



ADVICE LETTER SUMMARY

ENERGY UTILITY



MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.:

Utility type:

☐ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person:

Phone #:

E-mail:

E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☐ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? ☐ Yes ☐ No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? ☐ Yes ☐ No

Requested effective date:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

Protests and correspondence regarding this AL are to be sent via email and are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

California Public Utilities Commission
Energy Division Tariff Unit Email:
EDTariffUnit@cpuc.ca.gov

Contact Name:
Title:
Utility/Entity Name:

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Contact Name:
Title:
Utility/Entity Name:

Telephone (xxx) xxx-xxxx:
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Email:

CPUC
Energy Division Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

ENERGY Advice Letter Keywords

Affiliate	Direct Access	Preliminary Statement
Agreements	Disconnect Service	Procurement
Agriculture	ECAC / Energy Cost Adjustment	Qualifying Facility
Avoided Cost	EOR / Enhanced Oil Recovery	Rebates
Balancing Account	Energy Charge	Refunds
Baseline	Energy Efficiency	Reliability
Bilingual	Establish Service	Re-MAT/Bio-MAT
Billings	Expand Service Area	Revenue Allocation
Bioenergy	Forms	Rule 21
Brokerage Fees	Franchise Fee / User Tax	Rules
CARE	G.O. 131-D	Section 851
CPUC Reimbursement Fee	GRC / General Rate Case	Self Generation
Capacity	Hazardous Waste	Service Area Map
Cogeneration	Increase Rates	Service Outage
Compliance	Interruptible Service	Solar
Conditions of Service	Interutility Transportation	Standby Service
Connection	LIEE / Low-Income Energy Efficiency	Storage
Conservation	LIRA / Low-Income Ratepayer Assistance	Street Lights
Consolidate Tariffs	Late Payment Charge	Surcharges
Contracts	Line Extensions	Tariffs
Core	Memorandum Account	Taxes
Credit	Metered Energy Efficiency	Text Changes
Curtailable Service	Metering	Transformer
Customer Charge	Mobile Home Parks	Transition Cost
Customer Owned Generation	Name Change	Transmission Lines
Decrease Rates	Non-Core	Transportation Electrification
Demand Charge	Non-firm Service Contracts	Transportation Rates
Demand Side Fund	Nuclear	Undergrounding
Demand Side Management	Oil Pipelines	Voltage Discount
Demand Side Response	PBR / Performance Based Ratemaking	Wind Power
Deposits	Portfolio	Withdrawal of Service
Depreciation	Power Lines	



Northern Rural Energy Network

YOUR LOCAL ENERGY SOLUTIONS

California Public Utilities Commission
Energy Division Tariff Unit
505 Van Ness Ave
Fourth Floor
San Francisco, CA 94102-3298

November 04, 2025

RuralREN North Advice Letter #006-E/006-G

(Northern California Rural Regional Energy Network ID U-1401-E)

Tier Designation

Tier Designation: This Advice Letter has a Tier 2 designation pursuant to Decision (D.) 21-05-031, Ordering Paragraph (OP) 10.

Subject

NREN 2024-2027 Energy Efficiency Portfolio Mid-Cycle Advice Letter

I. Purpose

The purpose of this Tier 2 advice letter is to provide a mid-cycle review of the portfolio and savings forecast of the Northern Rural Regional Energy Network (NREN) portfolio following the approval of its portfolio in Decision (D.)23-06-055 and modified in D.24-09-031. This advice letter is filed in compliance with Ordering Paragraph (OP) 10 of D.21-05-031, which directs portfolio administrators (PAs) to submit their mid-cycle advice letters (MCAL) on September 1, 2025. In late August, the Commission granted an MCAL extension for all PAs for 60 days after the issuance date of the decision adopting energy efficiency goals for 2026-2037, which was issued in proceeding R.25-04-010. D.25-08-034 Adopting Energy Efficiency Goals for 2026-2037 was issued by the Commission on September 5, 2025, establishing the new MCAL submittal deadline to November 4, 2025. NREN's MCAL is timely filed in compliance with the Commission's established deadline.

Tier Designation: This Advice Letter has a Tier 2 designation pursuant to D. 21-05-031, Ordering Paragraph (OP) 10.

II. Background

a. Regulatory Filing Requirements

1. *D.21-05-031*

The Mid-Cycle Advice Letter (MCAL) filing requirement was adopted in CPUC D. 21-05-031 which orders that each year on September 1, in the odd years when the energy efficiency (EE) potential and goals have been adopted by the Commission, each EE PA shall file either a portfolio true-up (prior to the start of a four-year portfolio) or a mid-cycle review (in year two of a four-year portfolio) Tier 2 advice letter adjusting technical inputs, forecasts, and portfolio to account for changes in energy efficiency potential and goals.

This decision requires each PA to meet the following criteria in its MCAL. NREN's MCAL meets each relevant criteria below:

- The program administrator's portfolio must meet the TSB for the four years, adjusted by the updated TSB for the remaining period of the portfolio.
- The portfolio must meet or exceed a forecasted TRC ratio of 1.0 for the resource acquisition segment of the portfolio (with the exception of RENs).
- The equity and market support segments of the portfolio, combined, must not exceed 30% of the total budget (with the exception of RENs).

- For IOUs: the statewide and third-party contribution percentage requirements must be met.
- The advice letters also must include a report on the progress against metrics relevant for each segment of the portfolio.

2. *D.23-06-055*

Requirements for the MCAL were adopted in D.23-06-055 also, including the following:

OP 16. Beginning with the mid-cycle budget advice letter submissions due in 2025, all portfolio administrators shall include specific descriptions of how they have incorporated or otherwise addressed impact evaluation recommendations for specific Commission studies released after 2022.

OP 24. Portfolio administrators shall develop indicators to measure community engagement, and should include them in their Mid-Cycle advice letters in 2025.

NREN complies with the above Ordering Paragraphs of this decision. Regarding OP 16, NREN describes its response to impact evaluation recommendations in Attachment C – Response to Recommendations. Regarding OP 24, NREN participated in the joint PA efforts of the development of the community engagement indicators, described in Attachment B – Community Engagement Indicators Results.

3. *D.25-08-034*

D.25-08-034, approved by the Commission in late August 2025, adopted total system benefit and energy savings goals for the four IOUs in California. This decision included a Potential & Goals study to adopt “realistic and aggressive, yet achievable” energy efficiency goals for the IOUs. This study has not historically set goals for REN PAs, however, the study and decision provide key data and guidance regarding the state’s potential for energy efficiency and conditions impacting all PAs’ portfolios.

Additionally, within this decision, the Commission acknowledges the volatility of federal tariffs and IRA tax credits, and agrees “with parties that recommend adopting the most conservative estimates in light of these unusually uncertain circumstances, which can negatively impact cost-effectiveness of energy efficiency measures.” The Commission adopts the scenario that anticipates a statewide decrease in TSB for 2026.

Related to this decision, this MCAL is timely filed in accordance with the Request for Extension of Time to Comply with Decision 21-05-031 Requiring a Tier 2 Mid-Cycle True-Up Advice Letter by September 1, 2025, which grants an extension for 60 days after the issuance date of the decision adopting energy efficiency goals for 2026-2037, D. 25-08-34. D.25-08-034 was issued on September 5, 2025, setting the MCAL due date to November 4, 2025.

4. *D.21-09-031*

In D.21-09-031, non-IOU PAs may propose to revise their goals and savings forecast in the TUAL or MCAL, and any proposal for revision must specifically identify the factor(s) impacted the proposed revision. NREN revises its goals and savings forecasts in this MCAL and has specifically identified the factors impacting the proposed revision as detailed in this narrative document.

5. *D.25-XX-XXX (Natural Gas Phase Out #2)*

At the time of this MCAL submittal, this decision has not yet been issued by the Commission.

6. *Resolution E-5400*

Following Decision (D.)24-09-031, NREN submitted a revised 2024-2027 Energy Efficiency Portfolio Business Plan Application (NREN AL #003-E/003-G). With this revised Business Plan, NREN submitted updated TUAL tables relevant to only NREN. Prior to this, the previous TUAL tables were relevant to the historic joint Rural REN. Resolution E-5400 approved NREN's revised Business Plan Application inclusive of its updated TUAL tables. Due to this, NREN refers to its updated TUAL tables for this MCAL.

E-5400 also orders that if NREN's programs overlap with the Energy Savings Assistance Program (ESA), NREN shall update and modify its portfolio in this MCAL if there are changes or modifications to their programs related to the findings of overlap with ESA. Included in this MCAL is a monitoring plan for overlap with ESA in this MCAL, described in Attachment E - ESA Overlap Monitoring Plan.

Contents of this Filing

The contents of this MCAL are as follows:

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- Attachment D – CEDARS Filing Confirmation
- Attachment E – ESA Overlap Monitoring Plan

III. Discussion

b. Portfolio Overview

7. Recent CPUC Decision or Guidance Impacting EE Portfolio

The Rural Regional Energy Network (Rural REN) was initially established by D.23-06-055 as an equity-focused REN to address the specific needs of rural communities, by offering energy efficiency programs in the North Coast, Central Coast, San Joaquin Valley, and Sierra regions of California. The Rural REN proposal was submitted by Redwood Coast Energy Authority (RCEA) on behalf of itself and several partners including County of San Luis Obispo (SLO), County of Ventura (Ventura), Association of Monterey Bay Area Governments (AMBAG), High Sierra Foundation (HSF), San Joaquin Valley Clean Energy Association (SJVCEO), and Sierra Business Council (SBC). RCEA was named the lead portfolio administrator by the Commission in D.23-06-055.

On May 21, 2024, the Administrative Law Judge filed a Ruling Seeking Comment on Potential Path Forward for Rural Regional Energy Network that proposed dividing NREN into two separate entities, one serving the North Coast and Northern Sierra regions, and the other serving the Central Coast and Central Valley areas. This proposal was approved in D.24-09-031, which ordered a modification to the Rural Regional Energy Network approved in D.23-06-055 to two RENs, the Northern California Rural Regional Energy Network (Northern Rural Energy Network or NREN) and the Central California Rural Regional Energy Network (CCRREN).

On December 23, 2024, the Redwood Coast Energy Authority, as the lead portfolio administrator of NREN, filed a Tier 3 Advice Letter submitting a revised Business Plan for the period 2024 through 2027 in compliance with D.24-09-031, Ordering Paragraph (OP) 9. The revised Business Plan was approved through Resolution E-5400 adopted on August 28, 2025. The original joint Rural REN filed a TUAL in early 2024. NREN's revised Business Plan (RRN AL #003-E/003-G) included updated TUAL tables, which are referenced and used for the purpose of this MCAL. The revised TUAL tables are relevant to only NREN, rather than the historic joint Rural REN.

8. Forecast Approach

Many of NREN's programs do not have associated savings, and KPIs were forecasted by the NREN Partners/Implementers based on anticipated program launch dates. For savings and TSB forecasting in programs RRN001, RRN002 and RRN003, deemed savings were used from measure packages based on forecasted installation quantities. As NREN is still working on the incorporation of NMEC into its resource programs, deemed savings were used to represent projects that will use NMEC for final claims. These measures are primarily for refrigeration and HVAC systems.

9. Portfolio Changes

NREN's portfolio of programs remains consistent with the updated Business Plan application (NREN AL#003-E/003-G), with one program anticipated to merge with another, and re-segmentation of that program as proposed in NREN AL#005-E/005-G. The activities of the Codes & Standards Program will be unchanged and be implemented under the Workforce, Education & Training (WE&T) Program. The WE&T program will be re-segmented into Market Support. Although still targeting equity communities, the program as designed was determined to be a better fit for the Market Support segment. The portfolio will include six programs in three segments and continues to allocate over half (53%) of its budget to the Equity segment. The Resource Acquisition and re-segmented Market Support programs will continue to largely focus on Equity customers as described in the updated Business Plan.

c. Summary of Forecasted Portfolio Impacts

10. Portfolio Budget Summary (copy table from excel file)

NREN's portfolio budget summary is presented in the tables that follow.

Table 1.1a - MCAL Updated Portfolio Budget by Sector and Segment

(Cumulative for PY 2024-2027 [1])

Ln	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$7,921,412.97		\$6,185,897.28		\$14,107,310.25
2	Commercial Sector	\$5,318,120.86				\$5,318,120.86
3	Industrial Sector	\$-	\$-	\$-		\$-
4	Agricultural Sector	\$-	\$-	\$-		\$-
5	Public Sector	\$-	\$-	\$2,346,852.94		\$2,346,852.94
6	Cross Cutting Sector					
7	Emerging Tech	\$-	\$-	\$-		\$-
8	WE&T		\$1,568,089.04			\$1,568,089.04
9	Finance			\$5,289,842.79		\$5,289,842.79
10	Codes & Standards				\$210,743.68	\$210,743.68
11	Portfolio Support	\$1,504,676.59	\$41,130.42	\$1,337,546.69	\$7,091.62	\$2,890,445.32
12	OBF Loan Pool	\$-				\$-
13	Portfolio Subtotal[2]	\$14,744,210.42	\$1,609,219.45	\$15,160,139.70	\$217,835.30	\$31,731,404.87

[1] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

[2] Excludes EM&V and Portfolio Oversight

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Ln	Segment	PY 2024- Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$175,259.61	\$4,324,301.82	\$4,645,212.96	\$5,599,436.03	\$14,744,210
2	Market Support	\$-	\$-	\$431,657.44	\$582,846.90	\$1,014,504
3	Equity	\$664,790.31	\$4,972,855.59	\$4,871,664.30	\$5,245,544.60	\$15,754,855
4	Codes and Standards	\$11,794.00	\$206,041.30	\$ -	\$ -	\$217,835
5	EM&V (PA and ED)	\$137,290.00	\$379,700.93	\$414,522.29	\$476,159.47	\$1,407,673
6	Total Budget w/o OBF Loan Pool	\$989,134	\$9,882,900	\$10,363,057	\$11,903,987	\$33,139,078
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					51%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$989,134	\$ 9,882,900	\$10,363,057	\$11,903,987	\$33,139,078
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$989,134	\$9,882,900	\$10,363,057	\$11,903,987	\$33,139,078
12	Approved Budget Cap ^[4]					\$33,139,078

[4] D.24-09-031 approved NREN's total funding for 2024-2027.

Table 1.5 - 4 Year Funding Sources - RENs/CCAs (RENs/CCAs Only)

Line		PG&E		SDG&E		SCE	SCG
1	Year	Electric\$	Gas\$	Electric\$	Gas\$	Electric\$	Gas\$
2	2024	1,916,590	383,410				
3	2025	8,401,193	1,680,239				
4	2026	8,644,244	1,728,849				
5	2027	8,653,794	1,730,759				
6	Total	27,615,821	5,523,257	-	-	-	-

11. Total System Benefit Forecast

Table 2.1a - MCAL Updated Annual and Cumulative Total System Benefit Forecast

Line	Segment	PY2024-Actual	PY2025TUAL	PY2026	PY2027	Cumulative
1	Resource Acquisition	\$-	\$698,968	\$1,154,949	\$2,152,734.98	\$4,006,652
2	Market Support	\$-	\$-	\$-	\$-	\$-
3	Equity	\$-	\$64,550	\$64,673	\$113,001	\$242,223
4	Total TSB Forecast	\$-	\$763,517	\$1,219,622	\$2,265,736	\$4,248,875
5	CPUC TSB Goal	\$-				\$-
6	<i>TSB Forecast/ TSB Goal^[1]</i>	NA	NA	NA	NA	NA

[1]TSB Goal set in decision D.25-08-034. NOTE: the Potential & Goals decision does not set goals for REN PAs.

12. Portfolio Cost Effectiveness Forecast

Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)[1]

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.37	0.40	0.27
2		Market Support	-	-	-
3		Equity	0.04	0.03	0.03
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including C&S</i>	0.18	0.18	0.15
6		<i>Excluding C&S</i>	0.18	0.18	0.15

[1] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	0.44	0.44	0.63	0.64	0.54	0.55
3		Market Support						
4		Equity	0.02	0.02	0.03	0.03	0.03	0.03
5		Codes and Standards (C&S)						
6	Portfolio	<i>Including C&S</i>	0.22	0.23	0.34	0.35	0.29	0.29
7		<i>Excluding C&S</i>	0.22	0.23	0.34	0.35	0.29	0.29

13. Statewide and Third-Party Compliance (IOU only)

NREN does not have any SW programs.

14. Market Support and Equity Forecast

Table A: Market Support & Equity Segment Budget 2024-2027

Line	Segment	Qualifying Budget	Total Budget ¹	% of Budget	Cap (IOU and ATA CCA only)
1	Market Support	\$1,014,504	\$33,139,078	3.06%	30%
2	Equity	\$15,754,855		47.54%	
3	Market Support + Equity	\$16,769,359		50.60%	

1 – Does not include OBF Loan Pool or ED Portfolio Oversight

15. Codes & Standards Savings Forecast (ALL PA, as applicable)

NREN does not have any savings associated with Codes & Standards programs.

16. Non-Advocacy C&S Budget Forecast

As described in the Portfolio Changes section of this MCAL, NREN is closing its Codes & Standards program on December 31, 2025 (NREN AL #005-E/005-G). All C&S activities and budget will be shifted to NREN's Workforce Education & Training program, which includes all advocacy C&S activities. See the Portfolio Budget Summary for budget information.

IV. Energy Efficiency Portfolio Details

d. Segment Metrics

D.23-06-055 adopted objectives and indicators for the equity and market support segments and designated the reporting frequency (quarterly or annual) and level (segment or portfolio-wide). Following this decision, the Equity and Market Support Working Group (EMSWG) submitted an advice letter as ordered in D.23-06-055 OP 11 which clarified the equity and market support indicators, proposed modifications to the common metrics adopted in D.18-05-041, recommended a methodology to determine indicator baselines, and laid out a suggested schedule for tracking and reporting of equity and market support indicators and updated common metrics and indicators.

Resolution E-5351 sets guidance for indicators and metrics related to energy efficiency portfolios in compliance with D.23-06-055. As a new PA, NREN will follow this guidance for its programs.

The following metrics and indicators approved in Resolution E-5351 may be reported on as NREN continues to launch its programs:

Index	Name of Indicator or Metric	Sector
0	CO2-equivalent of net annual kWh savings	Portfolio-wide
1	First year annual kW gross	Portfolio-wide
2	First year annual kW net	Portfolio-wide
3	First year annual kWh gross	Portfolio-wide
4	First year annual kWh net	Portfolio-wide
5	First year annual Therm gross	Portfolio-wide
6	First year annual Therm net	Portfolio-wide
9	Lifecycle ex-ante kWh gross	Portfolio-wide
10	Lifecycle ex-ante kWh net	Portfolio-wide
11	Lifecycle ex-ante Therm gross	Portfolio-wide
12	Lifecycle ex-ante Therm net	Portfolio-wide
13	First year annual kW gross in Disadvantaged Communities	Portfolio-wide
14	First year annual kW net in Disadvantaged Communities	Portfolio-wide
15	First year annual kWh gross in Disadvantaged Communities	Portfolio-wide
16	First year annual kWh net in Disadvantaged Communities	Portfolio-wide
17	First year annual Therm gross in Disadvantaged Communities	Portfolio-wide
18	First year annual Therm net in Disadvantaged Communities	Portfolio-wide
21	Lifecycle ex-ante kWh gross in Disadvantaged Communities	Portfolio-wide
22	Lifecycle ex-ante kWh net in Disadvantaged Communities	Portfolio-wide
23	Lifecycle ex-ante Therm gross in Disadvantaged Communities	Portfolio-wide
24	Lifecycle ex-ante Therm net in Disadvantaged Communities	Portfolio-wide
25	First year annual kW gross in Hard-to-Reach Markets	Portfolio-wide
26	First year annual kW net in Hard-to-Reach Markets	Portfolio-wide
27	First year annual kWh gross in Hard-to-Reach Markets	Portfolio-wide
28	First year annual kWh net in Hard-to-Reach Markets	Portfolio-wide
29	First year annual Therm gross in Hard-to-Reach Markets	Portfolio-wide
30	First year annual Therm net in Hard-to-Reach Markets	Portfolio-wide
33	Lifecycle ex-ante kWh gross in Hard-to-Reach Markets	Portfolio-wide
34	Lifecycle ex-ante kWh net in Hard-to-Reach Markets	Portfolio-wide
35	Lifecycle ex-ante Therm gross in Hard-to-Reach Markets	Portfolio-wide
36	Lifecycle ex-ante Therm net in Hard-to-Reach Markets	Portfolio-wide
45	First year annual kWh gross	Residential (RSF)
46	First year annual kWh net	Residential (RSF)
47	First year annual Therm gross	Residential (RSF)

Index	Name of Indicator or Metric	Sector
48	First year annual Therm net	Residential (RSF)
51	Lifecycle ex-ante kWh gross	Residential (RSF)
52	Lifecycle ex-ante kWh net	Residential (RSF)
53	Lifecycle ex-ante Therm gross	Residential (RSF)
54	Lifecycle ex-ante Therm net	Residential (RSF)
55	CO2-equivalent of net annual kWh savings	Residential (RSF)
57	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Downstream	Residential (RSF)
58	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Downstream	Residential (RSF)
78	First year annual kW gross - In Unit	Residential (RMF)
79	First year annual kW net - In Unit	Residential (RMF)
80	First year annual kWh gross - In Unit	Residential (RMF)
81	First year annual kWh net - In Unit	Residential (RMF)
82	First year annual Therm gross - In Unit	Residential (RMF)
83	First year annual Therm net - In Unit	Residential (RMF)
86	Lifecycle ex-ante kWh gross - In Unit	Residential (RMF)
87	Lifecycle ex-ante kWh net - In Unit	Residential (RMF)
88	Lifecycle ex-ante Therm gross - In Unit	Residential (RMF)
89	Lifecycle ex-ante Therm net - In Unit	Residential (RMF)
102	First year annual kW gross - Common Area	Residential (RMF)
103	First year annual kW net - Common Area	Residential (RMF)
104	First year annual kWh gross - Common Area	Residential (RMF)
105	First year annual kWh net - Common Area	Residential (RMF)
106	First year annual Therm gross - Common Area	Residential (RMF)
107	First year annual Therm net - Common Area	Residential (RMF)
110	Lifecycle ex-ante kWh gross - Common Area	Residential (RMF)
111	Lifecycle ex-ante kWh net - Common Area	Residential (RMF)
112	Lifecycle ex-ante Therm gross - Common Area	Residential (RMF)
113	Lifecycle ex-ante Therm net - Common Area	Residential (RMF)
114	CO2-equivalent of net annual kWh savings	Residential (RMF)
116	Lifecycle ex-ante kWh net per project (building)	Residential (RMF)
117	Lifecycle ex-ante Therm net per project (building)	Residential (RMF)
119	Lifecycle ex-ante kWh net per project (property)	Residential (RMF)
120	Lifecycle ex-ante Therm net per project (property)	Residential (RMF)
139	First year annual kW gross	Commercial Sector (C)
140	First year annual kW net	Commercial Sector (C)
141	First year annual kWh gross	Commercial Sector (C)

Index	Name of Indicator or Metric	Sector
142	First year annual kWh net	Commercial Sector (C)
143	First year annual Therm gross	Commercial Sector (C)
144	First year annual Therm net	Commercial Sector (C)
147	Lifecycle ex-ante kWh gross	Commercial Sector (C)
148	Lifecycle ex-ante kWh net	Commercial Sector (C)
149	Lifecycle ex-ante Therm gross	Commercial Sector (C)
150	Lifecycle ex-ante Therm net	Commercial Sector (C)
163	CO2-equivalent of net annual kWh savings	Commercial Sector (C)
188	First year annual kW gross	Public Sector (P)
189	First year annual kW net	Public Sector (P)
190	First year annual kWh gross	Public Sector (P)
191	First year annual kWh net	Public Sector (P)
192	First year annual Therm gross	Public Sector (P)
193	First year annual Therm net	Public Sector (P)
196	Lifecycle ex-ante kWh gross	Public Sector (P)
197	Lifecycle ex-ante kWh net	Public Sector (P)
198	Lifecycle ex-ante Therm gross	Public Sector (P)
199	Lifecycle ex-ante Therm net	Public Sector (P)
200	CO2-equivalent of net annual kWh savings	Public Sector (P)
201	Percent annual net kW per project building or facility	Public Sector (P)
202	Percent annual net kWh per project building or facility	Public Sector (P)
203	Percent annual net Therms per project building or facility	Public Sector (P)
219	Total program-backed financing distributed to Public Sector customers requiring repayment	Public Sector (P)
297	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Codes & Standards (CS)
EQ1	Count of equity target participants in equity segment, by sector (Q, S);	Portfolio-wide
EQ2	Sum of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S);	Portfolio-wide
EQ3	Count of equity target participants in market support segment, by sector (Q, S);	Portfolio-wide
EQ4	Count of equity target participants in resource acquisition segment, by sector (Q, S);	Portfolio-wide
EQ5	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment (Q, S);	Portfolio-wide

Index	Name of Indicator or Metric	Sector
EQ6	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment (Q, S);	Portfolio-wide
EQ7	Sum of all equity segment participants' kW savings in equity segment (Q, S);	Portfolio-wide
EQ8	Sum of all equity segment participants' therm savings in equity segment (Q, S);	Portfolio-wide
EQ9	Sum of all equity segment participants' TSB in equity segment (Q, S);	Portfolio-wide
EQ10	Median of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S);	Portfolio-wide
EQ11	Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector (A, P);	Portfolio-wide
EQ12	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multi-family and commercial sector (A, P);	Portfolio-wide
EQ13	Percent of equity target participants in equity segment, by sector (Q, S);	Portfolio-wide
MS13	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A, P);	Portfolio-wide
MS14	Number of unique participants by sector that complete training (Q, S);	Portfolio-wide
MS16	Total projects completed/measures installed and dollar value of consolidated programs by sector (Q, P);	Portfolio-wide
MS18	Percentage of partners that have taken action supporting energy efficiency by type (Q, P);	Portfolio-wide
MS19	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency (Q, S);	Portfolio-wide
MS2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P);	Portfolio-wide
MS20	Assessed value of the partnership by partners (A, P);	Portfolio-wide
MS3	Percent of participation relative to eligible target population for curriculum (Q, S);	Portfolio-wide
MS4	Percent of total WE&T program participants that meet the definition of disadvantaged worker (Q, S);	Portfolio-wide

Index	Name of Indicator or Metric	Sector
UVM	Number of homes within a geographic HTR area that engage with NREN's Residential programs (including but not limited to homes that engaged in NREN's energy efficiency kits, rebates, technical support resources, etc)	Residential

Additionally, NREN is committed to reporting the metrics and indicators as described in D. 23-06-055 OP 23 (Demographic Data) and OP 25 (Equity and Market Support Segment Indicators) in 2025. Reporting for the metrics and indicators described in Resolution E-5351 will begin with Q4 2025 reporting in March 2026. Methodologies for these metrics and indicators will be developed as NREN's programs launch. NREN also participated in the development of Community Engagement Indicators and included them in this MCAL in Attachment B – Community Engagement Indicators Results.

e. Program Changes

The following section describes NREN programs in detail, including any changes since NREN's updated Business Plan application. Program design has not materially changed, but now that NREN is a year into implementation, there is a clearer roadmap for the programs in this cycle. This has led to changes in the budgets and forecasts.

RRN001: Residential Equity Program

NREN's Residential Equity program connects rural residential communities to energy efficiency opportunities through targeted outreach, education, assessments, and technical assistance focusing on equity-targeted hard-to-reach and underserved rural customers who often face very high energy burdens. The program aids rural communities in better understanding the concepts of energy conservation, energy efficiency, electrification, and demand response. The program also connects customers to the opportunities for energy savings that might exist in their homes and guides customers to other NREN programs as well as external programs and resources to support implementation of energy projects. The program will provide some small energy saving measures through direct installation during assessment and energy saving kits that can be handed out at outreach events or shipped directly to customers' homes. This program design remains unchanged from the NREN updated Business Plan but there was an increase in the budget as this program has seen uptake in the NREN communities and will continue to expand.

RRN002: Residential Resource Acquisition Program

NREN's Residential Resource Acquisition program is a comprehensive EE and decarbonization program offering technical services, customer incentives, and direct installation of measures aimed at reducing energy usage, on-peak load and GHG emissions. The program will be offered in all NREN's regions, which are mostly remote and sparsely populated areas. The program uses a whole house approach to increase adoption of EE, demand response, and decarbonization

measures, while providing added safety, resilience and occupant comfort benefits. While not categorized as an Equity segment program, the program will prioritize services for underserved and geographically hard-to-reach rural customers who often face very high energy burdens. The program complements NREN's Residential Equity program by integrating its marketing, outreach and education activities.

This program also offers a rebate catalog of measures for which a customer can receive a rebate after purchase. The program otherwise remains unchanged from the NREN updated Business Plan. NREN has contracted with kW Engineering to assist with design and implementation of the Normalized Metered Energy Savings (NMEC) component of the program with intent to launch those services in 2026. Forecasted savings were calculated using deemed savings methodology.

RRN003: Commercial Resource Acquisition Program

NREN's Commercial Resource Acquisition program is a comprehensive energy efficiency and decarbonization program offering technical services, incentives, and direct installation of select measures aimed at reducing energy usage, on-peak load and GHG emissions in rural micro, small and medium-sized businesses. The program will be offered in all NREN's regions, filling a gap in services to the most remote and sparsely populated areas and those most in need of a customized local delivery offering. The program uses a comprehensive approach to increase adoption of EE, demand response, and decarbonization measures, while providing operating cost savings and added non-energy benefits of safety, resilience and occupant comfort for local businesses. While not categorized as an Equity segment program, a high proportion of the businesses served will be hard-to-reach and located in or near rural underserved communities.

The program design remains unchanged from the NREN revised Business Plan, however, the program is launching on a later date and the quantity of forecasted measures was reduced to reflect this.

NREN has contracted with kW Engineering for the NMEC component of the commercial program with intent to launch those services in 2026. Savings forecasts were calculated using the deemed savings methodology.

RRN004: Finance Equity Program

As described in the new NREN Business Plan, the cross-cutting NREN Finance Program will equitably support the residential, SMB and public sectors in the NREN communities through financing options that will encourage and accelerate the implementation of energy efficiency projects. The Finance Equity Program is still being developed as NREN continues to launch its programs. This program intends to provide NREN's customers with financing options that address first-cost and access to capital barriers that exist in rural California.

NREN has contracted with Frontier Energy for design support for the program. The details of the program will be included in the Implementation Plan to be developed by the selected consultant and NREN Partners.

RRN005: Public Equity Program

The NREN Public Equity Program is a public agency-focused program designed to help hard-to-reach and underserved public agencies in NREN territory access, understand, and participate in energy efficiency by providing local expertise and knowledge of public buildings and infrastructure. The program builds on existing relationships, data, and experience to bring savings and knowledge of energy use to public sector customers. The program described in the NREN revised Business Plan only served Lake and Mendocino Counties, however the intent is to launch this program in all NREN territory in 2026.

RRN006: Workforce, Education & Training Equity Program

The cross-cutting Workforce, Education and Training program accelerates training, including upskilling of existing workers and training for new workers. The program addresses skills training and supports building professionals, while coordinating with local community colleges and agencies for training support. The program intends to ensure that training is available within the NREN communities where distance to training centers has been a barrier. The program will also work with trainees entering the workforce and ensure that the rural communities have access to trained and skilled workers. The training activities described will also include educating building departments and building professionals to provide rural building departments and building professionals with education and technical resources to increase comprehension and compliance in the California Building Energy Efficiency Code (Title 24) and escalate adoption of new standard technologies. The codes and standards training will leverage current IOU and Statewide offerings and will serve geographically rural and hard-to-reach areas that have distinct characteristics and needs.

Due to the inclusion of the codes and standards training in the WE&T program, the Codes & Standards program will be closed at the end of 2025. The closure of the C&S program is presented in the NREN AL #005-E/005-G.

As part of the mid-cycle review process, the WE&T program was also evaluated for its categorization in the equity segment. As the program focuses heavily on developing partnerships with community colleges and bringing existing training to the NREN region to strengthen the market actors, the market support segment appears to be a better fit for the program. The change of RRN006 from the equity to market support segment is presented in NREN AL #005-E/005-G.

RRN007: Codes & Standards Market Support Program

In the NREN revised Business Plan, the NREN Codes & Standards (C&S) program was intended to connect building departments and contractors with already existing training. The program was not intended to develop training curriculum, perform educational activities, or develop any resources to increase code compliance and enforcement. The activities described fit well with the program design of the Workforce, Education & Training Program, RRN006. For both

operation efficiency and proper segmentation of the program, RRN007 will be closed at the end of 2025 and activities will be shifted under the RRN006, WE&T.

f. Program Closures

17. Programs Closed between TUAL and MCAL

NREN's Codes & Standards program will be closed at the end of 2025. Instead, the activities intended for the C&S program will be incorporated into NREN's WE&T program. NREN's C&S programs have not yet launched as NREN's Business Plan Application was approved on 8/28/25.

The C&S activities included providing rural building departments and building professionals with education and technical resources to increase comprehension and compliance in the California Building Energy Efficiency Code (Title 24) and escalate adoption of new standard technologies. The program was designed to connect rural building departments with current IOU and Statewide offerings and will serve geographically rural and hard-to-reach areas that have distinct characteristics and needs. The program's goal was to ensure offerings are available in rural areas that will help those regions reduce energy usage through improved building design and construction and greater code compliance and enforcement.

Instead, NREN will incorporate these activities into its WE&T program. NREN has discussed this shift in activities with CPUC Energy Division and submitted a separate advice letter (NREN AL #005-E/005-G) describing these changes, at Energy Division staff's recommendation.

Along with this shift, NREN will also re-segment the WE&T program to be Market Support instead of Equity. As defined in D.21-05-07, the Market Support segment includes programs with a primary objective of supporting the long-term success of the energy efficiency market by educating customers, training contractors, building partnerships, or moving beneficial technologies towards greater cost-effectiveness. This aligns with the C&S activities and the WE&T program, which target the supply side of the market by training the public and private sector workforce on code compliance.

18. Programs to be Closed in 2026-2027

As described above, the C&S program will be closed at the end of 2025 and be incorporated into the WE&T program starting in 2026.

19. Programs to be Closed Upon Completion of Commitments

Not applicable.

g. EM&V (2024-2027)

As a new PA, NREN has not yet launched its EM&V plans. NREN intends to begin its EM&V studies after its programs have launched and have developed measurable impacts. NREN has entered zeroes into the table below, as instructed in the MCAL template.

Table C: Annual Breakdown of EM&V Budgets (Instructions: RENs and CCAs input 0)

Year	PA	Total Budget w/o EM&V	EM&V Total	EM&V CPUC	EM&V PA	Total Budget w/ EM&V
2024	PA, excluding ED Portfolio Oversight ¹	0	0	0	0	0
2024	IOU share of ED Portfolio Oversight	0	0	0	0	0
2024	ADD RENs (IOUs only)	0	0	0	0	0
2025	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2025	IOU share of ED Portfolio Oversight	0	0	0	0	0
2025	ADD RENs (IOUs only)	0	0	0	0	0
2026	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2026	IOU share of ED Portfolio Oversight	0	0	0	0	0
2026	ADD RENs (IOUs only)	0	0	0	0	0
2027	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2027	IOU share of ED Portfolio Oversight	0	0	0	0	0
2027	ADD RENs (IOUs only)	0	0	0	0	0
	Total	0	0	0	0	0

h. Cost Recovery

20. Unspent Funds

NREN was approved in September of 2024 and does not have unspent funds from 2017-2023.

21. Integrated Demand-Side Management (IDSM) Budget

NREN set aside funds per D.23-06-055 to provide an operational complement for integrated demand-side management (IDSM) in 2024-2027. D.23-06-055 gave PAs an option to allocate up to 2.5% or \$4 million of their energy efficiency budgets for IDSM. NREN plans to submit an advice letter detailing its IDSM plans in the coming months.

¹ DEFINE PORTFOLIO OVERSIGHT.

i. CEDARS Discrepancies (optional)

NREN received a claims review from Quantum that identified possible CEDARS discrepancies in Q1 and Q2 of 2025. NREN is reviewing this and will address any discrepancies in its Q3 2025 claims.

List of Attachments

Attached hereto are the following:

- Attachment A – Appendices from Excel Template in PDF
- Attachment B – Community Engagement Indicators Results
- Attachment C – PA Response to Recommendations
- Attachment D – CEDARS Filing Confirmation
- Attachment E – ESA Overlap Monitoring Plan

Protest

Anyone may protest this Advice Letter. The Protest must state the grounds upon which it is based. The Protest must be made in writing and received by the Commission within 20 days of the date this Advice Letter was filed with the Commission, or November 24, 2025. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

California Public Utilities Commission
CPUC Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of the Energy Division at EDTariffUnit@cpuc.ca.gov. It is also requested that a copy of the protest be sent by email to the address shown below on the same date it is mailed or delivered to the Commission.

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Effective Date

NREN requests that this Tier 2 advice filing become effective on regular notice December 4, 2025, which is 30 calendar days from the date of this filing.

Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically to service lists for R.13-11-005, A.22-02-005, and R.25-04-010 and uploaded to the CPUC Energy Division Advice Letter database (cpucadviceletters.org). Address changes to the General Order 96-B service list should be directed to Patricia Terry at pterry@redwoodenergy.org or by calling 707-269-1700. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

____/s/ Patricia C. Terry

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For the Northern California Rural Regional Energy Network (NREN)

**ATTACHMENT A – Appendices from Excel Template
in PDF**

NREN Business Plan and TUAL Information:

The historic joint Rural REN was approved in Decision (D.) 23-06-055, which included both Northern Rural REN and Central Rural REN.

The joint RuralREN was separated into the two regions (Northern and Central RENs) in D.24-09-031.

Following D.24-09-031, NREN submitted a revised Business Plan Application (NREN AL #003-E/003-G), which included updated TUAL tables relevant to only NREN. Prior to this, the previous TUAL tables were relevant to the historic joint Rural REN.

NREN's updated Business Plan was approved in Resolution E-5400.

Throughout its entire Mid-Cycle Advice Letter and its corresponding documents, NREN refers to its updated TUAL tables as submitted in its updated Business Plan Application and approved in Resolution E-5400.

Table 1.1a - MCAL Updated Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 [1])

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 7,921,412.97		\$ 6,185,897.28		\$ 14,107,310.25
2	Commercial Sector	\$ 5,318,120.86				\$ 5,318,120.86
3	Industrial Sector	\$ -	\$ -	\$ -		\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -		\$ -
5	Public Sector	\$ -	\$ -	\$ 2,346,852.94		\$ 2,346,852.94
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -		\$ -
8	WE&T		\$ 1,568,089.04			\$ 1,568,089.04
9	Finance			\$ 5,289,842.79		\$ 5,289,842.79
10	Codes & Standards				\$ 210,743.68	\$ 210,743.68
11	Portfolio Support	\$ 1,504,676.59	\$ 41,130.42	\$ 1,337,546.69	\$ 7,091.62	\$ 2,890,445.32
12	OBF Loan Pool	\$ -			\$ -	\$ -
13	Portfolio Subtotal [2]	\$ 14,744,210.42	\$ 1,609,219.45	\$ 15,160,139.70	\$ 217,835.30	\$ 31,731,404.87

[1] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

[2] excludes EM&V and Portfolio Oversight

Table 1.1b - TUAL Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 [1])

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 8,697,700	\$ -	\$ 6,022,548	\$ -	\$ 14,720,248
2	Commercial Sector	\$ 5,784,779	\$ -	\$ -	\$ -	\$ 5,784,779
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ 1,181,206	\$ -	\$ 1,181,206
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 1,964,597	\$ -	\$ 1,964,597
9	Finance	\$ -	\$ -	\$ 6,580,192	\$ -	\$ 6,580,192
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 678,384	\$ 678,384
11	Portfolio Support	\$ 423,616	\$ -	\$ 460,649	\$ 19,843	\$ 904,108
12	OBF Loan Pool	\$ -				\$ -
13	Portfolio Subtotal [2]	\$ 14,906,095	\$ -	\$ 16,209,192	\$ 698,227	\$ 31,813,514

[2] excludes EM&V and Portfolio Oversight

Table 1.1c - Change Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027)

Line	Budget Category	Change-Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ (776,287)	\$ -	\$ 163,349	\$ -	\$ (612,938)
2	Commercial Sector	\$ (466,658)	\$ -	\$ -	\$ -	\$ (466,658)
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ 1,165,647	\$ -	\$ 1,165,647
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ 1,568,089	\$ (1,964,597)	\$ -	\$ (396,508)
9	Finance	\$ -	\$ -	\$ (1,290,349)	\$ -	\$ (1,290,349)
10	Codes & Standards	\$ -	\$ -	\$ -	\$ (467,640)	\$ (467,640)
11	Portfolio Support	\$ 1,081,061	\$ 41,130	\$ 876,898	\$ (12,751)	\$ 1,986,337
12	OBF Loan Pool	\$ -				\$ -
13	Portfolio Subtotal [2]	\$ (161,885)	\$ 1,609,219	\$ (1,049,052)	\$ (480,392)	\$ (82,109)

[2] excludes EM&V and Portfolio Oversight

Table 1.2a - MCAL Total Cost Recovery Request, Including REN/CCA and Other Costs (IOU Only)⁴

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offset(2)	(f) Total
1	Southern California Edison						\$ -
2	SoCal REN						\$ -
3	3C-REN						\$ -
4	I-REN						\$ -
5	RREN Central ⁶						\$ -
6	RREN North ⁶						
7	Bay-REN (SW Program)						\$ -
8	Ava Community Energy						\$ -
9	CleanPowerSF						\$ -
10	Marin Clean Energy						\$ -
11	Peninsula Clean Energy						\$ -
12	Redwood Coast Energy Authority						\$ -
13	SD REN						\$ -
14	San Jose Clean Energy						\$ -
15	Sonoma Clean Power						\$ -
16	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	Collected 2024 Recovery						\$ -
18	Expected 2025 Recovery						\$ -
19	Remaining Cost Recovery						\$ -

[5] Funding reserved for EE technical consultants pursuant to D.23-06-055 OP 9

[6] Rural REN was split into two RENs in D. 24-09-031 and budgets were adjusted to account for split and timing of when NREN started

Table 1.2b - TUAL Total Cost Recovery Request, Including REN/CCA and Other Costs (IOU Only)

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offset[3]	(f) Total
1	Southern California Edison						\$ -
2	SoCal REN						\$ -
3	3C-REN						\$ -
4	I-REN						\$ -
5	RREN Central ⁶						\$ -
6	RREN North ⁶						
7	Bay-REN (SW Program)						\$ -
8	Ava Community Energy						\$ -
9	CleanPowerSF						\$ -
10	Marin Clean Energy						\$ -
11	Peninsula Clean Energy						\$ -
12	Redwood Coast Energy Authority						\$ -
13	SD REN						\$ -
14	San Jose Clean Energy						\$ -
15	Sonoma Clean Power						\$ -
8	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[5] Funding reserved for EE technical consultants pursuant to D.23-06-055 OP 9

[6] Rural REN was split into two RENs in D. 24-09-031 and budgets were adjusted to account for split and timing of when NREN started

Table 1.2c - Change Total Cost Recovery Request, Including REN/CCA and Other Costs (IOU Only)

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offset[3]	(f) Total
1	Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	RREN North ⁶						
4	Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	Ava Community Energy					\$ -	\$ -
9	CleanPowerSF					\$ -	\$ -
10	Marin Clean Energy					\$ -	\$ -
11	Peninsula Clean Energy					\$ -	\$ -
12	Redwood Coast Energy Authority					\$ -	\$ -
13	SD REN					\$ -	\$ -
14	San Jose Clean Energy					\$ -	\$ -
15	Sonoma Clean Power					\$ -	\$ -
4	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[5] Funding reserved for EE technical consultants pursuant to D.23-06-055 OP 9

[6] Rural REN was split into two RENs in D. 24-09-031 and budgets were adjusted to account for split and timing of when NREN started

Table 1.3 Portfolio Cost Recovery Request by Fuel (IOU Only)

Line	Spending Budget & Cost Recovery Request	Unspent/Uncommitted Funds for Offset					2024-2027
1	IOU (excluding fuel substitution budget)						
2	IOU Budget forecasted to support fuel sub						
3	Total cost recovery request for IOU portfolio (excluding offset)						
4	IOU 2023 Estimated Unspent & Uncommitted Funds to Offset 2024 Cost Recovery						
5	Total Cost Recovery Request for IOU Portfolio (including offset)						
6	Applicable electric split						
7	Applicable gas split						
8	Electric portion for cost recovery (excluding fuel sub budget)						
9	Fuel sub applicable electric split						
10	Electric portion for cost recover (fuel sub budget)						
11	Total electric portion for cost recovery for IOU portfolio						
12	Total Gas portion for cost recovery for IOU portfolio						
13	Electric split (with fuel sub)						
14	Gas split (with fuel sub)						

Table 1.4 Prior Years Unspnt Funds as of August 2024 (All PA)

Line		PY 2017	PY 2018	PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024
1	Unspent & Uncommitted								
2	EM&V								
3	Total								
4	Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2025 Rate Offset								
5	EM&V - PA Funds								
6	EM&V - CPUC Funds								
7	IOU Program Funds					-			
8	Total								

Table 1.5 - 4 Year Funding Sources - RENS/CCAs (RENS/CCAs Only)

Line		PG&E		SDG&E		SCE	SCG
1	Year	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2	2024	1,916,590	383,410				
3	2025	8,401,193	1,680,239				
4	2026	8,644,244	1,728,849				
5	2027	8,653,794	1,730,759				
6	Total	27,615,821	5,523,257	-	-	-	-

Table 1.6 - Mid-Cycle Advice Letter Funding Breakdown (ALL PAs)

Line	Year	2024 Reported Expenditures	2024 Carryover Funding ⁷	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset	2024-2027 Funding Total
1	2024	\$ 989,133.92						\$ 989,133.92
2	2025			\$ 9,882,899.64				\$ 9,882,899.64
3	2026				\$ 10,363,057.00			\$ 10,363,057.00
4	2027		\$ 713,713.08			\$ 11,903,987.00		\$ 11,903,987.00

[7] Funding committed in 2024 but not yet spent will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years.

2024 Carryover Funding of \$713,711 has been carried over to PY 2027.

[8] Following Decision (D.)24-09-031, NREN submitted a revised Business Plan Application (NREN AL #003-E/003-G), which included updated TUAL tables. NREN's updated Business Plan was approved in Resolution E-5400.

Table 2.1a - MCAL Updated Annual and Cumulative Total System Benefit Forecast

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ 698,968	\$ 1,154,949	\$ 2,152,734.98	\$ 4,006,652
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ -	\$ 64,550	\$ 64,673	\$ 113,001	\$ 242,223
4	Total TSB Forecast	\$ -	\$ 763,517	\$ 1,219,622	\$ 2,265,736	\$ 4,248,875
5	CPUC TSB Goal	\$ -				\$ -
6	<i>TSB Forecast / TSB Goal^[1]</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[1] TSB Goal set in decision D.25-08-034. NOTE: the Potential & Goals decision does not set goals for REN PAs.

Table 2.1b - TUAL Annual and Cumulative Total System Benefit Forecast

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ 698,968	\$ 935,482	\$ 930,407	\$ 2,564,857
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ -	\$ 64,549	\$ 94,067	\$ 92,070	\$ 250,686
4	Total TSB Forecast	\$ -	\$ 763,517	\$ 1,029,549	\$ 1,022,477	\$ 2,815,543
5	CPUC TSB Goal	\$ -				\$ -
6	<i>TSB Forecast / TSB Goal^[2]</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016. NOTE: the Potential & Goals decision does not set goals for REN PAs.

Table 2.1c - Change Annual and Cumulative Total System Benefit Forecast

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ (0)	\$ 219,467	\$ 1,222,328	\$ 1,441,795
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ -	\$ 1	\$ (29,394)	\$ 20,931	\$ (8,463)
4	Total TSB Forecast	\$ -	\$ 0	\$ 190,073	\$ 1,243,259	\$ 1,433,332
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -	\$ -
6	<i>TSB Forecast / TSB Goal^[3]</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[3] Difference in % of goals achieved from the TUAL to the MCAL. NOTE: the Potential & Goals decision does not set goals for REN PAs.

Table 2.2a - MCAL Updated Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[1]	-	-0.362808	-	-	(0.36280800)
2	GWh CPUC Target ^[1]	-	0			-
3	<i>GWh Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
4	MW Forecast	-	0.042	-	-	0.0420
5	MW CPUC Target ^[1]	-	0			-
6	<i>MW Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
7	MMThm Forecast	-	0.084	-	-	0.0840000
8	MMThm CPUC Target ^[1]	-	0			-
9	<i>MMThm Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[1] TSB Goal set in decion D.25-08-034. NOTE: the Potential & Goals decision does not set goals for REN PAs.

Table 2.2b - TUAL Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[2]	-	-0.362808	-0.537912	-0.537912	(1.4)
2	GWh CPUC Target ^[2]	-	0	0	0	-
3	<i>GWh Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
4	MW Forecast	-	0.042	0.055	0.055	0.2
5	MW CPUC Target ^[2]	-	0	0	0	-
6	<i>MW Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
7	MMThm Forecast	-	0.084	0.118	0.118	0.32
8	MMThm CPUC Target ^[2]	-	0	0	0	-
9	<i>MMThm Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016. NOTE: the Potential & Goals decision does not set goals for REN PAs.

Table 2.2c - Change Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[3]	-	-	1	1	1
2	GWh CPUC Target ^[3]	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
4	MW Forecast	-	-	(0)	(0)	(0)
5	MW CPUC Target ^[3]	-	-	(0)	(0)	(0)
6	<i>MW Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
7	MMThm Forecast	-	-	(0)	(0)	(0)
8	MMThm CPUC Target ^[3]	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
9	<i>MMThm Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[3] Difference in % of goals achieved from the TUAL to the MCAL. NOTE: the Potential & Goals decision does not set goals for REN PAs.

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 175,259.61	\$ 4,324,301.82	\$ 4,645,212.96	\$ 5,599,436.03	\$ 14,744,210
2	Market Support	\$ -	\$ -	\$ 431,657.44	\$ 582,846.90	\$ 1,014,504
3	Equity	\$ 664,790.31	\$ 4,972,855.59	\$ 4,871,664.30	\$ 5,245,544.60	\$ 15,754,855
4	Codes and Standards	\$ 11,794.00	\$ 206,041.30	\$ -	\$ -	\$ 217,835
5	EM&V (PA and ED)	\$ 137,290.00	\$ 379,700.93	\$ 414,522.29	\$ 476,159.47	\$ 1,407,673
6	Total Budget w/o OBF Loan Pool	\$ 989,134	\$ 9,882,900	\$ 10,363,057	\$ 11,903,987	\$ 33,139,078
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					51%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 989,134	\$ 9,882,900	\$ 10,363,057	\$ 11,903,987	\$ 33,139,078
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 989,134	\$ 9,882,900	\$ 10,363,057	\$ 11,903,987	\$ 33,139,078
12	Approved Budget Cap ^[4]					\$ 33,139,078

[4] D.24-09-031 approved NREN's total funding for 2024-2027.

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 548,006	\$ 4,324,254	\$ 4,786,541	\$ 5,247,140	\$ 14,905,941
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 993,865	\$ 4,972,902	\$ 5,027,647	\$ 5,214,926	\$ 16,209,340
4	Codes and Standards	\$ 23,684	\$ 206,044	\$ 239,535	\$ 228,970	\$ 698,233
5	EM&V (PA and ED)	\$ 137,291	\$ 379,701	\$ 403,615	\$ 404,956	\$ 1,325,563
6	Total Budget w/o OBF Loan Pool	\$ 1,702,847	\$ 9,882,901	\$ 10,457,338	\$ 11,095,992	\$ 33,139,078
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					49%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 1,702,847	\$ 9,882,901	\$ 10,457,338	\$ 11,095,992	\$ 33,139,078
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 1,702,847	\$ 9,882,901	\$ 10,457,338	\$ 11,095,992	\$ 33,139,078

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ (372,747)	\$ 48	\$ (141,328)	\$ 352,296	\$ (161,731)
2	Market Support	\$ -	\$ -	\$ 431,657	\$ 582,847	\$ 1,014,504
3	Equity	\$ (329,075)	\$ (46)	\$ (155,983)	\$ 30,619	\$ (454,485)
4	Codes and Standards	\$ (11,890)	\$ (3)	\$ (239,535)	\$ (228,970)	\$ (480,398)
5	EM&V (PA and ED)	\$ (1)	\$ (0)	\$ 10,907	\$ 71,203	\$ 82,110
6	Total Budget w/o OBF Loan Pool	\$ (713,713)	\$ (1)	\$ (94,281)	\$ 807,995	\$ 0
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					2%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (713,713)	\$ (1)	\$ (94,281)	\$ 807,995	\$ 0
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (713,713)	\$ (1)	\$ (94,281)	\$ 807,995	\$ 0

Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)^[1]

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.37	0.40	0.27
2		Market Support	-	-	-
3		Equity	0.04	0.03	0.03
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.18	0.18	0.15
6		Excluding C&S	0.18	0.18	0.15

[1] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

Table 3b - TUAL Portfolio Cost Effectiveness Ratios (PY 2024-2027)

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.28	0.32	0.39
2		Market Support	-	-	-
3		Equity	0.02	0.02	0.02
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.15	0.16	0.18
6		Excluding C&S	0.22	0.23	0.28

Table 3c - Change Portfolio Cost Effectiveness Ratios (PY 2024-2027)

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.09	0.08	(0.12)
2		Market Support	-	-	-
3		Equity	0.02	0.01	0.01
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.03	0.02	(0.03)
6		Excluding C&S	(0.04)	(0.05)	(0.13)

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	0.44	0.44	0.63	0.64	0.54	0.55
3		Market Support						
4		Equity	0.02	0.02	0.03	0.03	0.03	0.03
5		Codes and Standards (C&S)						
6	Portfolio	Including C&S	0.22	0.23	0.34	0.35	0.29	0.29
7		Excluding C&S	0.22	0.23	0.34	0.35	0.29	0.29

Table 4 - Portfolio Statewide and Third-party Contribution Percentage Requirements (IOU only)

Line	Budget Component	Third Party Budget	Cumulative Total Budget w/o OBF Loan Pool	Contribution Percentage	Minimum Threshold
1	Statewide ^[1]		\$ 33,139,078	0%	20%
2	Third-party ^[2]		\$ 33,139,078	0%	60%

[1] SW program definition per D.16-08-019, OP 24, OP 38, & OP 39.

[2] Third party program definition per D.16-08-019, OP 10, includes SW third-party budgets

[1] Updated Forecasts for 2024-2027 include 2024 Actuals, 2025 TUAL Forecast, and Updated forecasts for 2026 and 2027.

Please ensure that on Table A1, each IOU lists all of the SW program and the asosciated IOU specific budget.

Appendix 1 - 2024 - 2027 Program Portfolio Budget and Targets																					
Updated MCAL Forecasts ^[1]											TUAL Filing					Change					
(a) Program ID	(b) Program Name	(c) Target Exempt	(d) Program Type	(e) Business Sector	(f) Portfolio Segment	(l) Budget	(m) TSB	(n) GWh	(o) MW	(p) MMThm	(g) Budget	(h) TSB	(i) GWh	(j) MW	(k) MMThm	(q) Budget	(r) TSB	(s) GWh	(t) MW	(u) MMThm	(v) Change Notes
RRN001	Residential Equity	Yes	Core PA	Residential	Equity	\$ 6,185,897.28	\$ 242,223.49	0.08	0.01	0.02	\$ 6,022,548	\$ 250,686	7,763.00	1.00	42,120.000	\$ 163,349	\$ (8,463)	(7,762.92)	\$ (1)	\$ (42,120)	
RRN002	Residential Resource Acquisition	No	Core PA	Residential	Resource Acquisition	\$ 7,921,412.97	\$ 1,625,961.51	-0.41	0.34	0.08	\$ 8,697,700	\$ 451,160	(1,012,981.00)	48.00	115,599.000	\$ (776,287)	\$ 1,174,802	1,012,980.59	\$ (48)	\$ (115,599)	
RRN003	Commercial Resource Acquisition	No	Core PA	Commercial	Resource Acquisition	\$ 5,308,120.86	\$ 2,380,690.18	1.50	0.28	0.11	\$ 5,774,779	\$ 2,113,697	(433,414.00)	104.00	161,880.000	\$ (466,658)	\$ 266,993	433,415.50	\$ (104)	\$ (161,880)	
RRN004	Financing Equity	Yes	Core PA	Cross-Cutting	Equity	\$ 5,289,842.79	\$ -	-	-	-	\$ 6,580,192	\$ -	-	-	-	\$ (1,290,349)	\$ -	-	\$ -	\$ -	
RRN005	Public Equity	Yes	Core PA	Public	Equity	\$ 2,346,852.94	\$ -	-	-	-	\$ 1,181,206	\$ -	-	-	-	\$ 1,165,647	\$ -	-	\$ -	\$ -	
RRN006	Workforce Education and Training	Yes	Core PA	Cross-Cutting	Market Support	\$ 1,568,089.04	\$ -	-	-	-	\$ 1,964,597	\$ -	-	-	-	\$ (396,508)	\$ -	-	\$ -	\$ -	Changed segment to Market Support
RRN007	Codes and Standards	Yes	Core PA	Cross-Cutting	Codes & Standards	\$ 210,743.68	\$ -	-	-	-	\$ 678,384	\$ -	-	-	-	\$ (467,640)	\$ -	-	\$ -	\$ -	Program closing in 2025
RRN012_IDS	IDS Costs	Yes	Core PA	Commercial	Resource Acquisition	\$ 10,000.00	\$ -	-	-	-	\$ 10,000	\$ -	-	-	-	\$ -	\$ -	-	\$ -	\$ -	
RRN_RA_PortfolioSupport	Resource Acquisition Portfolio Support	Yes	Core PA	Portfolio Support	Resource Acquisition	\$ 1,504,676.59	\$ -	-	-	-	\$ 423,616	\$ -	-	-	-	\$ 1,081,061	\$ -	-	\$ -	\$ -	
RRN_Equity_PortfolioSupport	Equity Portfolio Support	Yes	Core PA	Portfolio Support	Equity	\$ 1,337,546.69	\$ -	-	-	-	\$ 460,649	\$ -	-	-	-	\$ 876,898	\$ -	-	\$ -	\$ -	
RRN_CS_PortfolioSupport	Codes and Standards Portfolio Support	Yes	Core PA	Portfolio Support	Codes & Standards	\$ 7,091.62	\$ -	-	-	-	\$ 19,843	\$ -	-	-	-	\$ (12,751)	\$ -	-	\$ -	\$ -	
RRN011_EMV	EM&V	Yes	Core PA	Portfolio Support	EM&V	\$ 1,407,672.69	\$ -	-	-	-	\$ 1,325,563	\$ -	-	-	-	\$ 82,110	\$ -	-	\$ -	\$ -	
RRN012_RRN_MS_PortfolioSupport	Market Support Portfolio Support	Yes	Core PA	Portfolio Support	Market Support	\$ 41,130.42	\$ -	-	-	-	\$ -	\$ -	-	-	-	\$ 41,130	\$ -	-	\$ -	\$ -	Added
Total						\$ 33,139,078	4,248,875	1.17	1	0	\$ 33,139,077	2,815,543	(1,438,632.00)	153.00	319,599.000	\$ 1	1,433,332	1,438,633.17	(152)	(319,599)	

Appendix 2 - Energy Efficiency Cap And Target Expenditure Projections (Cumulative for PY 2024-2027)

Program level budgets can be found on tab A1 - Program Table

Line	Budget Category	Expenditures			Cap & Target Performance		
		(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget ^[6]	(e) Cap Percentage	(f) Target %
1	Administrative Costs						
2	PA ^[1]	\$ 3,113,819		\$ 3,113,819	9.4%	10.0%	
3	Non-PA Third Party & Partnership ^[2]	\$ -	\$ -	\$ -	0.0%		
4	PA & Non-PA Target Exempt Programs ^[3]	\$ -	\$ -	\$ -			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 1,352,237	\$ -	\$ 1,352,237	4.1%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 3,826,113	\$ -	\$ 3,826,113			
9	Non Incentives and Non Rebates	\$ 23,429,235	\$ -	\$ 23,429,235	70.7%		
10	Target Exempt (Non Incentives and Non Rebates)	\$ -	\$ -	\$ -			
11	EM&V Costs (PA and ED) ^[4]	\$ 1,407,672	\$ -	\$ 1,407,672	4.2%	4.0%	
11a	EM&V - PA	\$ 350,057		\$ 350,057			
11b	EM&V - ED	\$ 1,057,615		\$ 1,057,615			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 33,129,077	\$ -	\$ 33,129,077			
13	Total Third-Party Qualifying Costs ^[5]				0.0%		
14	OBF Loan Pool Addition	\$ -		\$ -			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[8]			\$ 33,129,077			
16	ED Portfolio Oversight ^[10]	\$ -		\$ -			
17	EE-Funded IDSM						
	Multi-DER IDSM ^[7]	\$ 10,000		\$ 10,000		2.0%	
18	PA Spending Budget Request			\$ 33,139,077			

[1] 10% cap requirement based on D. 09-09-047 for IOU only

[2] New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.

[3] Target Exempt Programs include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).

[4] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED = \$0. The EM&V percentage is based on PA's total portfolio budget (from line 13) RENs, and CCAs

[5] IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets. Calculation of (d) Percent of Budget for Third-Party Implementer Contracts uses \$1,179,559,488 as its denominator.

[6] With the exception of Third Party Implementer Contracts as noted in footnote [5], calculation of (d) Percent of Budget uses \$1,143,059,488 as the denominator; equal to line 15 PA Budget Spending Request.

[7] D.23-06-055 OP 29: Portfolio administrators (PAs) may set aside up to 2.5 percent, or \$4 million, whichever is greater, up to a maximum of \$15 million, from within their total budgets during 2024-2027 approved in this decision to fund innovative integrated demand-side management projects, including ongoing load-shifting that is not event-based. Energy efficiency funding shall not be used for rebating capital costs of non-efficiency technologies, except as already provided for electric panel upgrades in Decisions 19-08-009 and 23-04-035.

[8] \$33,815,039 Pensions & Benefits Budget was excluded; not funded by the EE Portfolio

[9] Includes actual expenditures for 2024, 2025 TUAL forecasts, and updated values for 2026-2027 forecasts.

[10] Funding reserved for EE technical consultant pursuant to D.23-06-055 OP 9

[11] D.23-06-055, COL 1, COL 4, and table 1 (p.6), which set the SW funding allocations for IOUs and 10% for SoCalGas only.

[12] D.18-05-041 OP10: Each IOU PA should set aside a minimum annual amount of \$1 million for the residential sector and a load-share-proportional amount of \$20 million for the commercial sector from each IOU PA's IDSM budget to test and deploy integration strategies, which may test multiple program design and customer incentive approaches, as well as multiple technology types, with emphasis on demand-response-capable control technologies.

ATTACHMENT B – Community Engagement Indicators Results

Community Engagement Indicators Findings and Recommendations Memo

An Energy Efficiency Portfolio Administrator report in compliance with California Public Utilities
Commission Decision 23-06-055, Ordering Paragraph 24

July 31, 2025

Prepared by BluePoint Planning

Background

California Public Utilities Commission (CPUC or Commission) Decision (D.) 23-06-055 requires California's Energy Efficiency (EE) Portfolio Administrators (PAs) to collaboratively develop qualitative and quantitative indicators for tracking and reporting counts and types of community engagement activities targeted at equity communities.¹

Ordering Paragraph (OP) 24 of the decision states the following:

OP 24. Portfolio administrators shall develop indicators to measure community engagement, and should include them in their Mid-Cycle advice letters in 2025. After the advice letters are addressed by the Commission, the portfolio administrators shall report on the adopted community engagement indicators in their annual reports.

To begin this effort, the California Energy Efficiency Coordinating Committee (CAEECC) hosted a CAEECC Community Engagement Panel in April 2025. Key takeaways from the panel included:

- Relationship-building with customers and trusted community organizations is crucial.
- Programs should be more accessible.
- Indicators should account for the different types of community engagement.

Following the panel, Tri-County Regional Energy Network (3C-REN) engaged BluePoint Planning as a facilitator for collaboration among the PAs. BluePoint facilitated the process among the PAs of developing potential indicators and reaching consensus on a set of agreed-upon indicators.

The PAs will include the indicators in their Mid-Cycle Advice Letters to be filed in Fall 2025, with annual reporting to follow.

Introduction

This memo describes the purpose and desired outcomes of community engagement indicators for equity segment programs. These indicators are focused on measuring engagement particularly with disadvantaged communities (DACs), Hard-to-Reach (HTR) customers, and other environmental and social justice (ESJ) populations, though they consider all populations in the equity segment. The indicators provide a baseline common set of metrics that PAs will report on, and each PA may add additional indicators to track within their organization. Suggested Common Indicators (as well as Additional Potential Indicators) are included in the accompanying Community Engagement Indicators (CEIs) List.

Combined, the set of indicators were developed to paint a full picture of engagement; no one indicator will provide a full story. While there are only four agreed upon suggested common

¹ D.23-06-055 at 67-69.

indicators, PAs are also welcome to utilize any number of the additional non-consensus potential indicators. Below is more context on how CEIs were developed, the purpose of CEIs, and how to report and use the accompanying CEIs.

Purpose for Indicators

To help frame and focus the development of community engagement indicators, per CPUC OP 24, PAs met and discussed the overarching purpose and need for community engagement for equity programs. The following key themes reflect their input: to better understand community needs, build trust with different equity customers and communities, and ensure that equity programs are relevant and impactful.

Long-Term Outcomes

The ideal engagement outcomes are as follows. Each outcome is associated with different audiences, as described further below in this memo:

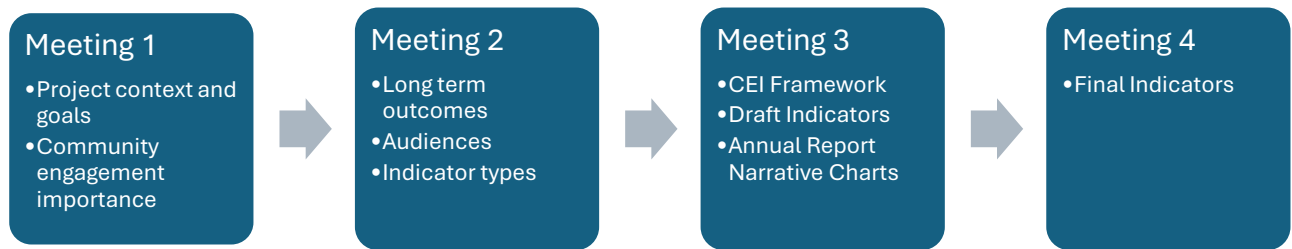
- **Relevance** – Programs are designed to address community needs while being accessible to participants.
- **Trust** – A continued relationship and sense of trust is fostered between engagement audiences (including program participants) and the PA / third party (3P) implementers.
- **Impact** – Equity engagement audiences participate and benefit from program and effectively utilize program offerings.

Overarching PA Considerations and Concerns

Throughout the Engagement Process (detailed below), there were a few main themes that emerged around considerations for developing the PA indicators. Overarching concerns and considerations in developing the indicators included the following:

- Each type of engagement does not necessarily occur in distinct phases; rather they span multiple phases and so phases may not be a good way to categorize when each indicator would be used.
- The scope of engagement may vary across PAs, some of which are rural and expressed that they may face lower participation in engagement activities. Thus, using percentages instead of counts for indicators as possible will make engagement more comparable across PAs.
- There is a desire for qualitative indicators that allow PAs to provide further context on engagement.

Portfolio Administrators Engagement Process



The Project Team led a series of four meetings to develop and hone a set of CEIs. The purpose of the first PA meeting was to reach a shared understanding of existing information and concerns, discuss the Community Engagement Indicators development process, and establish a work plan. The following themes emerged from this meeting:

- PAs believe that community engagement for equity programs is important because it helps them better understand a community's needs, builds trust with equity customers and communities, and ensures that equity programs are relevant and impactful.
- Creating community engagement indicators will be challenging for many reasons. Specifically, the value or impacts of engagement is hard to quantify. Indicators also need to be flexible, so engagement efforts can adapt to changes in community needs.
- Qualitative indicators may be more useful, as they can tell a story about engagement. However, there are still questions and concerns around designing, gathering, and reporting data on qualitative indicators.
- The role of CBO partners is important for engagement for equity programs. Community engagement indicators should assess the strength of relationships with CBO partners.
- Trust and awareness in different target audiences are also important outcomes of engagement that should be measured with indicators.

From there, the Project Team developed a straw person Community Engagement Indicators Framework and set of Indicator types. The purpose of the second PA meeting was to present and gather feedback on these documents. The following themes emerged from the second meeting:

- The PAs agree with all three long term outcomes of community engagement for equity programs developed after the first meeting: relevance, trust, and impact.
- The PAs generally agree with audiences listed (CBOs, contractors, and tenants/homeowners), and note that there may be direct communication with community members, public agencies, and business owners as well.
- The PAs generally agree with the proposed indicator types: awareness, input, participation, and satisfaction.
- Within the Community Engagement Indicators Framework, there needs to be better definitions and delineations between each of the three engagement phases: program design, implementation, and assessment.

- The Project Team should clarify the meaning of a “count” measurement for the indicators and more specificity may be needed here. In some cases, there may also be benefit of using percentages instead of counts.
- The Project Team needs to continue to develop and refine the methodology for gathering feedback for indicators.

The Project Team then developed and sent out a first draft of Community Engagement Indicators for PAs to review, and PAs provided their support of each indicator on a scale of 1-5, with 1 being low support and 5 being high support, as well as written feedback. Based on this, the Project Team developed and presented a second draft of CEIs for feedback at the third PA meeting (Framework included below). The following themes emerged from the third meeting:

- The PAs generally support the updated CEI Framework. They recommend revising the title of the third element, “Program Changes” to note that program changes should only occur when needed.
- The scope of engagement may vary across PAs, some of which are rural and expressed that they may face lower participation in engagement activities. Thus, using percentages instead of counts for indicators will make engagement more comparable across PAs.
- Some PAs have concerns regarding the level of detail for the indicators. Specifically, whether the indicators should be more prescriptive/specific about engagement or allow for more flexibility.
- The PAs generally support the Key Themes Chart and Program Changes Chart that will accompany the indicators spreadsheet. Some PAs have different ideas for the best way to report this information.
- Most PAs think that some tweaks are needed before the community engagement indicators are finalized.

Based on feedback from the second draft of Community Engagement Indicators and the third meeting, the Project Team updated and honed the CEIs and send out a third draft of CEIs to PAs for review. PAs indicated whether they would support the inclusion of each indicator by answering “Yes,” “No,” and “Yes, with minor edits.” For any instances that PAs answered “Yes, with minor edits,” PAs were asked to provide edits. Based on these responses, the Project Team compiled all PA responses, made minor edits to indicators, and organized these indicators into those that received all yeses (consensus), all but one yes (near consensus), general support, and mixed support. Consensus and near consensus indicators were organized into a set of Suggested Common Indicators, and the remaining indicators were organized into a list of Additional Potential Indicators.

The Project Team then held the final fourth PA meeting. The purpose of this meeting was to present PA votes and feedback on the third draft of the CEIs and reach agreement on the suggested common indicators to move forward with. Project Team proposed that Suggested Common Indicators list be presented to the CPUC. The following themes emerged from the fourth meeting:

- Some PAs think the suggested common indicators list should be condensed to fewer indicators.
- The PAs do not think that any of the additional indicators (original indicators 1, 3, 4, 5, and 6) should be added to the suggested common indicators list.
- The PAs that responded are all comfortable with the suggested common indicators list (original indicators 2, 7, 8, 9, 10, and 11).
- After discussion about whether some indicators could be condensed or reduce, a majority (77%) of PA representatives that responded think that satisfaction indicators 9 and 10 should be eliminated from the Suggested Common Indicators list.

Based on this feedback the Project Team removed indicators 9 and 10 from the Suggested Common Indicators list and moved them to the Additional Potential Indicators list. The attached spreadsheet is the Final Community Engagement Indicators Spreadsheet that PAs will do a final vote on.

Engagement Audiences

Different audiences will have different engagements and relationships with the PAs and therefore outcomes will vary – and so should the indicators. Contractors and CBOs may develop long-term relationships with PAs/Programs, which are important to build trust. Homeowners, tenants, and renters will likely have shorter involvement with PAs and programs and so trust may be a less relevant outcome (though utilities may aim to build trust via customers’ gas and electric accounts). Understanding these nuances can help ensure indicators are measuring something that is possible. Audiences include the following, along with the outcomes that correspond to each.

Audience	Role	Outcome
CBO	Direct engagement with community members, help to relay and gather feedback.	Trust
Contractors	May be helping to deliver a program, may also be the focus of a program (WE&T). In both cases will be important to engage for all phases.	Relevance, Trust, Impact
Tenants/ homeowners/ renters	Recipients of program services (tenants also include business owners)	Relevance, Impact
Public Agencies	May be recipient of program services or may help disseminate information about services	Relevance, Trust, Impact

Indicator Types

To help improve communications, align and coordinate measures of success, the following indicator types are used to aggregate sets of indicators that can be reported in annual reports, and from CBOs, partners and others.

Awareness (quantitative) – The number of community members, especially DACs, HTR customers, and other ESJ populations, who know about a program through engagement and education activities and communication.

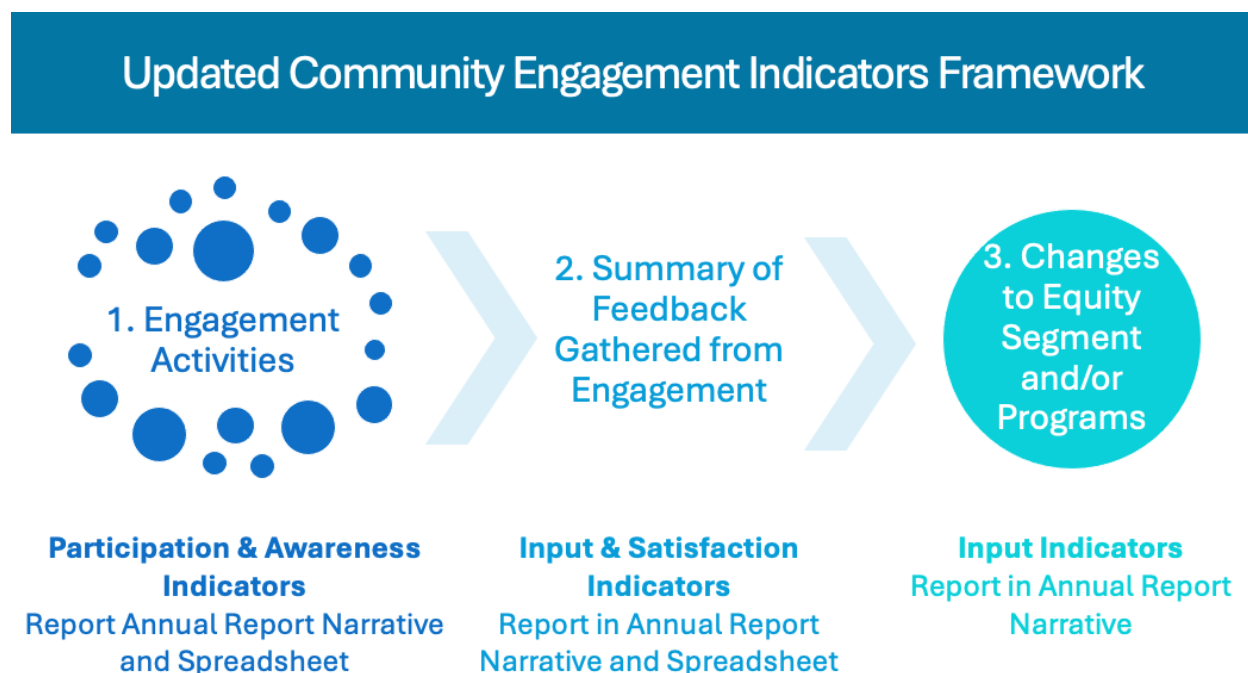
Input (qualitative and quantitative) – The amount and quality of feedback from program audience members, including changes to program design based on that feedback.

Participation (quantitative) – Participation in engagement activities and program offerings.

Satisfaction (qualitative) – Reports of satisfaction of program participation.

Indicator Framework

Below is the Community Engagement Indicators Framework, which describes different “buckets” of community engagement indicators, and how indicators within each of these buckets may be reported. These include both quantitative and qualitative indicators. Generally, quantitative indicators are reported in the Annual Report Spreadsheet while qualitative indicators will be included in the Annual Report Narrative.



Below is more detail on the three different buckets that an indicator can fall into. These indicators measure engagement as a whole and progress towards identifying specific segment or program feedback, and, finally, measure any changes to programs that result from that qualitative input. Each bucket has a different purpose and indicator types associated with it. Indicators in each bucket may be reported either through the Annual Report Spreadsheet or in the Annual Report Narrative.

1. **Engagement Activities** – Indicators in this bucket measure overall participation in all engagement activities, as well as program awareness. These indicators are largely quantitative and are to be reported in the Annual Report Spreadsheet. The summary narrative is to be filled out in the Engagement Activities Summary of the Annual Report.
2. **Summary of Feedback** – Indicators in this bucket illustrate engagement in program input and program satisfaction surveys. These indicators include a qualitative summary narrative that PAs have received from engagement activities, as well as quantitative feedback about satisfaction and supporting metrics that illustrate the quantity of that input. Quantitative indicators are to be reported in the Annual Report Spreadsheet and the summary narrative is to be filled out in an Annual Report Key Themes sheet and to be submitted in the Annual Report.
3. **Program Changes (as needed)** – This indicator qualitatively measures any program changes that are made from feedback received. The summary narrative is to be filled out in an Annual Report Program Changes sheet and to be submitted in the Annual Report.

Indicator List

Below is the list of Suggested Common Indicators, in green, and Additional Potential Indicators in yellow. PAs were asked to do a final yes or no vote on these indicators.

Suggested Common Indicators	Indicator	Unit of Measurement
Engagement Activities		
2	Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context PAs want to add about their engagement activities	Summary Narrative
Summary of Feedback		
7	People who provided feedback relevant to equity segment	Count
8	Feedback themes from engagement activities relevant to equity segment	List of key themes
Changes to Program		
11	Changes to equity segment program design as needed, based on feedback	Summary Narrative
Additional Potential Indicators	Indicator	Unit of Measurement
Engagement Activities		
1	People in all engagement activities relevant to the equity segment	Count
3	People in partners' engagement activities relevant to equity segment	Percent
4	Funding for partners' engagement activities related to equity segment	Dollars
5	People reached through online, telephone, or other outreach for the equity segment.	Percent
6	Equity segment inquiries	Count
Summary of Feedback		
9	Equity segment participant satisfaction survey responses	Count
10	Rating from equity segment participant satisfaction surveys	Numerical Rating

Consensus Indicators

The following four indicators received support from all PAs.

Indicator	Yes	No
Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context PAs want to add about their engagement activities	12	0
Number of people who provided feedback relevant to equity segment	12	0
Feedback themes from engagement activities relevant to equity segment	12	0
Feedback themes from engagement activities relevant to equity segment	12	0

Non-Consensus Indicators

The following indicators received mixed support from PAs.

Indicator	Yes	No
Number of people in all engagement activities relevant to the equity segment	7	5
People in partners' engagement activities relevant to equity segment	6	6
Funding for partners' engagement activities related to equity segment	6	6
People reached through online, telephone, or other outreach for the equity segment.	6	6
Equity segment inquiries	7	5
Equity segment participant satisfaction survey responses	6	6
Rating from equity segment participant satisfaction surveys	6	6

Best Practices

Below are best practices for measuring community engagement that PAs are encouraged to follow.

- Include a feedback mechanism at every engagement activity to measure outreach touches.
- Compile all feedback from different engagement activities and pull out most common themes (for summary narratives).
- Vet program changes with partners to ensure changes reflect input and continue to build trust with partners.
- Engagement activities should include efforts to reach community members where they are and provide support and accommodations (e.g. food, childcare) during activities such as focus groups and community meetings.

Reporting

Indicators are designed, as much as possible, to utilize information that is already being gathered, but perhaps not formally collated, by PAs. Reporting of CEIs will occur annually in two places: quantitative indicators will be reported in the BP metrics table of the Annual Report Spreadsheet and qualitative indicators will be reported in the Annual Report Narrative.

The accompanying Community Engagement Indicators Spreadsheet includes a list of indicators included in the BP metrics table as well as separate worksheets of summary tables to be included in the Annual Report Narrative (Engagement Activities Summary Table, Key Themes Table, and Program Changes Table).

For indicators reported in the Annual Report Spreadsheet, the “purpose” field will be repurposed to the Annual Report Spreadsheet’s “description” field. For indicators reported in the Annual Report Narrative, each cell in the qualitative indicators table should be brief and include 1-3 sentence descriptions.

At the time of this Memo, there is still discussion on the timing and protocols for CEIs reporting in the Annual Report. Appendix A of this Memo includes survey results from the PAs on these preferences, which can be used as reference in determining reporting timelines and processes.

Key Definitions

The definitions below are meant to provide additional context for and accompany the revised Community Engagement Indicator spreadsheet.

Indicator Type – The type of engagement that each indicator is designed to measure (participation, awareness, etc.).

Unit of Measurement – How each indicator is counted, which may include measurements such as count, dollars, or percent.

Methodology – Methods to conduct and collect information on indicator engagement activities.

Engagement Activity – Engagement activities include workshops, focus groups, door-to-door canvassing, surveys, etc. that are designed to solicit feedback from program participants or potential program participants on equity segment programs.

Equity Segment Participant (definition from CPUC Resolution E-5351) – Must be a participant in an Equity segment program but does NOT have to be hard-to-reach, located in a disadvantaged community, or underserved.

Partner (definition from CPUC Resolution E-5351) – An entity that has agreed to engage in a mutually beneficial relationship to serve at least one primary purpose of the EE portfolio: resource acquisition, equity, or market support with regard to supply or delivery of products, services, education, and/or training. These include but are not limited to educational institutions/organizations, governments, community-based organizations, trade associations, suppliers, manufacturers, contractors, etc.

Social Media Click Rate – The total number of clicks, likes, and/or shares on a social media post link divided by the total number of impressions of that post.

Feedback – Feedback on programs refers to oral and/or written comments from workshops, pop-up activities, document review, or other engagement activities.

Satisfaction Rating – This rating is for satisfaction surveys and utilizes a rating system on a scale of 1 (poor) to 5 (excellent).

Qualitative – A unit that captures descriptive data. Contributes to a more complete story of the indicator. Contains insights into the progress that is being made toward outcomes. Often requires more capacity and time to track. Qualitative measurements can include feedback summaries.

Quantitative – A unit counted or measured in numerical values. Relatively easy to measure (if data is available). Only provides a snapshot in time of the indicator.

Appendix – OP24 Implementation Survey Results

Separate from BluePoint Planning’s CEI facilitation process, the PAs need to further refine the logistics for implementing the indicators. To assess PAs’ current thoughts on implementation, Sebastien Csapo (PG&E) sent out a survey to all PAs with questions regarding CEI reporting.

Summary of Survey Results

- Majority of PA respondents think the CEI should only apply to prospective new equity programs.
- Majority of PA respondents think the 2027 program year is the earliest program year the new standards should apply.
- PA respondents’ opinions varied on whether the Reporting PCG should be involved for clarifying reporting issues or not.
- Strong majority of PA respondents think that there should be a phase-in period for the CEI.
- All PA respondents support optional reporting, rather than required reporting, on the non-consensus CEI.

Survey Results

2. Should CEI indicators be used retroactively for existing equity programs or only prospectively for new equity programs?



3. What is the earliest program year these new reporting standards should apply?



4. Do you think the "Reporting PCG" would need to be involved for clarifying reporting issues?



5. Should there be a phase-in period (e.g., a period of time after adoption of the MCAL and potential involvement of the Reporting PCG.)?



6. Treatment of non-consensus indicators?



ATTACHMENT C – PA Response to Recommendations

ATTACHMENT D – CEDARS Filing Confirmation

Patricia Terry

From: cedars@sound-data.com
Sent: Tuesday, November 4, 2025 11:55 AM
To: Patricia Terry
Subject: CEDARS 2026 budget filing submitted for RRN

CEDARS FILING SUBMISSION RECEIPT

The RRN portfolio budget filing has been submitted and is now under review. A summary of the budget filing is provided below.

PA: Rural REN North (RRN)

Budget Filing Year: 2026

Submitted: 11:54 on 04 Nov 2025

By: Patricia Terry

Advice Letter Number: 006E/006G

* Portfolio Budget Filing Summary *

- TRC: 0.15
- PAC: 0.15
- TRC (no admin): 0.91
- PAC (no admin): 1.14
- RIM: 0.22
- SCB: 0.22
- SCH: 0.23
- Budget: \$10,363,057.01
- TotalSystemBenefit: \$1,219,622.31
- ElecBen: \$486,450.87
- GasBen: \$1,138,240.82
- WaterEnergyBen: \$1,190.56
- OtherBen: \$26,542.33
- TRCCost: \$11,092,247.16
- PACCost: \$10,736,234.49
- RIMCost: \$13,727,714.25
- SCBCost: \$11,280,641.19
- SCHCost: \$11,302,042.16

* Programs Included in the Budget Filing *

- RRN001: Residential Equity
- RRN002: Residential Resource Acquisition
- RRN003: Commercial Resource Acquisition
- RRN004: Financing Equity

- RRN005: Public Equity
- RRN006: Workforce Education and Training
- RRN011_EMV: EM&V
- RRN012_IDSM: IDSM
- RRN012_RRN_MS_PortfolioSupport: Market Support Portfolio Support
- RRN_Equity_PortfolioSupport: Equity Portfolio Support
- RRN_RA_PortfolioSupport: RA Portfolio Support

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CEDARS Administrator

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Patricia Terry

From: cedars@sound-data.com
Sent: Tuesday, November 4, 2025 11:55 AM
To: Patricia Terry
Subject: CEDARS 2027 budget filing submitted for RRN

CEDARS FILING SUBMISSION RECEIPT

The RRN portfolio budget filing has been submitted and is now under review. A summary of the budget filing is provided below.

PA: Rural REN North (RRN)

Budget Filing Year: 2027

Submitted: 11:54 on 04 Nov 2025

By: Patricia Terry

Advice Letter Number: 006E/006G

* Portfolio Budget Filing Summary *

- TRC: 0.23
- PAC: 0.24
- TRC (no admin): 1.02
- PAC (no admin): 1.2
- RIM: 0.3
- SCB: 0.34
- SCH: 0.35
- Budget: \$11,903,987.01
- TotalSystemBenefit: \$2,265,735.66
- ElecBen: \$966,887.04
- GasBen: \$2,020,307.08
- WaterEnergyBen: \$1,674.81
- OtherBen: \$42,233.51
- TRCCost: \$13,011,164.12
- PACCost: \$12,565,980.36
- RIMCost: \$18,370,617.12
- SCBCost: \$13,326,224.15
- SCHCost: \$13,354,733.90

* Programs Included in the Budget Filing *

- RRN001: Residential Equity
- RRN002: Residential Resource Acquisition
- RRN003: Commercial Resource Acquisition
- RRN004: Financing Equity

- RRN005: Public Equity
- RRN006: Workforce Education and Training
- RRN011_EMV: EM&V
- RRN012_IDSM: IDSM
- RRN012_RRN_MS_PortfolioSupport: Market Support Portfolio Support
- RRN_Equity_PortfolioSupport: Equity Portfolio Support
- RRN_RA_PortfolioSupport: RA Portfolio Support

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ATTACHMENT E – ESA Overlap Monitoring Plan

ESA Monitoring Plan

NREN has established a coordination protocol between its Residential Equity Program and PG&E's ESA Program in the Joint Cooperation Memo between NREN and PGE (submitted 10/27/25). This plan is listed below:

NREN program team will initiate regularly scheduled program coordination calls with PG&E programs teams and local ESA implementers. Ad-hoc meetings will also be scheduled to accommodate the need to resolve any urgent issues that might arise. Standing agenda items may include program updates, uptake, challenges, contractor issues, data sharing, double dip prevention processes, and marketing campaign plans.

Although Residential Resource and Non-Resource programs are listed in separate sections, in the regular coordination calls, the entire Residential sector will be discussed holistically to ensure coordination across all customers.

The key differences between the NREN Residential Equity Program and the ESA Program Include:

Geography: ESA and Energy Smart Homes serve all of PG&E territory while NREN programs only serve the 17 counties within NREN territory.

Customers: The NREN program will primarily target underserved, HTR, and tribal customers, which may include low-income customers. The ESA program serves only income qualified customers. Where a customer qualifies for both programs, the NREN program will only provide services that are not provided by the ESA program. These services will be established through coordination with the ESA program as described in the next section. The NREN Program will then make a referral to the ESA program on behalf of the customer and follow up on services. If the customer cannot be served by ESA, they may refer the customer back to NREN for additional services.

To monitor coordination, NREN will coordinate with PG&E to keep track of the number of customers, and which program each customer is referred to. NREN will request the results of the referrals from PG&E and follow up as needed. NREN will report on this data in its 2025 Annual Report.