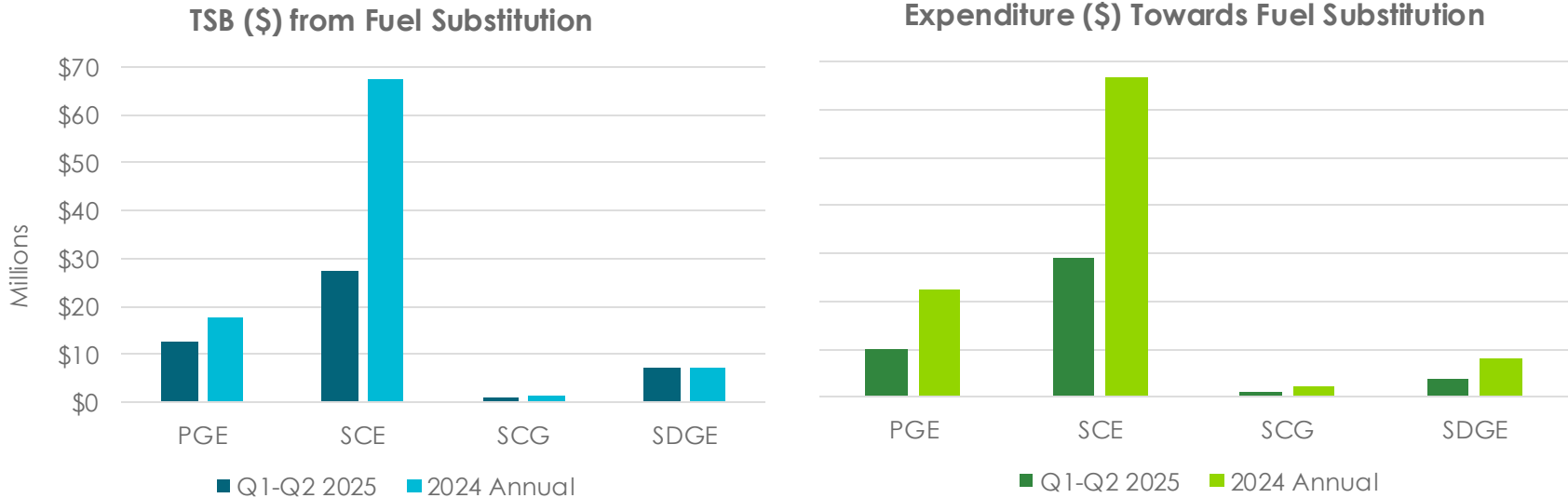
Excludes: Codes & Standards, Energy Savings Assistance, Portfolio Support
RENs: CCR REN, RRN, SDRN (newly approved)

- Majority of non-IOU TSB is from Residential sector.
- PCE and IREN have no TSB from Q1/Q2.
- Need to ensure that REN/CCA energy savings/TSB reported achievements are reflective of the work they are doing.



Note: TSB achievements typically in proportion to size of territory.

IOU Fuel Substitution – Q1-Q2 2025 vs 2024 Annual



- Compared to 2024 - IOUs delivered increasing TSB from Fuel Sub

Excludes: Program Category: Codes and Standards, Energy Savings Assistance

Source: [CEDARS 2024 and 2025 record level claims](#), October 2025.

Summary

- PAs spent less than half of their expected budgets for 2025, during Q1/Q2. As in previous years, we expect to see a lot more activity in for the 2nd half of this year.
- Fuel substitution increasing in the portfolios – especially commercial water heating.
- PG&E and SCG have a Resource Acquisition segment TRC >1 , SCE and SDGE have Resource Acquisition segment TRC >0.9 .

Thank You



California Public Utilities Commission

Southern CA Performance Review

Southern CA Performance Review

Lunch

NorCal Performance Review

Central CA Performance Review

Break

Key Themes

Wrap Up

I-REN

SoCalREN

SDREN

SCE

SoCalGas

SDG&E

Regional Q&A



Non-CAEECC Member Participation:

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slido

Tutorial on how to use Slido for Non-CAEECC Member Participation

I-REN



I-REN CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025

Presenter: [Benjamin Druyon](#)

Email: bdruyon@wrcog.us

I-REN Q1-Q2 2025 Recent Developments/Key Highlights/Challenges



Workforce Activity reorienting to new Metrics reporting framework

- Resolution E-5351 removed common metrics, clarified EMS Indicators, impacting WE&T tracking

Workforce Programming and Resources Partnerships with Riverside, San Bernardino Counties

- Vocational training, certifications, and educational pathways

IOU Data Requests

- Per CPUC Data Decision D.23-02-002, streamlines data coordination with SCE, SoCalGas

Public Sector NMEC Program

- First milestone payment sent; savings were claimed upon installation in Q4 2024, incentive payment reported in Q1 2025
- Gas predictability analysis and granular solar data have presented challenges

Expanding Accessibility to C&S trainings

- All C&S Trainings have a live simulcast Spanish translation

Collaboration with local organizations

- First collaboration with the Desert and Inland Chapters of the American Institute of Architects
- Two-day series on Zero Net Carbon Design

I-REN Summary of TSB and Expenditures for Q1 and Q2 2025



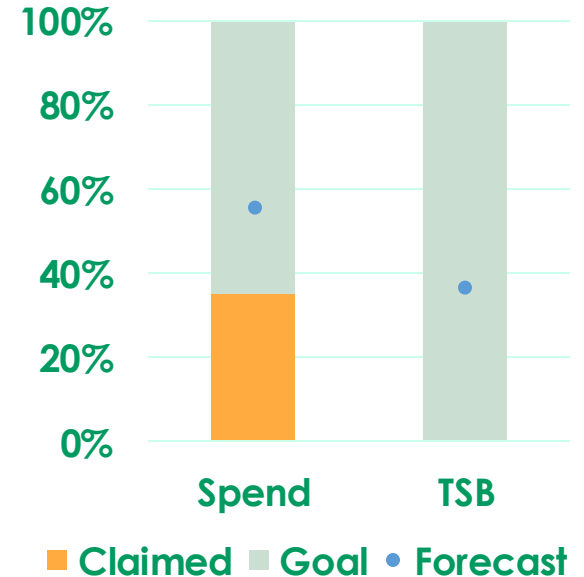
	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	N/A	N/A	N/A	N/A	N/A	N/A
Market Support	0	\$248,578	0	\$835,720	0	\$1,084,297
Equity	0	\$1,361,419	0	\$1,789,296	0	\$3,150,715
EM&V	0	\$4,929	0	\$21,382	0	\$26,310
Codes & Standards	0	\$276,796	0	\$324,468	0	\$601,263
TOTAL Portfolio	0	\$1,891,722	0	\$2,970,865	0	\$4,862,587

I-REN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing



2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	0		Q1 and Q2 Expenditure	\$4,862,587	
Q3 and Q4 TSB Forecast	\$210,000		Q3 and Q4 Expenditure Forecast	\$3,000,000	
Total TSB Forecast Attainment	\$210,000		Total 2025 Forecast Expenditure	\$7,862,587	
2024 + 2025 TSB Forecast	\$311,863		2024 + 2025 Total Expenditures	\$14,586,020	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$2,442,661	13%	Approved 4-year budget amount % of budget spent	\$56,951,316	14%

2025 EE Portfolio Actuals & Forecast



I-REN 2025 Q1 and Q2 Claims by Sector & Prevalent Measures



		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		0	0	0	0	0	0	0
GHG (w/ C&S)		0	0	0	0	0	0	0
kWh	Annual Gross	0	0	0	0	0	0	0
	Annual Net	0	0	0	0	0	0	0
	Lifecycle Net	0	0	0	0	0	0	0
Therms	Annual Gross	0	0	0	0	0	0	0
	Annual Net	0	0	0	0	0	0	0
	Lifecycle Net	0	0	0	0	0	0	0
KW	Annual Gross	0	0	0	0	0	0	0
	Annual Net	0	0	0	0	0	0	0

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	N/A	N/A	N/A	N/A	N/A	N/A
Average Measure Cost / Deemed Value	N/A	N/A	N/A	N/A	N/A	N/A

Questions & Input

*First from CAEECC Members
then from the Public*

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SoCalREN

SoCalREN CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025



SoCalREN Q1-Q2 2025 Recent Developments/Key Highlights/Challenges

- All SoCalREN Public Sector and Agricultural programs officially launched and in market; including two new equity programs specifically designed to meet:
 - Rural and HTR public agencies
 - Small HTR agriculture customers
- Despite recent developments at the federal level, SoCalREN did host an informational webinar for public agencies regarding direct pay tax credits; some public agencies will be attempting to take advantage of these prior to their elimination.
- Challenges in the MF sector still exist, specifically the Central HPWH Measure Package updates which still show a negative impact on portfolio TSB and tariffs causing higher prices on HPWH equipment
- CBO engagement doubled over the two quarters amplifying the reach and impact of SoCalREN services/programs

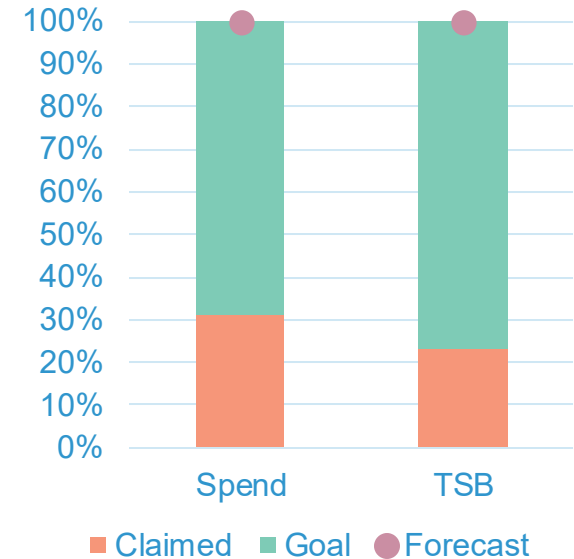
SoCalREN Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	0	1,263,185	2,802,182	2,702,325	2,802,182	3,965,509
Market Support	0	3,055,176	0	4,118,958	0	7,174,133
Equity	0	627,138	0	1,603,337	0	2,230,475
EM&V	0	93,552	0	149,450	0	243,001
Codes & Standards	0	0	0	0	0	0
TOTAL Portfolio	0	5,039,051	2,802,182	8,574,069	2,802,182	13,613,120

SoCalREN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	2,802,182		Q1 and Q2 Expenditure	13,613,120	
Q3 and Q4 TSB Forecast	23,933,111		Q3 and Q4 Expenditure Forecast	39,786,519	
Total TSB Forecast Attainment	\$26,735,862		Total 2025 Forecast Expenditure	53,399,639	
2025 TSB Forecast	\$26,735,862		2025 Total Expenditures	53,399,639	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	103,422,805	35%	Approved 4-year budget amount % of budget spent	227,597,351	36%

2025 EE Portfolio Actuals & Forecast



SoCalREN 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		0	0	0	N/A	0	2,802,181	2,802,181
GHG (w/ C&S)¹		0	0	0	--	0	9,895	9,895
kWh	Annual Gross	0	0	0	--	0	5,570	5,570
	Annual Net	0	0	0	--	0	3,342	3,342
	Lifecycle Net	0	0	0	--	0	16,711	16,711
Therms	Annual Gross	0	0	0	--	0	206,423	206,423
	Annual Net	0	0	0	--	0	123,854	123,854
	Lifecycle Net	0	0	0	--	0	2,053,076	2,053,076
kW	Annual Gross	0	0	0	--	0	0	0
	Annual Net	0	0	0	--	0	0	0

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	--	--	--	N/A	--	Pipe insulation, 1-in thickness, > 1-in and <= 4-in pipe diameter, hot water, indoor
Average Measure Cost / Deemed Value²	--	--	--	N/A	--	438.33

¹ Lifecycle Net CO₂ used for GHG values

² Gross Measure Cost per installation (not per unit)



Thank You!

Lujuana Medina
Imedina@isd.lacounty.gov

Questions & Input

*First from CAEECC Members
then from the Public*

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SDREN



SDREN CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

Presenter: Aisha Cervantes-Cissna

Email: ACissna@SDCommunityPower.org

SDREN Q1-Q2 Key Highlights

- Released solicitations for third-party program implementers
 - Request for Proposals issued between February – May 2025 for all 10 programs
- Commenced contract negotiations with third-party implementers
 - To date, first phase of contracts executed; program launch activities underway
- Established a framework for effective coordination
 - Regular coordination with regional LSEs
- Expanded program awareness and visibility through regional stakeholder engagement
 - Participated in 17+ stakeholder meetings/events, including engagements specifically for the region's Tribal governments
- Launched strategic marketing initiatives
 - Developed portfolio wide brand strategy

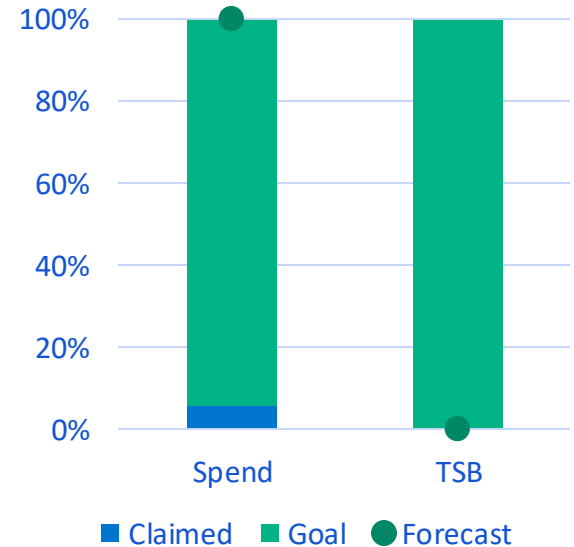
SDREN Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	N/A	\$65,708	N/A	\$84,382	N/A	\$150,090
Market Support	N/A	\$168,786	N/A	\$214,089	N/A	\$382,875
Equity	N/A	\$220,488	N/A	\$282,754	N/A	\$503,242
EM&V	N/A	\$0	N/A	\$0	N/A	\$0
Codes & Standards	N/A	\$31,169	N/A	\$39,248	N/A	\$70,417
TOTAL Portfolio	N/A	\$486,151	N/A	\$620,473	N/A	\$1,106,624

SDREN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	N/A		Q1 and Q2 Expenditure	\$1,106,624	
Q3 and Q4 TSB Forecast	N/A		Q3 and Q4 Expenditure Forecast	\$6,262,318	
Total TSB Forecast Attainment	N/A		Total 2025 Forecast Expenditure	\$7,368,942	
2024 + 2025 TSB Forecast	N/A		2024 + 2025 Total Expenditures	\$7,682,722	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	N/A	N/A	Approved 4-year budget amount % of budget spent	124,274,207	6.2%

2025 EE Portfolio Actuals & Forecast



SDREN 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		N/A	N/A	N/A	N/A	N/A	N/A	N/A
GHG (w/ C&S)								
kWh	Annual Gross							
	Annual Net							
	Lifecycle Net							
Therms	Annual Gross							
	Annual Net							
	Lifecycle Net							
kW	Annual Gross							
	Annual Net							

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	N/A	N/A	N/A	N/A	N/A	N/A
Average Measure Cost / Deemed Value	N/A	N/A	N/A	N/A	N/A	N/A

Questions & Input

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SCE

Southern California Edison

CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025

Presenter: Erica Keating
Email: Erica.Keating@SCE.com

SCE Q1-Q2 2025 Recent Developments/Key Highlights/Challenges

- Five New Commercial Programs Launched in Q1 and Q2 2025
 - Programs will support customers in deploying site- and population-NMEC, deemed, and custom projects
- Enrollment in Commercial, Industrial, Agricultural, Public, and Higher Education Programs Offering Strategic Energy Management Continued Throughout Q1 and Q2 2025
 - Programs are expected to deliver TSB in Q4 2025
- Executed Amendments for Multiple Deemed Contracts, which are on track to deliver additional TSB in 2025 and beyond
 - AgEE, Comp Comm, Multi Family, and RES
- Negotiated Contract Extension for SWEETP
 - Program delivery to expand into 2026-27 with ramp down in 2028-29
 - 7% annual budget reduction
- Expanded CHEER Participants from 2.3 to 2.7 Million Households and Added Triggered Alerts
 - Estimating 20% increase in TSB from 2026-2028
 - Also exploring additional levers for expansion
- Comprehensive Commercial Program Deliveries Exceeded Contract Values *(As of September 2025)*
 - \$60M TSB = 189% of Total Contract Value
 - 1,517 HPWH Installed Year to Date

SCE Summary of TSB and Expenditures for Q1 and Q2 2025

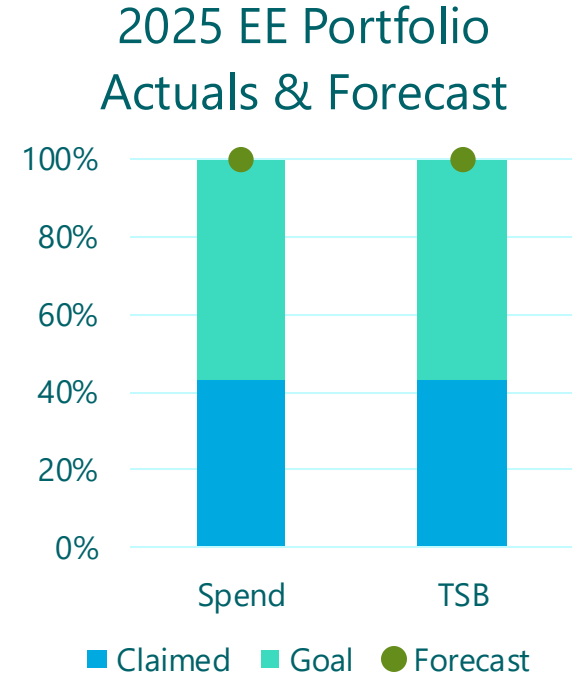
	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit	Total Expenditure	Total System Benefit	Total Expenditure	Total System Benefit	Total Expenditure
Resource Acquisition	\$4,699,189	\$7,419,808	\$51,628,734	\$47,965,517	\$56,327,923	\$55,385,325
Market Support	-	\$7,490,900	\$607,075	\$12,580,247	\$607,075	\$20,071,146
Equity	-	\$563,858	\$781	\$929,210	\$781	\$1,493,068
EM&V	-	\$1,649,617	-	\$1,649,617	-	\$3,299,235
Codes & Standards	-	\$3,161,126	\$519,999,913	\$8,234,086	\$519,999,913	\$11,395,212
TOTAL PORTFOLIO	\$4,699,189	\$20,285,311	\$572,236,503	\$71,358,677	\$576,935,692	\$91,643,987

SCE 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress*			2025 Full Year Expenditure Estimate and 4-Year Progress*		
Q1 and Q2 TSB Claimed	\$57,895,440		Q1 and Q2 Expenditure	\$80,248,775	
Q3 and Q4 TSB Forecast	\$76,681,793		Q3 and Q4 Expenditure Forecast	\$106,288,507	
Total TSB Forecast Attainment	\$134,577,233		Total 2025 Forecast Expenditure	\$186,537,282	
2024 + 2025 TSB Forecast	\$283,458,645		2024 + 2025 Total Expenditures	\$373,873,050	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$500M	57 %	Approved 4-year budget amount % of budget spent	\$1,016M	37 %

*Notes:

- 1) Excludes Codes and Standards
- 2) Q3 and Q4 forecast excludes non-SCE administered statewide programs
- 3) 2024 TSB and Expenditures exclude Codes and Standards and RENS



SCE 2025 Q1 and Q2 Claims by Sector and Prevalent Measures

		Agricultura l	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		\$2,023,637	\$33,415,769	\$519,999,913	-	\$-33,625	\$21,529,999	\$576,935,692
GHG (w/ C&S)		8,154	85,706	2,346,549	-	-206	21,701	2,461,903
kWh	Annual Gross	5,262,392	-13,272,679	1,930,711,235	-	-44,164	41,178,729	1,963,835,513
	Annual Net	3,420,555	-14,649,420	561,631,515	-	-44,164	42,877,126	593,235,611
	Lifecycle Net	27,361,364	-190,884,033	7,651,044,396	-	-670,937	28,547,093	7,515,397,883
Therms	Annual Gross	-	1,941,752	-	-	-	172,966	2,114,718
	Annual Net	-	2,039,288	-	-	-	164,779	2,204,067
	Lifecycle Net	-	26,509,269	-	-	-	1,906,376	28,415,645
kW	Annual Gross	517	353	371,803	-	-	4,006	376,679
	Annual Net	336	205	112,533	-	-	3,506	116,600

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	Efficient LED Efficacy	Commercial Heat Pump Water Heater	RNC Single Family Whole Building	-	HOPPS Whole Building Measure	Home Energy Report
Average Measure Cost / Deemed Value	\$79.92	\$99.14	\$566.72	-	-	-

Questions & Input

*First from CAEECC Members
then from the Public*

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SoCalGas

SCG CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025

Presenter: Darren Hanway

Email: DHanway@socalgas.com

SoCalGas Q1-Q2 2025 Recent Developments/Key Highlights/Challenges

Recent Developments:

- Soon to launch Market Access Program
- Launched an equipment leasing program
- RFP release for IDEEA365 Round 4

Highlights:

- Increased demand for efficiency financing
- Increased funding received from electric and water utilities for water conservation measures

Challenges:

- Disruption of the ENERGY STAR program
- Uncertainty in equipment costs due to tariffs

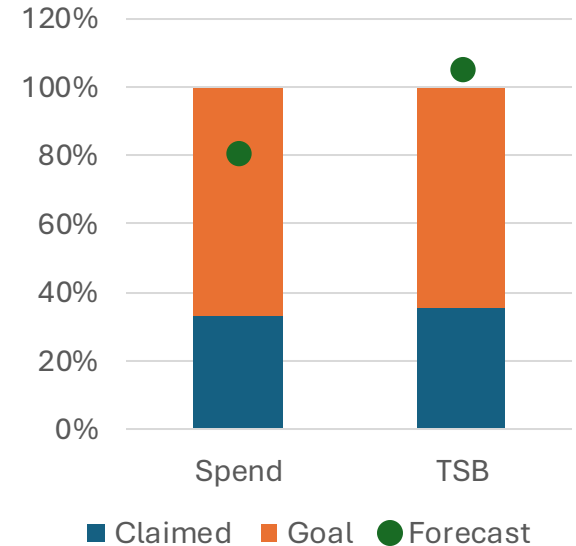
SoCalGas Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	\$39,732,506	\$21,131,640	\$16,750,216	\$8,128,533	\$56,482,722	\$ 29,260,172
Market Support	\$12,901	\$3,290,767	\$311,855	\$4,774,609	\$324,757	\$8,065,376
Equity	\$6,467,960	\$5,166,756	\$3,892,198	\$5,222,487	\$10,360,159	\$10,389,244
EM&V	-	\$830,207	-	\$830,207		\$1,660,413
Codes & Standards	\$72,379,193	\$706,203	\$71,770,686	\$700,080	\$144,149,879	\$1,406,282
TOTAL Portfolio	\$118,592,561	\$31,125,572	\$98,179,229	\$19,655,915	\$211,317,516	\$50,781,487

SoCalGas 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$67,167,636		Q1 and Q2 Expenditure	\$50,781,487	
Q3 and Q4 TSB Forecast	\$131,832,364		Q3 and Q4 Expenditure Forecast	\$74,218,513	
Total TSB Forecast Attainment	\$199,000,000		Total 2025 Forecast Expenditure	\$125,000,000	
2024 + 2025 TSB Forecast	\$371,767,579		2024 + 2025 Total Expenditures	\$248,100,933	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$716.5M	51.9%	Approved 4-year budget amount % of budget spent	\$615.9M	40.3%

2025 EE Portfolio Actuals & Forecast



SCG 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		\$2,063,895	\$12,323,838	\$146,845,702	\$3,769,249	\$2,340,056	\$43,974,775	\$211,317,516
GHG (w/ C&S)		647	4,802	73,856	2,620	623	49,230	131,777
kWh	Annual Gross	-	-341	710	-	-5,355	2,842,130	2,837,145
	Annual Net	-	-221	462	-	-4,028	2,576,206	2,572,418
	Lifecycle Net	-	-4,429	-9,126	-	-94,671	28,525,285	28,417,059
therms	Annual Gross	184,872	1,419,815	268,64,582	472,760	169,700	9,764,973	38,876,701
	Annual Net	121,907	904,281	13,908,760	493,353	117,283	9,271,155	24,816,739
	Lifecycle Net	1,508,993	14,612,780	202,285,666	2,540,994	1,727,618	32,452,488	255,128,540
kW	Annual Gross	-	-	-	-	-	2,612	2,612
	Annual Net	-	-	-	-	-	2,430	2,430

- GHG is derived using the first year net CO2 field from CEDARS.
- The table includes C&S data.

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	Process Boiler-Water - Tier 2 (>=90%CE)	Small Tankless Water Heater, Tier 4 (>=0.96 UEF)	Steam - Heat Recovery	SEM-Operational/Maintenance Savings	Small Tankless Water Heater, Tier 4 (>=0.96 UEF)	Behavioral - Home Energy Reports
Average Cost per TSB	\$0.44	\$0.19	\$0.91	\$0.14	\$3.71	\$0.32



Questions & Input

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then from the Public*

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SDG&E



CAEECC SDG&E Semi Annual Portfolio Performance Report Out

November 6, 2025



SDG&E Q1-Q2 2025 Recent Developments / Key Highlights / Challenges

- Ramp up of new Commercial Programs in 2025
 - SDG&E launched Retail Offices and Wholesale, Grocery Restaurant Food Storage, Lodging, Public Institutions and Healthcare, including third-party Market Access Programs programs
- Catching up on program year 2025 activities
 - Behind on key programs to submit claims
- Optimizing portfolio
 - Fund shifting allocated to higher performing programs
- Market Support and Equity (MS&E) Compliance Framework
 - Resolution on MS&E indicators clarification was adopted

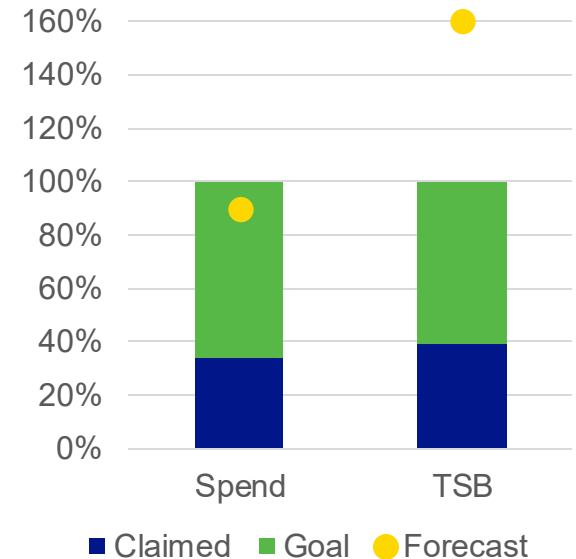
SDG&E Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	\$7,918,006	\$9,674,454	\$9,481,245	\$7,269,513	\$17,399,251	\$16,943,967
Market Support	\$24,947	\$2,337,167	\$64,051	\$2,567,517	\$88,998	\$4,904,684
Equity	\$668	\$753,343	\$976	\$1,134,826	\$1,644	\$1,888,169
EM&V	-	\$86,142	-	\$293,949	-	\$380,091
Codes & Standards	\$59,932,274	\$1,049,242	\$59,428,411	\$1,070,767	\$119,360,685	\$2,120,009
TOTAL Portfolio	\$67,875,895	\$9,674,454	\$68,974,683	\$12,336,572	\$136,850,578	\$26,236,922

SDG&E 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$17,489,893		Q1 and Q2 Expenditure	\$26,236,922	
Q3 and Q4 TSB Forecast	\$56,136,469		Q3 and Q4 Expenditure Forecast	\$45,587,553	
Total TSB Forecast Attainment	\$73,626,362		Total 2025 Forecast Expenditure	\$69,824,475	
2024 + 2025 TSB Forecast	\$124,156,078		2024 + 2025 Total Expenditures	\$131,979,916	
Approved goal % of TSB ('24+'25) to 4-yr goal	\$227,709,298	30%	Approved 4-year budget amount % of budget spent	\$305,891,188	29%

2025 EE Portfolio Actuals & Forecast



SDG&E 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		\$205,130	\$11,670,452	\$119,360,685	\$0	\$35,548	\$5,578,761	\$136,850,576
GHG (w/ C&S)		142	3,226	45,024	0	18	10,998	60,408
kWh	Annual Gross	0	-3,852,248	394,995,596	0	0	12,816,401	403,959,749
	Annual Net	0	-4,147,220	114,901,685	0	0	13,522,314	124,276,779
	Lifecycle Net	0	-54,016,123	1,565,293,033	0	0	6,788,462	1,518,065,372
Therms	Annual Gross	42,956	999,284	2,405,480	0	5,209	1,160,636	4,613,565
	Annual Net	26,795	859,150	1,242,402	0	3,386	1,196,198	3,327,931
	Lifecycle Net	133,977	11,837,670	18,167,003	0	23,702	2,792,980	32,955,332
kW	Annual Gross	0	48	76,065	0	0	19	76,132
	Annual Net	0	28	23,026	0	0	17	23,071

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	Greenhouse Heat Curtain	Heat Pump Water Heater / Tankless Water Heater	C&S Uncategorized / Whole Building	Whole Building	Tank Insulation	Whole Building
Average Measure/Deemed Value	\$149,628	\$6,169,285 / \$2,904,681	\$43,467,982 / \$16,068,762	TBD	\$35,548	\$4,347,698

Questions & Input

*First from CAEECC Members
then from the Public*

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Regional Q&A:
Southern California

LUNCH

(40 mins)

Here's a look at what's next on our agenda!



NorCal Performance Review

Central CA Performance Review

Break

Key Themes

Wrap Up



Non-CAEECC Member Participation:

Participate in Questions & Input via Slido

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Questions & Input can be added **at any point** during the PA presentation. There is a 300 character limit. Use replies to add on if you need more space.



Please **add your name/attribution** to your question to support facilitation.



Please **tag** your Questions according to the PA Presenter (i.e. PG&E or SoCalREN), so we can address your questions accordingly.



Questions can be **upvoted** to uplift common questions. **Due to limited time, only a few questions may be addressed during the meeting.**

The Facilitator will use upvotes and facilitator discretion in selecting questions. All questions will be included in the Meeting Summary. PAs will be asked to respond in the Meeting Summary.

slido

NorCal Performance Review

Central CA Performance Review

Key Themes

Wrap Up

NorCal Performance Review

BayREN

NREN

PG&E

MCE

Regional Q&A

Break

BayREN



Local Governments Empowering Our Communities

BayREN CAEECC Semi-Annual Energy Efficiency Report Out (Q1 – Q2 2025)

Jane Elias | jelias@bayareametro.gov

November 6, 2025

Recent Developments and Highlights

- The Efficiency and Sustainable Energy Home Program launched late June 2025
 - 52 site visits, 3 completed projects by July 2025 with ongoing sign-ups
- The [Decarbonization Showcase](#) selected 5 participating buildings to receive free technical and financial support (April 2025)
 - Projects will be tracked to create case studies that will support decarbonization of other buildings
- After 5 years, BayREN's Regional Heat Pump Water Heater Incentive Program wrapped in August 2025
 - 1,500 HPWH installations across the Bay Area, \$1,000 incentive. [Lessons learned.](#)
- The Energy Concierge service for local government staff has been hosting Office Hours events this year to provide technical assistance, financing, and education
 - Concierge office hours are provided on a monthly basis and guest speakers often participate

Recent Challenges

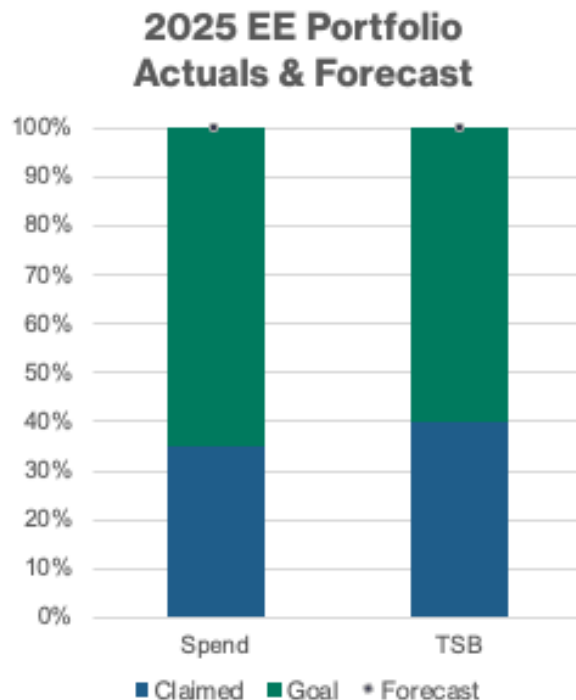
- BayREN Business had no new projects in Q1 & Q2
 - Due to contracting with a new implementer
 - Started accepting new projects in August 2025
- Water Upgrades Save Program moved to close in 2025
 - Program faced water agency enrollment challenges due local and state policy and trends
 - Paused program activities in July 2025
 - Closure pending advice letter approval (Nov 8, 2025 decision)

BayREN Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	0	1,391,215	0	712,141	0	2,103,356
Market Support	0	1,267,954	0	1,531,876	0	2,799,830
Equity	767,688	4,732,546	752,192	4,004,128	1,519,880	8,736,673
EM&V	0	81,139	0	110,720	0	191,859
Codes & Standards	0	557,038	0	539,061	0	1,096,098
TOTAL Portfolio	767,688	8,029,892	752,192	6,897,927	1,519,880	14,927,819

BayREN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$1,519,880		Q1 and Q2 Expenditure	\$14,927,819	
Q3 and Q4 TSB Forecast	\$3,226,314		Q3 and Q4 Expenditure Forecast	\$23,971,922	
Total TSB Forecast Attainment	\$4,746,194		Total 2025 Forecast Expenditure	\$38,899,741	
2024 + 2025 TSB Forecast	\$9,672,316		2024 + 2025 Total Expenditures	\$60,784,114	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$23,971,883	40%	Approved 4-year budget amount % of budget spent	\$171,676,636	35.4%



BayREN 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		N/A	0	\$53,898	N/A	0	\$1,465,981	\$1,519,880
GHG (w/ C&S) ¹		–	0	189	–	0	5,789	5,978
kWh	Annual Gross	–	0	27,858	–	0	-989,558	-961,700
	Annual Net	–	0	16,807	–	0	-1,100,560	-1,083,752
	Lifecycle Net	–	0	124,788	–	0	-12,541,150	-12,416,362
Therms	Annual Gross	–	0	6,314	–	0	151,054	157,368
	Annual Net	–	0	3,815	–	0	153,809	157,624
	Lifecycle Net	–	0	28,296	–	0	1,796,936	1,825,232
kW	Annual Gross	–	0	4	–	0	160	164
	Annual Net	–	0	2	–	0	53	55

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	N/A	–	Faucet, lavatory aerator, 0.5 gpm, gas, AOE	N/A	–	Multifamily central heat pump water heater system
Average Measure Cost / Deemed Value ²	–	–	0.81	–	–	74,923

¹ Lifecycle Net Electric CO₂ + Lifecycle Net Gas CO₂ used for GHG values

² Gross Measure Cost per installation (not per unit)



Questions?

Jane Elias

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BAYREN

Questions & Input

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NREN

NREN CAEECC Semi- Annual EE Report Out (Q1-Q2 2025)

Patricia Terry, Senior Portfolio Manager, Redwood Coast Energy Authority

Northern Rural
Energy Network

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NREN Q1-Q2 2025 Recent Developments/ Key Highlights/ Challenges

Highlights

- Preparations to launch programs in 2025 and 2026
- Program sub-elements launched including:
 - Residential Equity:
 1. Residential Energy Efficiency Kits
 2. Residential Phone assessments
 3. Outreach and educational events
 - Residential Resource Acquisition:
 1. Downstream rebate catalog
 2. Testing out a new application method through Resolve Energy using document uploads to populate applications.
- Contracting for program support
 - Energy Resources Integration , LLC (ERI) completed a non-residential needs assessment supporting program design for the commercial, public, and WE&T programs.
 - KW Engineering contracted for NMEC support on the commercial and residential resource acquisition programs.
 - Frontier Energy supporting finance program design refinement
 - SMUD starting a residential needs assessment to support the residential equity and resource acquisition programs

Program Spotlight

Meet people where they are

NREN Partner, Lake Area Planning Council (LAPC), implements programs in the Lake County area, including the Residential Equity Program that provides Energy Efficiency Kits at no-cost to customers. The Program targets Hard-to-Reach and Underserved customers and required innovative ways to get services to those customers. One method that has found success is meeting the customers in places they already gather at including senior lunches and bingo.



- Held 5 Energy Efficiency Kit “Events” at Senior Centers
- Senior Centers sent targeted e-mails and posted flyers
- LAPC sent press releases to local media
- NREN has handed out 73 kits to date in-person
- A total of 195 kits have been distributed in Lake County



Challenges

- Data access is difficult for a small REN
- Designing programs to reach a large and diverse territory takes time
- Non-residential needs assessment highlighted some of the difficulties with reaching our hard-to-reach rural communities (lack of trust, awareness, time)

Recent Developments

- Met in Truckee for strategic planning and business plan
- JCM Filed on 10/27/25
- Codes and Standards program closure
- WE&T Program re-segmentation (11/3)
- MCAL filed (11/4)
- Working on filing updated IPs for all programs
- Stakeholder meeting to present Residential IPs (11/14)

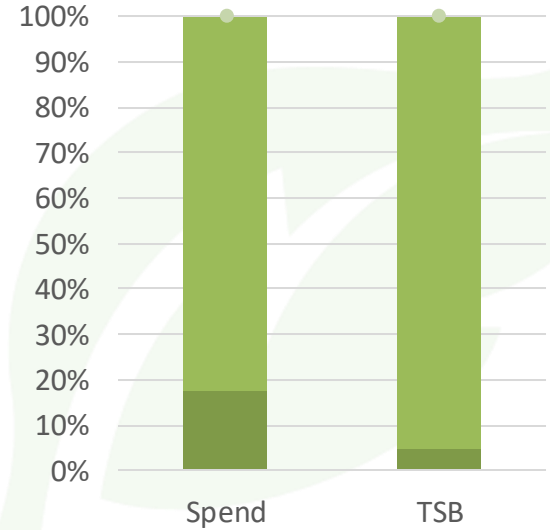
NREN Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	\$1,363	\$397,022	\$36,585	\$555,395	\$37,948	\$952,417
Market Support	\$0	\$0	\$0	\$0	\$0	\$0
Equity	\$0	\$392,732	\$0	\$708,057	\$0	\$1,100,789
EM&V	\$0	\$0	\$0	\$0	\$0	\$0
Codes & Standards	\$0	\$43,951	\$0	\$21,088	\$0	\$65,039
TOTAL Portfolio	\$1,363	\$833,705	\$36,585	\$1,284,549	\$37,948	\$2,118,246

NREN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$37,947		Q1 and Q2 Expenditure	\$2,118,246	
Q3 and Q4 TSB Forecast	\$725,570		Q3 and Q4 Expenditure Forecast	\$7,764,654	
Total TSB Forecast Attainment	\$763,517		Total 2025 Forecast Expenditure	\$9,882,900	
2024 + 2025 TSB Forecast	\$763,517		2024 + 2025 Total Expenditures	\$10,234,743	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$3,811,425	20%	Approved 4-year budget amount % of budget spent	\$33,139,078	30.9%

2025 EE Portfolio Actuals & Forecast



■ Claimed ■ Goal ● Forecast

NREN Summary of TSB and Expenditures for Q1 and Q2 2025

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB							\$37,948	\$37,948
GHG (w/ C&S)								
kWh	Annual Gross						-10,066	-10,066
	Annual Net						-13,464	-13,464
	Lifecycle Net						-184,665	-184,665
Therms	Annual Gross						2,368	2,368
	Annual Net						2,467	2,467
	Lifecycle Net						34,966	34,966
kW	Annual Gross						1	1
	Annual Net						0	0

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name						SWHC044 Ductless HVAC Residential, Fuel Sub
Average Measure Cost / Deemed Value						Average Deemed Cost: \$2,738.83

CAC Participation

- Participation in Needs Assessments
- Regional Advisory Groups
- Outreach and Education
- Other?

Thank You

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Questions & Input

*First from CAEECC Members
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PG&E

PG&E CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025





PG&E Q1-Q2 2025 Recent Developments/Key Highlights/Challenges

Key Highlights:

- **PG&E's Q1-Q2 TSB performance has been exceptional, on target and forecasted to exceed our internal annual goal**
 - Most notable contributions are from our Residential Behavioral program, Industrial SEM programs and Building Electrification programs serving the commercial and public sectors: NetOne and Government K-12.
- **Accelerated building electrification through dedicated programs with all-electric offerings.**
 - 1,624 heat pumps (water and space heating) were installed through the NetOne, Government K-12 Comprehensive and SW New Construction (Res & Non-Res) Programs in the first half of the year.

Challenges:

- **Slow ramp-up for the Measured Savings for Summer Reliability Program**
 - Market access aggregators have needed to adjust their project development processes to comply with Resource Acquisition program eligibility, leading to lower than expected Total System Benefit (TSB).
 - To generate interest in higher-value projects, the Implementer has offered enhanced incentives and kickers. This has translated to positive results.
 - PG&E and the Implementer are continuing to strategize for cost-effective solutions to ensure overall program success.
- **Initial adoption of residential electrification pilots, Empower My Home, Powerful Neighborhoods and Electrify My Block slower than expected.**
 - Mistrust in the market, stemming from skepticism around 'free upgrades' and increased presence of federal immigration agents, created challenges for the program to engage customers directly. However, the programs are seeing increasing success by partnering with local CBOs and community-based contractors.
 - Remediation costs are higher than anticipated, with higher prevalence of knob and tube in target communities.
- **AB 130 and federal deregulatory actions drove major pivots for C&S work**
 - AB 130 created a moratorium on changes to residential buildings in the 2028 Energy Code which necessitated a shift to non-residential measure support
 - AB 130 also intensified requests from local jurisdictions for technical assistance from the C&S team in advance of the deadline for reach code adoption
 - Significant federal appliance standards deregulatory actions required an urgent and laborious response from the statewide C&S team



PG&E Summary of TSB and Expenditures for Q1 and Q2 2025

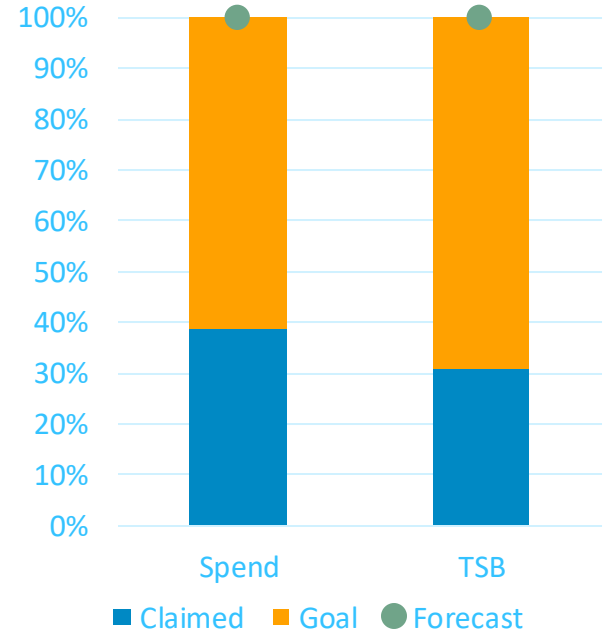
	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	\$36,954,839	\$19,914,268	\$46,254,720	\$27,095,213	\$83,209,558	\$47,009,481
Market Support	\$78,707	\$2,341,415	\$1,509,407	\$12,694,388	\$1,588,114	\$15,035,803
Equity	\$0	\$1,026,685	\$0	\$4,724,095	\$0	\$5,750,780
EM&V	\$0	\$0	\$0	\$3,524,516	\$0	\$3,524,516
Codes & Standards	\$326,066,107	\$3,181,421	\$323,324,801	\$15,387,088	\$649,390,908	\$18,568,509
TOTAL Portfolio	\$363,099,652	\$26,463,790	\$371,088,928	\$63,425,300	\$734,188,580	\$89,889,090



PG&E 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$84,797,672		Q1 and Q2 Expenditure	\$89,889,090	
Q3 and Q4 TSB Forecast	\$191,575,858		Q3 and Q4 Expenditure Forecast	\$143,130,823	
Total TSB Forecast Attainment	\$276,373,530		Total 2025 Forecast Expenditure	\$233,019,913	
2024 + 2025 TSB Forecast	\$578,119,752		2024 + 2025 Total Expenditures	\$438,257,600	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$853 M	67.8%	Approved 4-year budget amount % of budget spent	\$900M	48.7%

2025 EE Portfolio Actuals & Forecast





PG&E 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		5.93M	30.77M	1.31M	14.54M	4.90M	27.34M	84.80M
Lifecycle Net CO2 (w/ C&S) Metric Tons		21,953	131,087	3,307,788	54,414	18,549	94,390	3,628,182
GWh	Annual Gross	7.62	9.03	3.00	10.53	5.77	121.50	157.45
	Annual Net	4.94	6.80	2.15	10.30	2.80	126.60	153.59
	Lifecycle Net	34.99	57.30	21.76	50.59	1.18	106.66	272.48
MMTherms	Annual Gross	0.67	1.92	-0.01	1.28	0.34	5.49	9.70
	Annual Net	0.43	1.44	0.00	1.32	0.29	5.64	9.12
	Lifecycle Net	2.17	21.35	-0.06	7.08	3.30	10.86	44.70
MW	Annual Gross	0.38	1.95	0.91	1.49	0.98	17.69	23.39
	Annual Net	0.25	1.66	0.61	1.45	0.59	18.56	23.12

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	Opaque Heat Curtains	Tankless Water Heaters	OBF Whole Building	SEM	HP Water Heater	Home Energy Reports
Average Measure Cost / Deemed Value	\$0.84/Area-ft2-BA	\$2.96/CAP-KBTUH	N/A	N/A	\$97.70/CapOut-kBtuh	\$0

Questions & Input

*First from CAEECC Members
then from the Public*

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MCE



November 6, 2025

MCE

CAEECC Semi-Annual Energy Efficiency Report Out

Q1-Q2, 2025



- Home Energy Savings (HES): Upgraded 52% of forecasted homes in Q1-Q2
- Green Workforce Pathways:
 - Contractor Event in August
 - Launched Contractor Finder Tool
- Residential Flex Market:
 - Relaunched mid-2025 with strong participation
 - Project volume driven by MCE's kicker incentive layered on EE funds
- Non-Residential Flex Market:
 - Ongoing challenge meeting cost-effectiveness thresholds
 - MAP Program rule changes impacting project pipeline
 - Forecasts to be revised downward in next application
- Strategic Energy Management (SEM):
 - New sales team launched in 2025
 - Successful large-customer enrollments
 - Anticipated TSB increase in 2026



MCE Q1-Q2 2025

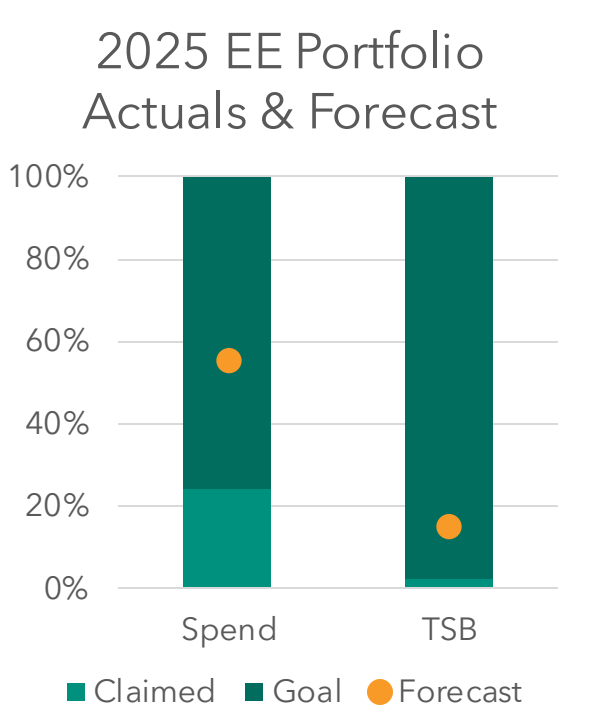
Recent Developments/Key Highlights/Challenges

MCE Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	(17,023)	\$463,925	\$276,251	\$928,305	\$259,228	\$1,392,230
Market Support	\$0	\$163,783	\$0	\$351,046	\$0	\$514,828
Equity	\$271,050	\$1,066,620	\$269,381	\$1,583,309	\$540,431	\$2,649,928
EM&V	\$0	\$45,101	\$0	\$56,277	\$0	\$101,378
Codes & Standards	N/A	N/A	N/A	N/A	N/A	N/A
TOTAL Portfolio	\$254,027	\$1,739,429	\$545,632	\$2,918,937	\$799,659	\$4,658,366

MCE 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$545,632		Q1 and Q2 Expenditure	\$4,658,366	
Q3 and Q4 TSB Forecast	\$3,000,000		Q3 and Q4 Expenditure Forecast	\$6,000,000	
Total TSB Forecast Attainment	\$3,545,632		Total 2025 Forecast Expenditure	\$10,658,366	
2024 + 2025 TSB Forecast	\$6,827,869		2024 + 2025 Total Expenditures	\$21,429,989	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	\$92,772,618	7%	Approved 4-year budget amount % of budget spent	\$78,217,316	27%



MCE 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Ag.	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		\$0	\$259,228	\$0	\$0	N/A	\$540,431	799,659
GHG (w/ C&S)		0	929	0	0	N/A	2,019	2,948
kWh	Annual Gross	0	529,283	0	0	N/A	(86,385)	442,898
	Annual Net	0	541,871	0	0	N/A	(101,749)	440,122
	Lifecycle Net	0	2,947,290	0	0	N/A	(1,111,160)	1,836,130
Therms	Annual Gross	0	4,182	0	0	N/A	26,066	30,248
	Annual Net	0	2,718	0	0	N/A	24,616	27,334
	Lifecycle Net	0	13,592	0	0	N/A	444,405	457,997
kW	Annual Gross	0	63	0	0	N/A	54	117
	Annual Net	0	64	0	0	N/A	40	104

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	No Ag. Measures Installed as of Q2	Pop-NMEC	Non-resource program	No Ind. Measures Installed as of Q2	N/A	Fuel Sub - Heat Pump Water Heater
Average Measure Cost / Deemed Value	\$0	\$35,263	\$0	\$0	N/A	\$3,755



Thank you!



mceCleanEnergy.org
info@mceCleanEnergy.org

Questions & Input

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then from the Public*

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Regional Q&A:
NorCal

Central CA Performance Review

Key Themes

Wrap Up

Central CA Performance Review

3C-REN

CCRREN

Regional Q&A

3C-REN



TRI-COUNTY
REGIONAL ENERGY NETWORK

SAN LUIS OBISPO • SANTA BARBARA • VENTURA

3C-REN CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025



3C-REN Q1-Q2 2025 Recent Developments/Key Highlights/Challenges

Building Performance Training (WE&T program)

- High Performance Happy Hour Series: Partnered with local architectural chapter and hosted at local community space, Community Environmental Council
- High performance building tour in partnership with local contractor and architecture firm brought together design and construction professionals



Happy Hour led by SLO-based In Balance Green Consulting

Single Family Home Energy Savings

- Incentives were fully subscribed by June 13, 2025
- HTR budget allocations resulted in approximately 68% of projects serving HTR customers (and 87% of total incentive budget)



Multifamily Home Energy Savings

- Gas leaks prompted electrification of HTR and AB 1550 Low-Income Community property; project leveraged 3C-REN and TECH; the scope also included insulation for this old 1926 property
- Property with 160 units leveraged 3C-REN and SGIP to install in-unit and central heat pump water heaters throughout
- Smaller Q1-2 project pipeline prompted staff to develop targeted mailers for Q3-4 to drive more projects in 2025 build the 2026 pipeline



Happy Hour HPWH demo



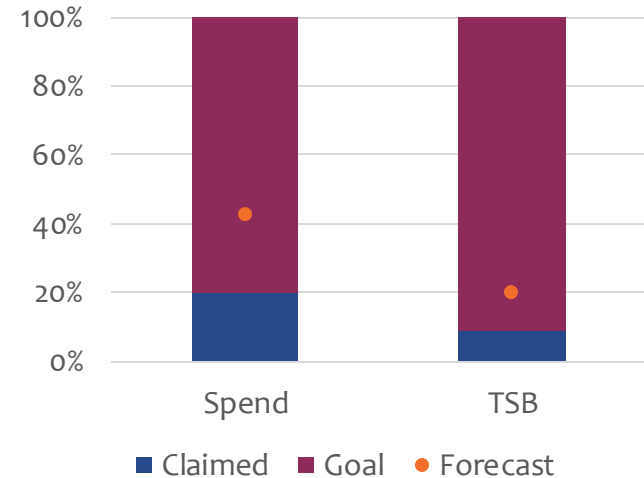
3C-REN Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1+Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	\$-	\$-	\$-	\$-	\$-	\$-
Market Support	\$-	\$462,249	\$-	\$643,903	\$-	\$1,106,152
Equity	\$242,752	\$612,043	\$443,750	\$1,187,319	\$686,502	\$1,799,362
EM&V	\$-	\$4,135	\$-	\$7,285	\$-	\$11,420
Codes & Standards	\$-	\$167,317	\$-	\$278,454	\$-	\$445,771
TOTAL Portfolio	\$242,752	\$1,245,744	\$443,750	\$2,116,961	\$686,502	\$3,362,705

3C-REN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$686,502		Q1 and Q2 Expenditure	\$3,362,705	
Q3 and Q4 TSB Forecast	\$903,008		Q3 and Q4 Expenditure Forecast	\$4,044,525	
Total TSB Forecast Attainment	\$1,589,510		Total 2025 Forecast Expenditure	\$7,407,230	
2024 + 2025 TSB Forecast	\$3,033,018		2024 + 2025 Total Expenditures	\$17,180,553	
Approved 4-Year TSB goal % of TSB ('24-'25) to 4-Yr goal*	\$32,397,889	9%	Approved 4-Year budget amount % of budget spent	\$71,367,489	24%

2025 EE Portfolio Actuals & Forecast



*There was a calculation error when 3C-REN's TSB goal was set in TUAL. This goal will be updated in MCAL for PY26/27. This error only affected the goal; all TSB achievements are accurately reported



3C-REN 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		\$-	\$-	\$-	\$-	\$-	\$686,502	\$686,502
GHG (w/ C&S)		-	-	-	-	-	254	254
kWh	Annual Gross	-	-	-	-	-	-749,067	-749,067
	Annual Net	-	-	-	-	-	-717,983	-717,983
	Lifecycle Net	-	-	-	-	-	-7,334,539	-7,334,539
Therms	Annual Gross	-	-	-	-	-	96,413	96,413
	Annual Net	-	-	-	-	-	91,942	91,942
	Lifecycle Net	-	-	-	-	-	935,429	935,429
kW	Annual Gross	-	-	-	-	-	2	2
	Annual Net	-	-	-	-	-	1	1

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	-	-	-	-	-	Heat Pump Water Heater
Average Measure Cost / Deemed Value	-	-	-	-	-	\$9,132



Presenter: Alejandra Tellez

Email: alejandra.tellez@venturacounty.gov

Questions & Input

*First from CAEECC Members
then from the Public*

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CCR REN

California Central Rural Regional Energy Network (CCR REN) CAEECC Semi-Annual Energy Efficiency Report Out (Q1-Q2 2025)

November 6, 2025

Presenter: Jordan Garbayo

Email: jgarbayo@co.slo.ca.us

CCR REN Q1-Q2 2025 Recent Developments/Key Highlights/Challenges

- Commercial Program Launch
 - First project completed in Q2
 - \$1.3m TSB installed to 10/23/2025
 - \$2.49m TSB forecasted for 2025
 - Challenge – Electrification can lead to participant utility bill cost increases which is creating a market barrier to adoption
- Workforce Education and Training Program Launch
 - 36 disadvantaged youth energy specialists trained
 - 17 full-time seasonal hires
 - 20 professional development training workshops
- Residential Equity Program Launch
 - 760 in-person Green House Calls completed
 - 641 virtual Green House Calls Completed
 - 150 outreach events
- Codes and Standards Program Launch
 - 172 participants completed training activities
 - 55 jurisdictions with staff participating in training activities
- Public Sector Program Launch
 - 16 public agencies served
 - 42 projects referred to PG&E Public sector programs

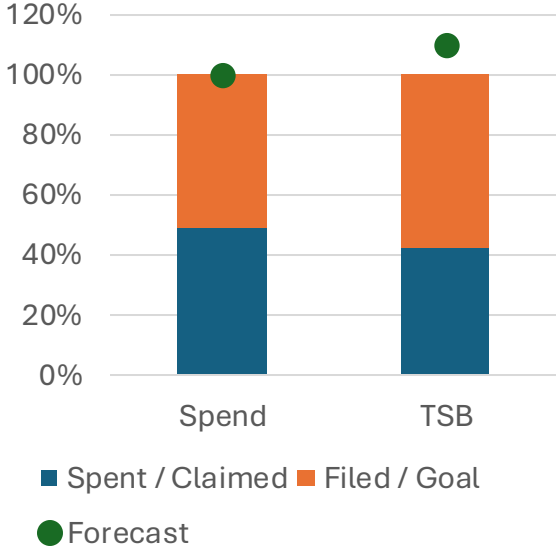
CCR REN Summary of TSB and Expenditures for Q1 and Q2 2025

	Q1 2025		Q2 2025		Q1 + Q2 2025	
	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
Resource Acquisition	\$-	\$ 183,892	\$ 94,674	\$ 370,168	\$94,674	\$ 554,060
Market Support	\$-	\$-	\$-	\$-	\$-	\$-
Equity	\$-	\$ 415,966	\$-	\$ 1,291,291	\$-	\$ 1,707,257
EM&V	\$-	\$ 4,062	\$-	\$-	\$-	\$ 4,062
Codes & Standards	\$-	\$ 96,346	\$-	\$ 225,822	\$-	\$ 322,168
TOTAL Portfolio	\$-	\$ 700,266	94,674	\$ 1,887,281	\$94,674	\$ 2,587,547

CCR REN 2025 Full Year TSB and Expenditures Estimate and 4-Year Budget Standing

2025 TSB Full Year Estimate and 4-Year Progress			2025 Full Year Expenditure Estimate and 4-Year Progress		
Q1 and Q2 TSB Claimed	\$94,674		Q1 and Q2 Expenditure	\$2,587,547	
Q3 and Q4 TSB Forecast	\$2,396,630		Q3 and Q4 Expenditure Forecast	\$6,156,875	
Total TSB Forecast Attainment	\$2,491,304		Total 2025 Forecast Expenditure	\$8,744,422	
2024 + 2025 TSB Forecast	\$2,491,304		2024 + 2025 Total Expenditures	\$9,076,212	
Approved 4-year TSB goal % of TSB ('24+'25) to 4-yr goal	7,269,653	1.3%	Approved 4-year budget amount % of budget spent	\$36,399,000	25%

2025 EE Portfolio Actuals & Forecast



CCR REN 2025 Q1 and Q2 Claims by Sector & Prevalent Measures

		Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	Total
TSB		-	\$ 94,674	-	-	-	-	\$94,674
GHG Lifecycle Net CO2(w/ C&S)		-	359	-	-	-	-	359
kWh	Annual Gross	-	-13,121	-	-	-	-	-13,121
	Annual Net	-	-13,745	-	-	-	-	-13,745
	Lifecycle Net	-	-180,079	-	-	-	-	-180,079
Therms	Annual Gross	-	4,630	-	-	-	-	4,630
	Annual Net	-	4,383	-	-	-	-	4,383
	Lifecycle Net	-	77,534	-	-	-	-	77,534
kW	Annual Gross	-	-0.032	-	-	-	-	-0.032
	Annual Net	-	-0.035	-	-	-	-	-0.035

Top Measures by TSB by Sector

	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential
Measure Name	-	On-Demand Water Heater	-	-	-	-
Average Measure Cost / Deemed Value	-	\$5,612	-	-	-	- 127

Questions & Input

*First from CAEECC Members
then from the Public*

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Regional Q&A:
Central CA

BREAK

(5 mins)

Here's a look at what's next on our agenda!



Key Themes

Wrap Up

Key Themes

Wrap Up

Key Themes

Open Discussion

Summary of Key Themes

Open Discussion

*First from CAEECC Members
then from the Public*

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Summary of Key Themes

- Placeholder to be filled out live during meeting

Wrap Up

Wrap Up

Next Steps

Next Steps: Meeting Notes



11/14 - noon 11/19

PAs review meeting notes

PAs will be asked to respond to unanswered Questions & Input submitted via Slido and the Meeting Summary



11/20 - 11/26

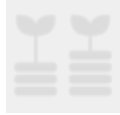
Draft summary posted on CAEECC website

Draft summary is open to suggested changes



11/26

Final meeting summary posted



January 2025

CAEECC Member-only
Phase 3 DEI Training
Plan

Q1

February 11, 2025

Full CAEECC Quarterly
Meeting #45



April 9, 2025

Panel on Community
Engagement

Q2

May 8, 2025

Full CAEECC
Quarterly Meeting
SF + Virtual



August 5th, 2025

*Annual 2024 Portfolio
Performance Report
Review
Virtual*

Q3

August 13, 2025

Full CAEECC
Quarterly Meeting
Fully virtual
PAs to present 2024
Equity Highlights



November 6, 2025

*Semi Annual 2025
Portfolio Performance
Report Review
Virtual*

Q4

December 9, 2025

Full CAEECC
Quarterly Meeting
*SoCal (TEC Irvine) + SF
(BayREN) + virtual*

2025 Meeting Dates