



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: **San Francisco Bay Area Regional Energy Network (BayREN) (#941)**

Utility type:

☒ ELC ☒ GAS ☐ WATER
☐ PLC ☐ HEAT

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EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: **34-E**

Tier Designation: **2**

Subject of AL: **2024-2027 Energy Efficiency Portfolio Mid-Cycle Advice Letter**

Keywords (choose from CPUC listing):

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☐ One-Time ☒ Other: **Mid-cycle in a four-year portfolio**

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

D.15-10-029, D.18-05-041, D.21-05-031, D.21-09-037 and D.23-06-055

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: **No**

Summarize differences between the AL and the prior withdrawn or rejected AL: **N/A**

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: **11/30/25**

No. of tariff sheets:

Estimated system annual revenue effect (%): **N/A**

Estimated system average rate effect (%): **N/A**

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: **N/A**

Service affected and changes proposed¹: **None**

Pending advice letters that revise the same tariff sheets: **None**

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:

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Clear Form

ENERGY Advice Letter Keywords

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



October 31, 2025

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Energy Division Tariff Unit
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Advice Letter 34-E
(BayREN ID #941)

Tier Designation

This Advice Letter has a Tier 2 designation pursuant to Decision 21-05-031, Ordering Paragraph 10.

Subject:

BayREN 2024-2027 Portfolio Mid-Cycle Advice Letter

I. Purpose

The purpose of this Tier 2 Advice Letter is to update the portfolio and savings forecast for the Bay Area Regional Energy Network (“BayREN”) as the mid-cycle review in year two of the four-year portfolio from 2024-2027. This letter adjusts BayREN’s technical inputs, forecasts, and budget.

II. Background

BayREN is a coalition of the nine counties that make up the San Francisco Bay Area. Led by the Association of Bay Area Governments (“ABAG”)¹, BayREN implements effective energy saving programs on a regional level and draws on the expertise, experience, and proven track record of Bay Area local governments to develop and administer successful climate, resource, and sustainability programs. Since its inception, BayREN has been addressing the three areas

¹ On July 1, 2017, ABAG underwent a staff consolidation with the Metropolitan Transportation Commission (MTC). ABAG and its Executive Board continue to exist.

indicated by the California Public Utilities Commission (“Commission” or “CPUC”) Decision 12-11-015 in the formation and implementation of programs: filling gaps that the investor-owned utilities (“IOUs”) are not serving; developing programs for hard-to-reach markets; and piloting new approaches to programs that have the potential to scale and offer innovative avenues to energy savings.

A. Regulatory Filing Requirements

BayREN’s Mid-Cycle Advice Letter (“MCAL”) complies with the directives provided in D.21-05-031 and meets the criteria applicable to Regional Energy Networks (“RENs”).

1. D.21-05-031 directed that each year on September 1, in the odd years when the energy efficiency (“EE”) potential and goals have been adopted by the Commission, each EE Portfolio Administrator (“PA”) shall file either a portfolio true-up (prior to the start of a four-year portfolio) or a mid-cycle review (in year two of a four-year portfolio) Tier 2 advice letter adjusting technical inputs, forecasts, and portfolio to account for the changes in energy efficiency potential and goals. Due to the timing of adoption of the new potential and goals ruling, on August 22, 2025, the Executive Director of the CPUC extended the deadline for all PAs to 60 days after the adoption of the updated potential and goals. D.25-08-034 adopting goals was issued on September 5, 2025.
2. D.23-06-055 approved PA Business Plans and required the following updates in true-up and midcycle advice letters:
 - Guidance in D.21-05-031, such as adjustments to forecasts stemming from updated input, including TSB goals, avoided cost calculator updates, new database for energy efficiency (DEER) values, etc.;
 - Updated statewide allocations and resulting budgets (within the authorized cap) and savings forecasts; and
 - Updates or corrections to program segmentation.

Ordering Paragraph 16 requires all portfolio administrators to include specific descriptions of how they have incorporated or otherwise addressed impact evaluation recommendations.

Ordering Paragraph 23 requires Portfolio administrators to work with the Reporting Policy Coordination Group (“PCG”) to jointly submit a report addressing the demographic questions in Section 7.7 of this decision by no later than September 1, 2025. Based on analysis included in the report, the portfolio administrators shall propose, in their next portfolio proposals due in 2026, their preferred approaches to regular reporting of demographic energy efficiency program participation information. This report was submitted by PG&E via email on August 6, 2025.

Ordering Paragraph 24 requires Portfolio administrators to 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. The joint PA report on community engagement indicators is included in this advice letter as Attachment B.

3. D. 25-08-034 adopted goals for 2026-2037 by IOU territory. IOU PAs will incorporate goals within the Decision into the MCAL. REN achievements will be allocated to IOU territories.

B. Contents of this Filing

The contents of this Mid-Cycle Advice Letter conform to all CPUC requirements and are shown in the Table of Contents below.

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Attachment A – Appendices from Excel Template in PDF

Attachment B – Community Engagement Indicators Results

Attachment C – PA Response to Recommendations

Attachment D – CEDARS Filing Confirmation

III. Discussion

A. Portfolio Overview

BayREN has programs in all segments, but as anticipated by the Commission for RENs, the majority of the portfolio is devoted to the Equity and Market Support segments. This portfolio segmentation approach leverages BayREN’s strength as a local government organization by

primarily implementing programs that offer co-benefits in addition to energy savings, as well as a targeted Resource Acquisition program that delivers savings while staying true to the mission of a REN of providing new or unique value to the Commission's energy, climate, and/or equity goals. The programs also meet the three CPUC-directed criteria for REN programs: filling gaps that the investor-owned utilities (IOUs) are not serving; developing programs for hard-to-reach markets; and piloting new approaches to programs that have the potential to scale and offer innovative avenues to energy savings².

Over the next two years, BayREN will continue its successful programs and incorporate Integrated Demand Side Management ("IDSM") technical assistance, consistent with Resolution E-5387, into residential and public sector offerings to set the portfolio up for the next Business Plan cycle.

1. Recent CPUC Decision or Guidance Impacting EE Portfolios

DEER Resolution. Resolution E-5350 provided guidance to Measure Package developers which impacted savings for many measure packages in a variety of ways. The guidance included but was not limited to the following changes:

- Refrigerant Leakage impacts;
- Refrigerant benefits/costs for EULs exceeding 20 years;
- Lighting baselines;
- Updated and expired Net to Gross values;
- Updated EUL values;

IDSM Resolution E-5387. E-5387 approves BayREN's IDSM Advice Letter proposing the incorporation of IDSM technical assistance, including application support, IDSM audits, marketing, education and outreach, and workforce development, into existing residential and public sector programs, with a focus on ongoing or permanent load shifting or load reduction. BayREN has not proposed new IDSM programs and is not doing so at this time.

HPWH guidance. The guidance memo on SWWH028 on 2/28/25 and updated on 4/28/25 reduced the claimable capacity value for the A.O. Smith CAHP-120 commercial heat pump water heater, consequently reducing the claimable savings from this unit. Similar guidance was issued for multifamily uses of the measure package on June 6, 2024. Because BayREN has programs that utilizes the measure package for both Multifamily and Commercial sectors, the guidance required a revisitation of the contributions provided by these measures.

Frozen measure package versions. Energy Division staff provided a list of measure package versions to be used for the MCAL and Business Plan forecasts in August 2025. The list took into consideration the status of various measure packages that are in development or have been submitted for approval, or in some cases, have been approved but are known to require revision. BayREN updated forecasts using the approved measure package versions where applicable.

² D.12-11-015

2. Forecast Approach

Implementers for BayREN’s three resource programs, Single Family, Multifamily, and Commercial, compiled updated CET inputs based on program changes, measure package updates, and market changes since the True-Up Advice Letter (“TUAL”). Forecasts were updated to reflect achievable energy savings based on additional years of program data. The revised forecasts also take into consideration program design changes, incentive structure changes, and updated measure packages. The updated inputs were reviewed for reasonableness and processed using updated Avoided Costs (2024/E-5328) in CET Avoided Cost Version 2026.

3. Portfolio Changes

Various programs within BayREN’s portfolio have been updated based on expansion, program redesign, and contracting with new implementers. In addition, BayREN is closing its Water Upgrades Save Program. Discussion of program-level changes are included later in this document, and updated versions of the Implementation Plans for each program are being uploaded to CEDARs.

B. Summary of Forecasted Portfolio Impacts

1. Portfolio Budget Summary

As shown in Table 1.1a, 1.2a, and 1.3a in the appendix, the portfolio budget remains largely consistent with the business plan and TUAL budgets, with a moderate net shift in budget to successful programs in the Resource Acquisition segment. The majority of BayREN’s budget remains in the Equity segment. By sector, the majority of the portfolio’s budget goes to the Residential sector, followed by Commercial, Workforce Education and Training (“WE&T”), and Public.

Table 2.3a shows the forecasted budget is slightly less than BayREN’s approved budget cap, due to reallocation of less than the anticipated unspent budget from the closing program. The updated Evaluation Measurement and Verification (“EM&V”) calculation subsequently resulted in a small additional reduction.

Table 1.1a does not include EM&V. Table 2.3a does include EM&V. Table 1.5 was calculated using allocations provided by PG&E via email on October 28, 2025, and SDG&E’s 2023 True-Up Advice Letter and includes funding for BayREN’s Statewide HES program.

Table 1.1a - MCAL Updated Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027^{3,4}

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ -	\$16,352,284	\$69,716,227	\$ -	\$86,068,511
2	Commercial Sector	\$21,238,200	\$ -	\$15,073,302	\$ -	\$36,311,502
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ 9,736,093	\$ -	\$ -	\$ 9,736,093
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$12,509,118	\$ -	\$12,509,118
9	Finance	\$ -	\$3,688,850	\$ -	\$ -	\$3,688,850
10	Codes & Standards	\$ -	\$ -	\$ -	\$6,835,523	\$6,835,523
11	Portfolio Support	\$1,056,444	\$1,640,272	\$5,037,758	\$425,500	\$8,159,974
12	OBF Loan Pool					\$ -
13	Portfolio Subtotal	\$22,249,644	\$31,417,499	\$102,336,405	\$7,261,023	\$163,309,570

Table 2.3a - MCAL Updated Annual and Cumulative Budget⁵

Line	Segment	PY 2024-Actual ⁶	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$7,080,766	\$4,965,670	\$5,195,505	\$5,052,704	\$22,294,644
2	Market Support	\$5,638,852	\$5,943,919	\$10,446,118	\$9,388,608	\$31,417,497
3	Equity	\$21,474,380	\$25,841,848	\$26,458,364	\$28,561,813	\$102,336,404
4	Codes and Standards	\$1,488,806	\$1,905,662	\$2,037,031	\$1,829,525	\$7,261,023
5	EM&V (PA and ED)	\$1,529,711	\$1,610,712	\$1,796,115	\$1,868,028	\$6,804,566
6	Total Budget w/o OBF Loan Pool	\$37,212,515	\$40,267,811	\$45,933,132	\$46,700,678	\$170,114,136
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					79%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$37,212,515	\$40,267,811	\$45,933,132	\$46,700,678	\$170,114,136
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$37,212,515	\$40,267,811	\$45,933,132	\$46,700,678	\$170,114,136
12	Approved Budget Cap⁷					\$171,676,636

³ 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

⁴ Excludes EM&V and Portfolio Oversight

⁵ Table 2.3a includes the SW HES program as represented in CEDARS. BayREN AL 28-E established funding for 2025-2027. The distribution across years is not reflected in CEDARS because 2025 cannot be updated.

⁶ Includes funding committed in 2024 but not yet spent that will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years. Carryover funding is not included in budget forecasts for 2026-2027 except as noted in Line 3 of Table 1.6.

⁷ Decision 23-06-055 OP5

Table 1.5 shows the funding split between gas and electric for BayREN across IOUs for both BayREN’s regional programs and the Statewide HES Program.

Table 1.5 - 4 Year Funding Sources - RENs/CCAs (RENs/CCAs Only)⁸

Line	Year	PG&E ⁹		SDG&E ¹⁰		SCE	SCG
		Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
1	2024 ¹¹	21,955,384	15,257,131	0	0	0	0
2	2025	24,563,365	15,704,446	0	0	0	0
3	2026	26,374,398	16,164,954	299,364	199,576	2,445,300	449,540
4	2027	25,110,032	18,183,126	300,576	200,384	2,455,200	451,360
5	Total	98,003,178	65,309,658	599,940	399,960	4,900,500	900,900

2. Total System Benefit Forecast

BayREN’s updated TSB forecast below shows a significant increase in TSB relative to the TUAL. The increase in TSB can be attributed to shifting budgets into resource programs and updates to the Avoided Cost Calculator.

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	\$1,473,580	\$1,908,133	\$2,545,478	\$2,623,068	\$8,550,259
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$3,452,542	\$3,784,213	\$6,921,523	\$6,847,395	\$21,005,674
4	Total TSB Forecast	\$4,926,122	\$5,692,346	\$9,467,002	\$9,470,463	\$29,555,933
5	CPUC TSB Goal	\$5,260,926	\$5,692,346	\$6,326,064	\$6,692,546	\$23,971,882
6	<i>TSB Forecast / TSB Goal¹²</i>	<i>94%</i>	<i>100%</i>	<i>150%</i>	<i>142%</i>	<i>123%</i>

3. Portfolio Cost Effectiveness Forecast

BayREN, like other RENs, is not subject to cost effectiveness requirements due to the different objectives of RENs within the overall EE portfolio and limitations on activities that can be undertaken. Nonetheless, BayREN does track cost-effectiveness and works to improve these metrics along with its equity, market support, and unique value metrics.

⁸ Table 1.5 includes the SW HES program as represented in CEDARS. BayREN AL 28-E established funding for 2025-2027. The distribution across years is not reflected in CEDARS because 2025 cannot be updated.

⁹ These electric and gas percentage splits were provided by PG&E on October 28, 2025.

¹⁰ These electric and gas percentage splits were taken from SDG&E’s TUAL.

¹¹ Includes funding committed in 2024 but not yet spent that will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years. Carryover funding is not included in budget forecasts for 2026-2027 except as noted in Line 3 of Table 1.6.

¹² TSB Goal from BayREN True-Up Advice Letter, AL 24-E

BayREN's updated cost effectiveness forecast is shown below. All of the cost effectiveness ratios have increased except for RIM for the Resource Acquisition segment, due to higher RIM costs.

Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)¹³

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.29	0.45	0.17
2		Market Support	-	-	-
3		Equity	0.23	0.28	0.23
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.19	0.23	0.17
6		Excluding C&S	0.19	0.23	0.18

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	0.39	0.41	0.41	0.42	0.40	0.41
3		Market Support	-	-	-	-	-	-
4		Equity	0.41	0.41	0.45	0.45	0.43	0.43
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	Including C&S	0.31	0.31	0.33	0.34	0.32	0.32
7		Excluding C&S	0.32	0.32	0.34	0.35	0.33	0.33

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

Although BayREN does have a statewide program, this section is for IOUs only as RENs do not have statewide or third-party compliance obligations to report here.

5. Market Support and Equity Forecast

BayREN's market support and equity segment budgets are shown below relative to the overall forecasted spend.

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

Line	Segment	Qualifying Budget	Total Budget ¹⁴	% of Budget	Cap (IOU & ATA CCA only)
1	Market Support	\$31,417,497	\$163,309,570	19%	30%
2	Equity	\$102,336,404		63%	
3	Market Support + Equity	\$133,753,902		82%	

¹³ 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

¹⁴ Does not include OBF Loan Pool or ED Portfolio Oversight or EM&V; does include Statewide HES Program.

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

BayREN's Codes & Standards program does not claim savings but works to ensure that energy savings from code are realized in real projects on the ground. The program also encourages the adoption of above-code and other energy-related codes and policies both to test potential code improvements to see if they may be suitable for statewide adoption and to drive additional energy savings.

7. Non-Advocacy C&S Budget Forecast

This section does not apply to non-IOU PAs.

IV. Energy Efficiency Portfolio Details

A. Segment Metrics

The CPUC adopted Resolution E-5351 in June 2025, establishing refined indicators for equity and market support segments, along with a reduced set of common metrics. The resolution tasked the Reporting PCG with finalizing methodologies and a reporting template for metrics and indicators not already available in CEDARS. BayREN participates in the Reporting PCG and is looking forward to the completion of a template for future reporting.

BayREN will continue collecting and reporting segment metrics and indicators, as well as common metrics and value metrics.

B. Program Changes

Led by local governments, BayREN delivers programs and resources tailored to local priorities, with a focus on underserved communities. By 2030, BayREN plans to deliver measurable health and resilience benefits for Bay Area communities, while achieving energy savings and greenhouse gas emission reductions. In 2026 and 2027, BayREN will be working to integrate a focus on health and resilience into its programs, including building partnerships with both governmental and non-governmental organizations working in these areas, identifying approaches for combining efforts in order to leverage results, and defining additional related metrics.

1. Residential Sector

Multifamily Program. Starting in 2022, BayREN's Multifamily Program began transitioning from primarily custom measures to primarily deemed measures in order to simplify reporting of benefits. In 2023, the program was designated as an equity segment program and started offering higher rebates for properties in census tracts experiencing disproportionate heat, air quality, and housing cost burdens. Properties can qualify for higher incentives if they install measures to

alleviate these burdens. The program also incentivizes fuel substitution and service panel upgrades. In 2026, the Multifamily Program will receive \$1 million in unused funds from other programs to supplement its incentive budget in order to support additional multifamily projects. At the same time, the program will also begin to apply supplementary equity prioritization criteria, such as limiting the size of qualifying market rate projects.

Single Family. BayREN’s single family program relaunched in 2025 with a new program design. The BayREN Efficiency and Sustainable Energy (“EASE”) Home Program provides income-qualified households with comprehensive healthy-home retrofits, prioritizing weatherization and energy efficiency improvements. The program targets moderate-income residents, especially non-English speaking and pollution-burdened households, requiring income verification. Services are delivered through a direct install approach, supported by a single point-of-contact for technical assistance and project management. The program utilizes a select group of installer contractors and may leverage external funding for additional electrification upgrades.

Green Labeling. The Green Labeling program has historically consisted of two main offerings: Home Energy Scores (“HES”) and real estate trainings. With the anticipated launch of the statewide HES California program in 2026, all HES-related activities within BayREN will be shifted to the statewide program narrative. The real estate training piece will remain within the BayREN regional portfolio.

2. Commercial Sector

BayREN Business. The BayREN Business program transitioned to a new implementer, Alternative Energy Systems Consulting (“AESC”), and re-opened in August 2025. The program now uses the Cost Effectiveness Tool to calculate TSB as the basis for incentive payments. The program will offer a higher advance payment upon project completion to aggregators and one performance payment at the end of the performance period.

BayREN Refrigeration Replacement (“BRRR”) Program. The BRRR program completed its pilot phase in March 2025 and conducted a regional soft launch in the Counties of Marin, Napa, and Sonoma over the summer. The soft launch is a broader opportunity to test program processes and incentive levels on a bigger group of projects and receive feedback from contractors. Upon completion of the regional soft launch, the BRRR program will finalize all program processes and incentives and will aim to launch to the full nine-County Bay Area in Q4 2025. BRRR will claim energy savings and greenhouse gas reductions from deemed energy efficiency measures active in eTRM. BRRR will also report energy savings from other energy efficiency measures and greenhouse gas savings from refrigerant replacement and leak repair in its Value Metrics.

3. Public Sector

Integrated Energy Services (“IES”). The IES program was proposed in the last Business Plan and launched in 2024, with its Energy Concierge and Energy Roadmapping services for local governments both starting operations towards the end of the year. Metrics and targets have been

updated based on the experience to date, and the program will begin considering how it supports equity and begin tracking potential new metrics.

Targeted Decarbonization Services (“TDS”). The TDS Program, also proposed in the last Business Plan and starting operations in 2024, provides training and resources on efficient decarbonization technologies such as heat pumps to local government facilities and finance staff. The program launched its Decarbonization Showcase service in Q1 2025 and selected five local government projects for the first cohort to demonstrate practical solutions for reducing or eliminating emissions from public buildings. The TDS Program is considering additional approaches to support local governments in decarbonizing their buildings.

4. Workforce, Education and Training

BayREN’s WE&T program, Climate Careers®, will continue in 2026-27 and expand its reach by operating summer site offices in six counties, an expansion beyond the four offices operated in 2024-2025. The Green House Calls, which delivers energy- and water-saving measures to local households and provides employment to local youth, will pilot new measures in 2026 to deliver added benefits and provide enhanced skill development for youth Energy Specialists. Successful measures will be continued in 2027. The Green House Calls program will also expand its efforts by offering tailored workforce development services. Every fall, Climate Careers Energy Specialists are offered the opportunity to be placed in paid externships with companies and organizations doing energy and climate work, further introducing interested young people to and preparing them for the variety of career opportunities available in the energy and climate sectors.

5. Codes and Standards

The BayREN Codes and Standards program will continue to support local governments in improving code compliance and encouraging adoption and implementation of codes and other policies that save energy. In 2025, three new training curriculums were developed and introduced for building department staff: Solar Photovoltaic and Battery Storage Systems, Introduction to CALGreen, and Electrical Upgrade Alternatives for Building Retrofits. In 2026, new trainings on the 2025 Energy Code will be added. BayREN released its new Existing Building Study in 2025 to help local governments identify pathways to reducing energy use in and decarbonizing the existing buildings in their communities. The Codes and Standards Program will continue to support local governments in these and similar efforts in 2026-27.

6. Statewide Home Energy Score (HES) California

BayREN will launch the Statewide HES California program in 2026, expanding the HES activities BayREN has offered in the Bay Area since 2018 to the rest of the state. The program trains Assessors to prepare Home Energy Score reports, maintains a 5% QA requirement, and also provides rebates for homeowners to receive a Home Energy Score report. The program further spreads awareness of the score and helps jurisdictions explore how they can use the HES to help meet their climate goals.

C. Program Closures

1. Programs Closed between TUAL and MCAL

None.

2. Programs to be Closed in 2026-2027

As an administrative change to streamline portfolio administration, BayREN plans to close in CEDARS the standalone IDSM programs and shift budgets into the parent program budgets. IDSM services will be fully integrated into program delivery, and expenditures on IDSM activities will continue to be tracked.

3. Programs to be Closed Upon Completion of Commitments

On October 7, 2025, BayREN filed Advice Letter 32-E to close its Water Upgrades Save program by the end of 2025. The program worked with Bay Area municipal water utilities to install water- and energy-saving upgrades that the customer paid for on their water bills with utility bill savings. The Program faced significant unforeseen challenges that prevented customer enrollment and achieving program designated savings goals. In particular, there was a lack of uptake by partner water utilities due to:

- Changes in emergency requirements for retail water utilities;
- Availability of grants to provide direct-install projects to any water customer;
- Initial statewide launch of water budgets for water utility portfolios;
- Perception from water utilities that indoor opportunities have been already captured; and
- Leadership changes in partner utilities.

D. EM&V (2024-2027)

Although BayREN has EM&V budgets and undertakes EM&V activities, budgets are captured in IOU tables. Therefore, RENs and CCAs were instructed to input 0 in the table below to avoid double-counting.

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

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

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

E. Cost Recovery

BayREN's costs are captured in IOU tables. Therefore, BayREN is not populating table 1.2a to avoid double-counting. Tables 1.2a, 1.2b, 1.2c, and 1.3 apply only to IOUs.

1. Unspent Funds

BayREN does not hold any unspent funds from years prior to 2024.

2. Integrated Demand-Side Management (IDSM) Budget

BayREN filed Advice Letter 25-E in March of 2024 requesting authorization to utilize funds within its existing budget for IDSM activities. These activities were approved through Resolution E-5387, issued on September 18, 2025. BayREN is therefore incorporating technical assistance ("TA") for IDSM measures into three programs and will track those expenditures separately for each program.

EE-DR: Which programs and how many programs in your portfolio are utilizing (or plan to utilize) EE-DR funds? Please describe the EE-DR work performed by these programs.

Per D. 18-05-041, utility PAs were required to allocate budget for residential and commercial integrated EE-DR activities. This requirement does not apply to RENS.

EE-Multi-DER (optional): Which programs and how many programs in your portfolio are utilizing (or plan to utilize) EE-Multi-DER funds? Please describe the EE-multi-DER work performed by these programs.

IDSM Resolution E-5387 approved BayREN's IDSM Advice Letter proposing the incorporation of IDSM technical assistance, including application support, IDSM audits, marketing, education and outreach, and workforce development, into four existing residential and public sector programs, with a focus on ongoing or permanent load

shifting or load reduction. BayREN has not proposed new IDSM programs and is not doing so at this time. Due to program design changes, one of the two residential programs will not be providing IDSM technical assistance. The programs that will offer IDSM-related technical assistance are BayREN's Multifamily Program and its two public sector programs, Integrated Energy Services and Targeted Decarbonization Services.

V. CEDARS Discrepancies (optional)

BayREN's Climate Careers program has not forecasted savings but will claim savings going forward as it has in the past. Savings claims are expected to be in line with recent years.

VI. Protest

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

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

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

Jane Elias
Section Director, Energy Programs
Association of Bay Area Governments
375 Beale Street, Suite 700
San Francisco, CA 94105
jelias@bayareametro.gov

VII. Effective Date

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

VIII. Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically to service lists for R.25-04-010 and A.22-02-005 and uploaded to the CPUC Energy Division Advice Letter database (cpucadviceletters.org). Address changes to the General Order 96-B service list should be directed to Jane Elias at jelias@bayareametro.gov or by calling (415) 778-4428.

/s/ Jane Elias

Jane Elias
Section Director, Energy Programs
Association of Bay Area Governments
375 Beale Street, Suite 700
San Francisco, CA 94105
E-mail: jelias@bayareametro.gov
Tel: (415) 778-4428

Attachment A – Appendices from Excel Template in PDF

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	\$ -	\$ 16,352,284	\$ 69,716,227	\$ -	\$ 86,068,511
2	Commercial Sector	\$ 21,238,200	\$ -	\$ 15,073,302	\$ -	\$ 36,311,502
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ 9,736,093	\$ -	\$ -	\$ 9,736,093
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 12,509,118	\$ -	\$ 12,509,118
9	Finance	\$ -	\$ 3,688,850	\$ -	\$ -	\$ 3,688,850
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 6,835,523	\$ 6,835,523
11	Portfolio Support	\$ 1,056,444	\$ 1,640,272	\$ 5,037,758	\$ 425,500	\$ 8,159,974
12	OBF Loan Pool					\$ -
13	Portfolio Subtotal [2]	\$ 22,294,644	\$ 31,417,499	\$ 102,336,405	\$ 7,261,023	\$ 163,309,571

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

[2] excludes EM&V and Portfolio Oversight

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

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ -	\$ 16,391,216	\$ 68,164,345	\$ -	\$ 84,555,561
2	Commercial Sector	\$ 18,860,198	\$ -	\$ 17,502,541	\$ -	\$ 36,362,739
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ 8,750,524	\$ -	\$ -	\$ 8,750,524
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 12,334,428	\$ -	\$ 12,334,428
9	Finance	\$ -	\$ 7,703,873	\$ -	\$ -	\$ 7,703,873
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 7,446,000	\$ 7,446,000
11	Portfolio Support	\$ 978,647	\$ 1,208,563	\$ 5,082,552	\$ 386,684	\$ 7,656,446
12	OBF Loan Pool					
13	Portfolio Subtotal [2]	\$ 19,838,845	\$ 34,054,176	\$ 103,083,866	\$ 7,832,684	\$ 164,809,571

[2] excludes EM&V and Portfolio Oversight

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

Line	Budget Category	Change-Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ -	\$ (38,932)	\$ 1,551,882	\$ -	\$ 1,512,950
2	Commercial Sector	\$ 2,378,002	\$ -	\$ (2,429,239)	\$ -	\$ (51,237)
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ 985,569	\$ -	\$ -	\$ 985,569
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 174,690	\$ -	\$ 174,690
9	Finance	\$ -	\$ (4,015,023)	\$ -	\$ -	\$ (4,015,023)
10	Codes & Standards	\$ -	\$ -	\$ -	\$ (610,477)	\$ (610,477)
11	Portfolio Support	\$ 77,797	\$ 431,709	\$ (44,794)	\$ 38,816	\$ 503,528
12	OBF Loan Pool					\$ -
13	Portfolio Subtotal [2]	\$ 2,455,799	\$ (2,636,677)	\$ (747,461)	\$ (571,661)	\$ (1,500,000)

[2] excludes EM&V and Portfolio Oversight

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

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

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

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

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

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

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

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

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

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

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

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

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

Line	Spending Budget & Cost Recovery Request	2023 Unspent Funds	2024	2025	2026	2027	2024-2027
1	IOU (excluding fuel substitution budget)		\$ -	\$ -	\$ -	\$ -	\$ -
2	IOU Budget forecasted to support fuel sub		\$ -	\$ -	\$ -	\$ -	\$ -
3	Total cost recovery request for IOU portfolio (excluding offset)		\$ -	\$ -	\$ -	\$ -	\$ -
4	IOU Pre-2024 Estimated Unspent & Uncommitted Funds to Offset 2024-2027 Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	Total Cost Recovery Request for IOU Portfolio (including offset)	\$ -	\$ -	\$ -	\$ -	\$ -	
6	Applicable electric split						
7	Applicable gas split	100%	100%	100%	100%	100%	
8	Electric portion for cost recovery (excluding fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	Fuel sub applicable electric split	100%	100%	100%	100%	100%	
10	Electric portion for cost recover (fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total electric portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Total Gas portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	Electric split (with fuel sub)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
14	Gas split (with fuel sub)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	

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

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 2024-2027 Rate Offset									
5	EM&V - PA Funds									\$ -
6	EM&V - CPUC Funds									\$ -
7	IOU Program Funds									\$ -
8	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Table 1.5 - 4 Year Funding Sources - RENS/CCAs (RENS/CCAs Only)^[7]

Line		PG&E ^[8]		SDG&E ^[8]		SCE	SCG
1	Year	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2	2024 ^[9]	\$ 21,955,384	\$ 15,257,131				
3	2025	\$ 24,563,365	\$ 15,704,446				
4	2026	\$ 26,374,398	\$ 16,164,954	\$ 299,364	\$ 199,576	\$ 2,445,300	\$ 449,540
5	2027	\$ 25,110,032	\$ 18,183,126	\$ 300,576	\$ 200,384	\$ 2,455,200	\$ 451,360
6	Total	\$ 98,003,178	\$ 65,309,658	\$ 599,940	\$ 399,960	\$ 4,900,500	\$ 900,900

[7] Table 1.5 includes the SW HES program as represented in CEDARS. BayREN AL 28-E established funding for 2025-2027. The distribution across years is not reflected in CEDARS because 2025 cannot be updated.

[8] The electric and gas percentage splits used here were provided by PG&E via email dated October 28, 2025 and taken from SDG&E's TUAL

[9] Includes funding committed in 2024 but not yet spent that will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years. Carryover funding is not included in budget forecasts for 2026-2027 except as noted in Line 3 of Table 1.6.

Table 1.6 - Mid-Cycle Advice Letter Funding Breakdown (ALL PAs)^[10]

Line	Year	2024 Reported Expenditures ^[11]	2024 Carryover Funding ^[12]	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset ^[13]	2024-2027 Funding Total
1	2024	\$ 21,884,372	\$ 13,798,432					\$ 35,682,804
2	2025			\$ 38,657,099				\$ 38,657,099
3	2026		\$ 1,030,254		\$ 43,106,763			\$ 44,137,017
4	2027					\$ 44,832,651	\$ 1,500,000	\$ 46,332,651

[10] Excluding EM&V. Includes both Regional Programs and the Statewide Program budget.

[11] Does not Include commitments

[12] Funding committed in 2024 but not yet spent will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years. Carryover funding is not included in budget forecasts for 2026-2027 except as noted in Line 3.

[13] Offset for following year's budget

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

Line	Segment	PY 2024-Actual	PY 2025 TUAL ¹	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 1,473,580	\$ 1,908,133	\$ 2,545,478	\$ 2,623,068	\$ 8,550,259
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 3,452,542	\$ 3,784,213	\$ 6,921,523	\$ 6,847,395	\$ 21,005,674
4	Total TSB Forecast	\$ 4,926,122	\$ 5,692,346	\$ 9,467,002	\$ 9,470,463	\$ 29,555,933
5	CPUC TSB Goal	\$ 5,260,926	\$ 5,692,346	\$ 6,326,064	\$ 6,692,546	\$ 23,971,882
6	TSB Forecast / TSB Goal ^[2]	94%	100%	150%	142%	123%

[1] Adjusted to reflect SW budget approved in AL 28-E
[2] TSB Goal from BayREN True-Up Advice Letter, AL 24-E

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	\$ 1,691,781	\$ 1,908,133	\$ 2,412,478	\$ 2,393,970	\$ 8,406,362
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 3,569,146	\$ 3,784,214	\$ 3,913,586	\$ 4,298,576	\$ 15,565,522
4	Total TSB Forecast	\$ 5,260,927	\$ 5,692,347	\$ 6,326,064	\$ 6,692,546	\$ 23,971,884
5	CPUC TSB Goal	\$ 5,260,926	\$ 5,692,346	\$ 6,326,064	\$ 6,692,546	\$ 23,971,882
6	TSB Forecast / TSB Goal ^[3]	100%	100%	100%	100%	100%

[3] TSB Goal from BayREN True-Up Advice Letter, AL 24-E

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	\$ (218,201)	\$ (0)	\$ 133,000	\$ 229,098	\$ 143,897
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ (116,604)	\$ (1)	\$ 3,007,937	\$ 2,548,819	\$ 5,440,152
4	Total TSB Forecast	\$ (334,805)	\$ (1)	\$ 3,140,938	\$ 2,777,917	\$ 5,584,049
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -	\$ -
6	TSB Forecast / TSB Goal ^[4]	-6%	0%	50%	42%	23%

[4] 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]	-	-	-	-	-
2	GWh CPUC Target ^[1]	-	-	-	-	-
3	GWh Forecast/Target	%	0%	0%	0%	0%
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target ^[1]	-	-	-	-	-
6	MW Forecast/Target	%	0%	0%	0%	0%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[1]	-	-	-	-	-
9	MMThm Forecast/Target	%	0%	0%	0%	0%

[1] TSB Goal set in decions D.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]					-
2	GWh CPUC Target ^[2]	-	-			-
3	GWh Forecast/Target	%	0%	0%	0%	0%
4	MW Forecast					-
5	MW CPUC Target ^[2]					-
6	MW Forecast/Target	%	0%	0%	0%	0%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[2]	-	-	-	-	-
9	MMThm Forecast/Target	%	0%	0%	0%	0%

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016

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]	-	-	-	-	-
2	GWh CPUC Target ^[3]	-	-	-	-	-
3	GWh Forecast/Target	%	0%	0%	0%	0%
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target ^[3]	-	-	-	-	-
6	MW Forecast/Target	%	0%	0%	0%	0%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[3]	%	0%	0%	0%	0%
9	MMThm Forecast/Target	%	0%	0%	0%	0%

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

Table 2.3a - MCAL Updated Annual and Cumulative Budget^[5]

Line	Segment	PY 2024-Actual ^[6]	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 7,080,766	\$ 4,965,670	\$ 5,195,505	\$ 5,052,704	\$ 22,294,644
2	Market Support	\$ 5,638,852	\$ 5,943,919	\$ 10,446,118	\$ 9,388,608	\$ 31,417,497
3	Equity	\$ 21,474,380	\$ 25,841,848	\$ 26,458,364	\$ 28,561,813	\$ 102,336,404
4	Codes and Standards	\$ 1,488,806	\$ 1,905,662	\$ 2,037,031	\$ 1,829,525	\$ 7,261,023
5	EM&V (PA and ED)	\$ 1,529,711	\$ 1,610,712	\$ 1,796,115	\$ 1,868,028	\$ 6,804,566
6	Total Budget w/o OBF Loan Pool	\$ 37,212,515	\$ 40,267,811	\$ 45,933,132	\$ 46,700,678	\$ 170,114,136
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					79%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 37,212,515	\$ 40,267,811	\$ 45,933,132	\$ 46,700,678	\$ 170,114,136
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 37,212,515	\$ 40,267,811	\$ 45,933,132	\$ 46,700,678	\$ 170,114,136
12	Approved Budget Cap ^[7]					\$ 171,676,636

[5] Table 2.3a includes the SW HES program as represented in CEDARS. BayREN AL 28-E established funding for 2025-2027. The distribution across years is not reflected in CEDARS because 2025 cannot be updated.
[6] Includes funding committed in 2024 but not yet spent that will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years. Carryover funding is not included in budget forecasts for 2026-2027 except as noted in Line 3 of Table 1.6.
[7] Decision 23-06-055 OP5

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 4,830,805	\$ 4,965,670	\$ 5,005,579	\$ 5,036,791	\$ 19,838,845
2	Market Support	\$ 5,400,131	\$ 5,943,919	\$ 10,639,197	\$ 12,070,928	\$ 34,054,176
3	Equity	\$ 24,504,459	\$ 25,841,848	\$ 26,229,085	\$ 26,508,474	\$ 103,083,867
4	Codes and Standards	\$ 1,977,663	\$ 1,905,662	\$ 1,959,179	\$ 1,990,180	\$ 7,832,683
5	EM&V (PA and ED)	\$ 1,529,711	\$ 1,610,712	\$ 1,826,377	\$ 1,900,266	\$ 6,867,065
6	Total Budget w/o OBF Loan Pool	\$ 38,242,769	\$ 40,267,811	\$ 45,659,417	\$ 47,506,639	\$ 171,676,636
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					80%
8	OBF Loan Pool Addition					\$ -
9	Budget excluding Portfolio Oversight	\$ 38,242,769	\$ 40,267,811	\$ 45,659,417	\$ 47,506,639	\$ 171,676,636
10	ED Portfolio Oversight					\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 38,242,769	\$ 40,267,811	\$ 45,659,417	\$ 47,506,639	\$ 171,676,636

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 2,249,961	\$ 0	\$ 189,925	\$ 15,913	\$ 2,455,799
2	Market Support	\$ 238,721	\$ (0)	\$ (193,079)	\$ (2,682,320)	\$ (2,636,679)
3	Equity	\$ (3,030,079)	\$ (0)	\$ 229,278	\$ 2,053,339	\$ (747,462)
4	Codes and Standards	\$ (488,857)	\$ 0	\$ 77,852	\$ (160,655)	\$ (571,660)
5	EM&V (PA and ED)	\$ 0	\$ (0)	\$ (30,262)	\$ (32,238)	\$ (62,499)
6	Total Budget w/o OBF Loan Pool	\$ (1,030,254)	\$ (1)	\$ 273,714	\$ (805,960)	\$ (1,562,501)
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					217%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (1,030,254)	\$ (1)	\$ 273,714	\$ (805,960)	\$ (1,562,501)
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (1,030,254)	\$ (1)	\$ 273,714	\$ (805,960)	\$ (1,562,501)

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.29	0.45	0.17
2		Market Support	-	-	-
3		Equity	0.23	0.28	0.23
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.19	0.23	0.17
6		Excluding C&S	0.19	0.23	0.18

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

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.26	0.43	0.33
2		Market Support	-	-	-
3		Equity	0.16	0.18	0.19
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.14	0.16	0.16
6		Excluding C&S	0.14	0.17	0.17

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.03	0.02	(0.16)
2		Market Support	-	-	-
3		Equity	0.07	0.10	0.04
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.05	0.07	0.01
6		Excluding C&S	0.05	0.06	0.01

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	0.39	0.41	0.41	0.42	0.40	0.41
3		Market Support	-	-	-	-	-	-
4		Equity	0.41	0.41	0.45	0.45	0.43	0.43
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	Including C&S	0.31	0.31	0.33	0.34	0.32	0.32
7		Excluding C&S	0.32	0.32	0.34	0.35	0.33	0.33

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

Line	Budget Component	Third Party Budget	Cumulative Total Budget w/o OBF Loan Pool	Contribution Percentage	Minimum Threshold
1	Statewide ^[1]				
2	Third-party ^[2]				

[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

Appendix 1 - 2024 - 2027 Program Portfolio Budget and Targets

(a) Program ID	(b) Program Name	(c) Target Exempt	(d) Program Type	(e) Business Sector
BAYREN02	MULTIFAMILY	No	Core PA	Residential Sector
BAYREN02_IDSM	MULTIFAMILY IDSM	No	Core PA	Residential Sector
BAYREN03	CODES AND STANDARDS	Yes	Core PA	Codes & Standards
BAYREN04	WATER/ENERGY NEXUS	Yes	Core PA	Finance
BAYREN05-A	EM&V			
BAYREN06	COMMERCIAL	No	Core PA	Commercial Sector
BAYREN07	GREEN LABELING	Yes	Core PA	Residential Sector
BAYREN08	SINGLE FAMILY	No	Core PA	Residential Sector
BAYREN08_IDSM	SINGLE FAMILY IDSM	No	Core PA	Residential Sector
BAYREN09	CLIMATE CAREERS	Yes	Core PA	WE&T
BAYREN10	BAYREN REFRIGERANT REPLACEMENT	No	Core PA	Commercial Sector
BAYREN11	INTEGRATED ENERGY SERVICES	Yes	Core PA	Public Sector
BAYREN11_IDSM	INTEGRATED ENERGY SERVICES IDSM	Yes	Core PA	Public Sector
BAYREN12	TARGETED DECARBONIZATION SERVICES	Yes	Core PA	Public Sector
BAYREN12_IDSM	TARGETED DECARBONIZATION SERVICES IDSM	Yes	Core PA	Public Sector
BAY_EQUITY_PORTFOLIOSUPPORT	PORTFOLIO ADMIN-EQUITY	Yes	Core PA	Portfolio Support
BAY_MS_PORTFOLIOSUPPORT	PORTFOLIO ADMIN-MARKET SUPPORT	Yes	Core PA	Portfolio Support
BAY_RA_PORTFOLIOSUPPORT	PORTFOLIO ADMIN-RESOURCE ACQUISITION	Yes	Core PA	Portfolio Support
BAY_CS_PORTFOLIOSUPPORT	PORTFOLIO ADMIN-CODES & STANDARDS Portfolio S	Yes	Core PA	Portfolio Support
BAY_SW_HESC	SW Home Energy Score California	Yes	SW Third Party	Residential Sector
BAY_SW_HESC_PA	SW Home Energy Score California - PA Costs	Yes	SW Third Party	Residential Sector
Total				

Updated MCAL Forecasts ^[1]

TUAL Filing

(f) Portfolio Segment	(l) Budget	(m) TSB	(n) GWh	(o) MW	(p) MMThm	(g) Budget	(h) TSB	(i) GWh	(j) MW	(k) MMThm
Equity	\$ 35,072,920	\$ 9,270,773	(3.62)	0	1	\$ 32,931,616	\$ 7,200,843	(0.95)	0.10	0.384
Equity	\$ 272,422	\$ -	-	-	-	\$ 1,094,838	\$ -	-	-	-
Codes & Standards	\$ 6,835,523	\$ -	-	-	-	\$ 7,446,000	\$ -	-	-	-
Market Support	\$ 3,688,850	\$ -	-	-	-	\$ 7,703,873	\$ -	-	-	-
	\$ 6,408,566	\$ -	-	-	-	\$ 6,471,065	\$ -	-	-	-
Resource Acquisition	\$ 21,238,200	\$ 8,550,260	11.84	1	(0)	\$ 18,860,198	\$ 8,406,362	11.97	1.39	(0.028)
Market Support	\$ 6,848,284	\$ -	-	-	-	\$ 6,887,216	\$ -	-	-	-
Equity	\$ 34,370,885	\$ 11,612,400	(1.24)	1	0	\$ 33,412,961	\$ 8,364,678	(2.51)	0.61	0.532
Equity	\$ -	\$ -	-	-	-	\$ 724,930	\$ -	-	-	-
Equity	\$ 12,509,118	\$ 122,502	0.04	0	0	\$ 12,334,428	\$ -	-	-	-
Equity	\$ 15,073,302	\$ -	-	-	-	\$ 17,502,541	\$ -	-	-	-
Market Support	\$ 3,486,124	\$ -	-	-	-	\$ 3,056,690	\$ -	-	-	-
Market Support	\$ 241,501	\$ -	-	-	-	\$ 454,486	\$ -	-	-	-
Market Support	\$ 5,681,984	\$ -	-	-	-	\$ 4,968,755	\$ -	-	-	-
Market Support	\$ 326,482	\$ -	-	-	-	\$ 270,593	\$ -	-	-	-
Equity	\$ 5,037,758	\$ -	-	-	-	\$ 5,082,552	\$ -	-	-	-
Market Support	\$ 1,640,274	\$ -	-	-	-	\$ 1,208,563	\$ -	-	-	-
Resource Acquisition	\$ 1,056,444	\$ -	-	-	-	\$ 978,647	\$ -	-	-	-
Codes & Standards	\$ 425,501	\$ -	-	-	-	\$ 386,683	\$ -	-	-	-
Market Support	\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-
Market Support	\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-
	\$ -	\$ -	-	-	-					
	\$ -	\$ -	-	-	-					
	\$ -	\$ -	-	-	-					
	\$ 160,214,138	29,555,934	7.02	3	1	\$ 161,776,636	23,971,883	8.51	2.10	0.888

Change

(q) Budget	(r) TSB	(s) GWh	(t) MW	(u) MMThm	(v) Change Notes
\$ 2,141,303	\$ 2,069,930	(2.67)	\$ (0)	\$ 0	Additional budget, updated measures
\$ (822,416)	\$ -	-	\$ -	\$ -	Shifted some budget to main program.
\$ (610,477)	\$ -	-	\$ -	\$ -	Shifted budget to other programs.
\$ (4,015,023)	\$ -	-	\$ -	\$ -	Reduced budget due to closure.
\$ (62,499)	\$ -	-	\$ -	\$ -	Recalculated based on new budget.
\$ 2,378,002	\$ 143,897	(0.13)	\$ 0	\$ 0	Additional budget, updated measures
\$ (38,932)	\$ -	-	\$ -	\$ -	Budget shifted to other programs.
\$ 957,924	\$ 3,247,721	1.27	\$ 1	\$ (0)	Additional budget, updated measures
\$ (724,930)	\$ -	-	\$ -	\$ -	Budget shifted to main program.
\$ 174,690	\$ 122,502	0.04	\$ 0	\$ 0	Change due to updated measure packages and Avoided Cost Calculator.
\$ (2,429,239)	\$ -	-	\$ -	\$ -	Budget shifted to other programs.
\$ 429,434	\$ -	-	\$ -	\$ -	Additional budget.
\$ (212,985)	\$ -	-	\$ -	\$ -	Some budget shifted to main program.
\$ 713,229	\$ -	-	\$ -	\$ -	Additional budget.
\$ 55,889	\$ -	-	\$ -	\$ -	Additional budget.
\$ (44,795)	\$ -	-	\$ -	\$ -	Portfolio support budget reallocated based on new program budgets.
\$ 431,711	\$ -	-	\$ -	\$ -	Portfolio support budget reallocated based on new program budgets.
\$ 77,797	\$ -	-	\$ -	\$ -	Portfolio support budget reallocated based on new program budgets.
\$ 38,817	\$ -	-	\$ -	\$ -	Portfolio support budget reallocated based on new program budgets.
\$ -	\$ -	-	\$ -	\$ -	Budget not included here because of instruction that IOUs should list SW program budgets.
\$ -	\$ -	-	\$ -	\$ -	Budget not included here because of instruction that IOUs should list SW program budgets.
\$ -	\$ -	-	\$ -	\$ -	
\$ -	\$ -	-	\$ -	\$ -	
\$ -	\$ -	-	\$ -	\$ -	
\$ (1,562,499)	\$ 5,584,051	(1.49)	\$ 1	\$ 0	Net budget reduction based on program changes.

Appendix 2 - Energy Efficiency Cap And Target Expenditure Projections (Cumulative for PY 2024-2027)
Program level budgets can be found on tab A1 - Program Table

Line	Budget Category	Expenditures			Cap & Target		
		(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]	\$ 1,963,851		\$ 1,963,851	1.2%	10.0%	
3	Non-PA Third Party & Partnership ^[2]	\$ -	\$ -	\$ -	0.0%		10.0%
4	PA & Non-PA Target Exempt Programs ^[3]	\$ 11,290,195	\$ -	\$ 11,290,195			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 15,813,099		\$ 15,813,099	9.6%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 75,782,348		\$ 75,782,348			
9	Non Incentives and Non Rebates	\$ 27,898,070		\$ 27,898,070	16.9%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)	\$ 30,562,010		\$ 30,562,010			
11	EM&V Costs (PA and ED) ^[4]	\$ 1,871,255	\$ -	\$ 1,871,255	1.1%	4.0%	
11a	EM&V - PA	\$ 1,871,255		\$ 1,871,255			
11b	EM&V - ED			\$ -			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 165,180,827	\$ -	\$ 165,180,827			
13	Total Third-Party Qualifying Costs ^[5]				0.0%		60.0%
14	OBF Loan Pool Addition			\$ -			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[8]			\$ 165,180,827			
16	ED Portfolio Oversight ^[10]			\$ -			
17	EE-Funded IDSM					2.5%	
	Multi-DER IDSM ^[7]	\$ 840,405					
18	PA Spending Budget Request			\$ 165,180,827			

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

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

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

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

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

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

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

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

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

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

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

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

Appendix 3 - RTR Implementation Descriptions per D.23-06-055
ED staff request that PAs describe their progress on recommendations from PY2022 onwards evaluations that impact programs in the current budget cycle.

	Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	(PA Response)
CALMAC ID	Study Name	Recommendations	If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other
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	Accepted
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 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	All RENs	Accepted
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	Accepted
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	Accepted
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	Accepted

PA Response Notes		Proposed RTR Implementation			
Examples:	Next Steps:	Timeline:	Status:	Notes:	Impacted Programs:
Describe specific program change, give reason for rejection, or indicate that it's under further review.	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.	Set deadlines for the completion of each action. Include a start date and end date when possible.	Track the status of each action item (e.g., Not Started, In Progress, Completed).	Add notes for any additional information or updates.	Identify which programs (program IDs) would be impacted by the action items.
BayREN continues to work to promote electrification and ensure that equity communities are able to participate in programs. For example, the Multifamily Program implemented a new incentive structure in 2023 that included increased incentives for electrification measures and will be adding new equity prioritization criteria in 2026. The Single Family program underwent a program redesign and relaunched in 2025, targeting moderate-income residents, especially non-English speaking and pollution-burdened households and requiring income verification. BayREN's new public sector programs started up in 2024 and prioritize assistance to public buildings that serve equity-priority populations, such as the Menlo Park Belle Haven Child Care Development Center. In 2025, BayREN's Codes and Standards Program developed and launched an Existing Buildings Study which includes a dashboard that provides information for each jurisdiction in the Bay Area about its existing building stock and pathways to decarbonizing those buildings. The program has also developed trainings to support electrification, such as the new "Alternatives to Electrical Upgrades" training. BayREN will continue to seek further opportunities to support decarbonization within existing programs, both through traditional EE and incorporation of IDSМ support.	Continue to promote electrification and provide equity-focused multipliers in various programs as appropriate.	Ongoing	Ongoing	None	All programs
BayREN will share multifamily successes via regular coordination meetings with PG&E, MCE, and other multifamily PAs and CCAs. Coordination will also take place through other statewide and sector-specific discussions facilitated by the CPUC and CalTF.	BayREN's multifamily program staff will continue to meet regularly with their PG&E counterparts and share information and successes.	Ongoing	Ongoing	None	BAYREN02 Multifamily
BayREN will share multifamily successes via regular coordination meetings with PG&E, MCE, and other multifamily PAs and CCAs. Coordination will also take place through other statewide and sector-specific discussions facilitated by the CPUC and CalTF.	Continue regular coordination meetings and discussions to share multifamily successes.	Ongoing	Ongoing	None	BAYREN02 Multifamily
BayREN coordinates closely with the other PAs in our territory (PG&E and MCE), as detailed in our Joint Cooperation Memos (JCMs). BayREN staff attend our regular coordination calls, with support from consultants as needed.	Continue ongoing coordination meetings. As part of the next JCM discussions, BayREN will work with PG&E and MCE to determine any clarification of roles that is needed for coordination meetings, whether a RACI chart would be helpful, and approaches for more formally tracking attendance as appropriate.	Ongoing and part of the work for the JCM that will be due in 2026	Ongoing	None	All programs
In 2025, BayREN's single family program relaunched with a new program design. The BayREN Efficiency and Sustainable Energy (EASE) Home Program provides income-qualified households with comprehensive healthy-home retrofits, prioritizing weatherization and energy efficiency improvements. The program targets moderate-income residents, especially non-English speaking and pollution-burdened households, requiring income verification. Services are delivered through a direct install approach, supported by a single point-of-contact for technical assistance and project management. The program utilizes a select group of installer contractors and may leverage external funding for additional electrification upgrades	The program has just finished launching in all nine counties. BayREN will monitor the program to ensure that it is working as designed to assist underserved customers.	Ongoing	Ongoing	None	BAYREN08 Single Family

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:

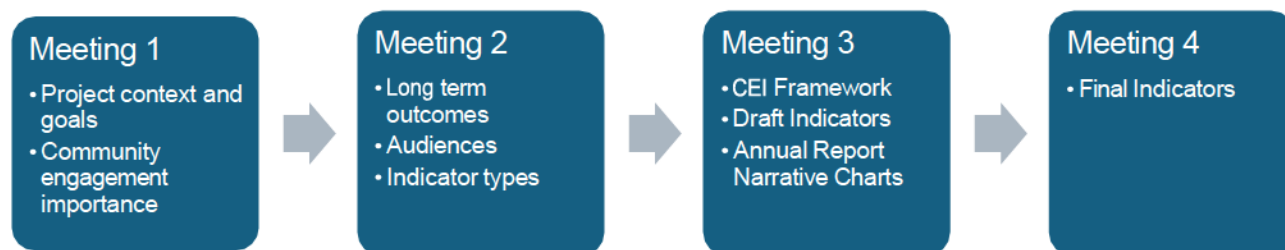
- **Relevance** – Programs are designed to address community needs while being accessible to participants.
- **Trust** – A continued relationship and sense of trust is fostered between engagement audiences (including program participants) and the PA / third party (3P) implementers.
- **Impact** – Equity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

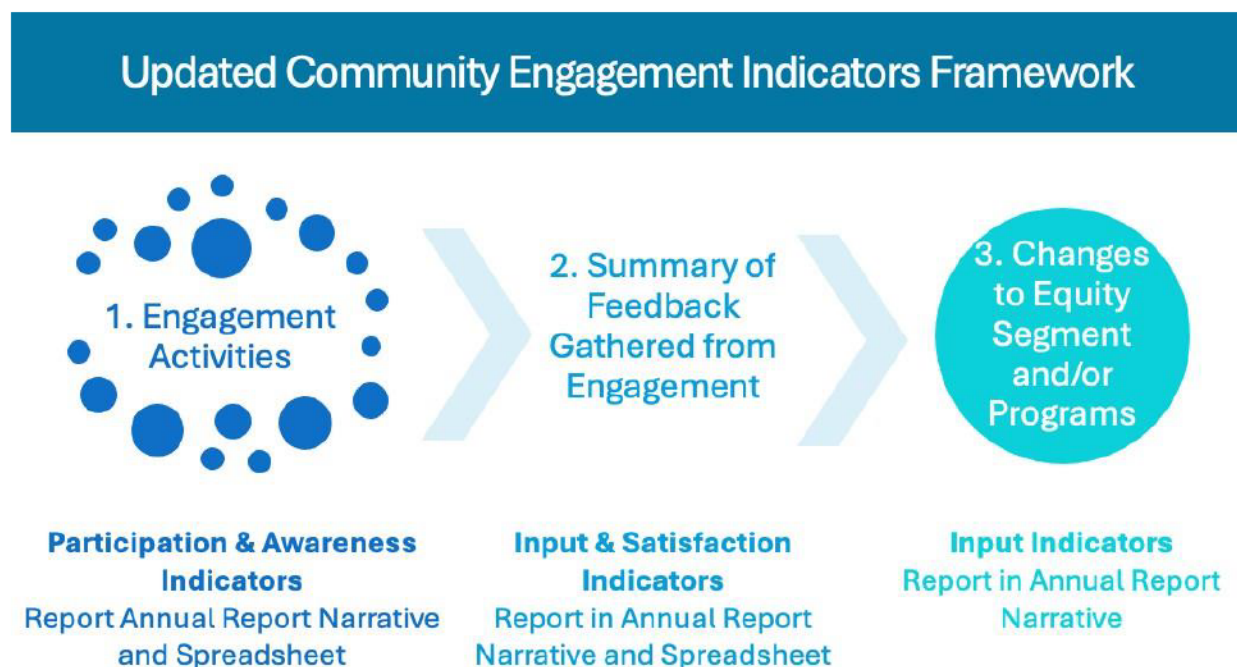
Input (qualitative and quantitative) – The amount and quality of feedback from program audience members, including changes to program design based on that feedback.

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.

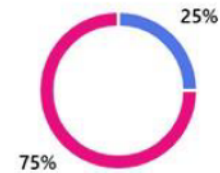
Summary of Survey Results

- 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?

● Retroactive	3
● Prospective	9



Equity Segment | Community Engagement Indicators

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



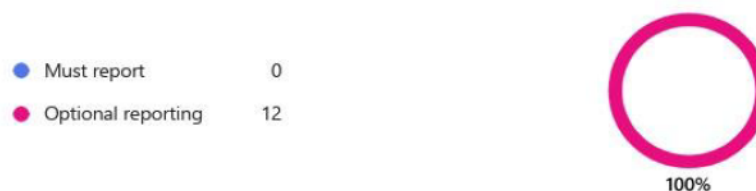
4. Do you think the "Reporting PCG" would need to be involved for clarifying reporting issues?



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



6. Treatment of non-consensus indicators?



Attachment C – PA Response to Recommendations

Recommendation 1: Increase efforts to create a pathway to electrification and provide equity-focused multipliers (CALMAC ID CPU0372.01; PY 2022 Regional Energy Networks Impact)

Recommendation verbatim from report: 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 equity-focused multipliers that target low-income participants, DACs, and environmental justice areas

REN Response: BayREN continues to work to promote electrification and ensure that equity communities are able to participate in programs. For example, the Multifamily Program implemented a new incentive structure in 2023 that included increased incentives for electrification measures and will be adding new equity prioritization criteria in 2026. The Single Family program underwent a program redesign and relaunched in 2025, targeting moderate-income residents, especially non-English speaking and pollution-burdened households and requiring income verification. BayREN’s new public sector programs started up in 2024 and prioritize assistance to public buildings that serve equity-priority populations, such as the Menlo Park Belle Haven Child Care Development Center. In 2025, BayREN’s Codes and Standards Program developed and launched an Existing Buildings Study which includes a dashboard that provides information for each jurisdiction in the Bay Area about its existing building stock and pathways to decarbonizing those buildings. The program has also developed trainings to support electrification, such as the new “Alternatives to Electrical Upgrades” training.

BayREN will continue to seek further opportunities to support decarbonization within existing programs, both through traditional EE and incorporation of IDSM support.

Next Steps: Continue to promote electrification and provide equity-focused multipliers in various programs as appropriate.

Status: Ongoing.

Notes: None.

Impacted programs: All programs.

Recommendation 2: Consider sharing successes serving the multifamily sector during coordination meetings with utilities (CALMAC ID CPU0372.01; PY 2022 Regional Energy Networks Impact)

Recommendation verbatim from report: 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

REN Response: BayREN will share multifamily successes via regular coordination meetings with PG&E, MCE, and other multifamily PAs and CCAs. Coordination will also take place through other statewide and sector-specific discussions facilitated by the CPUC and CalTF.

Next Steps: BayREN's multifamily program staff will continue to meet regularly with their PG&E counterparts and share information and successes.

Status: Ongoing

Notes: None

Impacted programs: BAYREN02 Multifamily.

Recommendation 3: Collaborate with the utilities and other stakeholders to share best practices, particularly for the multifamily sector (CALMAC ID CPU0372.01; PY 2022 Regional Energy Networks Impact)

Recommendation verbatim from report: 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.

REN Response: BayREN will share multifamily successes via regular coordination meetings with PG&E, MCE, and other multifamily PAs and CCAs. Coordination will also take place through other statewide and sector-specific discussions facilitated by the CPUC and CalTF.

Next Steps: Continue regular coordination meetings and discussions to share multifamily successes.

Status: Ongoing

Notes: None

Impacted programs: BAYREN02 Multifamily.

Recommendation 4: PAs should attend coordination meetings and consider clarifying roles of attendees (CALMAC ID CPU0372.01; PY 2022 Regional Energy Networks Impact)

Recommendation verbatim from report: 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.

REN Response: BayREN coordinates closely with the other PAs in our territory (PG&E and MCE), as detailed in our Joint Cooperation Memos (JCMs). BayREN staff attend our regular coordination calls, with support from consultants as needed.

Next Steps: Continue ongoing coordination meetings. As part of the next JCM discussions, BayREN will work with PG&E and MCE to determine any clarification of roles that is needed for coordination meetings, whether a RACI chart would be helpful, and approaches for more formally tracking attendance as appropriate.

Status: Ongoing and part of the work for the JCM that will be due in 2026.

Notes: None

Impacted programs: All programs.

Recommendation 5: Target more underserved populations that would not undertake similar upgrades without program support (CALMAC ID CPU0372.01; PY 2022 Regional Energy Networks Impact)

Recommendation verbatim from report: 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.

REN Response: In 2025, BayREN's single family program relaunched with a new program design. The BayREN Efficiency and Sustainable Energy (EASE) Home Program provides income-qualified households with comprehensive healthy-home retrofits, prioritizing weatherization and energy efficiency improvements. The program targets moderate-income residents, especially non-English speaking and pollution-burdened households, requiring income verification. Services are delivered through a direct install approach, supported by a single point-of-contact for technical assistance and project management. The program utilizes a select group of installer contractors and may leverage external funding for additional electrification upgrades

Next Steps: The program has just finished launching in all nine counties. BayREN will monitor the program to ensure that it is working as designed to assist underserved customers.

Status: Ongoing.

Notes: None.

Impacted programs: BAYREN08 Single Family.

Attachment D – CEDARS Filing Confirmation

CEDARS FILING SUBMISSION RECEIPT

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

PA: Bay Area Regional Energy Network (BAY)

Budget Filing Year: 2026

Submitted: 15:46 on 29 Oct 2025

By: BayREN TEC

Advice Letter Number: 34-E

* Portfolio Budget Filing Summary *

- TRC: 0.2
- PAC: 0.24
- TRC (no admin): 0.78
- PAC (no admin): 2.93
- RIM: 0.27
- Budget: \$45,933,131.80
- TotalSystemBenefit: \$9,467,001.60
- ElecBen: \$3,166,040.99
- GasBen: \$8,599,209.46
- OtherBen: \$0.00
- TRCCost: \$59,153,829.25
- PACCost: \$48,131,560.54

* Programs Included in the Budget Filing *

- BAY_CS_PortfolioSupport: PORTFOLIO ADMIN-CODES & STANDARDS
- BAY_Equity_PortfolioSupport: PORTFOLIO ADMIN-EQUITY
- BAY_MS_PortfolioSupport: PORTFOLIO ADMIN-MARKET SUPPORT
- BAY_RA_PortfolioSupport: PORTFOLIO ADMIN-RESOURCE ACQUISITION
- BAYREN02: Multi Family
- BAYREN02_IDSM: MULTIFAMILY IDSM
- BAYREN03: Codes and Standards Program
- BAYREN04: Water Upgrades Save
- BAYREN05-A: Evaluation Measurement and Verification - BAYREN
- BAYREN06: Commercial

- BAYREN07: Green Labeling
- BAYREN08: Single Family
- BAYREN08_IDS: SINGLE FAMILY IDS
- BAYREN09: Climate Careers
- BAYREN10: Refrigerant Replacement
- BAYREN11: Integrated Energy Services
- BAYREN11_IDS: INTEGRATED ENERGY SERVICES IDS
- BAYREN12: Targeted Decarbonization Services
- BAYREN12_IDS: TARGETED DECARBONIZATION SERVICES IDS
- BAY_SW_HESC: SW Home Energy Score California
- BAY_SW_HESC_PA: SW Home Energy Score California - PA Costs

CEDARS FILING SUBMISSION RECEIPT

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

PA: Bay Area Regional Energy Network (BAY)

Budget Filing Year: 2027

Submitted: 15:46 on 29 Oct 2025

By: BayREN TEC

Advice Letter Number: 34-E

* Portfolio Budget Filing Summary *

- TRC: 0.21
- PAC: 0.24
- TRC (no admin): 0.72
- PAC (no admin): 1.09
- RIM: 0.26
- Budget: \$46,700,679.00
- TotalSystemBenefit: \$9,470,463.24
- ElecBen: \$3,245,594.99
- GasBen: \$8,271,125.11
- OtherBen: \$0.00
- TRCCost: \$53,592,334.81
- PACCost: \$48,249,989.53

* Programs Included in the Budget Filing *

- BAY_CS_PortfolioSupport: PORTFOLIO ADMIN-CODES & STANDARDS
- BAY_Equity_PortfolioSupport: PORTFOLIO ADMIN-EQUITY
- BAY_MS_PortfolioSupport: PORTFOLIO ADMIN-MARKET SUPPORT
- BAY_RA_PortfolioSupport: PORTFOLIO ADMIN-RESOURCE ACQUISITION
- BAYREN02: Multi Family
- BAYREN02_IDSM: MULTIFAMILY IDSM
- BAYREN03: Codes and Standards Program
- BAYREN04: Water Upgrades Save
- BAYREN05-A: Evaluation Measurement and Verification - BAYREN
- BAYREN06: Commercial

- BAYREN07: Green Labeling
- BAYREN08: Single Family
- BAYREN08_IDSM: SINGLE FAMILY IDSM
- BAYREN09: Climate Careers
- BAYREN10: Refrigerant Replacement
- BAYREN11: Integrated Energy Services
- BAYREN11_IDSM: INTEGRATED ENERGY SERVICES IDSM
- BAYREN12: Targeted Decarbonization Services
- BAYREN12_IDSM: TARGETED DECARBONIZATION SERVICES IDSM
- BAY_SW_HESC: SW Home Energy Score California
- BAY_SW_HESC_PA: SW Home Energy Score California - PA Costs