



November 4, 2025

ADVICE LETTER 4747-E/ 3469-G
(U 902-M)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

**SUBJECT: ENERGY EFFICIENCY MID CYCLE TRUE UP ADVICE LETTER PURSUANT TO
D.21-05-031**

I) PURPOSE

Pursuant to Decisions (D.) 21-05-031, D.23-06-055, and D.25-08-034, San Diego Gas & Electric Company (SDG&E) hereby submits for approval to the California Public Utilities Commission (Commission or CPUC) the 2026–2027 energy efficiency (EE) portfolio budget mid-cycle true-up Tier 2 advice letter (MCAL).

SDG&E requests that the Commission approve its 2026–2027 MCAL, including SDG&E's spending and cost recovery budgets, effective January 1, 2026. Additionally, SDG&E is requesting San Diego Regional Energy Network's (SDREN) total cost recovery, as detailed in MCAL Table 1.2a, which represents approximately 32% of the total cost recovery budget.^[08] SDG&E additionally requests that the Commission approve the forecasted Public Purpose Program (PPP) electric/gas splits for 2024-2027 cost recovery allocations as indicated in the relevant tables, effective January 1, 2026.

II) BACKGROUND

a. Regulatory Filing Requirements

**1. Decision Pending: SDG&E's Revised Business Plan Application for 2024-2031
(A.25-04-014)**

SDG&E filed Application (A.) 25-04-014 on April 25, 2025, requesting withdrawal from regional program administration, except for Codes and Standards, on the basis that SDG&E's EE regional program portfolio does not meet the statutory threshold for cost effective, reliable, and feasible EE programming. If SDG&E's Application is approved, SDG&E's expectation is that such approval would supersede the approval of this MCAL, and SDG&E would commence closing regional programs within the 2026-2027 timeframe in alignment with its Application, or as otherwise directed by a decision in A.25-04-014.

This MCAL is being submitted for compliance purposes, and in accordance with the aforementioned CPUC Decisions and the direction provided by ALJ Fitch at the EE Rulemaking (R.25-04-010) prehearing conference (PHC) on June 17, 2025.¹ While SDG&E anticipates compliance based on

¹ R.25-04-010, PHC transcript at 68. Regarding SDG&E's Application (A.) 25-04-014 to withdrawal from regional program administration, ALJ Fitch noted, until SDG&E's Application is ruled on, "the rules and requirements of the general energy efficiency portfolio administrators apply."

current forecasts, historical trends suggest such forecasts often do not materialize as projected. For instance, SDG&E's True-Up Advice Letter filed on October 16, 2023, projected SDG&E would achieve 182% of its Total System Benefit (TSB) goal for 2024.² In practice, SDG&E achieved 112%.³ Although this may appear favorable, the actual portfolio outcomes were around 40% less than forecasted for that year; meaning that forecasts may be significantly different from actual outcomes. SDG&E's MCAL forecasts performance much closer to 100% of the annual targets. If historical patterns persist, actual results may fall significantly short of forecasted values. Furthermore, SDG&E's forecast anticipates meeting the 1.0 cost-effectiveness threshold for the resource acquisition segment. However, historically, SDG&E has not met this minimum threshold in practice.⁴ Such discrepancies do not represent value for SDG&E's customers.

2. D.21-05-031

In 2021, the Commission adopted the Rolling Business Plan Framework, and as part of the framework, investor-owned utilities (IOUs) Program Administrators (PAs), must meet the following requirements when submitting their MCALs:

- The PA portfolio must meet the TSB goal for the four years, adjusted by the updated TSB goal 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 to each segment of the portfolio.⁵

3. D.23-06-055

The Business Plan Decision, D.23-06-055, approved budgets for 2024-2027 and revised the IOU statewide allocations and compliance requirements for statewide programs.⁶ D.23-06-055 also requires IOUs to fund CPUC portfolio oversight.⁷

4. D.25-08-034

SDG&E's cumulative adopted TSB and EE goals for 2026-2027 is a TSB value of \$137,437,176 with Codes and Standards goals of 309.4 GWh, 51.7 MW and 1.7 MMTherms.⁸ Per D.21-05-031, SDG&E is required to meet the updated four-year (2024-2027) cumulative TSB target on a forecasted basis.

² SDG&E AL 4302-E.

³ SDG&E's 2024 Annual Report. See Table T-1 Savings and Goals.

⁴ CEDARS indicates a .79 Total Resource Cost (TRC) for the Resource Acquisition segment in 2023 and a .98 in 2024.

⁵ D.21-05-031 at 42-43.

⁶ D.23-06-055 Table 1 at 6, and Table 3 at 9.

⁷ D.23-06-055, OP 9.

⁸ D.25-08-034 at Table 6.

b. Contents of this Filing

The contents of this MCAL is as follows:

- Portfolio Overview
- Recent CPUC Decision or Guidance Impacting EE Portfolio
- Forecast Approach
- Portfolio Changes
- Summary of Forecasted Portfolio Impacts
- Portfolio Budget Summary
- Total System Benefit Forecast
- Portfolio Cost Effectiveness Forecast
- Statewide and Third-Party Compliance
- Market Support and Equity Forecast
- Codes and Standards Savings Forecast
- Non-Advocacy Codes and Standards Budget Forecast
- Energy Efficiency Portfolio Details
- Segment Metrics
- New Programs Program Changes
- Program Closures
- Evaluation Measurement & Verification (EM&V)
- Cost Recovery
- Unspent Funds
- Integrated Demand Side Management
- CEDARS Discrepancies (optional)

Attachment A – Appendices from Excel Template in PDF⁹

Attachment B – Community Engagement Indicators Results

Attachment C – PA Response to Recommendations

Attachment D – CEDARS Filing Confirmation

⁹ Please see CEDARS for excel version of Attachment A.

III) DISCUSSION

a. Portfolio Overview

1. Recent CPUC Decision or Guidance Impacting EE Portfolio

Energy Efficiency Goals Decision (D.25-08-034)

The EE Goals Decision was based upon achievable potential as determined by calculating EE savings based on specific incentive levels, program delivery methods, assumptions about existing CPUC policies, market influences, and barriers. The approved EE 2025 Potential and Goals Study forecasts the potential energy savings from various EE programs as well as Codes and Standards advocacy efforts for the residential, commercial, agriculture, and industrial sectors.

Statewide Lead Transition Advice Letter 4494-E/3332-G

On August 19, 2024 SDG&E submitted advice letter 4494-E/3332-G requesting approval to transition SDG&E's role as the statewide lead program administrator (PA) of the Heating Ventilation & Air Conditioning Upstream/Midstream program (HVAC) and the Plug Load & Appliances Midstream program (PLA) to Pacific Gas & Electric Company (PG&E) and Southern California Edison (SCE), respectively.¹⁰ On November 6, 2024, Energy Division approved SDG&E's request. SDG&E has coordinated with PG&E and SCE in support of the transition.

Decision Approving San Diego Regional Energy Network (D.24-08-003)

On January 5, 2024, San Diego Community Power (SDCP) on behalf of SDREN filed a motion for approval of SDREN's Portfolio Application, consisting of a 2024-2031 strategic business plan and 2024-2027 portfolio plan and budget. D.24-08-003 approved SDCP's portfolio application including energy savings goals and funding for 2024 – 2027. SDG&E and SDREN were also ordered to execute a Joint Cooperation Memorandum (JCM), which was completed and uploaded to California Energy Data and Reporting System (CEDARS) in accordance with OP 3 of D.24-08-003 which required a JCM within 90 days of the issuance date of D.24-08-003.

2. Forecast Approach

SDG&E's MCAL forecast approach leverages methodologies employed and approved from SDG&E's Business Plan Application while considering relevant decisions and guidance including: the 2025 Potential & Goals Study and Natural Gas Incentives Phase Out Decisions and the 2024 updates to the Avoided Cost Calculator (ACC) as adopted in Resolution (Res.) E-5328. Additionally, any changes to the composition of programs within the portfolio, whether adding or removing programs, have been incorporated into the forecasts for 2024-2027.

SDG&E utilizes its existing network of third-party implementers to inform its forecasting process. For this MCAL filing, implementers provided revised forecasts based on their market insights and on-the-ground expertise. Implementers were instructed to incorporate recent updates to measure packages as well as findings from the 2025 Potential and Goals Study, which contains the latest market potential

¹⁰ SDG&E Advice Letter 4494-E/3332-G available at: [SDGE_ELEC_Advice-4494-E_Approved](#).

data. Additionally, implementers were asked to consider any strategic or operational changes that may influence program performance.

SDG&E's forecasts are optimized around TSB rather than traditional energy savings metrics. SDG&E also expects programs within the resource acquisition segment to be cost-effective, targeting a TRC ratio greater than 1.0 where feasible.

To complete its forecast, SDG&E incorporated its utility administration costs by soliciting updated estimates from its consultants and internal subject matter experts. Historical program performance and spending trends were also evaluated to ensure a comprehensive and data-driven forecast.

The methods and sources of measure savings assumptions used in the portfolio are as follows:

- Deemed Measures – approved Electronic Technical Resource Manual (eTRM) database measures and Deemed Workpaper Rulebook Version 4.0,
- Custom Calculated Measures – International Performance Measurement and Verification Protocol (IPMVP), CPUC Custom Project Review Team-reviewed methodologies, and Statewide Custom Project Guidance Document, Version 1.4,
- Site-Level Normalized Metered Energy Consumption (NMEC) – NMEC Rulebook methods reviewed by the Custom Project Review Team of the CPUC, and
- Population-level NMEC – NMEC Rulebook methods reviewed and validated by SDG&E's Measurement and Verification team.

For the statewide programs transitioning from SDG&E to PG&E and SCE, SDG&E developed a forecasted budget and TSB to support program continuity through September 2026 for both HVAC and PLA. PG&E and SCE subsequently provided forecasts starting in Q4 of 2026 through the end of 2027 to inform the MCAL process.

3. Portfolio Changes

With regard to optimization, SDG&E notes that for this MCAL cycle, the size of the statewide portfolio significantly influenced the regional portfolio, effectively determining the budget available for regional programs. Given the aggressive TSB targets established in D.25-08-034, it was essential that regional program spending generated measurable TSB. Accordingly, SDG&E prioritized its budget toward resource acquisition programs that supported achievement of the TSB target. Additionally, SDG&E has taken steps to reduce internal administrative costs where feasible, to maintain compliance with the 20% statewide requirement.

For instance, the 2027 forecast for the statewide HVAC program, provided by the new lead PA, is approximately 90% lower than SDG&E's original 2027 forecast in its True-Up Advice Letter (TUAL). In response to this reduction and the program changes and closures outlined in Section IV, letter d, SDG&E has reallocated its budget to prioritize funding for its regional resource acquisition programs to meet the revised 2024-2027 TSB target.

Notably, SDG&E has increased budgets from its TUAL for its third-party multifamily, industrial, and market access programs. The Multifamily Program, a well-established direct installation initiative, delivered the highest TSB among SDG&E's regional programs in 2024. The budget increase aligns closely with the program's actual expenditures from that year. After experiencing initial delays in ramp-

up, the Industrial Program is now gaining momentum, particularly through engagement with Strategic Energy Management (SEM) participants. In addition, the portfolio's market access programs are well-positioned for growth. Their inclusive "open to all" model attracts a diverse pool of contractors and aggregators, unconstrained by a single implementer or its subcontractors, significantly enhancing the program's potential reach and impact.

b. Summary of Forecasted Portfolio Impacts

1. Portfolio Budget Summary

Table 1.1a outlines SDG&E's portfolio budget by sector and segment for 2024-2027, excluding allocations for Evaluation, Measurement, and Verification (EM&V) and Portfolio Oversight. The budget includes actual expenditures from the 2024 program year, the approved 2025 forecast submitted through the True-Up Advice Letter (TUAL), and an updated forecast for program years 2026–2027. The total portfolio budget amounts to \$267,472,567, reflecting an approximate 9% reduction compared to the TUAL approved budget. Including the EM&V and Portfolio Oversight budgets, the total budget amounts to \$276,943,171, as shown in Table 2.3a—representing an approximate 10% reduction compared to the TUAL-approved budget. Lastly, SDG&E's cost recovery amount includes SDREN's portfolio budget, totaling \$124,274,207, as outlined in Table 1.5.

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	\$ 73,400,061	\$ 13,803,410	\$ 3,988,993	\$ -	\$ 91,192,464
2	Commercial Sector	\$ 66,772,241	\$ 7,063,104	\$ 9,294,652	\$ -	\$ 83,129,997
3	Industrial Sector	\$ 20,214,889	\$ 665,728	\$ -	\$ -	\$ 20,880,618
4	Agricultural Sector	\$ 2,703,160	\$ 474,961	\$ -	\$ -	\$ 3,178,121
5	Public Sector	\$ 15,116,273	\$ 1,708,529	\$ -	\$ -	\$ 16,824,801
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ 9,291,809	\$ -	\$ -	\$ 9,291,809
8	WE&T	\$ -	\$ 12,030,637	\$ 815,545	\$ -	\$ 12,846,182
9	Finance	\$ -	\$ 659,149	\$ -	\$ -	\$ 659,149
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 12,241,272	\$ 12,241,272
11	Portfolio Support	\$ 12,159,582	\$ 3,259,990	\$ 962,015	\$ 846,566	\$ 17,228,153
12	OBF Loan Pool ^[2]					\$ -
13	Portfolio Subtotal ^[3]	\$ 190,366,205	\$ 48,957,318	\$ 15,061,206	\$ 13,087,838	\$ 267,472,567

[1] PY 2024 actual expenditures and the PY 2025 budget forecast in SDG&E's 4302-E True Up Advice Letter (TUAL) are used in the updated PY 2024-2027 forecast.

[2] excludes SDG&E's On-Bill Financing (OBF) Loan Pool as it was authorized separately from the EE Program Portfolio budget

[3] excludes Evaluation, Measurement, & Verification (EM&V) and Portfolio Oversight

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual ⁶	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 42,424,588	\$ 50,019,516	\$ 49,751,616	\$ 48,170,486	\$ 190,366,205
2	Market Support	\$ 10,475,401	\$ 15,956,710	\$ 10,736,848	\$ 11,788,358	\$ 48,957,318
3	Equity	\$ 2,329,994	\$ 5,325,984	\$ 3,721,127	\$ 3,684,101	\$ 15,061,206
4	Codes and Standards	\$ 3,236,996	\$ 3,379,251	\$ 3,225,549	\$ 3,246,042	\$ 13,087,838
5	EM&V (PA and ED)	\$ 458,952	\$ 3,111,728	\$ 2,809,798	\$ 2,787,041	\$ 9,167,518
6	Total Budget w/o OBF Loan Pool	\$ 58,925,930	\$ 77,793,188	\$ 70,244,938	\$ 69,676,029	\$ 276,640,085
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					23%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 58,925,930	\$ 77,793,188	\$ 70,244,938	\$ 69,676,029	\$ 276,640,085
10	ED Portfolio Oversight ^[5]	\$ 5,486	\$ 99,200	\$ 99,200	\$ 99,200	\$ 303,086
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 58,931,416	\$ 77,892,388	\$ 70,344,138	\$ 69,775,229	\$ 276,943,171
12	Approved Budget Cap ^[4]					\$ 308,543,164

[4] Decision 23-06-055, OP5

[5] SDG&E has corrected its ED Portfolio Oversight allocation for years 2025-2027, which differs from its TUAL filing.

[6] PY2024 actuals reflect expenditures charged against the PY2024 budget, excluding any 2024 expenditures from pre-2024 budgets (commitments).

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

Year	PG&E		SDG&E ^[9]		SCE	SCG
	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2024			\$ 9,511,632	\$ 6,341,088		
2025			\$ 19,653,441	\$ 13,102,294		
2026			\$ 21,618,786	\$ 14,412,524		
2027			\$ 23,780,665	\$ 15,853,777		
Total	\$ -	\$ -	\$ 74,564,524	\$ 49,709,683	\$ -	\$ -

[9] Table 2 in D.24-08-003 authorizes SD REN's annual electric and gas amounts for collection by SDG&E, as the fiscal agent for SDREN.

2. Total System Benefit Forecast

The forecasts in this MCAL show SDG&E will meet its TSB goal over the four-year cycle. As established in the EE Goals Decision, SDG&E's cumulative adopted TSB, and EE goals for 2024–2027 total \$227,709,298, with Codes and Standards targets of 735.3 GWh, 125.5 MW, and 6.3 MMtherms. The forecast incorporates actual achievements from the 2024 program year, the approved 2025 forecast submitted through the TUAL, and updated projections for program years 2026 and 2027. As shown in Table 2.1a, SDG&E's forecast indicates achievement of 112% of the approved TSB goal over the four-year period, which represents an approximate 30% reduction compared to the TUAL approved forecast. As part of the forecasting process, SDG&E evaluated the precision of the 2025 TUAL TSB forecast and based on program performance to date and updated projections, SDG&E anticipates that the 2025 TSB achievement will more closely reflect the TSB achieved in 2024. SDG&E took a conservative approach by incorporating this anticipated reduction into its MCAL forecast and prioritized investment in programs that have shown strong results or are positioned for future growth, as discussed previously in Section 3: Portfolio Changes. While SDG&E expects a decrease in 2025 TSB achievement and is not forecasted to meet the annual TSB goals for 2026 and 2027, SDG&E does project it will meet the cumulative four-year goal of \$227,709,298.

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	\$ 50,410,731	\$ 85,483,270	\$ 61,572,392	\$ 63,498,819	\$ 260,965,213
2	Market Support	\$ 115,048	\$ 13,982,823	\$ 1,047,472	\$ 1,330,029	\$ 16,475,373
3	Equity	\$ 3,937	\$ 798,186	\$ 12,775	\$ 19,556	\$ 834,453
4	Total TSB Forecast	\$ 50,529,716	\$ 100,264,280	\$ 62,632,639	\$ 64,848,404	\$ 278,275,039
5	CPUC TSB Goal	\$ 45,004,630	\$ 45,267,492	\$ 65,431,025	\$ 72,006,151	\$ 227,709,298
6	<i>TSB Forecast / TSB Goal^[1]</i>	112%	221%	96%	90%	122%

[1] TSB goal set in decision 25-08-034

3. Portfolio Cost Effectiveness Forecast

The forecasts in this MCAL show that SDG&E will meet the TRC ratio goal of 1.0 for the resource acquisition segment over the four-year cycle. The forecast incorporates actual results from the 2024 program year, the approved 2025 forecast submitted through the TUAL, and updated projections for 2026 and 2027. For the 2024–2027 cycle, SDG&E projects a TRC ratio of 1.12 for the resource acquisition segment—approximately a 16% decrease compared to the TUAL approved forecast. TRC ratios for the other segments are provided in Table 3a. The cumulative portfolio TRC ratio is forecasted at 1.45, including Codes and Standards, and 0.92, excluding Codes and Standards, as shown in Table 3a. The new values represent approximately a 16% decrease in the portfolio TRC ratio, including Codes and Standards, and approximately a 21% decrease, excluding Codes and Standards. The corresponding Program Administrator Cost Test (PAC) and Ratepayer Impact Measure (RIM) ratios are also available in Table 3a. Finally, Table 3d presents the Societal Cost Test (SCT) ratios, both base and high scenarios, for program years 2026 and 2027. On average, the portfolio SCT ratio is 1.98, including Codes and Standards, and 1.17, excluding Codes and Standards.

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.12	1.29	0.48
2		Market Support	0.37	0.43	0.38
3		Equity	0.06	0.06	0.05
4		Codes and Standards (C&S)	1.79	66.38	0.97
5	Portfolio	Including C&S	1.45	4.01	0.75
6		Excluding C&S	0.92	1.05	0.45

[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	
			Base	High	Base	High	Base	High
1	Segment	Resource Acquisition	1.43	1.45	1.47	1.50	1.45	1.48
2		Market Support	0.16	0.16	0.16	0.16	0.16	0.16
3		Equity	0.00	0.01	0.01	0.01	0.01	0.01
4		Codes and Standards (C&S)	2.52	2.59	2.41	2.46	2.47	2.53
5	Portfolio	Including C&S	1.98	2.03	1.92	1.96	1.95	2.00
6		Excluding C&S	1.16	1.18	1.16	1.18	1.16	1.18

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

SDG&E's statewide program portfolio is comprised of three programs; (1) midstream/upstream HVAC, (2) Plug Load and Appliance and (3) Quality Installation and Quality Maintenance. SDG&E received approval to transition two programs for which it is the lead PA, midstream/upstream HVAC and Plug Load and Appliance, to Pacific Gas & Electric (PG&E) and Southern California Edison (SCE) respectively. SDG&E expects to file an Advice Letter proposing to transition its third statewide program to another PA. SDG&E's forecast shows continued compliance with the 60% third-party and 20% statewide compliance requirement.

SDG&E notes that the Bay Area Regional Energy Network (BayREN) was approved for the Home Energy Score Program, which fits the definition of a statewide program, however SDG&E did not include the budget associated with BayREN's statewide program because explicit direction from Energy Division Staff and/or the CPUC on this matter has yet to be articulated to IOUs. However, SDG&E believes BayREN's Home Energy Score budget should count toward the IOUs' statewide compliance requirement in future Application filings and AL submissions.

Table 4.1 - 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]	\$ 57,818,835	\$ 276,640,085	21%	20%
2	Third-party ^[2]	\$ 206,239,661	\$ 276,640,085	75%	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

5. Market Support and Equity Forecast

D.21-05-031 orders all EE PAs to segment their portfolios into three categories; resource acquisition, market support, and equity. The decision limits market support and equity expenditures of these segments to no more than 30% of the total portfolio budget. SDG&E confirms within this MCAL that its expected market support and equity budget is 23% over the four-year period.

Significant portfolio changes contributing to Market Support and Equity:

Within the market support and equity segments, SDG&E has limited changes to report.

1. SDG&E's Market Support and Equity budget was reduced as a proportion of the portfolio budget from 27% to 23%.
2. The inclusion of Community Engagement Indicators, per D.23-06-055, which requires PAs to collaboratively develop qualitative and quantitative indicators for tracking and reporting counts and types of community engagement activities targeted at equity communities.
3. The closure request of SDG&E's Non-Residential Behavior program, detailed in the Program Closure section below.

Table 4.2 - Market Support & Equity Segment Budget 2024-2027

Line	Segment	Qualifying Budget	Total Budget ^[3]	% of Budget	Cap (IOU and ATA CCA only)
1	Market Support	\$ 48,957,318	\$ 276,640,085	18%	30%
	Equity	\$ 15,061,206	\$ 276,640,085	5%	
2	Market Support + Equity	\$ 64,018,524	\$ 276,640,085	23%	

[3] Does not include OBF Loan Pool or ED Portfolio Oversight

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

SDG&E's forecasts show that it will meet its GWh, MW, and MMTherms goals over the four-year cycle based on the inputs outlined in this MCAL. In alignment with the EE Goals Decision, SDG&E's cumulative Codes and Standards targets for the four-year period are 735.3 GWh, 125.5 MW, and 6.3 MMTherms. The forecast reflects actual performance from the 2024 program year, the approved 2025 forecast submitted via the TUAL, and updated projections for 2026 and 2027. As illustrated in Table 2.1a, SDG&E's forecast exceed its approved goals as follows, 108% of the GWh target, 128% of the MW target, and 133% of the MMTherms target. This represents an approximate 3% reduction in the GWh, and MW forecasts compared to the TUAL-approved forecasts, while the MMTherms forecast remains unchanged.

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]	251	214	174	156	794
2	GWh CPUC Target ^[1]	219	207	163	146	735
3	GWh Forecast/Target	114%	104%	106%	107%	108%
4	MW Forecast	51	43	35	32	161
5	MW CPUC Target ^[1]	38	36	28	24	126
6	MW Forecast/Target	134%	121%	127%	133%	128%
7	MMThm Forecast	3	2	2	2	8
8	MMThm CPUC Target ^[1]	2	2	1	1	6
9	MMThm Forecast/Target	109%	91%	245%	205%	133%

[1] TSB goal set in decision 25-08-034

7. Non-Advocacy C&S Budget Forecast

As shown in Table 1 the cumulative Non-Advocacy Codes & Standards (C&S) Program Budget accounts for 47% of the total budget, remaining below the 70% cumulative cap.

Table 1 - Non-Advocacy C&S Budget 2024-2027

Line	Cumulative Non-Advocacy C&S Program Budget	Cumulative Total C&S Budget	Percentage of Budget	Cumulative Cap
1	\$6,121,929	\$13,087,838	47%	70%

IV) Energy Efficiency Portfolio Details

a. Segment Metrics

D.21-05-031 requires PAs “to develop metrics and criteria for evaluating progress of all programs, with particular focus on market support and equity programs that may not have measurable energy savings.”¹¹ D.21-05-031 further requires that True-Up or Mid-Cycle Advice Letters include a report on the progress against metrics relevant for each segment of the portfolio.¹² Therefore, SDG&E provides such progress below.

Resource Acquisition

SDG&E reports on savings data for resource acquisition programs via the CPUC's CEDARS. Available data includes annual budget filings, quarterly savings claims, and monthly report summaries. Please refer to CEDARS for reported information on all SDG&E's EE programs:

<https://cedars.cpuc.ca.gov/claims/confirmed-dashboard/SDGE/program-segment/>

Market Support and Equity

Pursuant to OP 11 of D.23-06-055, the PAs submitted a joint Tier 2 advice letter that: (a) clarified the indicators adopted in D. 23-06-055, including any modifications from metrics and indicators adopted in D. 18-05-041 and (b) identified information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines. Resolution E-5351 clarified

¹¹ D.21-05-031 at COL 7.

¹² D.21-05-031 at 43.

and revised the adopted indicators and metrics related to energy efficiency portfolios in compliance with D.23-06-055.

Pursuant to OP 25 of D.23-06-055, the PAs submitted a joint Tier 3 advice letter that: (a) proposes goal construct options for each segment (equity and market support); (b) recommends a process for proposing and adopting equity and market support segment goals, and (c) proposes study scope, methods, and associated budget to develop meaningful, measurable, and achievable goals. The advice letter was suspended for up to 120 days beginning August 31, 2025. Market support and equity metrics are expected to be available for the 2028 cycle.

b. New Programs

Pursuant to AL 4494-E, SDG&E was authorized to transition the HVAC and PLA programs to PG&E and SCE, respectively. New program IDs were created to reflect this change. The new HVAC program, administered by PG&E, will be fully electric and only serve non-residential customers. The program is anticipated to launch in Q4 of 2026 and will replace SDG&E's existing commercial and residential HVAC programs. Similarly, SCE will administer the new residential PLA program, which will also be fully electric. SDG&E developed a forecasted budget and TSB to support program continuity through September 2026 for PLA. SCE subsequently provided forecasts from those respective dates through the end of 2027.

SDG&E also established new program IDs for its new third-party solicited market access programs. These programs were developed in response to D.23-06-055 and launched in Q3 2025. The programs are replacing SDG&E's Core Market Access Programs, which served to integrate SDG&E's Summer Reliability Market Access Program (SRMAP) into the energy efficiency portfolio. This integration helped maintain program momentum and ensured there was no gap in market access offerings.

Table 2 - New Program IDs for 2024-2027

Program ID	Program Name	Program Description	Segment	Program Type
SDGE_SW_HVAC_AE_NonRes	SW HVAC All Electric Non-Residential	PG&E is seeking a new and innovative all electric upstream/midstream HVAC program to serve non-residential customers.	Resource Acquisition	Statewide Third-Party
SDGE_SW_HVAC_AE_NonRes_PA	SW HVAC All Electric Non-Residential (Utility)	This program ID was created to account for SDG&E's internal utility costs needed to support the implementation of PG&E's new HVAC offering.	Resource Acquisition	Core PA
SDGE_SW_PLA_AE	SW Plug Load and Appliance All Electric	SCE is seeking a new and innovative all electric midstream PLA program to serve residential customers.	Resource Acquisition	Statewide Third-Party
SDGE_SW_PLA_AE_PA	SW Plug Load and Appliance All Electric (Utility)	This program ID was created to account for SDG&E's internal utility costs needed to support the implementation of SCE's new PLA offering.	Resource Acquisition	Core PA

Program ID	Program Name	Program Description	Segment	Program Type
SDGE4201	Market Access Program - Residential	The GRID-Responsive Incentive Design Market Access Program (GRID-MAP) provides residential single family and multifamily customers with technical assistance and open access to qualified aggregators to facilitate energy efficiency projects. The program incorporates an incentive structure that is aligned with the value to SDG&E's grid and based on NMEC savings methodologies.	Resource Acquisition	Local Third Party
SDGE4202	Market Access Program - Commercial	The GRID-Responsive Incentive Design Market Access Program (GRID-MAP) provides commercial retail, office, and wholesale customers with technical assistance and open access to qualified aggregators to facilitate energy efficiency projects. The program incorporates an incentive structure that is aligned with the value to SDG&E's grid and based on NMEC savings methodologies.	Resource Acquisition	Local Third Party

c. Program Changes

Market Access Offerings:

D.23-06-055 required, “[b]y no later than July 1, 2024, the investor-owned utility portfolio administrators (PAs) and Marin Clean Energy shall make available solicitations using market access approaches for residential and commercial downstream opportunities in their territories.” At the time, SDG&E was already in the process of initiating solicitation for four new third-party programs to serve its commercial sector based upon building type. During the solicitation process, bidders for three of the four new sub-segments proposed a market access approach as part of their program design. To avoid duplication and market confusion, SDG&E modified the target customer segment for its commercial market access program solicitation (SDGE4202) to only include commercial retail, office, and wholesale customers. The following programs are now third-party-solicited and utilize a market access approach to address both residential and commercial downstream retrofit opportunities in SDG&E's service territory:

Table 3 - Program Changes

Program ID	Program Name	Customer Segments
SDGE4168	Lodging (Hotels/Motels)	Lodging (hotel and motel) businesses within the commercial sector
SDGE4169	Groceries, Restaurants, and Food Storage	Groceries, restaurants, and food storage businesses within the commercial sector
SDGE4171	Private Institutions/Healthcare	Private Institutions (private schools) and Healthcare businesses within the commercial sector
SDGE4201	Market Access Program – Residential	Single family and multifamily customers within the residential sector
SDGE4202	Market Access Program – Commercial	Retail, office, and wholesale businesses within the commercial sector

Local Residential Fuel Substitution:

While SDG&E had initially forecasted claimable TSB in its TUAL for its Local Residential Fuel Substitution Program, the forecast for this program was ultimately adjusted as part of this MCAL filing based on the final programmatic design. As a market support program, operating as the Customer Home Electrification Readiness Program (CHERP), the program focuses on providing technical assistance to help customers navigate the complexities of electrification, such as equipment installation, bill impacts, and eligibility for rebates, incentives, and tax credits. CHERP does not directly install measures or claim TSB. Instead, it supports customers in accessing other programs—across local, state, and federal funding streams—that may install measures and therefore potentially claim TSB. As a result, CHERP's own TSB forecast (SDGE4175) was removed from SDG&E's 2026-2027 forecast. The MCAL forecast still includes a TSB value for 2025, which reflects the forecasted values from the TUAL, however, SDG&E accounted for this reduction in TSB when revising its portfolio forecast for 2026 and 2027.

d. Program Closures**1. Programs Closed between TUAL and MCAL**

SDG&E's TUAL included budget allocations for the K-12 and Local Government programs, however, in this MCAL, due to these closures, SDG&E is not forecasting a budget for 2026-2027 associated with these programs.

Table 4 - Program Closures

Program ID	Program Name	AL Approval
SDGE4011	K-12 Customer Service Program	11/15/2024
SDGE4010	Local Government	10/16/2024

2. Programs to be Closed in 2026-2027

As part of SDG&E's MCAL filing, SDG&E is requesting approval to close multiple programs codes, most of which were created in error when SDG&E began transitioning to third-party implementation and were never active, nor included in SDG&E's original business plan application. D.21-05-031 allows PAs to request program closure through a Tier 2 advice letter. For third party programs that are closing to

contract term, no webinar is required. For programs closing prior to the contract end date, a public webinar is required.

SDG&E is requesting approval to close the following programs:

Table 5 - Programs to be Closed in 2026-2027

Program ID	Program Name	Date of webinar
SDGE4184	Non-Residential Behavioral Program	October 15, 2025
SDGE3226	SW-COM Direct Install	N/A - closing to contract term
SDGE4012	Federal Customer Services Program	N/A - closing to contract term
SDGE4197	Core Market Access Program - Residential	N/A - core program
SDGE4198	Core Market Access Program - Commercial	N/A - core program
SDGE4039	3P-IDEEA	N/A - core program
SDGE4051	IDSM Residential ME&O - DR	N/A - core program
SDGE4052	IDSM Commercial ME&O - DR	N/A - core program
SDGE4054	IDSM Residential - DR	N/A - core program
SDGE4055	IDSM Commercial - DR	N/A - core program
SDGE4056	IDSM Commercial - DR	N/A - core program
SDGE4057	IDSM Behavioral - DR	N/A - core program
SDGE4058	IDSM Non-Res Audits - DR	N/A - core program
SDGE-ESPI	ESPI	N/A - core program

PAs are also required to provide the following information to facilitate approval of all program closures: (a) a description of the program, the program implementer, and the region and customer/sector served by program; (b) justification for closure, including demonstration of alignment with State Greenhouse Gas (GHG) emissions reductions goals and EE goals, and a brief discussion of the program closure impact to ratepayers, (c) year program started; (d) date program was due to sunset; (e) most recent three program years (inclusive of current year) filed (i.e., forecasted) budget, TRC, and savings, per TSB metric if applicable; (f) most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per TSB metric if applicable; (g) a discussion and overview of stakeholder feedback and any changes to transition to closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and (h) what, if any, plans the PAs have to replace the program. Below, SDG&E provides this data for each program above for which it is requesting program closure:

SDGE4184-Non-Residential Behavioral Program

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Market Support Program Implementer: Bidgely, Inc. Market Sector: Commercial Program Description: The Business Energy Report (BER) program is designed to help Small Business (≤ 20 kW) customers achieve energy savings through personalized, data-driven business energy reports. A key priority of the BER program is supporting hard-to-reach customers and businesses in disadvantaged communities. Participation is based on a randomized control group. The program's primary goal is to empower energy report recipients to adopt energy-efficient behaviors and equipment upgrades that reduce consumption. By increasing awareness of energy usage, the program promotes demand shifting and peak load conservation, offering businesses actionable insights and customized efficiency recommendation						
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	The program faced the following challenges. <ul style="list-style-type: none"> • Did not meet energy savings goals • Limited engagement from customers • Challenges in determining the correct end user 						
C	Year program started:	2024						
D	Date program was due to sunset:	December 31, 2027						
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	Year	Forecasted Budget	Total Resource Cost	Forecasted Total System Benefit (TSB)	Forecasted Savings kWh	Forecasted Savings kW	Forecasted Savings Therms
		2023	N/A	N/A	N/A	N/A	N/A	N/A
		2024	\$1,340,030	0.56	\$755,715	6,287,528	718	N/A
		2025	\$997,739	1.30	\$1,300,861	10,573,657	1,207	N/A
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	Year	Expenditures	Claimed Total Resource Cost	Claimed Savings kWh	Claimed Savings kW	Claimed Savings Therms	
		2023	N/A	N/A	N/A	N/A	N/A	
		2024	\$653,301	N/A	N/A	N/A	N/A	

G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	SDG&E held a public webinar on October 15, 2025. SDG&E shared information and justification for the closure. There was no stakeholder feedback or input.
H	What, if any, plans the PA has to replace the program:	There are no plans to replace the program.

SDGE3226-SW-COM Direct Install

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Public (previously Commercial) Program Implementer: Synergy Companies Program Description: The Business Energy Solutions program delivers no-cost or discounted EE equipment upgrades by an installation contractor to reduce peak demand and energy consumption for K-12 schools. The program is designed to increase the adoption of EE measures by offering an EE audit as well as EE equipment and installation at no cost or at a discounted price.						
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	SDGE3226 is a legacy program that was only offered to help fill in the gap while SDREN conducts their solicitation for the K-12 customer base. SDREN's program is expected to launch by 2026.						
C	Year program started:	The program's current model began in 2015.						
D	Date program was due to sunset:	December 31, 2025						
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	Year	Forecasted Budget	Total Resource Cost	Forecasted Savings kWh	Forecasted Savings kW	Forecasted Savings Therms	Forecasted TSB
		2023	N/A	N/A	N/A	N/A	N/A	N/A
		2024	\$2,435,895	1.14	2,814,276	279	21,719	\$3,281,589
		2025	N/A	N/A	N/A	N/A	N/A	N/A

		Note: The BES Program was initially slated to close in Q4 of 2022 as indicated in SDG&E' 2022-2023 Biennial Energy Efficiency Program and Portfolio Budget Request Advice Letter (AL 3887-E-A/3035-G-A). Therefore, the program does not have 2023 forecasted values. Similarly, SDG&E did not include a 2025 forecast in its TUAL (AL-4302-E), as a new K-12 offering was initially expected to launch in 2025.						
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	Year	Expenditures	Claimed Total Resource Cost	Claimed Savings kWh	Claimed Savings kW	Claimed Savings Therms	Claimed TSB
		2023	\$5,249,988	0.54	3,668,861	354	134,501	\$2,629,915
		2024	\$570,026	1.00	-152,922	0	63,085	\$570,007
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A						
H	What, if any, plans the PA has to replace the program:	SDG&E does not plan to replace this program. K-12 customers may be eligible to participate in SDREN's public sector Climate Resilience Leadership Program, which is expected to be active and enrolling participants in 2026.						

SDGE4012-Federal Customer Services Program

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Public Program Implementer: TRC Solutions, Inc. Program Description: The SD EnergyLink Program is a downstream resource acquisition program that uses a customer-focused, cost-effective, and comprehensive approach to achieve sustainable total system benefits and electric and gas savings. The Program provides end-to-end program implementation services, including marketing, outreach, engineering, operations, customer service, quality assurance, data management, and reporting, to federal, tribal, and local governmental customers, including those located in Disadvantaged Communities within SDG&E's service territory. The Program ensures that customers receive the support and education they need to implement projects while driving deeper savings and investment in measures over time.						
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	The program has not met, and is not expected to meet, its cost-effectiveness and overall system benefit targets. Additionally, SDREN is launching two public sector programs – the Tribal Engagement and the Climate Resilience Leadership programs – which are designed to support tribes, tribal organizations, and public agencies. Eliminating programs such as this one, that are not cost-effective, and reducing overlap, helps address affordability concerns for ratepayers.						
C	Year program started:	2022						
D	Date program was due to sunset:	December 31, 2025						
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	Year	Forecasted Budget	Total Resource Cost	Forecasted Savings kWh	Forecasted Savings kW	Forecasted Savings Therms	Forecasted TSB
		2023	\$6,140,917	1.60	7,696,411	674	166,856	\$12,351,720
		2024	\$5,947,521	1.05	7,577,234	669	164,154	\$8,033,652
		2025	\$4,084,812	1.18	5,621,136	478	103,379	\$6,101,176
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	Year	Expenditures	Claimed Total Resource Cost	Claimed Savings kWh	Claimed Savings kW	Claimed Savings Therms	Claimed TSB
		2023	\$1,625,702	0.20	1,366,507	382	0	617,299

		2024	\$1,476,366	0.03	123,106	-208	4336	79,737	
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A							
H	What, if any, plans the PA has to replace the program:	SDG&E does not plan to replace this program. Federal and local government customers may be eligible to participate in SDREN's public sector Tribal Engagement and/or Climate Resilience Leadership programs or statewide programs, if eligible.							

SDGE4197- Core Market Access Program – Residential

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Residential Program Implementer: SDG&E Program Description The Residential CORE Market Access Program was a transitional program intended to mitigate the gap between the Summer Reliability Market Access Program and the launch of the third-party Market Access Program; SDG&E launched the Residential Core Market Access Program on July 1, 2024. There were no customer participants during the gap period.							
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	SDG&E has launched a third-party solicited residential market access program that replaces this interim core program.							
C	Year program started:	2024							
D	Date program was due to sunset:	July 1, 2025							
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost	Year	Forecasted Budget	Total Resource Cost	Forecasted Savings kWh	Forecasted Savings kW	Forecasted Savings Therms	Forecasted TSB	

	(TRC), and savings, per Total System Benefit (TSB) metric if applicable:	2023	N/A	N/A	N/A	N/A	N/A	N/A
		2024	\$1,086,546	0.57	592,039	773	0	\$993,619
		2025	\$1,068,936	0.67	552,564	772	0	\$938,305
		Note: Program started July 1, 2024.						
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	Year	Expenditures	Claimed Total Resource Cost	Claimed Savings kWh	Claimed Savings kW	Claimed Savings Therms	Claimed TSB
		2023	N/A	N/A	N/A	N/A	N/A	N/A
		2024	\$211,083	0	0	0	0	\$0
		Note: Program started July 1, 2024.						
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A						
H	What, if any, plans the PA has to replace the program:	SDG&E has replaced this program with a third-party solicited residential market access program (SDGE4201).						

SDGE 4198- Core Market Access Program – Commercial

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Commercial Program Implementer: SDG&E Program Description: The Commercial CORE Market Access Program was a transitional program intended to fill the gap between the Summer Reliability Market Access Program and the launch of the third-party Market Access Program. SDG&E launched the Commercial CORE Market Access Program on July 1, 2024. Three customers participated in the CORE Market Access Program.
B	Justification for closure, including demonstration of alignment with State	SDG&E has launched third-party solicited commercial market access programs that replace this interim core program.

	GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:							
C	Year program started:	2024						
D	Date program was due to sunset:	July 1, 2025						
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	Year	Forecasted Budget	Total Resource Cost	Forecasted Savings kWh	Forecasted Savings kW	Forecasted Savings Therms	Forecasted TSB
		2023	N/A	N/A	N/A	N/A	N/A	N/A
		2024	\$2,252,496	0.90	3,416,962	384	0	\$3,569,944
		2025	\$2,176,002	1.23	3,166,675	384	0	\$3,335,996
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	Year	Expenditures	Claimed Total Resource Cost	Claimed Savings kWh	Claimed Savings kW	Claimed Savings Therms	Claimed TSB
		2023	N/A	N/A	N/A	N/A	N/A	N/A
		2024	\$601,387	0.67	421,272	48	0	\$445,675
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA’s plan; and:	N/A						
H	What, if any, plans the PA has to replace the program:	SDG&E has replaced this program with third-party solicited commercial market access programs (SDGE4168, SDGE4169, SDGE4171, SDGE4202).						

SDGE 4039- 3P-IDEEA

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Market Support Market Sector: Commercial Program Implementer: SDG&E Program Description: This program is duplicative of SDGE3280 and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	This program ID is duplicative of SDGE3280, which is still active.

SDGE 4051- IDSM Residential ME&O - DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Residential Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. Marketing, Education, and Outreach activity and funding have transitioned to third-party implementers.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE 4052- IDSM Commercial ME&O – DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Commercial Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. Marketing, Education, and Outreach activity and funding have transitioned to third-party implementers.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE 4054- IDSM Residential - DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Residential Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. IDSM Demand Response funding is incorporated within third-party programs, where relevant. Refer to section 12 of this MCAL.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE 4055- IDSM Commercial - DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Commercial Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. IDSM Demand Response funding is incorporated within third-party programs, where relevant. Refer to section 12 of this MCAL.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE 4056- IDSM Commercial - DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Commercial Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. IDSM Demand Response funding is incorporated within third-party programs, where relevant. Refer to section 12 of this MCAL.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE 4057- IDSM Behavioral - DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Residential Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. IDSM Demand Response funding is incorporated within third-party programs, where relevant. Refer to section 12 of this MCAL.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE 4058- IDSM Non Res Audits - DR

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Resource Acquisition Market Sector: Commercial Program Implementer: SDG&E Program Description: This program was not included in SDG&E's Business Plan Application and has never been active. SDG&E created new 4000 series program IDs when it originally began transitioning to third-party implementation, and this program ID was created in error. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	This program ID was created in error. IDSM Demand Response funding is incorporated within third-party programs, where relevant. Refer to section 12 of this MCAL.
C	Year program started:	N/A – this program has never been active.
D	Date program was due to sunset:	N/A – this program has never been active.
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A – this program has never been active.
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A – this program has never been active.
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	N/A – this program has never been active.

SDGE-ESPI - ESPI

A	A description of program, implementer, region, and customer/sector served by the program:	Program Segment: Market Support Market Sector: Cross-Cutting Program Implementer: SDG&E Program Description: The Efficiency Savings and Performance Incentive (ESPI) mechanism was adopted on September 5, 2013 in D.13-09-023. In D.20-11-013, the Commission imposed a moratorium on award payments under the Efficiency Savings and Performance Incentive Mechanism (ESPI) beginning with program year 2021.
B	Justification for closure, including demonstration of alignment with State GHG emissions reductions goals and EE goals and discussion of impact to ratepayers from program closure:	There is a moratorium in effect for ESPI award payments. This program was not included in SDG&E's Business Plan Application. SDG&E is using this MCAL as an opportunity to reconcile its list of programs and their status.
C	Year program started:	2013 – ESPI mechanism adopted
D	Date program was due to sunset:	2021 – moratorium takes effect
E	Most recent three program years (inclusive of current year) filed (i.e., Forecasted) budget, Total Resource Cost (TRC), and savings, per Total System Benefit (TSB) metric if applicable:	N/A
F	Most recent two years (excluding current year) program budget expenditures, claimed TRC and savings, per (TSB) metric if applicable:	N/A
G	A discussion and overview of stakeholder feedback and any changes to transition closure as a result of input from the webinar to ensure that program implementers are aware of the PA's plan; and:	N/A
H	What, if any, plans the PA has to replace the program:	At this time, there are no plans to replace this program.

3. Programs to be Closed Upon Completion of Commitments

SDG&E recorded final payments in its 2024 Annual Report for the following programs, in most cases leveraging pre-2024 committed funds:

- **SDGE3260: Local-IDSM-ME&O-Local Marketing (EE)** – closed via AL 3887-E-A/3035-G-A
- **SDGE3317: HOPPs Building Retro-Commissioning** – closed via AL 4302-E
- **SDGE4010: Local Government Customers Program** – closed via AL4514-E/3341-G
- **SDGE4011: K-12 Customer Services Program** – closed via AL 4302-E

SDG&E anticipates the following programs to close in 2025 upon completion of remaining commitments:

- **SDGE3222: SW-COM-Calculated Incentives-Savings by Design** – closed via AL 4302-E
- **SDGE4004: Commercial Large Customer Services (>20KW) Program** – closed via AL4513-E/3340-G

e. EM&V (2024-2027)

SDG&E's TUAL approved its request to allocate 40% (versus 27%) of the EM&V budget to SDG&E to fund significant changes and newly ordered studies.¹³ The table below provides the forecasted update for 2026 and 2027.

Table 6 - EMV: Breakdown of EM&V Allocated Costs and Justification to 40 Percent

	2026	2027
Total EM&V	\$2,809,798	\$2,787,041
EM&V ED (60%)	\$1,685,879	\$1,672,225
EM&V IOU (40%)	\$1,123,919	\$1,114,816
Labor	\$246,603	\$254,001
CalTF (EM&V Share)	\$104,828	\$106,990
eTRM (EM&V Share)	\$151,820	\$154,952
CPUC tools/Proj Coordination (CEDARS)	\$188,600	\$188,600
AKAB Surveys (\$2MM)	\$63,850	\$63,850
CALMAC Maintenance	\$10,540	\$10,540
BER Tech Review	\$25,000	
NMEC Technical Support	\$150,000	\$75,000
Studies	\$182,678	\$260,884

¹³ SDG&E True Up Advice Letter 4302-E at 32.

Table 7 - Annual Breakdown of EM&V Budgets

Year	Portfolio Administrator (PA)	Total Budget w/o EM&V	EM&V Total (4% of Total Budget with EM&V)	EM&V ED	EM&V PA	Total Budget w/ EM&V
2024	PA, excluding ED Portfolio Oversight ¹⁴	\$58,466,978	\$458,952	\$54,615	\$404,337	\$58,925,930
2024	PA share of ED Portfolio Oversight	\$0	\$0	\$5,486	\$0	\$5,486
2024	SD REN	\$313,781	\$0	\$0	\$0	\$313,781
2024	Bay-REN	\$0	\$0	\$0	\$0	\$0
2025	PA, excluding ED Portfolio Oversight	\$74,681,460	\$3,111,728	\$1,867,037	\$1,244,691	\$77,793,188
2025	PA share of ED Portfolio Oversight	\$0	\$0	\$99,200	\$0	\$99,200
2025	SD REN	\$31,495,900	\$1,259,836	\$913,381	\$346,455	\$32,755,736
2025	Bay-REN	\$44,121	\$1,838	\$1,333	\$506	\$45,960
2026	PA, excluding ED Portfolio Oversight	\$67,435,140	\$2,809,798	\$1,685,879	\$1,123,919	\$70,244,938
2026	PA share of ED Portfolio Oversight	\$0	\$0	\$99,200	\$0	\$99,200
2026	SD REN	\$42,110,100	\$1,690,680	\$1,183,476	\$507,204	\$43,800,780
2026	Bay-REN	\$434,909	\$18,121	\$13,138	\$4,983	\$453,030
2027	PA, excluding ED Portfolio Oversight	\$66,888,988	\$2,787,041	\$1,672,225	\$1,114,816	\$69,676,029
2027	PA share of ED Portfolio Oversight	\$0	\$0	\$99,200	\$0	\$99,200
2027	SD REN	\$45,574,648	\$1,829,262	\$1,280,483	\$548,779	\$47,403,910
2027	Bay-REN	\$480,970	\$20,040	\$14,529	\$5,511	\$501,010
	Total	\$387,926,995	\$13,987,296	\$8,989,182	\$5,301,201	\$402,217,378

¹⁴ Funding reserved for EE technical consultants pursuant to D.23-06-055, OP 9.

f. Cost Recovery

SDG&E's electric and gas energy efficiency revenue requirement is collected through the Public Purpose Program (PPP) rates. SDG&E files electric and gas PPP advice letters in October of each year requesting to establish the electric and gas PPP rates effective January 1st of the following year. The rate revenue consists of Commission-approved EE authorized program budget for the following year and the net amortization component of the regulatory account balances.

To fund the 2024–2027 SDG&E, Bay-REN, and SDREN's portfolios and EM&V budgets updated in this MCAL, SDG&E requests total cost recovery in the net amount of \$384,890,819. This cost recovery amount reflects the total PA budget requests, offset by SDG&E's pre-2024 unspent and uncommitted funds of \$35 million that were previously collected.

Table 1.2a - MCAL Updated 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) 2024 Carryover Funding ^[6]	(f) Unspent & Uncommitted Funds for 2024-2027 Offset ^[6]	(g) Total Cost Recovery Amt
1	San Diego Gas and Electric Company	\$ 267,472,567	\$ 303,086	\$ 3,887,764	\$ 5,279,754	\$ 17,673,440	\$ (35,000,000)	\$ 259,616,612
2	SoCal REN							\$ -
3	3C-REN							\$ -
4	I-REN							\$ -
5	RREN Central ^[7]							\$ -
6	RREN North ^[7]							\$ -
7	Bay-REN (SW Program)	\$ 960,000	\$ -	\$ 11,000	\$ 29,000	\$ -	\$ -	\$ 1,000,000
8	Ava Community Energy							\$ -
9	CleanPowerSF							\$ -
10	Marin Clean Energy							\$ -
11	Peninsula Clean Energy							\$ -
12	Redwood Coast Energy Authority							\$ -
13	SD REN ^[8]	\$ 119,494,429	\$ -	\$ 1,402,438	\$ 3,377,340	\$ -	\$ -	\$ 124,274,207
14	San Jose Clean Energy							\$ -
15	Sonoma Clean Power							\$ -
16	Total	\$ 387,926,996	\$ 303,086	\$ 5,301,202	\$ 8,686,094	\$ 17,673,440	\$ (35,000,000)	\$ 384,890,819
17	Collected 2024 Recovery^[10]							\$ 42,385,791
18	Expected 2025 Recovery^[11]							\$ 77,886,388
19	Remaining Cost Recovery							\$ 264,618,640

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

[6] Unspent and uncommitted funds that were used to offset program year 2024 cost recovery as filed in SDG&E Advice Letters 4291-E & 3245-G.

[7] D.24-09-031 split Rural REN into Rural REN North and Rural REN Central.

[8] Unspent funds from Program Year 2024 will be carried forward and made available for use during Program Years 2025 through 2027, within the current funding cycle.

[9] SD REN budgets were authorized in D.24-08-003 after SDG&E's TUAL 4302-E was approved.

[10] As filed in SDG&E Public Purpose Programs Rates Advice Letters 4291-E & 3245-G.

[11] As filed in SDG&E Public Purpose Programs Rates Advice Letters 4504-E & 3358-G.

Electric and Gas Split

The proposed electric and gas split is based on the proportion of benefits each commodity provides to the forecasted total portfolio net benefits. SDG&E's annual electric and gas split has been updated accordingly for the MCAL given the changes in the total net benefits forecasted for its portfolio. The table below includes the updated applicable electric and gas splits for each program year of the 2024–2027 cycle and includes a 100% electric split for budget forecasted for fuel substitution.¹⁵

¹⁵ While SDG&E's 2024-2027 True-Up Advice Letter 4302-E did not include a breakout of fuel substitution as part of the electric and gas split, the breakout of fuel substitution is provided here for additional transparency into the calculation of the electric and gas revenue requirements and to demonstrate compliance with the requirement in D.19-08-009, OP 5 that directs fuel substitution measures and associated program costs to be funded by ratepayers of the new fuel.

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

Line	Spending Budget & Cost Recovery Request	Pre-2024 Unspent & Uncommitted Funds for Offset	2024	2025	2026	2027	2024-2027
1	IOU (excluding fuel substitution budget)		\$ 52,161,673	\$ 74,467,516	\$ 66,489,250	\$ 67,487,310	\$ 260,605,749
2	IOU Budget forecasted to support fuel sub ^[12]		\$ 6,769,744	\$ 3,424,871	\$ 3,854,888	\$ 2,287,919	\$ 16,337,422
3	2024 Carryover Funding ^[8]		\$ 17,673,440				
4	Total cost recovery request for IOU portfolio (excluding offset)		\$ 76,604,857	\$ 77,892,388	\$ 70,344,138	\$ 69,775,229	\$ 294,616,612
5	IOU Pre-2024 Estimated Unspent & Uncommitted Funds to Offset 2024 Cost Recovery	\$ (35,000,000)	\$ -	\$ -	\$ -	\$ -	\$ (35,000,000)
6	Total Cost Recovery Request for IOU Portfolio (including offset)	\$ (35,000,000)	\$ 76,604,857	\$ 77,892,388	\$ 70,344,138	\$ 69,775,229	\$ 259,616,612
7	Applicable electric split	89%	60%	60%	54%	55%	
8	Applicable gas split	11%	40%	40%	46%	45%	
9	Electric portion for cost recovery ^[13] (excluding fuel sub budget)	\$ (31,000,000)	\$ 41,901,068	\$ 44,680,510	\$ 35,904,195	\$ 37,118,020	\$ 128,603,793
10	Fuel sub applicable electric split		100%	100%	100%	100%	
11	Electric portion for cost recovery (fuel sub budget)	\$ -	\$ 6,769,744	\$ 3,424,871	\$ 3,854,888	\$ 2,287,919	\$ 16,337,422
12	Total electric portion for cost recovery for IOU portfolio ^[13]	\$ (31,000,000)	\$ 48,670,812	\$ 48,105,381	\$ 39,759,083	\$ 39,405,940	\$ 144,941,215
13	Total Gas portion for cost recovery for IOU portfolio ^[14]	\$ (4,000,000)	\$ 27,934,045	\$ 29,787,007	\$ 30,585,055	\$ 30,369,289	\$ 114,675,396
14	Electric split (with fuel sub) ^[15]		64%	62%	57%	56%	
15	Gas split (with fuel sub) ^[15]		36%	38%	43%	44%	

[8] Unspent funds from program year 2024 will be carried forward and made available for use during program years 2025 through 2027, within the current funding cycle.

[12] 2024 expenditures reported herein were revised in order to true up the gas and electric expenditures for fuel substitution projects in the IOUs statewide programs. This is pursuant to Decision 19-08-009, Ordering Paragraph 5, which stipulates that fuel substitution measures and their associated program costs shall be borne by the ratepayers of the new fuel, rather than by the ratepayers of the fuel being replaced.

[13] Pre-2024 unspent and uncommitted electric funds of \$31 million that were applied to offset program year 2024 cost recovery as filed in SDG&E Advice Letter 4291-E.

[14] Pre-2024 unspent and uncommitted gas funds of \$4 million that were applied to offset program year 2024 cost recovery as filed in SDG&E Advice Letter 3245-G.

[15] The electric and gas splits with fuel substitution are based on the electric and gas portions of the cost recovery after accounting for fuel substitution actuals cost for program year 2024 and the budget forecast for program years 2025-2027.

1. Unspent Funds

SDG&E's cost recovery request of \$259,616,612 for its portfolio in Table 1.2a and 1.3 above is partially offset by SDG&E's pre-2024 unspent and uncommitted funds of \$35 million that were previously collected. As noted in Table 1.4 below, SDG&E did not forecast unspent and uncommitted funds as of 2024 to offset cost recovery in 2025.

Table 1.4 Prior Years Unspent Funds as of 2024 (RENS/CCAs and IOUs) ^[11]

Line		PY 2017	PY 2018	PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024	TOTAL 2017-2024
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	PA Funds									\$ -
8	Total									\$ -

[11] SDG&E did not forecast unspent and uncommitted funds as of 2024 to offset 2025 cost recovery.

2. Integrated Demand-Side Management (IDSM) Budget

D.24-05-040 approved SDG&E's Integrated Demand-Side Management – Demand Response (IDSM-DR) annual budget of \$4.75 million for program years 2024–2027. This budget is collected separately from, and in addition to, EE budgets. Consistent with prior practice, funding for SDG&E's third-party IDSM-DR programs will continue to be managed through the Advanced Metering and Demand Response Memorandum Account (AMDRMA), separate from the EE Portfolio budget request in this MCAL.

SDG&E records all IDSM-DR and existing demand response program costs in the AMDRMA. Balances in this account will continue to be transferred annually to the Rewards and Penalties Balancing Account (RPBA) for amortization in electric distribution rates over 12 months, effective January 1 of each year, in accordance with SDG&E's adopted tariffs.

The EE programs listed in the table below have an IDSM-DR component in their scope of work.

Table 8 - Programs with IDSM-DR Component

Program ID	Program Name
SDGE4006	Industrial Sector Program
SDGE4009	Agricultural Growers Service Program
SDGE4040	IDSM Local Residential Behavioral Program (EE)
SDGE4168	Lodging (Hotels/Motels)
SDGE4169	Groceries, Restaurants, and Food Storage
SDGE4170	Wholesale/Retail/Office, including Entertainment Services
SDGE4171	Private Institutions/Healthcare
SDGE4201	Market Access Program - Residential
SDGE4202	Market Access Program – Commercial

In some cases, SDG&E provides implementers a demand response incentive, provided the customer remains enrolled in a demand response program for a minimum of 12 months. SDG&E is also offering demand response funding for marketing and outreach activities, but considering the marketing and outreach activities are intended to result in demand response program enrollment, SDG&E is attempting to shift more of the IDSM-DR funding in its contracts to incentives that are linked to demand response program enrollment, as that is the ultimate goal.

D.23-06-055 authorized new multi-distributed energy resource IDSM programs (IDSM-DER), including demand response and beyond, which PAs could propose through the submission of Tier 3 advice letters. SDG&E did not file a Tier 3 advice letter and is therefore not requesting an IDSM-distributed energy resource (IDSM DER) budget for 2024 through 2027.

g. CEDARS Discrepancies (optional)

The following discrepancies have been identified across various dashboards as of October 29, 2025:

Goal Attainment Dashboard

- The goals for TSB, GWh, MW, and MMThm are outdated and reflect previous targets. Consequently, the associated percent-to-goal metrics are inaccurate.

Segment Summary Dashboard

- For the Resource Acquisition segment (2026 and 2027), and the total across all program segments, the metrics for Net kWh, Net kW, Net Therm, Gross kWh, Gross kW, Gross Therm, First Year Net CO₂, and Lifecycle Net CO₂ incorrectly include ESA program data. ESA is not part of this filing and should be excluded.

Sector Summary Dashboard

- **Residential Sector:** For 2026 and 2027, and the total across all sectors, the values for TSB, Net kWh, Net kW, Net Therm, Gross kWh, Gross kW, and Gross Therm include ESA program data. ESA is not part of this filing and should be excluded.
- **Cross-Cutting Sector:** For 2026–2027, the Gross kWh, Gross kW, and Gross Therm values are incorrectly reflecting net savings instead of gross.

Programs in This Budget Filing Dashboard

- The ESA program is incorrectly included and should be removed, as it is not part of this budget filing.
- For the three statewide C&S programs (SDGE_SW_CSA_Appl, SDGE_SW_CSA_Bldg, SDGE_SW_CSA_Natl), the Gross kWh, Gross kW, and Gross Therm values are incorrectly mirroring net savings.

Tickets have been submitted to address and correct the above discrepancies.

EFFECTIVE DATE

SDG&E believes that this Advice Letter should be classified as Tier 2 (effective after staff approval) and respectfully requests an approval date of December 4, 2025, 30 days after the date submitted.

PROTEST

Anyone may protest this Advice Letter to the California Public Utilities Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be submitted electronically and must be received no later than November 24, 2025, which is 20 days from the date this Advice Letter was submitted with the Commission. There is no restriction on who may submit a protest.

The protest should be sent via e-mail to the attention of the Energy Division at EDTariffUnit@cpuc.ca.gov. A copy of the protest should also be sent via e-mail to the address shown below on the same date it is delivered to the Commission.

Attn: Greg Anderson
Regulatory Tariff Manager
E-mail: GAnderson@sdge.com
SDGETariffs@sdge.com

NOTICE

A copy of this submittal has been served on the utilities and interested parties shown on the attached list, and to service lists R.13-11-005 and R.25-04-010, by providing them a copy electronically. Address changes should be directed to SDG&E Tariffs by email to SDGETariffs@sdge.com.

/s/ Clay Faber

CLAY FABER
Director – Regulatory Affairs



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: San Diego Gas & Electric Company (U902-M)

Utility type:

☒ ELC ☒ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Norma Toothman

Phone #: (619) 240-1371

E-mail: nltoothman@semprautilities.com

E-mail Disposition Notice to: SDGETariffs@sdge.com

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 4747-E/3469-G

Tier Designation: 2

Subject of AL: Energy Efficiency Mid Cycle True Up Advice Letter Pursuant to D.21-05-031

Keywords (choose from CPUC listing): Compliance; Energy Efficiency

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

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.21-05-031

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: 12/4/25

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

CPUC, Energy Division
Attention: Tariff Unit
Email: EDTariffUnit@cpuc.ca.gov

Name: Greg Anderson
Title: Regulatory Tariff Manager
Utility Name: San Diego Gas & Electric Company
Address: 8330 Century Park Court; CP 31D 92123
City: San Diego State: California
Telephone (xxx) xxx-xxxx: (858) 654-1717
Facsimile (xxx) xxx-xxxx:
Email: GAnderson@sdge.com

Name: SDG&E Tariff Department
Title:
Utility Name: San Diego Gas & Electric Company
Address: 8330 Century Park Court; CP 31D 92123
City: San Diego State: California
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email: SDGETariffs@sdge.com

Clear Form

General Order No. 96-B
ADVICE LETTER SUBMITTAL MAILING LIST

Public Utilities Commission
CA. Public Advocates (CalPA)

R. Pocta
F. Oh
P. Cunningham
C. Li
M. Halperin

Energy Division

M. Ghadessi
M. Salinas
L. Tan
R. Ciupagea
Tariff Unit

CA Energy Commission

B. Penning
B. Helft

Advantage Energy

C. Farrell

Alcantar & Kahl LLP

M. Cade
K. Harteloo

AT&T

Regulatory

Barkovich & Yap, Inc.

B. Barkovich

Biofuels Energy, LLC

K. Frisbie

Braun & Blaising, P.C.

S. Blaising
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K. Cameron
M. Alcantar

CalCCA

Regulatory

CA Dept. of General Services

H. Nanjo

California Energy Markets

General

California Farm Bureau Federation

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K. Campbell

EQ Research

General

Goodin, MacBride, Squeri, & Day LLP

B. Cragg
J. Squeri

Green Charge

K. Lucas

Hanna and Morton LLP

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L. Fernandez
L. Utouh

Shute, Mihaly & Weinberger LLP

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Solar Turbines

C. Frank

SPURR

M. Rochman

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K. Gansecki

TerraVerde Renewable Partners LLC

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TURN

M. Hawiger

UCAN

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Service List

R-13-11-005
R-25-04-010

San Diego Gas & Electric Advice Letter 4747-E/3469-G

ATTACHMENT A Appendices from Excel Template

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	\$ 73,400,061	\$ 13,803,410	\$ 3,988,993	\$ -	\$ 91,192,464
2	Commercial Sector	\$ 66,772,241	\$ 7,063,104	\$ 9,294,652	\$ -	\$ 83,129,997
3	Industrial Sector	\$ 20,214,889	\$ 665,728	\$ -	\$ -	\$ 20,880,618
4	Agricultural Sector	\$ 2,703,160	\$ 474,961	\$ -	\$ -	\$ 3,178,121
5	Public Sector	\$ 15,116,273	\$ 1,708,529	\$ -	\$ -	\$ 16,824,801
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ 9,291,809	\$ -	\$ -	\$ 9,291,809
8	WE&T	\$ -	\$ 12,030,637	\$ 815,545	\$ -	\$ 12,846,182
9	Finance	\$ -	\$ 659,149	\$ -	\$ -	\$ 659,149
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 12,241,272	\$ 12,241,272
11	Portfolio Support	\$ 12,159,582	\$ 3,259,990	\$ 962,015	\$ 846,566	\$ 17,228,153
12	OBF Loan Pool ^[2]					\$ -
13	Portfolio Subtotal ^[3]	\$ 190,366,205	\$ 48,957,318	\$ 15,061,206	\$ 13,087,838	\$ 267,472,567

[1] PY 2024 actual expenditures and the PY 2025 budget forecast in SDG&E's 4302-E True Up Advice Letter (TUAL) are used in the updated PY 2024-2027 forecast.

[2] excludes SDG&E's On-Bill Financing (OBF) Loan Pool as it was authorized separately from the EE Program Portfolio budget

[3] excludes Evaluation, Measurement, & Verification (EM&V) and Portfolio Oversight

Table 1.1b - TUAL Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027) - As filed in SDG&E AL 4302-E

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 56,481,296	\$ 16,339,278	\$ 4,116,467	\$ -	\$ 76,937,041
2	Commercial Sector ^[4]	\$ 69,602,109	\$ 13,496,051	\$ 12,948,875	\$ -	\$ 96,047,035
3	Industrial Sector	\$ 15,251,119	\$ 1,516,847	\$ -	\$ -	\$ 16,767,966
4	Agricultural Sector	\$ 3,204,195	\$ 730,366	\$ -	\$ -	\$ 3,934,561
5	Public Sector	\$ 40,313,788	\$ 2,699,304	\$ -	\$ -	\$ 43,013,092
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ 9,919,442	\$ -	\$ -	\$ 9,919,442
8	WE&T	\$ -	\$ 12,577,464	\$ 892,950	\$ -	\$ 13,470,414
9	Finance	\$ -	\$ 968,222	\$ -	\$ -	\$ 968,222
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 12,791,171	\$ 12,791,171
11	Portfolio Support	\$ 13,364,718	\$ 4,217,119	\$ 1,298,296	\$ 926,463	\$ 19,806,596
12	OBF Loan Pool ^[2]					\$ -
13	Portfolio Subtotal ^[3]	\$ 198,217,225	\$ 62,464,092	\$ 19,256,589	\$ 13,717,634	\$ 293,655,541

[2] excludes SDG&E's OBF Loan Pool as it was authorized separately from the EE Program Portfolio budget

[3] excludes EM&V and Portfolio Oversight

[4] includes SDGE3226, which is classified in CEDARS as Commercial, but serves K-12 customers due to the early closure of the K-12 program

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	\$ 16,918,764	\$ (2,535,868)	\$ (127,474)	\$ -	\$ 14,255,422
2	Commercial Sector	\$ (2,829,868)	\$ (6,432,947)	\$ (3,654,223)	\$ -	\$ (12,917,038)
3	Industrial Sector	\$ 4,963,770	\$ (851,119)	\$ -	\$ -	\$ 4,112,652
4	Agricultural Sector	\$ (501,035)	\$ (255,404)	\$ -	\$ -	\$ (756,439)
5	Public Sector	\$ (25,197,515)	\$ (990,775)	\$ -	\$ -	\$ (26,188,290)
6	Cross Cutting Sector					

7	Emerging Tech	\$ -	\$ (627,632)	\$ -	\$ -	\$ (627,632)	
8	WE&T	\$ -	\$ (546,827)	\$ (77,405)	\$ -	\$ (624,232)	
9	Finance	\$ -	\$ (309,073)	\$ -	\$ -	\$ (309,073)	
10	Codes & Standards	\$ -	\$ -	\$ -	\$ (549,899)	\$ (549,899)	
11	Portfolio Support	\$ (1,205,136)	\$ (957,129)	\$ (336,282)	\$ (79,897)	\$ (2,578,443)	
12	OBF Loan Pool ^[2]						\$ -
13	Portfolio Subtotal ^[3]	\$ (7,851,020)	\$ (13,506,774)	\$ (4,195,384)	\$ (629,796)	\$ (26,182,974)	

[2] excludes SDG&E's OBF Loan Pool as it was authorized separately from the EE Program Portfolio budget

[3] excludes EM&V and Portfolio Oversight

Table 1.2a - MCAL Updated 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) 2024 Carryover Funding ^[8]	(f) Unspent & Uncommitted Funds for 2024-2027 Offset ^[6]	(g) Total Cost Recovery Amt
1	San Diego Gas and Electric Company	\$ 267,472,567	\$ 303,086	\$ 3,887,764	\$ 5,279,754	\$ 17,673,440	\$ (35,000,000)	\$ 259,616,612
2	SoCal REN							\$ -
3	3C-REN							\$ -
4	I-REN							\$ -
5	RREN Central ^[7]							\$ -
6	RREN North ^[7]							\$ -
7	Bay-REN (SW Program)	\$ 960,000	\$ -	\$ 11,000	\$ 29,000	\$ -	\$ -	\$ 1,000,000
8	Ava Community Energy							\$ -
9	CleanPowerSF							\$ -
10	Marin Clean Energy							\$ -
11	Peninsula Clean Energy							\$ -
12	Redwood Coast Energy Authority							\$ -
13	SD REN ^[9]	\$ 119,494,429	\$ -	\$ 1,402,438	\$ 3,377,340	\$ -	\$ -	\$ 124,274,207
14	San Jose Clean Energy							\$ -
15	Sonoma Clean Power							\$ -
16	Total	\$ 387,926,996	\$ 303,086	\$ 5,301,202	\$ 8,686,094	\$ 17,673,440	\$ (35,000,000)	\$ 384,890,819
17	Collected 2024 Recovery ^[10]							\$ 42,385,791
18	Expected 2025 Recovery ^[11]							\$ 77,886,388
19	Remaining Cost Recovery							\$ 264,618,640

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

[6] Unspent and uncommitted funds that were used to offset program year 2024 cost recovery as filed in SDG&E Advice Letters 4291-E & 3245-G.

[7] D.24.09-031 split Rural REN into Rural REN North and Rural REN Central.

[8] Unspent funds from Program Year 2024 will be carried forward and made available for use during Program Years 2025 through 2027, within the current funding cycle.

[9] SD REN budgets were authorized in D.24-08-003 after SDG&E's TUAL 4302-E was approved.

[10] As filed in SDG&E Public Purpose Programs Rates Advice Letters 4291-E & 3245-G.

[11] As filed in SDG&E Public Purpose Programs Rates Advice Letters 4504-E & 3358-G.

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) 2024 Carryover Funding ^[8]	(f) Unspent & Uncommitted Funds for 2024-2027 Offset ^[6]	(g) Total Cost Recovery Amt
1	San Diego Gas and Electric Company	\$ 293,655,541	\$ 372,800	\$ 4,894,259	\$ 7,341,389	\$ -	\$ (34,000,000)	\$ 272,263,988
2	SoCal REN							\$ -
3	3C-REN							\$ -
4	I-REN							\$ -
5	RREN Central ^[7]							\$ -

6	RREN North ^[7]							\$ -
7	Bay-REN (SW Program)	\$ 960,000	\$ -	\$ 11,000	\$ 29,000	\$ -	\$ -	\$ 1,000,000
8	Ava Community Energy							\$ -
9	CleanPowerSF							\$ -
10	Marin Clean Energy							\$ -
11	Peninsula Clean Energy							\$ -
12	Redwood Coast Energy Authority							\$ -
13	SD REN ^[9]	\$ 119,494,429	\$ -	\$ 1,314,439	\$ 3,465,339	\$ -	\$ -	\$ 124,274,207
14	San Jose Clean Energy							\$ -
15	Sonoma Clean Power							\$ -
16	Total	\$ 414,109,970	\$ 372,800	\$ 6,219,698	\$ 10,835,728	\$ -	\$ (34,000,000)	\$ 397,538,195

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

[6] Forecasted unspent and uncommitted funds to be used to offset program year 2024 cost recovery as filed in SDG&E True UP Advice Letter 4302-E.

[7] D.24.09-031 split Rural REN into Rural REN North and Rural REN Central

[8] Unspent funds from program year 2024 will be carried forward and made available for use during program years 2025 through 2027, within the current funding cycle.

[9] SD REN budgets were authorized in D.24-08-003 after SDG&E's TUAL 4302-E was approved.

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) 2024 Carryover Funding ^[8]	(f) Unspent & Uncommitted Funds for 2024-2027 Offset ^[6]	(g) Total Cost Recovery Amt
1	San Diego Gas and Electric Company	\$ (26,182,974)	\$ (69,714)	\$ (1,006,495)	\$ (2,061,634)	\$ 17,673,440	\$ (1,000,000)	\$ (12,647,377)
2	SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	RREN Central ^[7]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	RREN North ^[7]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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 ^[9]	\$ -	\$ -	\$ 87,999	\$ (87,999)	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Total	\$ (26,182,974)	\$ (69,714)	\$ (918,496)	\$ (2,149,633)	\$ 17,673,440	\$ (1,000,000)	\$ (12,647,377)

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

[6] Unspent and uncommitted funds that were used to offset collection of program year 2024 cost recovery as filed in SDG&E Advice Letters 4291E & 3245G.

[7] D.24.09-031 split Rural REN into Rural REN North and Rural REN Central.

[8] Unspent funds from program year 2024 will be carried forward and made available for use during program years 2025 through 2027, within the current funding cycle.

[9] SD REN budgets were authorized in D.24-08-003 after SDG&E's TUAL was approved.

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

Line	Spending Budget & Cost Recovery Request	Pre-2024 Unspent & Uncommitted Funds for Offset	2024	2025	2026	2027	2024-2027
1	IOU (excluding fuel substitution budget)		\$ 52,161,673	\$ 74,467,516	\$ 66,489,250	\$ 67,487,310	\$ 260,605,749
2	IOU Budget forecasted to support fuel sub ^[12]		\$ 6,769,744	\$ 3,424,871	\$ 3,854,888	\$ 2,287,919	\$ 16,337,422
3	2024 Carryover Funding ^[8]		\$ 17,673,440				

4	Total cost recovery request for IOU portfolio (excluding offset)		\$ 76,604,857	\$ 77,892,388	\$ 70,344,138	\$ 69,775,229	\$ 294,616,612
5	IOU Pre-2024 Estimated Unspent & Uncommitted Funds to Offset 2024 Cost Recovery	\$ (35,000,000)	\$ -	\$ -	\$ -	\$ -	\$ (35,000,000)
6	Total Cost Recovery Request for IOU Portfolio (including offset)	\$ (35,000,000)	\$ 76,604,857	\$ 77,892,388	\$ 70,344,138	\$ 69,775,229	\$ 259,616,612
7	Applicable electric split	89%	60%	60%	54%	55%	
8	Applicable gas split	11%	40%	40%	46%	45%	
9	Electric portion for cost recovery ^[13] (excluding fuel sub budget)	\$ (31,000,000)	\$ 41,901,068	\$ 44,680,510	\$ 35,904,195	\$ 37,118,020	\$ 128,603,793
10	Fuel sub applicable electric split		100%	100%	100%	100%	
11	Electric portion for cost recovery (fuel sub budget)	\$ -	\$ 6,769,744	\$ 3,424,871	\$ 3,854,888	\$ 2,287,919	\$ 16,337,422
12	Total electric portion for cost recovery for IOU portfolio ^[13]	\$ (31,000,000)	\$ 48,670,812	\$ 48,105,381	\$ 39,759,083	\$ 39,405,940	\$ 144,941,215
13	Total Gas portion for cost recovery for IOU portfolio ^[14]	\$ (4,000,000)	\$ 27,934,045	\$ 29,787,007	\$ 30,585,055	\$ 30,369,289	\$ 114,675,396
14	Electric split (with fuel sub) ^[15]		64%	62%	57%	56%	
15	Gas split (with fuel sub) ^[15]		36%	38%	43%	44%	

[8] Unspent funds from program year 2024 will be carried forward and made available for use during program years 2025 through 2027, within the current funding cycle.

[12] 2024 expenditures reported herein were revised in order to true up the gas and electric expenditures for fuel substitution projects in the IOUs statewide programs. This is pursuant to Decision 19-08-009, Ordering Paragraph 5, which stipulates that fuel substitution measures and their associated program costs shall be borne by the ratepayers of the new fuel, rather than by the ratepayers of the fuel being replaced.

[13] Pre-2024 unspent and uncommitted electric funds of \$31 million that were applied to offset program year 2024 cost recovery as filed in SDG&E Advice Letter 4291-E.

[14] Pre-2024 unspent and uncommitted gas funds of \$4 million that were applied to offset program year 2024 cost recovery as filed in SDG&E Advice Letter 3245-G.

[15] The electric and gas splits with fuel substitution are based on the electric and gas portions of the cost recovery after accounting for fuel substitution actuals cost for program year 2024 and the budget forecast for program years 2025-2027.

Table 1.4 Prior Years Unspent Funds as of 2024 (RENS/CCAs and IOUs) ^[11]

Line		PY 2017	PY 2018	PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024	TOTAL 2017-2024
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	PA Funds									\$ -
8	Total									\$ -

[11] SDG&E did not forecast unspent and uncommitted funds as of 2024 to offset 2025 cost recovery.

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

Year	PG&E		SDG&E ^[9]		SCE	SCG
	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2024			\$ 9,511,632	\$ 6,341,088		
2025			\$ 19,653,441	\$ 13,102,294		
2026			\$ 21,618,786	\$ 14,412,524		
2027			\$ 23,780,665	\$ 15,853,777		
Total	\$ -	\$ -	\$ 74,564,524	\$ 49,709,683	\$ -	\$ -

[9] Table 2 in D.24-08-003 authorizes SD REN's annual electric and gas amounts for collection by SDG&E, as the fiscal agent for SDREN.

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

Line	Year	2024 Reported Expenditures	2024 Carryover Funding ^[8]	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset ^[6]	2024-2027 Funding Total ^[15]
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1	2024	\$ 58,931,416	\$ 17,673,440				\$ (35,000,000)	\$ 41,604,857
2	2025			\$ 77,892,388				\$ 77,892,388
3	2026				\$ 70,344,138			\$ 70,344,138
4	2027					\$ 69,775,229		\$ 69,775,229

[6] Unspent and uncommitted funds that were used to offset collection of program year 2024 cost recovery as filed in SDG&E Advice Letters 4291E & 3245G.

[8] Unspent funds from program year 2024 will be carried forward and made available for use during program years 2025 through 2027, within the current funding cycle.

[15] Total funding excludes REN/CCA funding.

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	\$ 50,410,731	\$ 85,483,270	\$ 61,572,392	\$ 63,498,819	\$ 260,965,213
2	Market Support	\$ 115,048	\$ 13,982,823	\$ 1,047,472	\$ 1,330,029	\$ 16,475,373
3	Equity	\$ 3,937	\$ 798,186	\$ 12,775	\$ 19,556	\$ 834,453
4	Total TSB Forecast	\$ 50,529,716	\$ 100,264,280	\$ 62,632,639	\$ 64,848,404	\$ 278,275,039
5	CPUC TSB Goal	\$ 45,004,630	\$ 45,267,492	\$ 65,431,025	\$ 72,006,151	\$ 227,709,298
6	TSB Forecast / TSB Goal ^[1]	112%	221%	96%	90%	122%

[1] TSB goal set in decision 25-08-034

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	\$ 73,258,988	\$ 85,483,270	\$ 86,400,300	\$ 94,376,583	\$ 339,519,142
2	Market Support	\$ 7,989,315	\$ 13,982,823	\$ 15,376,506	\$ 15,915,710	\$ 53,264,354
3	Equity	\$ 507,832	\$ 798,186	\$ 839,153	\$ 589,223	\$ 2,734,395
4	Total TSB Forecast	\$ 81,756,135	\$ 100,264,280	\$ 102,615,958	\$ 110,881,516	\$ 395,517,890
5	CPUC TSB Goal	\$ 45,004,630	\$ 45,267,492	\$ 45,878,572	\$ 47,996,979	\$ 184,147,673
6	TSB Forecast / TSB Goal ^[2]	182%	221%	224%	231%	215%

[2] TSB goal set in decision 23-08-005

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	\$ (22,848,257)	\$ -	\$ (24,827,908)	\$ (30,877,764)	\$ (78,553,929)
2	Market Support	\$ (7,874,266)	\$ -	\$ (14,329,033)	\$ (14,585,681)	\$ (36,788,980)
3	Equity	\$ (503,896)	\$ -	\$ (826,378)	\$ (569,667)	\$ (1,899,941)
4	Total TSB Forecast	\$ (31,226,419)	\$ -	\$ (39,983,320)	\$ (46,033,112)	\$ (117,242,850)
5	CPUC TSB Goal	\$ -	\$ -	\$ 19,552,453	\$ 24,009,172	\$ 43,561,625
6	TSB Forecast / TSB Goal ^[3]	-69%	0%	-128%	-141%	-93%

[3] Difference in % of goals achieved from the TUAL to the MCAL

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]	251	214	174	156	794
2	GWh CPUC Target ^[1]	219	207	163	146	735
3	GWh Forecast/Target	114%	104%	106%	107%	108%
4	MW Forecast	51	43	35	32	161
5	MW CPUC Target ^[1]	38	36	28	24	126
6	MW Forecast/Target	134%	121%	127%	133%	128%
7	MMThm Forecast	3	2	2	2	8
8	MMThm CPUC Target ^[1]	2	2	1	1	6

9	<i>MMThm Forecast/Target</i>	109%	91%	245%	205%	133%
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[1] TSB goal set in decision 25-08-034

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]	228	214	200	182	824
2	GWh CPUC Target ^[2]	219	207	202	186	814
3	<i>GWh Forecast/Target</i>	104%	104%	99%	98%	101%
4	MW Forecast	45	43	41	37	166
5	MW CPUC Target ^[2]	38	36	35	32	141
6	<i>MW Forecast/Target</i>	118%	121%	116%	116%	118%
7	MMThm Forecast	2	2	2	2	8
8	MMThm CPUC Target ^[2]	2	2	2	2	8
9	<i>MMThm Forecast/Target</i>	96%	91%	120%	100%	100%

[2] TSB goal set in decision 23-08-005

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]	22	-	(26)	(26)	(30)
2	GWh CPUC Target ^[3]	-	-	(39)	(40)	(79)
3	<i>GWh Forecast/Target</i>	10%	0%	7%	9%	7%
4	MW Forecast	6	-	(5)	(5)	(5)
5	MW CPUC Target ^[3]	-	-	(7)	(8)	(15)
6	<i>MW Forecast/Target</i>	16%	0%	11%	16%	11%
7	MMThm Forecast	0	-	0	0	1
8	MMThm CPUC Target ^[3]	-	-	(1)	(1)	(1)
9	<i>MMThm Forecast/Target</i>	13%	0%	125%	105%	33%

[3] Difference in % of goals achieved from the TUAL to the MCAL

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual ⁶	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 42,424,588	\$ 50,019,516	\$ 49,751,616	\$ 48,170,486	\$ 190,366,205
2	Market Support	\$ 10,475,401	\$ 15,956,710	\$ 10,736,848	\$ 11,788,358	\$ 48,957,318
3	Equity	\$ 2,329,994	\$ 5,325,984	\$ 3,721,127	\$ 3,684,101	\$ 15,061,206
4	Codes and Standards	\$ 3,236,996	\$ 3,379,251	\$ 3,225,549	\$ 3,246,042	\$ 13,087,838
5	EM&V (PA and ED)	\$ 458,952	\$ 3,111,728	\$ 2,809,798	\$ 2,787,041	\$ 9,167,518
6	Total Budget w/o OBF Loan Pool	\$ 58,925,930	\$ 77,793,188	\$ 70,244,938	\$ 69,676,029	\$ 276,640,085
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					23%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 58,925,930	\$ 77,793,188	\$ 70,244,938	\$ 69,676,029	\$ 276,640,085
10	ED Portfolio Oversight ^[5]	\$ 5,486	\$ 99,200	\$ 99,200	\$ 99,200	\$ 303,086
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 58,931,416	\$ 77,892,388	\$ 70,344,138	\$ 69,775,229	\$ 276,943,171

12	Approved Budget Cap ^[4]		\$	308,543,164
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[4] Decision 23-06-055, OP5

[5] SDG&E has corrected its ED Portfolio Oversight allocation for years 2025-2027, which differs from its TUAL filing.

[6] PY2024 actuals reflect expenditures charged against the PY2024 budget, excluding any 2024 expenditures from pre-2024 budgets (commitments).

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 51,083,962	\$ 50,019,516	\$ 48,149,459	\$ 48,964,288	\$ 198,217,225
2	Market Support	\$ 14,755,302	\$ 15,956,710	\$ 15,849,921	\$ 15,902,159	\$ 62,464,092
3	Equity	\$ 4,314,606	\$ 5,325,984	\$ 5,376,563	\$ 4,239,437	\$ 19,256,589
4	Codes and Standards	\$ 3,297,320	\$ 3,379,251	\$ 3,472,392	\$ 3,568,671	\$ 13,717,634
5	EM&V (PA and ED)	\$ 3,060,466	\$ 3,111,728	\$ 3,035,347	\$ 3,028,106	\$ 12,235,648
6	Total Budget w/o OBF Loan Pool	\$ 76,511,657	\$ 77,793,188	\$ 75,883,682	\$ 75,702,662	\$ 305,891,188
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					27%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 76,511,657	\$ 77,793,188	\$ 75,883,682	\$ 75,702,662	\$ 305,891,188
10	ED Portfolio Oversight	\$ 93,200	\$ 93,200	\$ 93,200	\$ 93,200	\$ 372,800
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 76,604,857	\$ 77,886,388	\$ 75,976,882	\$ 75,795,862	\$ 306,263,988

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ (8,659,374)	\$ -	\$ 1,602,156	\$ (793,802)	\$ (7,851,020)
2	Market Support	\$ (4,279,901)	\$ -	\$ (5,113,072)	\$ (4,113,800)	\$ (13,506,774)
3	Equity	\$ (1,984,612)	\$ -	\$ (1,655,436)	\$ (555,335)	\$ (4,195,384)
4	Codes and Standards	\$ (60,324)	\$ -	\$ (246,843)	\$ (322,630)	\$ (629,796)
5	EM&V (PA and ED)	\$ (2,601,514)	\$ -	\$ (225,550)	\$ (241,065)	\$ (3,068,129)
6	Total Budget w/o OBF Loan Pool	\$ (17,585,727)	\$ -	\$ (5,638,744)	\$ (6,026,632)	\$ (29,251,103)
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					-4%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (17,585,727)	\$ -	\$ (5,638,744)	\$ (6,026,632)	\$ (29,251,103)
10	ED Portfolio Oversight	\$ (87,714)	\$ 6,000	\$ 6,000	\$ 6,000	\$ (69,714)
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (17,673,440)	\$ 6,000	\$ (5,632,744)	\$ (6,020,632)	\$ (29,320,817)

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.12	1.29	0.48
2		Market Support	0.37	0.43	0.38
3		Equity	0.06	0.06	0.05
4		Codes and Standards (C&S)	1.79	66.38	0.97
5	Portfolio	<i>Including</i> C&S	1.45	4.01	0.75
6		<i>Excluding</i> C&S	0.92	1.05	0.45

[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	1.34	1.62	0.64
2		Market Support	0.79	1.02	0.82
3		Equity	0.14	0.14	0.14
4		Codes and Standards (C&S)	2.30	59.89	40.09
5	Portfolio	<i>Including</i> C&S	1.74	4.10	1.91
6		<i>Excluding</i> C&S	1.17	1.41	0.65

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	(0.22)	(0.33)	(0.16)
2		Market Support	(0.42)	(0.59)	(0.43)
3		Equity	(0.09)	(0.09)	(0.08)
4		Codes and Standards (C&S)	(0.50)	6.49	(39.12)
5	Portfolio	<i>Including</i> C&S	(0.29)	(0.10)	(1.16)
6		<i>Excluding</i> C&S	(0.25)	(0.36)	(0.20)

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
			Base	High	Base	High	Base	High
1	Segment	Resource Acquisition	1.43	1.45	1.47	1.50	1.45	1.48
2		Market Support	0.16	0.16	0.16	0.16	0.16	0.16
3		Equity	0.00	0.01	0.01	0.01	0.01	0.01
4		Codes and Standards (C&S)	2.52	2.59	2.41	2.46	2.47	2.53
5	Portfolio	<i>Including</i> C&S	1.98	2.03	1.92	1.96	1.95	2.00
6		<i>Excluding</i> C&S	1.16	1.18	1.16	1.18	1.16	1.18

Table 4.1 - 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]	\$ 57,818,835	\$ 276,640,085	21%	20%
2	Third-party ^[2]	\$ 206,239,661	\$ 276,640,085	75%	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

Table 4.2 - Market Support & Equity Segment Budget 2024-2027

Line	Segment	Qualifying Budget	Total Budget ^[3]	% of Budget	Cap (IOU and ATA CCA only)
1	Market Support	\$ 48,957,318	\$ 276,640,085	18%	30%
	Equity	\$ 15,061,206	\$ 276,640,085	5%	
2	Market Support + Equity	\$ 64,018,524	\$ 276,640,085	23%	

[3] Does not include OBF Loan Pool or ED Portfolio Oversight

Appendix 1 - 2024 - 2027 Program Portfolio Budget and Targets

(a) Program ID	(b) Program Name	(c) Target Exempt	(d) Program Type	(e) Business Sector	(f) Portfolio Segment	(g) Budget	(h) TSB	(i) GWh	(j) MW	(k) MMTWh	(l) Budget	(m) TSB	(n) GWh	(o) MW	(p) MMTWh	(q) Budget	(r) TSB	(s) GWh	(t) MW	(u) MMTWh	(v) Change Notes
SDGE3226	SW-COM Direct Install	No	Core PA	Commercial	Resource Acquisition	\$ 570,026	\$ 570,007	(0.15)	-	0.063	\$ 2,435,895	\$ 3,281,589	2.81	0.28	0.022	\$ (1,865,869)	\$ (2,711,582)	(2.97)	(0.28)	0.041	Refer to footnote 2. Requesting closure in this MCAL filing.
SDGE3251	SW C&S - Compliance Enhancement	Yes	Core PA	Codes and Standards	Codes and Standards	\$ 2,304,708	\$ -	-	-	-	\$ 3,230,503	\$ -	-	-	-	\$ (925,795)	\$ -	-	-	-	Refer to footnote 2.
SDGE3252	SW C&S - Reach Codes	Yes	Core PA	Codes and Standards	Codes and Standards	\$ 1,960,219	\$ -	-	-	-	\$ 1,688,731	\$ -	-	-	-	\$ 271,487	\$ -	-	-	-	Refer to footnote 2.
SDGE3253	SW C&S - Planning Coordination	Yes	Core PA	Codes and Standards	Codes and Standards	\$ 1,460,725	\$ -	-	-	-	\$ 1,226,171	\$ -	-	-	-	\$ 234,554	\$ -	-	-	-	Refer to footnote 2.
SDGE3262	SW-FIN-On-Bill Finance	Yes	Core PA	Finance	Market Support	\$ 659,149	\$ -	-	-	-	\$ 968,222	\$ -	-	-	-	\$ (309,073)	\$ -	-	-	-	Refer to footnote 2.
SDGE3280	3P-IDEA	Yes	Core PA	Commercial	Market Support	\$ 3,396,724	\$ -	-	-	-	\$ 7,093,897	\$ -	-	-	-	\$ (3,697,173)	\$ -	-	-	-	Refer to footnote 2.
SDGE3281	EM&V-Evaluation Measurement & Verification	No	Core PA	Evaluation Measurement and Verification	Evaluation Measurement and Verification	\$ 9,167,518	\$ -	-	-	-	\$ 12,235,648	\$ -	-	-	-	\$ (3,068,129)	\$ -	-	-	-	Refer to footnote 2.
SDGE4001	Single Family Program	No	Local Third Party	Residential	Resource Acquisition	\$ 7,060,322	\$ 6,437,580	2.22	3.09	0.160	\$ 7,101,044	\$ 7,091,018	1.20	4.24	0.405	\$ (40,722)	\$ (653,438)	1.02	(1.14)	(0.246)	Refer to footnote 2.
SDGE4002	Multi Family Program	No	Local Third Party	Residential	Resource Acquisition	\$ 34,990,527	\$ 36,486,973	8.14	6.97	1.537	\$ 19,348,531	\$ 22,222,987	8.46	9.35	0.665	\$ 15,641,996	\$ 14,263,985	(0.32)	(2.38)	0.872	Refer to footnote 2.
SDGE4004	Commercial Large Customer Services (>20KW) Program	No	Local Third Party	Commercial	Resource Acquisition	\$ 6,339,792	\$ 6,188,222	(5.36)	(0.04)	0.925	\$ 6,635,029	\$ 7,255,960	1.20	0.29	0.613	\$ (295,239)	\$ 912,263	(6.56)	(0.32)	0.311	Refer to footnote 2.
SDGE4006	Industrial Sector Program	No	Local Third Party	Industrial	Resource Acquisition	\$ 20,214,889	\$ 23,393,173	33.52	4.09	0.960	\$ 15,251,119	\$ 31,302,174	31.76	3.36	0.889	\$ 4,963,770	\$ (7,909,001)	1.76	0.73	0.271	Refer to footnote 2.
SDGE4009	Agricultural Growers Services Program	No	Local Third Party	Agricultural	Resource Acquisition	\$ 2,703,160	\$ 3,172,408	1.69	0.21	0.295	\$ 3,204,195	\$ 3,382,591	2.28	0.35	0.187	\$ (501,035)	\$ (210,183)	(0.59)	(0.14)	0.107	Refer to footnote 2.
SDGE4010	Local Government Customers Program	No	Local Third Party	Public	Resource Acquisition	\$ 4,032,009	\$ 5,206,420	4.59	0.39	0.056	\$ 12,023,986	\$ 23,115,024	15.87	2.12	0.449	\$ (7,991,976)	\$ (17,908,604)	(11.28)	(1.73)	(0.394)	Refer to footnote 2. Program closed in 2024.
SDGE4011	K-12 Customer Services Program	No	Local Third Party	Public	Resource Acquisition	\$ 2,068,591	\$ 1,543,970	1.40	0.15	0.004	\$ 5,796,041	\$ 4,459,447	4.00	0.42	0.013	\$ (3,727,450)	\$ (2,915,476)	(2.60)	(0.27)	(0.009)	Refer to footnote 2. Program closed in 2024.
SDGE4012	Federal Customer Services Program	No	Local Third Party	Public	Resource Acquisition	\$ 5,705,302	\$ 6,180,913	5.74	0.27	0.108	\$ 16,191,913	\$ 26,350,426	21.71	1.94	0.543	\$ (12,486,610)	\$ (20,169,513)	(15.97)	(1.67)	(0.435)	Refer to footnote 2. Requesting closure in this MCAL filing.
SDGE4040	DSM Local Residential Behavioral Program (EE)	No	Local Third Party	Residential	Resource Acquisition	\$ 18,555,000	\$ 26,262,033	133.03	26.16	4.125	\$ 18,594,215	\$ 34,031,558	205.57	34.80	3.440	\$ (39,214)	\$ (7,769,525)	(72.55)	(8.63)	(0.685)	Refer to footnote 2.
SDGE4168	Lodging (Hotels/Motels)	No	Local Third Party	Commercial	Resource Acquisition	\$ 4,452,540	\$ 6,592,295	8.56	1.26	0.051	\$ 2,420,240	\$ 7,271,971	6.07	0.70	0.107	\$ 2,032,300	\$ (679,676)	2.49	0.55	(0.055)	Refer to footnote 2.
SDGE4169	Groceries, Restaurants and Food Storage	No	Local Third Party	Commercial	Resource Acquisition	\$ 6,822,728	\$ 12,904,608	18.74	2.20	0.129	\$ 6,511,266	\$ 23,191,263	16.88	1.70	0.306	\$ 311,462	\$ (10,286,655)	2.39	0.50	(0.177)	Refer to footnote 2.
SDGE4170	Wholesale/Retail/Office, including Entertainment Services	No	Local Third Party	Commercial	Resource Acquisition	\$ 17,273,066	\$ 28,506,759	15.74	1.61	0.846	\$ 15,837,472	\$ 35,200,075	28.09	3.39	0.591	\$ 1,435,595	\$ (6,693,317)	(12.35)	(1.78)	0.255	Refer to footnote 2.
SDGE4171	Private Institutions/Healthcare	No	Local Third Party	Commercial	Resource Acquisition	\$ 4,646,512	\$ 9,658,524	9.14	1.06	0.280	\$ 4,996,736	\$ 14,624,226	12.41	1.28	0.198	\$ (350,223)	\$ (4,965,702)	(3.27)	(0.22)	0.081	Refer to footnote 2.
SDGE4172	Small Business Outreach	No	Local Third Party	Commercial	Equity	\$ 9,294,652	\$ 834,453	0.17	0.02	0.049	\$ 12,948,875	\$ 2,734,395	0.55	0.05	0.158	\$ (3,654,223)	\$ (1,899,941)	(0.38)	(0.03)	(0.108)	Refer to footnote 2.
SDGE4174	Workforce, Education & Training Programs	Yes	Local Third Party	Workforce Education and Training	Market Support	\$ 11,594,946	\$ -	-	-	-	\$ 12,121,508	\$ -	-	-	-	\$ (526,562)	\$ -	-	-	-	Refer to footnote 2.
SDGE4175	Local Residential Fuel-Substitution	Yes	Core PA	Residential	Market Support	\$ 3,439,970	\$ 888,718	(0.75)	-	0.100	\$ 3,669,752	\$ 2,662,900	(2.31)	-	0.279	\$ (229,782)	\$ (1,774,182)	1.56	-	(0.178)	Refer to footnote 2.
SDGE4176	Residential Equity Program	Yes	Local Third Party	Residential	Equity	\$ 3,988,993	\$ -	-	-	-	\$ 4,116,467	\$ -	-	-	-	\$ (127,474)	\$ -	-	-	-	Refer to footnote 2.
SDGE4184	Non-Residential Behavioral Program	Yes	Local Third Party	Commercial	Market Support	\$ 1,651,040	\$ 1,300,861	10.57	1.21	-	\$ 4,591,588	\$ 5,151,758	41.10	4.69	-	\$ (2,940,548)	\$ (3,850,897)	(30.53)	(3.49)	-	Refer to footnote 2. Requesting closure in this MCAL filing.
SDGE4197	Core Market Access Program - Residential	No	Core PA	Residential	Resource Acquisition	\$ 1,280,019	\$ 938,305	0.55	0.77	-	\$ 3,103,362	\$ 3,678,292	2.16	2.70	-	\$ (1,823,363)	\$ (2,739,977)	(1.61)	(1.92)	-	This program is being replaced by program 4201. Requesting closure in this MCAL filing.
SDGE4198	Core Market Access Program - Commercial	No	Core PA	Commercial	Resource Acquisition	\$ 2,829,076	\$ 3,335,996	3.17	0.38	-	\$ 8,180,997	\$ 12,870,733	12.20	1.53	-	\$ (5,351,920)	\$ (9,534,738)	(9.04)	(1.15)	-	This program is being replaced by program 4202. Requesting closure in this MCAL filing.
SDGE4201	Market Access Program - Residential	No	Local Third Party	Residential	Resource Acquisition	\$ 757,158	\$ 546,204	0.06	0.04	0.025	\$ -	\$ -	-	-	-	\$ 757,158	\$ 546,204	0.06	0.04	0.025	This program replaced program 4197, following completion of a third-party solicitation.
SDGE4202	Market Access Program - Commercial	No	Local Third Party	Commercial	Resource Acquisition	\$ 4,154,114	\$ 4,632,420	6.74	1.00	-	\$ -	\$ -	-	-	-	\$ 4,154,114	\$ 4,632,420	6.74	1.00	-	This program replaced program 4198, following completion of a third-party solicitation.
SDGE_SW_CSA_Appl	SW Codes & Standards Advocacy - State Appliance Standards	Yes	SW Third Party	Codes and Standards	Codes and Standards	\$ 864,693	\$ 163,919,798	179.03	25.57	2.122	\$ 1,115,703	\$ 171,249,105	210.17	29.12	2.028	\$ (251,010)	\$ (7,329,308)	(31.14)	(3.55)	0.095	Revised forecasts were provided by the Statewide Lead PA.
SDGE_SW_CSA_Appl_PA	SW Codes & Standards Advocacy - State Appliance Standards (Utility)	Yes	Core PA	Codes and Standards	Codes and Standards	\$ 210,564	\$ -	-	-	-	\$ 242,302	\$ -	-	-	-	\$ (31,737)	\$ -	-	-	-	Refer to footnote 2.
SDGE_SW_CSA_Bldg	SW Codes & Standards Advocacy - State Building Codes	Yes	SW Third Party	Codes and Standards	Codes and Standards	\$ 2,959,498	\$ 542,996,128	403.35	78.38	5.717	\$ 3,015,321	\$ 519,906,011	423.41	87.60	5.152	\$ (55,314)	\$ 23,090,117	(20.06)	(9.23)	0.565	Revised forecasts were provided by the Statewide Lead PA.
SDGE_SW_CSA_Bldg_PA	SW Codes & Standards Advocacy - State Building Codes (Utility)	Yes	Core PA	Codes and Standards	Codes and Standards	\$ 275,593	\$ -	-	-	-	\$ 340,466	\$ -	-	-	-	\$ (64,883)	\$ -	-	-	-	Refer to footnote 2.
SDGE_SW_CSA_Natl	SW Codes & Standards Advocacy - National Codes & Standards Advocacy	Yes	SW Third Party	Codes and Standards	Codes and Standards	\$ 1,999,156	\$ 161,810,648	211.74	57.31	0.646	\$ 1,695,597	\$ 130,382,600	190.18	49.21	0.531	\$ 303,559	\$ 31,428,048	21.56	8.09	0.115	Revised forecasts were provided by the Statewide Lead PA.
SDGE_SW_CSA_Natl_PA	SW Codes & Standards Advocacy - National Codes & Standards Advocacy (Utility)	Yes	Core PA	Codes and Standards	Codes and Standards	\$ 206,137	\$ -	-	-	-	\$ 236,378	\$ -	-	-	-	\$ (30,241)	\$ -	-	-	-	Refer to footnote 2.
SDGE_SW_ETP_Elec	SW Emerging Technologies - Electric	Yes	SW Third Party	Emerging Technologies	Market Support	\$ 6,279,878	\$ -	-	-	-	\$ 6,507,496	\$ -	-	-	-	\$ (227,618)	\$ -	-	-	-	Revised forecasts were provided by the Statewide Lead PA.
SDGE_SW_ETP_Elec_PA	SW Emerging Technologies - Electric (Utility)	Yes	Core PA	Emerging Technologies	Market Support	\$ 1,189,687	\$ -	-	-	-	\$ 1,606,287	\$ -	-	-	-	\$ (416,599)	\$ -	-	-	-	Refer to footnote 2.
SDGE_SW_ETP_Gas	SW Emerging Technologies - Gas	Yes	SW Third Party	Emerging Technologies	Market Support	\$ 1,649,524	\$ -	-	-	-	\$ 1,584,000	\$ -	-	-	-	\$ 65,524	\$ -	-	-	-	Revised forecasts were provided by the Statewide Lead PA.
SDGE_SW_ETP_Gas_PA	SW Emerging Technologies - Gas (Utility)	Yes	Core PA	Emerging Technologies	Market Support	\$ 172,720	\$ -	-	-	-	\$ 221,659	\$ -	-	-	-	\$ (48,939)	\$ -	-	-	-	Refer to footnote 2.
SDGE_SW_FS	SW Foodservice Point of Sale Program	No	SW Third Party	Commercial	Resource Acquisition	\$ 8,242,488	\$ 15,942,780	3.28	0.49	0.847	\$ 8,323,200	\$ 13,885,738	3.44	0.69	0.768	\$ (80,712)	\$ 2,057,042	(0.16)	(0.19)	0.079	Revised forecasts were provided by the Statewide Lead PA.
SDGE_SW_FS_PA	SW Foodservice Point of Sale Program (Utility)	No	Core PA	Commercial	Resource Acquisition	\$ 32,616	\$ -	-	-	-	\$ 28,771	\$ -	-	-	-	\$ 3,					

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

		Expenditures			Cap & Target Performance		
Line	Budget Category	(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]	\$ 23,931,753		\$ 23,931,753	8.7%	10.0%	
3	Non-PA Third Party & Partnership ^[2]	\$ 25,013	\$ 12,014,642	\$ 12,039,655	4.4%		10.0%
4	PA & Non-PA Target Exempt Programs ^[3]	\$ 11,430,187	\$ 1,632,371	\$ 13,062,558			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 628,795	\$ 8,473,851	\$ 9,102,647	3.3%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 2,969,572	\$ 81,396,796	\$ 84,366,368			
9	Non Incentives and Non Rebates	\$ 13,273,981	\$ 79,923,429	\$ 93,197,411	33.7%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)	\$ 8,973,605	\$ 22,798,571	\$ 31,772,176			
11	EM&V Costs (PA and ED) ^[4]	\$ 9,167,518	\$ -	\$ 9,167,518	3.3%	4.0%	
11a	EM&V - PA	\$ 3,887,764		\$ 3,887,764			
11b	EM&V - ED	\$ 5,279,754		\$ 5,279,754			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 70,400,425	\$ 206,239,661	\$ 276,640,085			
13	Total Third-Party Qualifying Costs ^[5]		\$ 206,239,661		74.6%		60.0%
14	OBF Loan Pool Addition	\$ -		\$ -			
15	PA Spending Budget Request (excluding ED Portfolio Oversight)			\$ 276,640,085			
16	ED Portfolio Oversight ^[7]	\$ 303,086		\$ 303,086			
17	Multi-DER IDSM ^[8]	\$ -				2.5%	
19	PA Spending Budget Request ^[9]			\$ 276,943,171			

[1] IOU administrative costs (excluding non-IOU, third party and/or government partnership programs, and target exempt programs) are limited to 10% of total EE budgets based on D.09-09-047.

[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 are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Financing (including On-Bill Financing, but excluding OBF loan amounts), 3P-IDEEA, SW HVAC QI/QM, Local Residential Fuel Substitution, Residential Equity, Non-Residential Behavioral, and Codes & Standards programs.

[4] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include ED Portfolio Oversight, REN or CCAs EM&V budget. The EM&V budget is 4% of the IOU Spending Budget Request excluding any budget of ED Portfolio Oversight, RENs and CCAs.

[5] IOU's Third-Party Implementer Qualifying Costs (as defined per D.16-08-019, OP 10) includes third-party expenditures and forecasted budgets as well as statewide third-party expenditures and forecasted budgets. The total excludes all associated IOU expenditures and budgets. Calculation of (d) Percent of Budget for Third-Party Implementer Contracts uses PA Spending Budget Request of \$276,640,085 as its denominator.

[6] With the exception of Third Party Implementer Contracts as noted in footnote [5], calculation of (d) Percent of Budget uses \$276,640,085 as the denominator; equal to line 15 PA Budget Spending Request.

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

[8] 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.

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

	Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	(PA Response)	PA Response Notes	Proposed RTR Implementation				
CALMAC ID	Study Name	Recommendations	If incorrect, please indicate and redirect in notes.	Choose:	Examples:	Next Steps: For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines. For each rejected recommendation, document the reason provided for rejection. Outline any potential follow-up actions or considerations for the future.	Timeline: Set deadlines for the completion of each action. Include a start date and end date when possible.	Status: Track the status of each action item (e.g., Not Started, In Progress, Completed).	Notes: Add notes for any additional information or updates.	Impacted Programs: Identify which programs (program IDs) would be impacted by the action items.
Overall conclusions and recommendations						Proposed Next Steps				
CPU0367.01	PY 2018 - 2021 Forward-looking Smart Thermostat Study	There are program opportunities to increase smart thermostat penetration in households with air-conditioning in hot climate zones. Programs should aim to expand the penetration of smart thermostats that can operate as part of a "fleet" serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid.	SCE							
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	To increase the effectiveness and adoption of the online coupon tool, the Program implementer should enhance awareness and promotion of the tool among contractors. This could include targeted communication campaigns, training sessions on how to use the tool, and demonstrating the benefits and ease of purchasing equipment from big box stores using the coupons.	SCG							
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	The Program implementer should target outreach efforts and support to distributors and contractors in other parts of the state beyond southern California. This could include tailored marketing campaigns, incentives, and training programs to increase awareness and participation statewide.	SCG							
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	The Program administrator and implementer should formalize a process of verifying the eligibility of multifamily installations to ensure equipment is only installed on nonresidential/commercial rate meters.	SCG							
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Other programs should consider emulating the strategies these programs have taken to achieve success, including offering measures that better align with customer preferences, such as electrification and deeper gas usage saving measures, and employing more effective outreach strategies, such as direct multi-language outreach and community engagement (e.g., events).	All IOUS	Other	SDG&E agrees programs that have the same program design for the same customer segment as those evaluated may benefit from other strategies that have demonstrated success. However, SDG&E recognizes that these strategies may not be implementable for every program. SDG&E does encourage their implementers to review applicable impact evaluations and implement strategies that are applicable	SDG&E acknowledges that programs sharing similar designs and targeting the same customer segments as those previously evaluated may benefit from adopting proven strategies. While these approaches have demonstrated success, SDG&E recognizes that not all strategies are universally applicable across programs. To support continuous improvement, SDG&E encourages its implementers to review relevant impact evaluations and incorporate applicable strategies where feasible. Each third-party implemented program includes a pay-for-performance component, tying a portion of compensation to the achievement of key performance indicators (KPIs). As such, SDG&E entrusts implementers, experts in their respective fields to identify and apply the most effective strategies for their specific programs. It is in their best interest to emulate successful practices, as doing so directly contributes to meeting KPIs and maximizing overall compensation. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. During these meetings, KPI performance can be discussed. If KPIs are performing not to their goals, SDG&E and the implementer collaborate on ideas on how to improve participation in order to meet the KPIs. In these discussions could include participation feedback, inclusion of additional measures to a program, etc. SDG&E will continue holding regularly scheduled meetings with its third-party	Ongoing; Through regular cadenced meetings with third-party implementers	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Track efforts to obtain input from HTR/DAC communities and track HTR/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.	All IOUS	Other	The implementer of the Residential Zero Net Energy Transformation Program (RZNET) program tracks participant input via the key performance indicators. Surveys are conducted on all participants in the program, which include HTR/DAC participants	SDG&E agrees that it is important to intake stakeholder feedback to ensure the success of a program. where applicable a survey KPI is required in the contract where the implementer surveys program participants for their feedback on their interaction with the program. These surveys would include HTR/DAC customers that have participated in the program. Lastly, SDG&E's third-party implemented programs have a pay-for-performance component to each contract where a part of their compensation is tied to meeting their KPIs. Therefore, SDG&E entrusts the implementer, the expert in the field, to determine the most effective methods for garnering feedback from its participants. It's also in their best interest to consider this feedback, as it directly supports their ability to meet key performance indicators and maximize their total compensation. Most SDG&E programs actively solicit participant feedback and make adjustments based on that input. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. During these meetings, KPI performance can be discussed. If KPIs are performing not to their goals, SDG&E and the implementer collaborate on ideas on how to improve participation in order to meet the KPIs. In these discussions could include participant feedback, inclusion of additional measures to a program, etc. SDG&E will continue holding regularly scheduled meetings with its third-party	Ongoing; Through regular cadenced meetings with third-party implementers	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Existing and developing local 3PPs should take note of the marketing and outreach innovations that have continued to work for this pool of programs year-over-year: direct outreach and strategic partnerships.	All IOUS	Other	SDG&E does encourage their implementers to review applicable impact evaluations and implement strategies that are applicable	SDG&E requires all program implementers to remain informed of current CPUC policies, guidance documents, memos, and other relevant regulatory updates as outlined in their program contracts. Additionally, implementers are encouraged to review applicable impact evaluations to ensure alignment with best practices and to support effective program design. Ultimately, SDG&E entrusts the implementer, the expert in the field, to determine the most effective marketing and outreach strategies for their program. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. As impact evaluations become available, SDG&E will make every effort to share the impact evaluations during the implementer meetings.	Ongoing; As impact evaluations are released	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res

CPU0369.01	PY 2022 Local 3-Party Programs Impact	The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.	All IOUS	Reject	SDG&E agrees that ESJ goals should be included in certain program segments. SDG&E believes that these goals are better delivered and tracked in programs that are indicated as either a market support or equity program. While we are not opposed to the proposal, we would like to gain a clearer understanding of the framework	SDG&E believes that the equity framework and its associated goals are best advanced through programs specifically designed to support them—namely, those categorized as market support or equity programs. This approach helps reduce duplication and overlap between internal and external programs. Additionally, within the resource acquisition segment, SDG&E incorporates HTR/DAC Key Performance Indicators (KPIs) where feasible to ensure these customer groups are being effectively served.SDG&E remains committed to collaborating with programs that are intentionally aligned with the equity framework and goals, and will continue to provide support where appropriate within the resource acquisition process.	NA	NA	NA	NA
CPU0372.01	PY 2022 Regional Energy Networks Impact	RENs are in the unique position of being able to support more effectively CPUC policies and California's larger decarbonization goals through innovative solutions and scalable activities. For this reason, RENs should consider increasing efforts to create a pathway to electrification such as higher incentives and rebates, varying levels of incentives, and equityfocused multipliers that target low-income participants, DACs, and environmental justice areas	All RENs							
CPU0372.01	PY 2022 Regional Energy Networks Impact	Given their mandate to pilot activities where there is no current utility or CCA program offering, specifically where there is potent for scalability to a broader geographic reach, we recommend that the RENs consider sharing their successes serving the multifamily sector (including best practices for addressing split incentives and renter equity) during their coordination meetings with utilities. This type of sharing could expand useful approaches beyond the RENs	All RENs							
CPU0372.01	PY 2022 Regional Energy Networks Impact	We recommend that the RENs collaborate with the utilities and other stakeholders to share best practices and lessons learned from their experience and to identify opportunities for coordination and alignment of programs and incentives, particularly for programs that traditionally experience challenges serving the multifamily sector	All RENs							
CPU0372.01	PY 2022 Regional Energy Networks Impact	DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the JCMs even when third-party implementers manage the programs. The PAs should attend the coordination meetings and then direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the JCMs and PIPs that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the JCM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.	All RENs, MCE							
CPU0372.01	PY 2022 Regional Energy Networks Impact	The program should continue its successful effort to electrify and achieve realistic and ambitious single-family energy consumption reductions. However, the program should target more underserved populations that would not undertake similar upgrades without program support. To reach such customers, the program could increase incentives for populations unlikely to install expensive fuel substitution technologies without program support.	All RENs							
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Build more community input into all phases of program delivery.	SDG&E	Other	SDG&E rejects the evaluator's recommendations that third-party implementers need to provide an opportunity for input into the program design as at the phase of implementation does not allow for program design changes. The program design adheres to a rigorous solicitation process where many stakeholders provide input. Additionally, prior to implementation of the program there is a public webinar where an opportunity to provide input is given. However, most SDG&E programs do solicit feedback from participants and make adjustments to their programs based on this feedback.	SDG&E rejects the evaluator's recommendations that third-party implementers need to provide an opportunity for input into the program design as at the phase of implementation does not allow for significant program design changes. The program design is the result of a rigorous solicitation process that includes input from a wide range of stakeholders. Additionally, prior to implementation, SDG&E hosts a public webinar to provide stakeholders with an opportunity to offer feedback. That said, SDG&E recognizes the importance of stakeholder input in ensuring program success. Where applicable, contracts include a survey-based KPI requiring implementers to collect feedback from program participants regarding their experience. Most SDG&E programs actively solicit participant feedback and make adjustments based on that input.	NA	NA	NA	NA
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery innovations in delivering deeper savings.	SDG&E	Accepted	SDG&E agrees with the evaluators recommendations that the local third-party programs are in their beginning stages of implementation and will require more time to achieve deeper savings.	SDG&E acknowledged that, at the time of the evaluation, the majority of third-party programs were still in the early stages of development and required additional time to deliver innovative solutions and achieve deeper energy savings. SDG&E recognizes the value of impact evaluations as an essential tool for assessing program performance and supports their continued implementation. Implementers are encouraged to review applicable impact evaluations and strategy documents to ensure alignment with best practices and to support effective program design. Ultimately, SDG&E entrusts the implementer, the expert in the field, to determine the most effective strategies for their program. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. As impact evaluations become available, SDG&E will make every effort to share the impact evaluations during the implementer meetings.	Ongoing: As impact evaluations are released	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESJ Goals 4.1, 6.1, 8, and 9.	SDG&E	Other	SDG&E agrees that ESJ goals should be included in certain programs. However, SDG&E believes that these goals are better delivered and tracked in programs that are indicated as either a market support or equity program. Additionally, within our resource acquisition portfolio, HTR and DAC metrics are included and tracked.	SDG&E believes that the equity framework and its associated goals are best advanced through programs specifically designed to support them—namely, those categorized as market support or equity programs. This approach helps reduce duplication and overlap between internal and external programs. Additionally, within the resource acquisition segment, SDG&E incorporates HTR/DAC Key Performance Indicators (KPIs) where feasible to ensure these customer groups are being effectively served.SDG&E remains committed to collaborating with programs that are intentionally aligned with the equity framework and goals, and will continue to provide support where appropriate within the resource acquisition process. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. These meetings provide an opportunity to discuss cross-program collaboration where appropriate, particularly to support specific customer segments while minimizing duplicative efforts. Additionally, SDG&E has started monthly sector coordination meetings with SDREN, whose programs primarily serve disadvantaged communities and are expected to align with the Equity, Sustainability, and Justice (ESJ) framework.	Ongoing: Through regular cadenced meetings with third-party implementers and other program administrators	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res

CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.	SDG&E	Accepted	SDG&E currently utilizes KPIs to measure and reward 3Ps for targeting and engaging HTR and DAC customers. Additionally, SDG&E is currently soliciting for equity focused programs to further engagement from this customer segment.	SDG&E believes that the equity framework and its associated goals are best advanced through programs specifically designed to support them—namely, those categorized as market support or equity programs. This approach helps reduce duplication and overlap between internal and external programs. Additionally, within the resource acquisition segment, SDG&E incorporates HTR/DAC Key Performance Indicators (KPIs) where feasible to ensure these customer groups are being effectively served.SDG&E remains committed to collaborating with programs that are intentionally aligned with the equity framework and goals, and will continue to provide support where appropriate within the resource acquisition process. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. These meetings provide an opportunity to discuss cross-program collaboration where appropriate, particularly to support specific customer segments while minimizing duplicative efforts. Additionally, SDG&E has started monthly sector coordination meetings with SDREN, whose programs primarily serve disadvantaged communities and are expected to align with the Equity, Sustainability, and Justice (ESJ) framework.	Ongoing; Through regular cadenced meetings with third-party implementers and other program administrators	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0357.01	PY 2021 SoCalGas Residential EE Portfolio Impact	Recommendation 5a: A market study should be conducted to determine the share of tankless water heaters among recently installed water heaters for both the replacement and new construction market.	SCG							
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	Improve alignment between program implementers, PA staff, and evaluators on program evaluation and qualification requirements. Increasing clarity on data requirements among all parties and streamlining the process of data sharing across parties can reduce duplicative work and confusion. Follow-on work led by ED can facilitate this process.	PG&E							
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	To protect participants, the implementer should ensure that equipment is operational and meets the functional needs of the building and that the 12 months of pre-installation data is an actual representation of baseline energy usage with functional equipment. A simple functional check by the implementer on the existing equipment during the investigation phase could eliminate this risk without adding additional burden on the participants.	PG&E							

Recommendation
There are program opportunities to increase smart thermostat penetration in households with air-conditioning in hot climate zones. Programs should aim to expand the penetration of smart thermostats that can operate as part of a “fleet” serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid
To increase the effectiveness and adoption of the online coupon tool, the Program implementer should enhance awareness and promotion of the tool among contractors. This could include targeted communication campaigns, training sessions on how to use the tool, and demonstrating the benefits and ease of purchasing equipment from big box stores using the coupons.
The Program implementer should target outreach efforts and support to distributors and contractors in other parts of the state beyond southern California. This could include tailored marketing campaigns, incentives, and training programs to increase awareness and participation statewide.
The Program administrator and implementer should formalize a process of verifying the eligibility of multifamily installations to ensure equipment is only installed on nonresidential/commercial rate meters.
Other programs should consider emulating the strategies these programs have taken to achieve success, including offering measures that better align with customer preferences, such as electrification and deeper gas usage saving measures, and employing more effective outreach strategies, such as direct multi-language outreach and community engagement (e.g., events).
Track efforts to obtain input from HTR/DAC communities and track HTR/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.
Existing and developing local 3PPs should take note of the marketing and outreach innovations that have continued to work for this pool of programs year-over-year: direct outreach and strategic partnerships.
The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.
RENs are in the unique position of being able to support more effectively CPUC policies and California’s larger decarbonization goals through innovative solutions and scalable activities. For this reason, RENs should consider increasing efforts to create a pathway to electrification such as higher incentives and rebates, varying levels of incentives, and equityfocused multipliers that target low-income participants, DACs, and environmental justice areas
Given their mandate to pilot activities where there is no current utility or CCA program offering, specifically where there is potential for scalability to a broader geographic reach, we recommend that the RENs consider sharing their successes serving the multifamily sector (including best practices for addressing split incentives and renter equity) during their coordination meetings with utilities. This type of sharing could expand useful approaches beyond the RENs
We recommend that the RENs collaborate with the utilities and other stakeholders to share best practices and lessons learned from their experience and to identify opportunities for coordination and alignment of programs and incentives, particularly for programs that traditionally experience challenges serving the multifamily sector
DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the JCMs even when third-party implementers manage the programs. The PAs should attend the coordination meetings and then direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the JCMs and PIPs that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the JCM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.

<p>The program should continue its successful effort to electrify and achieve realistic and ambitious single-family energy consumption reductions. However, the program should target more underserved populations that would not undertake similar upgrades without program support. To reach such customers, the program could increase incentives for populations unlikely to install expensive fuel substitution technologies without program support.</p>
<p>Build more community input into all phases of program delivery.</p>
<p>Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery innovations in delivering deeper savings.</p>
<p>PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESJ Goals 4.1, 6.1, 8, and 9.</p>
<p>Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.</p>
<p>Recommendation 5a: A market study should be conducted to determine the share of tankless water heaters among recently installed water heaters for both the replacement and new construction market.</p>
<p>Improve alignment between program implementers, PA staff, and evaluators on program evaluation and qualification requirements. Increasing clarity on data requirements among all parties and streamlining the process of data sharing across parties can reduce duplicative work and confusion. Follow-on work led by ED can facilitate this process.</p>
<p>To protect participants, the implementer should ensure that equipment is operational and meets the functional needs of the building and that the 12 months of pre-installation data is an actual representation of baseline energy usage with functional equipment. A simple functional check by the implementer on the existing equipment during the investigation phase could eliminate this risk without adding additional burden on the participants.</p>

San Diego Gas & Electric Advice Letter 4747-E/3469-G

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:

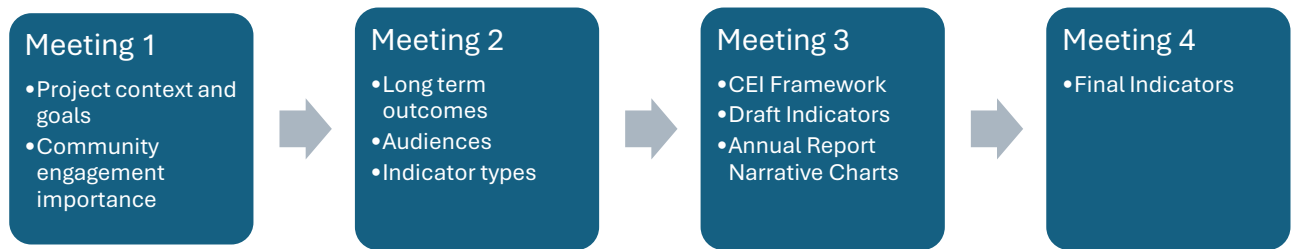
- **Relevance** – Programs are designed to address community needs while being accessible to participants.
- **Trust** – A continued relationship and sense of trust is fostered between engagement audiences (including program participants) and the PA / third party (3P) implementers.
- **Impact** – Equity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

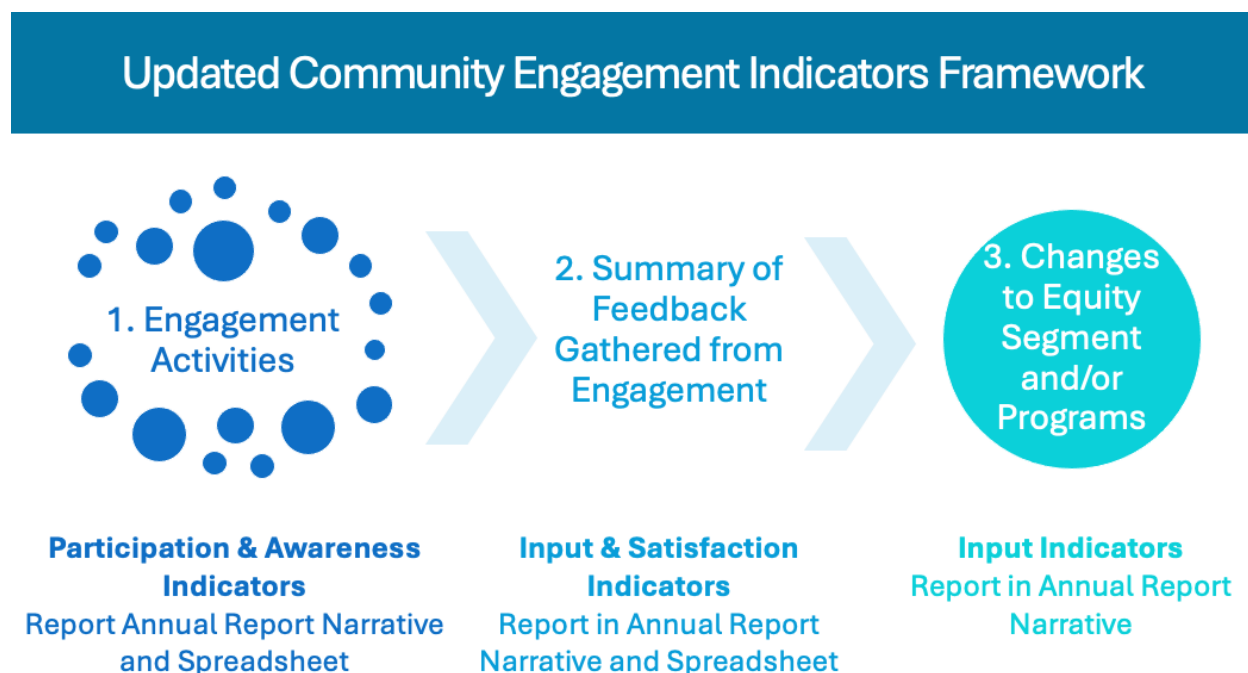
Input (qualitative and quantitative) – The amount and quality of feedback from program audience members, including changes to program design based on that feedback.

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?



Agreed Upon Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No
Engagement Activities							
Participation	Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context for PAs to add about their engagement activities	Provide context to the overall annual engagement for the equity segment each year.	Summary Narrative	Description of engagement activities relevant to equity segment, including types of activities conducted, number of activities, audiences targeted, number of people reached, outreach methods, and any additional context, such as using trusted messengers, using appropriate language, or providing supports to participants, like gift cards and food.	Annual Report Narrative	12	0
Summary of Feedback							
Input	Number of people who provided feedback relevant to the equity segment	Track the number of people who provided equity segment feedback. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people who provided feedback relevant to the equity segment during engagement activities.	Annual Report Spreadsheet	12	0
Input	Feedback themes from engagement activities relevant to the equity segment	Understand input from engagement activities related to the equity segment to then help make program changes if needed.	List of key themes	List of key themes sentences from all equity segment engagement activities feedback in the Annual Report Key Themes Chart.	Annual Report Narrative	12	0
Changes to Program							
Input	Changes to equity segment program design as needed, based on feedback	Ensure feedback for equity segment programs is informing equity segment programming.	Summary Narrative	Thematic summary of description of changes that were addressed and incorporated into equity segment programs in the Annual Report Program Changes Chart.	Annual Report Narrative	12	0

Additional Potential Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No
Engagement Activities							
Participation	Number of people in all engagement activities relevant to the equity segment	Track equity segment engagement. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people in all engagement activities relevant to the equity segment annually.	Annual Report Spreadsheet	7	5
Participation	People in partners' engagement activities relevant to the equity segment	Understand how effective partners are in engaging and building trust with equity segment populations.	Percent	Percentage determined by the number of participants in partners' engagement activities divided by the number of participants in all engagement activities. Partners would be required to track their engagement numbers.	Annual Report Spreadsheet	6	6
Input	Funding for partners' engagement activities related to the equity segment	Assess how funding correlates with how effective partners are in engaging and building trust with equity segment population.	Dollars	Amount of money spent to fund partners' engagement activities related to equity segment. Funding includes stipends, grants, contracts, etc. to support partners' engagement for equity segment.	Annual Report Spreadsheet	6	6
Awareness	People reached through online, telephone, or other outreach for the equity segment	Assess awareness of equity programs from equity segment population.	Percent	Percentage of emails opened from email campaign, rate of social media clicks, likes and shares, or percentage of text campaigns clicked in equity segment outreach.	Annual Report Spreadsheet	6	6
Awareness	Equity segment inquiries	Assess awareness of equity programs from equity segment population.	Count	Total number of unique submissions of interest forms on websites, number of calls, number of emails, or forms for more information across all equity segment programs. Note: Using unique QR codes on materials and webpages to track inquiries is recommended.	Annual Report Spreadsheet	7	5
Summary of Feedback							
Satisfaction	Equity segment participant satisfaction survey responses	Provides the count of surveys.	Count	Total number of completed surveys.	Annual Report Spreadsheet	6	6
Satisfaction	Rating from equity segment participant satisfaction surveys	Understand participant satisfaction with equity segment programs.	Numerical Rating	Average post-participation satisfaction rating for equity segment and/or programs using standard rating system of 1 (poor) to 5 (excellent).	Annual Report Spreadsheet	6	6

Type of Activity	Number of Activities	Audiences Targeted	Number of Participants	Outreach Methods	Additional Considerations and Context (Optional)
Type of activity such as workshops, focus groups, surveys, stakeholder interviews, etc.	Total number of any specific activities.	Audiences can be defined as contractors, participants, CBOs, public agencies, public members, etc.	Total number of participants in engagement activities. (Total of all participants in this column are reported as a sepearate indicator in CEDARS.)	Method(s) of promoting activity (e.g. social media, website, poster, phone calls).	List any additional context issues around scale of activities and outreach, and any other context related to quality and success of outreach. You may leave this blank.
Focus Groups	3	CBOs	35	Social media, email	Focus groups were publicized through CBO networks. Focus group members were compensated for their time and childcare was provided.
Community pop-up event	1	General public	15	Publicized in community newsletter	Poor weather led to low attendance at event
Survey	1	Program participants	800	Social media, email blast, website	

List of Key Themes	Equity Segment Program Name
List out key theme by feedback	Equity Segment Program Name or Sector Level
Need to add Mandarin language access in all outreach materials	Across Portfolio
Moderate income homeowners do not have access to incentives	Low-Income SF Homeowner Program
Low-income participants have difficulty and confusion around filling out incentive requests	Low-Income MF Renter Program, Low-Income SF Homeowner Program
Small Business participants indicate they are very happy with the program	Small Business Equipment Replacement Program

Equity Segment Program Name	Engagement Feedback Themes	Equity Segment Program Changes	Reason for Change
Equity Segment Program Name	List out key theme by feedback	List out any changes made to the program. If no changes were made, list "none."	Provide a brief description of why changes were made. If no changes were made, describe why no changes were made.
Overall Equity Segment	Need to add Mandarin language access in all outreach materials	All print outreach materials will include Mandarin translations	Need for increased language accessibility to meet Mandarin-speaking populations of equity program
Low-Income Single Family Program	Moderate income homeowners do not have access to incentives	Increase eligibility for homeowners with moderate incomes;	Need to reach underserved moderate income population who has difficulty making home upgrades with existing low-income single family incentives
Low-Income Single Family Program	Low-income participants have a difficulty and confusion around filling out incentive requests	Increase technical assistance	Need for additional support for program participation and uptake of incentives
Low-Income MF Renter Program	Low-income participants have a difficulty and confusion around filling out incentive requests	Increase technical assistance	Need for additional support for program participation and uptake of incentives
Small Business Equipment Replacement Program	Program participants are interested in program	None	No changes, as high participation and satisfaction indicate program is successful
Small Business Equipment Replacement Program	Program is easy to participate in	None	No changes, as high participation and satisfaction indicate program is successful

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ATTACHMENT C PA Response to Recommendations

	Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	(PA Response)	PA Response Notes	Proposed RTR Implementation				
CALMAC ID	Study Name	Recommendations	If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	Next Steps: For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines. For each rejected recommendation, document the reason provided for rejection. Outline any potential follow-up actions or considerations for the future.	Timeline: Set deadlines for the completion of each action. Include a start date and end date when possible.	Status: Track the status of each action item (e.g., Not Started, In Progress, Completed).	Notes: Add notes for any additional information or updates.	Impacted Programs: Identify which programs (program IDs) would be impacted by the action items.
Overall conclusions and recommendations						Proposed Next Steps				
CPU0367.01	PY 2018 - 2021 Forward-looking Smart Thermostat Study	There are program opportunities to increase smart thermostat penetration in households with air-conditioning in hot climate zones. Programs should aim to expand the penetration of smart thermostats that can operate as part of a "fleet" serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid.	SCE							
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	To increase the effectiveness and adoption of the online coupon tool, the Program implementer should enhance awareness and promotion of the tool among contractors. This could include targeted communication campaigns, training sessions on how to use the tool, and demonstrating the benefits and ease of purchasing equipment from big box stores using the coupons.	SCG							
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	The Program implementer should target outreach efforts and support to distributors and contractors in other parts of the state beyond southern California. This could include tailored marketing campaigns, incentives, and training programs to increase awareness and participation statewide.	SCG							
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	The Program administrator and implementer should formalize a process of verifying the eligibility of multifamily installations to ensure equipment is only installed on nonresidential/commercial rate meters.	SCG							
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Other programs should consider emulating the strategies these programs have taken to achieve success, including offering measures that better align with customer preferences, such as electrification and deeper gas usage saving measures, and employing more effective outreach strategies, such as direct multi-language outreach and community engagement (e.g., events).	All IOUS	Other	SDG&E agrees programs that have the same program design for the same customer segment as those evaluated may benefit from other strategies that have demonstrated success. However, SDG&E recognizes that these strategies may not be implementable for every program. SDG&E does encourage their implementers to review applicable impact evaluations and implement strategies that are applicable	SDG&E acknowledges that programs sharing similar designs and targeting the same customer segments as those previously evaluated may benefit from adopting proven strategies. While these approaches have demonstrated success, SDG&E recognizes that not all strategies are universally applicable across programs. To support continuous improvement, SDG&E encourages its implementers to review relevant impact evaluations and incorporate applicable strategies where feasible. Each third-party implemented program includes a pay-for-performance component, tying a portion of compensation to the achievement of key performance indicators (KPIs). As such, SDG&E entrusts implementers, experts in their respective fields to identify and apply the most effective strategies for their specific programs. It is in their best interest to emulate successful practices, as doing so directly contributes to meeting KPIs and maximizing overall compensation. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. During these meetings, KPI performance can be discussed. If KPIs are performing not to their goals, SDG&E and the implementer collaborate on ideas on how to improve participation in order to meet the KPIs. In these discussions could include participation feedback, inclusion of additional measures to a program, etc. SDG&E will continue holding regularly scheduled meetings with its third-party	Ongoing; Through regular cadenced meetings with third-party implementers	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Track efforts to obtain input from HTR/DAC communities and track HTR/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.	All IOUS	Other	The implementer of the Residential Zero Net Energy Transformation Program (RZNET) program tracks participant input via the key performance indicators. Surveys are conducted on all participants in the program, which include HTR/DAC participants	SDG&E agrees that it is important to intake stakeholder feedback to ensure the success of a program. where applicable a survey KPI is required in the contract where the implementer surveys program participants for their feedback on their interaction with the program. These surveys would include HTR/DAC customers that have participated in the program. Lastly, SDG&E's third-party implemented programs have a pay-for-performance component to each contract where a part of their compensation is tied to meeting their KPIs. Therefore, SDG&E entrusts the implementer, the expert in the field, to determine the most effective methods for garnering feedback from its participants. It's also in their best interest to consider this feedback, as it directly supports their ability to meet key performance indicators and maximize their total compensation. Most SDG&E programs actively solicit participant feedback and make adjustments based on that input. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. During these meetings, KPI performance can be discussed. If KPIs are performing not to their goals, SDG&E and the implementer collaborate on ideas on how to improve participation in order to meet the KPIs. In these discussions could include participant feedback, inclusion of additional measures to a program, etc. SDG&E will continue holding regularly scheduled meetings with its third-party	Ongoing; Through regular cadenced meetings with third-party implementers	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Existing and developing local 3PPs should take note of the marketing and outreach innovations that have continued to work for this pool of programs year-over-year: direct outreach and strategic partnerships.	All IOUS	Other	SDG&E does encourage their implementers to review applicable impact evaluations and implement strategies that are applicable	SDG&E requires all program implementers to remain informed of current CPUC policies, guidance documents, memos, and other relevant regulatory updates as outlined in their program contracts. Additionally, implementers are encouraged to review applicable impact evaluations to ensure alignment with best practices and to support effective program design. Ultimately, SDG&E entrusts the implementer, the expert in the field, to determine the most effective marketing and outreach strategies for their program. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. As impact evaluations become available, SDG&E will make every effort to share the impact evaluations during the implementer meetings.	Ongoing; As impact evaluations are released	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res

CPU0369.01	PY 2022 Local 3-Party Programs Impact	The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.	All IOUS	Reject	SDG&E agrees that ESJ goals should be included in certain program segments. SDG&E believes that these goals are better delivered and tracked in programs that are indicated as either a market support or equity program. While we are not opposed to the proposal, we would like to gain a clearer understanding of the framework	SDG&E believes that the equity framework and its associated goals are best advanced through programs specifically designed to support them—namely, those categorized as market support or equity programs. This approach helps reduce duplication and overlap between internal and external programs. Additionally, within the resource acquisition segment, SDG&E incorporates HTR/DAC Key Performance Indicators (KPIs) where feasible to ensure these customer groups are being effectively served.SDG&E remains committed to collaborating with programs that are intentionally aligned with the equity framework and goals, and will continue to provide support where appropriate within the resource acquisition process.	NA	NA	NA	NA
CPU0372.01	PY 2022 Regional Energy Networks Impact	RENs are in the unique position of being able to support more effectively CPUC policies and California's larger decarbonization goals through innovative solutions and scalable activities. For this reason, RENs should consider increasing efforts to create a pathway to electrification such as higher incentives and rebates, varying levels of incentives, and equityfocused multipliers that target low-income participants, DACs, and environmental justice areas	All RENs							
CPU0372.01	PY 2022 Regional Energy Networks Impact	Given their mandate to pilot activities where there is no current utility or CCA program offering, specifically where there is potent for scalability to a broader geographic reach, we recommend that the RENs consider sharing their successes serving the multifamily sector (including best practices for addressing split incentives and renter equity) during their coordination meetings with utilities. This type of sharing could expand useful approaches beyond the RENs	All RENs							
CPU0372.01	PY 2022 Regional Energy Networks Impact	We recommend that the RENs collaborate with the utilities and other stakeholders to share best practices and lessons learned from their experience and to identify opportunities for coordination and alignment of programs and incentives, particularly for programs that traditionally experience challenges serving the multifamily sector	All RENs							
CPU0372.01	PY 2022 Regional Energy Networks Impact	DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the JCMs even when third-party implementers manage the programs. The PAs should attend the coordination meetings and then direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the JCMs and PIPs that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the JCM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.	All RENs, MCE							
CPU0372.01	PY 2022 Regional Energy Networks Impact	The program should continue its successful effort to electrify and achieve realistic and ambitious single-family energy consumption reductions. However, the program should target more underserved populations that would not undertake similar upgrades without program support. To reach such customers, the program could increase incentives for populations unlikely to install expensive fuel substitution technologies without program support.	All RENs							
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Build more community input into all phases of program delivery.	SDG&E	Other	SDG&E rejects the evaluator's recommendations that third-party implementers need to provide an opportunity for input into the program design as at the phase of implementation does not allow for program design changes. The program design adheres to a rigorous solicitation process where many stakeholders provide input. Additionally, prior to implementation of the program there is a public webinar where an opportunity to provide input is given. However, most SDG&E programs do solicit feedback from participants and make adjustments to their programs based on this feedback.	SDG&E rejects the evaluator's recommendations that third-party implementers need to provide an opportunity for input into the program design as at the phase of implementation does not allow for significant program design changes. The program design is the result of a rigorous solicitation process that includes input from a wide range of stakeholders. Additionally, prior to implementation, SDG&E hosts a public webinar to provide stakeholders with an opportunity to offer feedback. That said, SDG&E recognizes the importance of stakeholder input in ensuring program success. Where applicable, contracts include a survey-based KPI requiring implementers to collect feedback from program participants regarding their experience. Most SDG&E programs actively solicit participant feedback and make adjustments based on that input.	NA	NA	NA	NA
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery innovations in delivering deeper savings.	SDG&E	Accepted	SDG&E agrees with the evaluators recommendations that the local third-party programs are in their beginning stages of implementation and will require more time to achieve deeper savings.	SDG&E acknowledged that, at the time of the evaluation, the majority of third-party programs were still in the early stages of development and required additional time to deliver innovative solutions and achieve deeper energy savings. SDG&E recognizes the value of impact evaluations as an essential tool for assessing program performance and supports their continued implementation. Implementers are encouraged to review applicable impact evaluations and strategy documents to ensure alignment with best practices and to support effective program design. Ultimately, SDG&E entrusts the implementer, the expert in the field, to determine the most effective strategies for their program. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. As impact evaluations become available, SDG&E will make every effort to share the impact evaluations during the implementer meetings.	Ongoing: As impact evaluations are released	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESJ Goals 4.1, 6.1, 8, and 9.	SDG&E	Other	SDG&E agrees that ESJ goals should be included in certain programs. However, SDG&E believes that these goals are better delivered and tracked in programs that are indicated as either a market support or equity program. Additionally, within our resource acquisition portfolio, HTR and DAC metrics are included and tracked.	SDG&E believes that the equity framework and its associated goals are best advanced through programs specifically designed to support them—namely, those categorized as market support or equity programs. This approach helps reduce duplication and overlap between internal and external programs. Additionally, within the resource acquisition segment, SDG&E incorporates HTR/DAC Key Performance Indicators (KPIs) where feasible to ensure these customer groups are being effectively served.SDG&E remains committed to collaborating with programs that are intentionally aligned with the equity framework and goals, and will continue to provide support where appropriate within the resource acquisition process. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. These meetings provide an opportunity to discuss cross-program collaboration where appropriate, particularly to support specific customer segments while minimizing duplicative efforts. Additionally, SDG&E has started monthly sector coordination meetings with SDREN, whose programs primarily serve disadvantaged communities and are expected to align with the Equity, Sustainability, and Justice (ESJ) framework.	Ongoing: Through regular cadenced meetings with third-party implementers and other program administrators	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_QIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res

CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.	SDG&E	Accepted	SDG&E currently utilizes KPIs to measure and reward 3Ps for targeting and engaging HTR and DAC customers. Additionally, SDG&E is currently soliciting for equity focused programs to further engagement from this customer segment.	SDG&E believes that the equity framework and its associated goals are best advanced through programs specifically designed to support them—namely, those categorized as market support or equity programs. This approach helps reduce duplication and overlap between internal and external programs. Additionally, within the resource acquisition segment, SDG&E incorporates HTR/DAC Key Performance Indicators (KPIs) where feasible to ensure these customer groups are being effectively served.SDG&E remains committed to collaborating with programs that are intentionally aligned with the equity framework and goals, and will continue to provide support where appropriate within the resource acquisition process. SDG&E conducts regular meetings with its third-party implementers to facilitate program updates and collaboration. During these sessions, both SDG&E and the implementers share relevant updates pertaining to their respective programs. These meetings provide an opportunity to discuss cross-program collaboration where appropriate, particularly to support specific customer segments while minimizing duplicative efforts. Additionally, SDG&E has started monthly sector coordination meetings with SDREN, whose programs primarily serve disadvantaged communities and are expected to align with the Equity, Sustainability, and Justice (ESJ) framework.	Ongoing; Through regular cadenced meetings with third-party implementers and other program administrators	In Progress	NA	4001 4002 4006 4009 4012 4040 4168 4169 4170 4171 4173 4174 4175 4176 4201 4202 SDGE_SW_PLA SDGE_SW_OIOM SDGE_SW_HVAC_Up_Com SDGE_SW_HVAC_Up_Res
CPU0357.01	PY 2021 SoCalGas Residential EE Portfolio Impact	Recommendation 5a: A market study should be conducted to determine the share of tankless water heaters among recently installed water heaters for both the replacement and new construction market.	SCG							
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	Improve alignment between program implementers, PA staff, and evaluators on program evaluation and qualification requirements. Increasing clarity on data requirements among all parties and streamlining the process of data sharing across parties can reduce duplicative work and confusion. Follow-on work led by ED can facilitate this process.	PG&E							
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	To protect participants, the implementer should ensure that equipment is operational and meets the functional needs of the building and that the 12 months of pre-installation data is an actual representation of baseline energy usage with functional equipment. A simple functional check by the implementer on the existing equipment during the investigation phase could eliminate this risk without adding additional burden on the participants.	PG&E							

San Diego Gas & Electric Advice Letter 4747-E/3469-G

ATTACHMENT D
CEDARS Filing Confirmation

CEDARS FILING SUBMISSION RECEIPT

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

PA: San Diego Gas & Electric (SDGE)

Budget Filing Year: 2026

Submitted: 08:19 on 04 Nov 2025

By: Greg Green

Advice Letter Number: 4747-E/3469-G

* Portfolio Budget Filing Summary *

- TRC: 1.4
- PAC: 3.78
- TRC (no admin): 1.84
- PAC (no admin): 11.0
- RIM: 0.43
- SCB: 1.98
- SCH: 2.03
- Budget: \$70,244,937.67
- TotalSystemBenefit: \$270,369,491.98
- ElecBen: \$146,995,104.51
- GasBen: \$122,158,652.32
- WaterEnergyBen: \$24,197.88
- OtherBen: \$4,220,234.73
- TRCCost: \$195,544,376.50
- PACCost: \$72,262,610.32
- RIMCost: \$655,850,056.91
- SCBCost: \$197,851,296.41
- SCHCost: \$197,951,187.44

* Programs Included in the Budget Filing *

- SDGE3226: SW-COM Direct Install
- SDGE3251: SW C&S; - Compliance Enhancement
- SDGE3252: SW C&S; - Reach Codes
- SDGE3253: SW C&S; - Planning Coordination

- SDGE3262: SW-FIN-On-Bill Finance
- SDGE3280: 3P-IDEEA
- SDGE3281: EM&V-Evaluation; Measurement & Verification
- SDGE4001: Single Family Program
- SDGE4002: Multi Family Program
- SDGE4006: Industrial Sector Program
- SDGE4009: Agricultural Growers Services Program
- SDGE4012: Federal Customer Services Program
- SDGE4040: IDSM Local Residential Behavioral Program (EE)
- SDGE4168: Lodging (Hotels/Motels)
- SDGE4169: Groceries, Restaurants and Food Storage
- SDGE4170: Wholesale/Retail/Office, including Entertainment Services
- SDGE4171: Private Institutions/Healthcare
- SDGE4173: Small Business Outreach
- SDGE4174: Workforce, Education & Training Programs
- SDGE4175: Local Residential Fuel-Substitution
- SDGE4176: Residential Equity Program
- SDGE4197: Core Market Access Program - Residential
- SDGE4198: Core Market Access Program - Commercial
- SDGE4201: Market Access Program - Residential
- SDGE4202: Market Access Program - Commercial
- SDGE_CS_PortfolioSupport: Codes & Standards Portfolio Support PA Costs
- SDGE_Equity_PortfolioSupport: Equity Portfolio Support PA Costs
- SDGE-ESAP: Energy Savings Assistance Program (ESA)
- SDGE-GRCL: GRC Labor Loaders
- SDGE_MS_PortfolioSupport: Market Support Portfolio Support PA Costs
- SDGE_Portfolio_Oversight: ED Portfolio Oversight
- SDGE_RA_PortfolioSupport: Resource Acquisition Portfolio Support PA Costs
- SDGE_SW_CSA_Appl: SW Codes & Standards Advocacy - State Appliance Standards
- SDGE_SW_CSA_Appl_PA: SW Codes & Standards Advocacy - State Appliance Standards (Utility)
- SDGE_SW_CSA_Bldg: SW Codes & Standards Advocacy - State Building Codes
- SDGE_SW_CSA_Bldg_PA: SW Codes & Standards Advocacy - State Building Codes (Utility)
- SDGE_SW_CSA_Natl: SW Codes & Standards Advocacy - National Codes & Standards Advocacy
- SDGE_SW_CSA_Natl_PA: SW Codes & Standards Advocacy - National Codes & Standards Advocacy (Utility)
- SDGE_SW_ETP_Elec: SW Emerging Technologies - Electric
- SDGE_SW_ETP_Elec_PA: SW Emerging Technologies - Electric (Utility)
- SDGE_SW_ETP_Gas: SW Emerging Technologies - Gas
- SDGE_SW_ETP_Gas_PA: SW Emerging Technologies - Gas (Utility)
- SDGE_SW_FS: SW Foodservice Point of Sale Program
- SDGE_SW_FS_PA: SW Foodservice Point of Sale Program (Utility)
- SDGE_SW_HESC_PA: SW Home Energy Score California (Utility)
- SDGE_SW_HVAC_AE_NonRes: SW HVAC All Electric Non-Residential

- SDGE_SW_HVAC_AE_NonRes_PA: SW HVAC All Electric Non-Residential (Utility)
- SDGE_SW_HVAC_QIQM: SW HVAC QI/QM Program
- SDGE_SW_HVAC_QIQM_PA: SW HVAC QI/QM Program (Utility)
- SDGE_SW_HVAC_Up_Com: SW HVAC Upstream Commercial
- SDGE_SW_HVAC_Up_Com_PA: SW HVAC Upstream Commercial (Utility)
- SDGE_SW_HVAC_Up_Res: SW HVAC Upstream Residential
- SDGE_SW_HVAC_Up_Res_PA: SW HVAC Upstream Residential (Utility)
- SDGE_SW_IP_Colleges: SW Higher Education
- SDGE_SW_IP_Colleges_PA: SW Higher Education (Utility)
- SDGE_SW_IP_Gov: SW Institutional Partnerships: DGS & DoC
- SDGE_SW_IP_Gov_PA: SW Institutional Partnerships: DGS & DoC (Utility)
- SDGE_SW_MCWH: SW Midstream Commercial Water Heating
- SDGE_SW_MCWH_PA: SW Midstream Commercial Water Heating (Utility)
- SDGE_SW_NC_NonRes_Ag_electric: SW New Construction Non Residential - Agricultural - All Electric
- SDGE_SW_NC_NonRes_Ag_electric_PA: SW New Construction Non Residential - Agricultural - All Electric (Utility)
- SDGE_SW_NC_NonRes_Ag_mixed: SW New Construction Non Residential - Agricultural - Mixed Fuel
- SDGE_SW_NC_NonRes_Ag_mixed_PA: SW New Construction Non Residential - Agricultural - Mixed Fuel (Utility)
- SDGE_SW_NC_NonRes_Com_electric: SW New Construction Non Residential - Commercial - All Electric
- SDGE_SW_NC_NonRes_Com_electric_PA: SW New Construction Non Residential - Commercial - All Electric (Utility)
- SDGE_SW_NC_NonRes_Com_mixed: SW New Construction Non Residential - Commercial - Mixed Fuel
- SDGE_SW_NC_NonRes_Com_mixed_PA: SW New Construction Non Residential - Commercial - Mixed Fuel (Utility)
- SDGE_SW_NC_NonRes_Ind_electric: SW New Construction Non Residential - Industrial - All Electric
- SDGE_SW_NC_NonRes_Ind_electric_PA: SW New Construction Non Residential - Industrial - All Electric (Utility)
- SDGE_SW_NC_NonRes_Ind_mixed: SW New Construction Non Residential - Industrial - Mixed Fuel
- SDGE_SW_NC_NonRes_Ind_mixed_PA: SW New Construction Non Residential - Industrial - Mixed Fuel (Utility)
- SDGE_SW_NC_NonRes_Pub_electric: SW New Construction Non Residential - Public - All Electric
- SDGE_SW_NC_NonRes_Pub_electric_PA: SW New Construction Non Residential - Public - All Electric (Utility)
- SDGE_SW_NC_NonRes_Pub_mixed: SW New Construction Non Residential - Public - Mixed Fuel
- SDGE_SW_NC_NonRes_Pub_mixed_PA: SW New Construction Non Residential - Public - Mixed Fuel (Utility)
- SDGE_SW_NC_NonRes_Res_electric: SW New Construction NonResidential - Residential - All Electric
- SDGE_SW_NC_NonRes_Res_electric_PA: SW New Construction NonResidential - Residential - All Electric (Utility)
- SDGE_SW_NC_NonRes_Res_mixed: SW New Construction NonResidential - Residential - Mixed Fuel
- SDGE_SW_NC_NonRes_Res_mixed_PA: SW New Construction NonResidential - Residential - Mixed Fuel (Utility)
- SDGE_SW_NC_Res_electric: SW New Construction Residential - All Electric
- SDGE_SW_NC_Res_electric_PA: SW New Construction Residential - All Electric (Utility)

- SDGE_SW_PLA: SW Plug Load and Appliances
- SDGE_SW_PLA_AE: SW Plug Load and Appliance All Electric
- SDGE_SW_PLA_AE_PA: SW Plug Load and Appliance All Electric (Utility)
- SDGE_SW_PLA_PA: SW Plug Load and Appliances (Utility)
- SDGE_SW_WET_CC: SW WET Career Connections
- SDGE_SW_WET_CC_PA: SW WET Career Connections (Utility)
- SDGE_SW_WET_Work: SW WE&T; Career & Workforce Readiness (CWR)
- SDGE_SW_WET_Work_PA: SW WE&T; Career & Workforce Readiness (CWR) (Utility)
- SDGE_SW_WP: SW Downstream Water/Wastewater Pumping Program
- SDGE_SW_WP_PA: SW Downstream Water/Wastewater Pumping Program (Utility)

CEDARS FILING SUBMISSION RECEIPT

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

PA: San Diego Gas & Electric (SDGE)

Budget Filing Year: 2027

Submitted: 08:26 on 04 Nov 2025

By: Greg Green

Advice Letter Number: 4747-E/3469-G

* Portfolio Budget Filing Summary *

- TRC: 1.35
- PAC: 3.83
- TRC (no admin): 1.77
- PAC (no admin): 11.19
- RIM: 0.43
- SCB: 1.92
- SCH: 1.96
- Budget: \$69,676,029.27
- TotalSystemBenefit: \$268,907,560.94
- ElecBen: \$145,332,332.69
- GasBen: \$121,146,675.51
- WaterEnergyBen: \$25,470.87
- OtherBen: \$4,354,090.49
- TRCCost: \$199,503,518.62
- PACCost: \$70,592,976.48
- RIMCost: \$643,124,026.54
- SCBCost: \$201,493,000.95
- SCHCost: \$201,538,286.95

* Programs Included in the Budget Filing *

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- SDGE3253: SW C&S; - Planning Coordination

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