

# Residential Energy Advisor Resource and Non-Resource Local Equity Program Closures CLEAResult Consulting, Inc.

March 16, 2026

# Webinar Agenda

- 1) Program Closure of the Residential Energy Advisor Resource & Non-Resource Local Equity Programs
- 2) Program Closure Schedule and Next Steps
- 3) Steps Taken to Continue Serving Residential Equity Customers
- 4) Questions, Answers and Resources

# Antitrust Statement

Pursuant to the California Public Utilities Commission (CPUC) Decisions D.16-08-019 and D.18-05-041, SCE is hosting a meeting for the purpose of complying with the Energy Division's process checklist for closing a program in compliance with D.21-05-031 and is intended to take place in full compliance with all applicable provisions of the CPUC orders, rules and regulations and all applicable provisions of state and federal antitrust laws. These discussions will be conducted in full conformance with the Antitrust Guidelines. Among other things, the antitrust laws forbid any agreement between or among competitors regarding prices, availability of service, terms of sale, division or markets, allocation of customers or any other activity that unreasonably restrains competition, including components of pricing such as vendor or contractor costs. It is the responsibility of every participant at this meeting to carry out this commitment.

# Program Closure: Residential Energy Advisor Resource (CW2273907) & Non-Resource (CW2273910) Local Equity Programs

## Program Closure Information: Residential Energy Advisor Resource & Non-Resource Local Equity Programs

- The Agreement was executed in March 2023
- Program launches were delayed due to added Customer PII Data needs from implementer
- Amendment #1 was executed in May 2024 to accommodate requested Customer PII Data
- Original contractual launch dates and delivery targets were missed
- Programs experienced ongoing operational and performance challenges that limited ability to achieve intended goals. Struggled with meeting eligibility requirements
- SCE and CLEAResult mutually agreed to terminate both program agreements and transition toward exploring pilot approaches to continue serving equity customers.
- Service lists were notified of the program closure in February 2026.
- SCE will formally document the program termination through an Advice Letter submission in 2026 as part of the standard program closure process.

# Program Closure and Next Steps: Residential Energy Advisor Resource & Non-Resource Local Equity Programs

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## Steps for Closing This Program

Milestones	Milestone Dates
Communicate with Program Implementer	<b>December 14, 2025</b>
Execute Termination Agreement(s)	<b>February 20, 2026</b>
Notify Service List and Stakeholders	<b>February 20, 2026</b>
Host Program Closure Webinar	<b>March 16, 2026 (Today)</b>
File Advice Letter for Program Closure	<b>April 14, 2026</b>
Receive CPUC Approval for Program Closure	<b>Expected May 2026</b>
Update Program Status for "SCE_Res_Equity_001 & SCE_Res_Equity_002" to "Closed" on CEDARS website	<b>May/June 2026</b>

**Note:** The Home Performance Plus pilot will continue providing REA program measures and products through 2026 operations until end of year.

# Steps SCE is Taking to Continue Serving Residential Equity Customers

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# SCE Continues to Serve Residential Customers

- SCE has additional EE programs to serve the residential sector (Residential Energy Solutions, Disadvantaged Communities and Marketing Outreach)
- SCE has launched the Home Performance Plus program as a pilot to continue serving residential equity customers.
- SCE will apply lessons learned to targeted residential approaches by refining and scaling solutions that are affordability driven.

# Questions, Answers and Resources

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# Questions

## QUESTIONS ABOUT THE WEBINAR OR PRESENTATION

### **Service List Participants**

Call Toll-Free: 1-800-600-4723

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**Monday-Friday, 8am-5pm PT  
(11am to 8pm ET)**

## IMPORTANT RESOURCES WEBINAR LINKS

### SCE Related Websites

SCE's Energy Efficiency Home Page:

<https://www.sce.com/about-us/environment/energy-conservation>

SCE Advice Letters:

<https://www.sce.com/regulatory/advice-letters>

EE Solicitations Home Page:

<https://www.sce.com/partners/Energy-Efficiency-Solicitations>

# Appendix

- AL – Advice Letter
- CET – Contract Evaluation Team
- EE – Energy Efficiency
- IE – Independent Evaluator
- IP – Implementation Program
- NSC – Negotiations Solicitations Contract
- PRG – Procurement Review Group
- RFA – Request For Abstracts
- RFP – Request For Proposals