



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

☐ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person:

Phone #:

E-mail:

E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

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

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

Does AL replace a withdrawn or rejected AL?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

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? ☐ Yes ☐ No

If yes, specification of confidential information:

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

Resolution required? ☐ Yes ☐ No

Requested effective date:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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

Tariff schedules affected:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

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

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

Contact Name:
Title:
Utility/Entity Name:

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

Contact Name:
Title:
Utility/Entity Name:

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

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

ENERGY Advice Letter Keywords

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



November 4, 2025

Advice Letter 003-E

(San Diego Regional Energy Network – CPUC Identification #4001)

California Public Utilities Commission
Energy Division
Attention: Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, CA 94102-3298

SUBJECT: San Diego Regional Energy Network’s 2026-2027 Mid-Cycle Advice Letter Compliance Filing.

Pursuant to California Public Utilities Commission (“Commission”) Decision (“D.”) 21-05-031 and Energy Division’s August 22, 2025 *Letter Granting Extension of Time to Comply with Decision 21-05-031 Requiring a Tier 2 Mid-Cycle True-Up Advice Letter by September 1, 2025*, San Diego Regional Energy Network (“SDREN”) hereby submits its 2026-2027 Mid-Cycle Advice Letter (“AL”) Compliance Filing.

TIER DESIGNATION

Pursuant to General Order (“GO”) 96-B, Energy Industry Rule 5.2, and Ordering Paragraph (“OP”) 10 of D.21-05-031, this AL is submitted with a Tier 2 designation.

EFFECTIVE DATE

This AL is effective upon Energy Division approval.

BACKGROUND

A. Overview of SDREN

The Commission authorized SDREN in August 2024, with a budget of \$124 million allocated through 2027.¹ SDREN's service territory is home to 3.3 million people, the second most populous of California's 58 counties and the fifth largest county in the United States. SDREN's service territory includes the County of San Diego, 18 incorporated cities, 18 Tribal nations, 16 significant naval and military installations, 42 school districts and 24 water districts.

SDREN aspires to be a regional leader focused on helping communities invest in strategies that accelerate decarbonization. Through its portfolio of programs, guided by its core values, SDREN is committed to delivering programs that make inroads into communities to reduce greenhouse gas ("GHG") emissions, achieve equity, drive market transformation and provide value to ratepayers.

SDREN seeks to do this by providing ten programs, listed below, to San Diegans that will serve the Commercial, Cross-Cutting (Codes and Standards and Workforce, Education and Training), Public and Residential sectors:

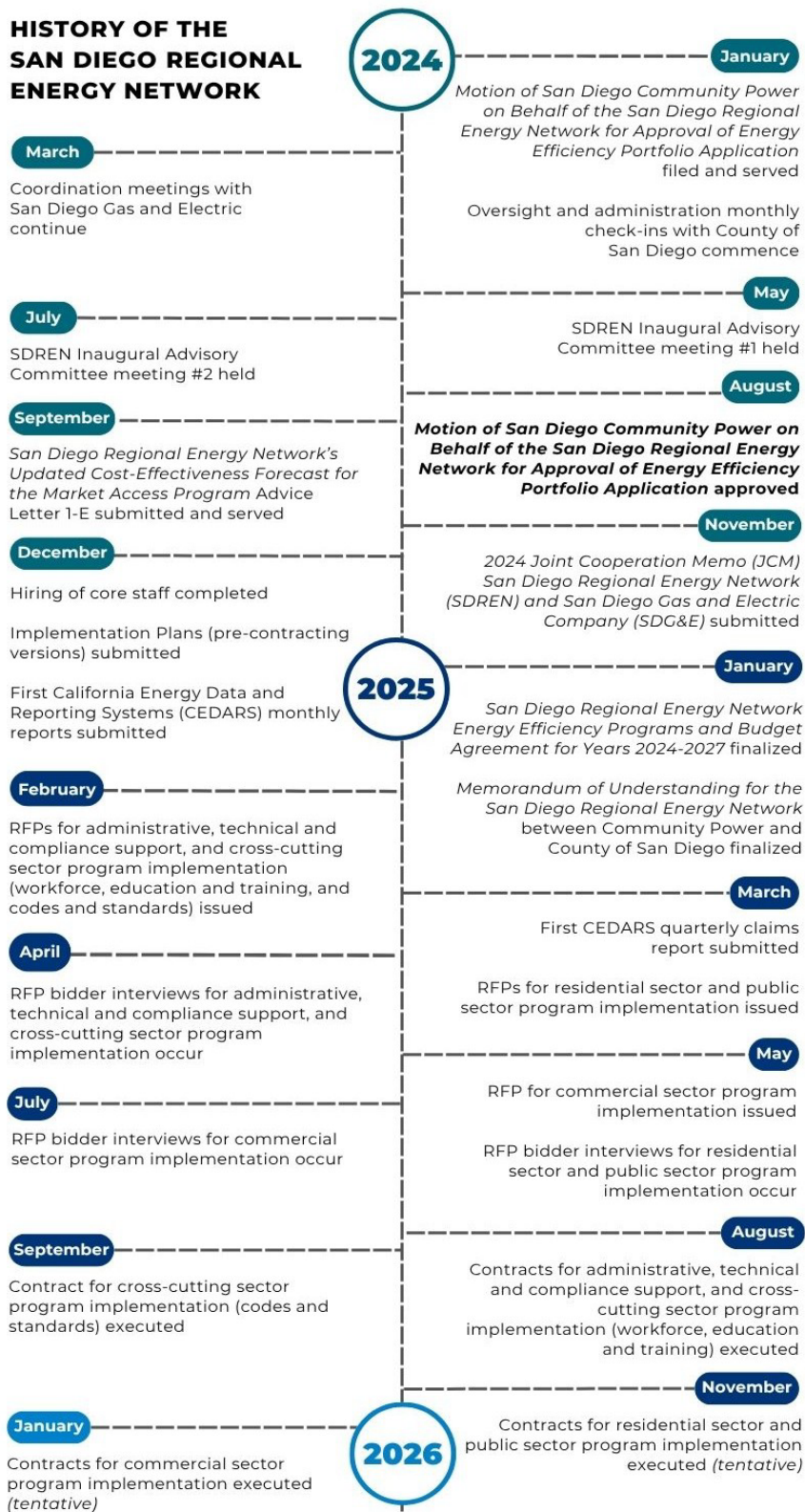
- Efficient Refrigeration;
- Market Access Program;
- Small-to-Medium Business Energy Coach;
- Codes and Standards Program;
- Energy Pathway Program;
- Workforce Training and Capacity Building Program;
- Climate Resilience Leadership;
- Tribal Engagement Program;
- Single-Family Program; and
- Multifamily Program.

SDREN plans to launch programs by the end of 2025 through early 2026. A timeline of activities SDREN has undertaken since authorization is featured below.

¹ Decision ("D.") 24-08-003 (Aug. 1, 2024).

KEY MILESTONES

HISTORY OF THE SAN DIEGO REGIONAL ENERGY NETWORK



B. Purpose and Key Objectives of the MCAL Process

The Commission explained in D.21-05-031 that the general purpose of the Mid-Cycle Advice Letter (“MCAL”) is for Portfolio Administrators (“PAs”) to update technical inputs and forecasts to reflect any changes adopted by the Commission through the biennial Potential and Goals (“PG”) Study. Ordering Paragraph 10 of that decision requires PAs to submit Tier 2 MCAL filings by September 1st in the odd years in which the Commission has adopted updated energy efficiency potential and goals.² The MCAL filing must detail adjustments to the PA’s “technical inputs, forecasts and portfolio to account for changes in energy efficiency potential and goals.”³ On August 22, 2025, the Executive Director of the Commission’s Energy Division granted an extension for all PAs’ MCALs, covering years 2026-2027. The extension provided that the deadline would be 60 days from the issuance of the decision adopting energy efficiency goals for 2026-2037.⁴ The Commission issued its decision adopting updated energy efficiency potential and goals on September 5, 2025,⁵ which resulted in an MCAL deadline of November 4, 2025.

While the PG Study updates are binding for investor-owned utilities (“IOUs”), the Commission has acknowledged that these updates do not affect the goals established by Community Choice Aggregators (“CCAs”) or Regional Energy Networks (“RENs”).⁶ Notwithstanding, the Commission found it “important to have their portfolio technical inputs and forecasts updated to reflect any new inputs available in the previous two years, and therefore do not remove the advice letter requirements for the non-IOU administrators.”⁷ Accordingly, while SDREN is not adjusting its forecasts based on the updated potential and goals set forth in D.25-08-034, this MCAL filing includes updates to technical inputs and forecasts that reflect available updates to cost-effectiveness inputs and the Cost-Effectiveness Tool (“CET”) itself. The MCAL process provides stakeholders with an opportunity to review and comment on these updated portfolio forecasts and approaches.

Finally, since its authorization in August 2024, SDREN has actively issued and evaluated solicitations for third party implementers, and anticipates launching programs by the end of 2025 through early 2026. Because SDREN did not submit a true-up advice letter, the portfolio values presented in the attached MCAL Excel templates are based on SDREN’s approved Business Plan rather than a true-up filing.

C. Overview of Specific MCAL Filing Requirements

1. D.21-05-031

Decision 21-05-031 established a new structure for the administration and oversight of energy efficiency portfolios in California. As described above, the Commission instituted a requirement for energy efficiency PAs to file a mid-cycle update via a Tier 2 advice letter during the second year of each four-year portfolio cycle. While the MCALs include adjustments to technical inputs,

² D.21-05-031, OP 10 (May 26, 2021).

³ *Id.*

⁴ *See* Energy Division Letter Granting Extension at 1.

⁵ *See* D.25-08-034 (Sept. 5, 2025).

⁶ D.21-05-031 at 68.

⁷ *Id.*

forecasts and portfolio approaches, they do not adjust authorized budgets, which are determined and set within the four-year portfolio application process. Instead, the mid-cycle updates allow for portfolio alignment with updated technical inputs and revised forecasts while ensuring ongoing compliance with the following key criteria:

- The PAs’ portfolios must meet the total system benefit (“TSB”) for the four years, adjusted by the updated TSB for the remaining period of the portfolio.
- The portfolio must meet or exceed a forecasted total resource cost (“TRC”) ratio of 1.0 for the resource acquisition segment of the portfolio (with the exception of RENs).
- The equity and market support segments of the portfolio, combined, must not exceed 30% of the total budget (with the exception of RENs).
- IOUs must meet the statewide and third-party contribution percentage requirements.
- The advice letters also must include a report on the progress against metrics relevant for each segment of the portfolio.⁸

With regard to the final criteria, SDREN does not have activity to report on “the progress against metrics relevant to each segment of the portfolio” as its programs have not yet gone to market. However, SDREN describes efforts generally related to metrics in subsequent sections of this MCAL.

Finally, D.21-05-031 provides that “stakeholders may engage in a process to reach consensus around portfolio changes to better align with goals and cost-effectiveness requirements. The results of this process should be included in the MCALs.”⁹ SDREN is not aware of engagement activities and therefore has nothing to report.

2. D.23-06-055

Decision 23-06-055 established several other MCAL requirements and analyses to be completed by the typical MCAL deadline of September 1, 2025. Those requirements, as well as SDREN’s compliance, are previewed below.

- **Response to Impact Evaluation Recommendations:** All PAs must include, as part of their MCAL submissions, a specific description of how they have incorporated or otherwise addressed impact evaluation recommendations for Commission studies released after 2022. Energy Division will determine which studies must be addressed. This requirement is intended to improve transparency and accountability and does not replace the existing response-to-recommendations process.¹⁰

SDREN’s responses to Impact Evaluation Recommendations are in the accompanying MCAL Excel spreadsheet on tab “A3 RTR Descriptions.”

- **Demographic Participation Report:** PAs are directed to collaborate with the Reporting Project Coordination Group (“PCG”) and, if appropriate, the California Energy Efficiency Coordinating Committee (“CAEECC”) metrics working groups to develop a report addressing demographic participation questions outlined in the

⁸ *Id.* at 41.

⁹ *Id.* at 48.

¹⁰ D.23-06-055, p. 32, OP 16 (Jul. 3, 2025).

decision. This report must be submitted by the MCAL filing date. Based on this analysis, PAs are expected to propose preferred approaches to regular demographic participation reporting in their 2026 portfolio filings.¹¹

SDREN participated in the Demographic Participation Report sub-group of the PCG; the final report is included in Attachment E.

- **Community Engagement Indicators:** PAs are required to include community engagement indicators in their MCALs due September 1, 2025. Indicators that received broad support, even if not adopted by consensus, should be reflected. PAs must thereafter report annually on each agreed-upon indicator.¹²

Consensus community engagement indicators are included in Attachment B of this filing.

- **Joint Cooperation Memos (“JCMs”) Timing Modification:** JCMs must now be submitted 60 days after CPUC approval of the final true-up and mid-cycle advice letters of each participating PA. This timing change ensures certainty regarding available program offerings. JCMs must be submitted to CEDARS, with service list notification in Rulemaking 13-11-005 or any successor proceeding.¹³

SDREN and San Diego Gas & Electric (“SDG&E”) have commenced discussions to prepare for the JCM filing due 60 days after the Commission’s approval of this MCAL.

3. Decision 25-08-034 (Updated Energy Efficiency Potential and Goals)

As noted above, the Commission approved D.25-08-034 on September 5, 2025. This decision established new energy efficiency goals for the IOUs for years 2026-2037. While the savings and TSB goals issued in D.25-08-034 do not apply to RENs or CCA PAs,¹⁴ REN and CCA contributions count toward the IOUs’ assigned goals. This MCAL does not adjust SDREN’s forecasts based on D.25-08-034, but it does include updates to technical inputs and forecasts that reflect available updates to cost-effectiveness inputs and the CET.

4. Forthcoming Decision Regarding Natural Gas Phase-Out

As of the submission of this MCAL, the Commission has not yet issued a decision establishing guidance on natural gas phaseout in the current energy efficiency oversight docket (Rulemaking (“R.”) 25-04-010).

D. Contents of this Filing

In accordance with the filing requirements described above, the contents of this MCAL are as follows:

- **Narrative** – This document;

¹¹ *Id.* at 65-66, OP 23.

¹² *Id.* at 68, OP 24.

¹³ *Id.* at 91, OP 35.

¹⁴ D.21-05-031 at 68.

- **Attachment A** – Appendices from Excel Spreadsheet in PDF;¹⁵
- **Attachment B** – Community Engagement Indicators Results;
- **Attachment C** – PA Response to Recommendations;
- **Attachment D** – CEDARS Filing Confirmation;
- **Attachment E** – Final Demographic Reporting Report; and
- **Attachment F** – Unique Value Metrics.

DISCUSSION

A. Portfolio Overview

1. Recent Decisions and Guidance Impacting SDREN’s Portfolio

At the same time it authorized SDREN, the Commission required SDREN to conduct a re-run of cost-effectiveness forecasting for its Market Access Program.¹⁶ The Commission adopted this requirement because Energy Division was interested in seeing whether recent updates to the Avoided Cost Calculator and Cost-Effectiveness Tool would impact the forecast of the program.¹⁷ The values from this re-run are described in SDREN AL-001-E, however – in line with the MCAL spreadsheet template’s guidance to refer to decision-adopted goals - values in this MCAL Excel spreadsheet reference the values originally set forth in its Business Plan instead of True-Up Advice Letter (“TUAL”) values, as SDREN was not approved at the time TUALs were due.

Additionally, SDG&E filed an off-cycle business plan application on April 25, 2025, to request Commission authorization to withdraw from regional energy efficiency administration except for its regional Codes and Standards program. As the Commission has not ruled on this application at the time of MCAL drafting, there are no changes or guidance relative to the application incorporated into this MCAL.

The Commission directed PAs to use CET Avoided Cost Calculator (“ACC”) version 2026 for this MCAL submission. This version uses ACC vintage 2024, which was adopted in Resolution E-5328.¹⁸ This version also incorporates the Societal Cost Test, which the Commission directed PAs to calculate as an information-only output for their portfolio, starting with this 2025 MCAL.¹⁹ The results of this re-run can be seen in the accompanying Excel spreadsheet (Attachment A). Resolution E-5328 made numerous other changes to the ACC, such as using the “IRP’s latest adopted system plan as the baseline portfolio of the ACC,” using “an ‘Integrated Calculation’

¹⁵ The excel version of Attachment A can be found on CEDARS for the public to download.

¹⁶ D.24-08-003 at OP 5.

¹⁷ *Id.* at 14.

¹⁸ Resolution E-5328, Finding 9 (Nov. 7, 2024).

¹⁹ *Id.* at Finding 8.

methodology to model the generation capacity avoided costs and GHG avoided costs using utility solar and lithium-ion energy storage,” and updating the current transmission and distribution (“T&D”) cost data in the avoided T&D methodology.²⁰

Other recent Commission guidance impacting this filing includes Resolution E-5351 and Resolution E-5387. Resolution E-5351 adopted a refined set of indicators and metrics applying to the market support and equity segments, in addition to common metrics that span the entire portfolio.²¹ SDREN indicated in its 2024-2031 Business Plan Portfolio Application that it would update its metrics to align with this guidance once issued, and it will reflect the changes to its indicators and metrics in its 2028-2035 Business Plan Application, due in Q1 2026. Resolution E-5387 adopted the Integrated Demand-Side Management (“IDSM”) advice letters that PAs submitted in 2024.²² While E-5387 does not appear to immediately apply to SDREN, SDREN discusses its IDSM portfolio strategy below.

2. Forecast Approach

SDREN reviewed the original inputs used in its Business Plan Application for reasonableness. Because the original inputs used the current measure packages available at the time, SDREN updated the technical inputs to the most appropriate measure package version currently available and processed inputs through the recently updated CET. Of note, SDREN made a measure package change to remove measure package SWCR005, as it is now expired. In addition, SDREN updated its forecast to incorporate the 2024 ACC. The results documented on CEDARS and in this MCAL reflect the updated measure package versions, updated CET, and updated ACC.

3. Portfolio Changes

SDREN has no portfolio changes to report at this time. In August of 2024, the Commission authorized SDREN to administer a portfolio of ten programs. Since its authorization, SDREN has focused its efforts on onboarding staff and releasing its solicitations for third-party implementers. SDREN is in the final stages of its solicitation process for third-party implementers and expects programs to launch in Q4 2025 through Q1 2026.

B. Summary of Forecasted Portfolio Impacts

1. Portfolio Budget Summary

As SDREN is in the final phases of its solicitation process and has yet to launch programs, there have been no changes to the SDREN sector and segment budgets since the filing of its Business Plan Application. SDREN’s portfolio budget by sector and segment, as well as its annual and cumulative budget, are reflected in the tables below.

²⁰ *Id.* at 5.

²¹ *See* Resolution E-5351 (Jun. 17, 2025).

²² Resolution E-5387 (Sept. 23, 2025).

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	\$-	\$-	\$ 31,414,499	\$-	\$ 31,414,499
2	Commercial Sector	\$ 14,831,384	\$-	\$ 16,479,649	\$-	\$ 31,311,033
3	Industrial Sector	\$-	\$-	\$-	\$-	\$-
4	Agricultural Sector	\$-	\$-	\$-	\$-	\$-
5	Public Sector	\$-	\$ 19,276,745	\$ 1,648,265	\$-	\$ 20,925,010
6	Cross Cutting Sector					
7	Emerging Tech	\$-	\$-	\$-	\$-	\$-
8	WE&T	\$-	\$ 17,302,883	\$-	\$-	\$ 17,302,883
9	Finance	\$-	\$-	\$-	\$-	\$-
10	Codes & Standards	\$-	\$-	\$-	\$ 6,591,560	\$ 6,591,560
11	Portfolio Support	\$ 1,647,931	\$ 4,064,403	\$ 5,504,713	\$ 732,396	\$ 11,949,443
12	OBF Loan Pool					\$-
13	Portfolio Subtotal [2]	\$ 16,479,315	\$ 40,644,031	\$ 55,047,126	\$ 7,323,956	\$ 119,494,428

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

[2] excludes EM&V and Portfolio Oversight

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$43,270	\$4,343,600	\$5,807,324	\$6,285,121	\$16,479,315
2	Market Support	\$106,714	\$10,713,000	\$14,322,943	\$15,501,374	\$40,644,031
3	Equity	\$144,570	\$14,508,800	\$19,398,895	\$20,994,862	\$55,047,127
4	Codes and Standards	\$19,227	\$1,930,500	\$2,580,937	\$2,793,292	\$7,323,956
5	EM&V (PA and ED)	\$-	\$1,259,836	\$1,690,680	\$1,829,262	\$4,779,778
6	Total Budget w/o OBF Loan Pool	\$313,781	\$32,755,736	\$43,800,779	\$47,403,911	\$124,274,207
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					77%
8	OBF Loan Pool Addition	\$-	\$-	\$-	\$-	\$-
9	Budget excluding Portfolio Oversight	\$313,781	\$32,755,736	\$43,800,779	\$47,403,911	\$124,274,207
10	ED Portfolio Oversight	\$-	\$-	\$-	\$-	\$-
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$313,781	\$32,755,736	\$43,800,779	\$47,403,911	\$124,274,207
12	Approved Budget Cap ^[4]					\$124,274,207

[4] Decision 24-08-003 OP1

2. Total System Benefit Forecast

The TSB forecast is summarized in the table below. Based on the latest ACC and updated measure package versions, the portfolio exceeds the TSB goal set for SDREN in D.24-08-003. As a REN, SDREN is not required to hit a TSB target, but strives to set attainable goals and demonstrate responsible use of ratepayer funds.

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	\$ -	\$1,979,434	\$2,945,582	\$3,291,248	\$8,216,264
2	Market Support	\$ -	\$1,753,895	\$2,203,212	\$2,733,100	\$6,690,207
3	Equity	\$ -	\$1,132,454	\$2,429,851	\$2,737,001	\$6,299,306
4	Total TSB Forecast	\$ -	\$4,865,783	\$7,578,645	\$8,761,349	\$21,205,777
5	CPUC TSB Goal		\$4,865,783	\$6,168,331	\$7,160,300	\$18,194,414
6	<i>TSB Forecast / TSB Goal^[1]</i>	#DIV/0!	100%	123%	122%	117%

[1] TSB Goal set in decions D.24-08-003

3. Portfolio Cost Effectiveness Forecast

SDREN's updated Cost Effectiveness forecast is summarized in the table below. The results of SDREN's Societal Cost Test are also presented below.

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.48	0.57	0.17
2		Market Support	0.21	0.21	0.17
3		Equity	0.16	0.15	0.12
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.22	0.22	0.14
6		Excluding C&S	0.23	0.23	0.15

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

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	0.57	0.60	0.59	0.61	0.58	0.60
3		Market Support	0.28	0.28	0.32	0.32	0.30	0.30
4		Equity	0.27	0.27	0.25	0.25	0.26	0.26
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	Including C&S	0.29	0.30	0.30	0.30	0.30	0.30
7		Excluding C&S	0.31	0.32	0.32	0.32	0.31	0.32

4. Market Support and Equity Forecast

There have been no changes to SDREN's market support and equity segment budget that was submitted in its 2024-2031 Business Plan Portfolio Application. The values in the table below are the same as those in that filing.

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

Line	Segment	Qualifying Budget	Total Budget ¹	% of Budget	Cap (IOU and ATA CCA only)
1	Market Support (Does not include OBF Loan Pool or ED Portfolio Oversight)	\$40,644,031	\$124,274,207	33%	30%
2	Equity	\$55,047,127		44%	
3	Market Support + Equity	\$95,691,158		77%	

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

SDREN does not implement Codes and Standards Advocacy programming.

6. Non-Advocacy Codes and Standards Budget Forecast

The table below shows SDREN’s Codes and Standards (“C&S”) budget. The Cumulative Cap applies only to IOUs.

Line	Cumulative Non-Advocacy C&S Program Budget	Cumulative Total C&S Budget	Percentage of Budget	Cumulative Cap
1	\$6,591,560	\$6,591,560	100%	70%

C. Energy Efficiency Portfolio Details

1. Segment Metrics

In its January 2024 Business Plan Application submission, SDREN included the full suite of market support and equity indicators as originally established by the CAEECC Equity and Market Support Working Group, the 300+ common metrics in use at the time, as well as six Unique Value Metrics (“UVMs”).²³ In its 2024-2031 Business Plan Application indicator and metrics spreadsheets, SDREN indicated it would follow Commission guidance issued as a result of the advice letter directed to refine the metrics and indicators detailed in its application.

On June 12, 2025, the Commission adopted Resolution E-5351 which established refined indicators for the equity and market support segments, in addition to a streamlined, reduced set of common metrics. The Resolution delegated the task of finalizing methodologies and a reporting template (for those indicators and metrics not already reported via CEDARS) to the Reporting PCG, stating “[r]eporting with the new template should be tested then made standard practice in time to report Q4 2025.”

SDREN participates in the Reporting PCG; as such, SDREN will engage in PCG deliberations surrounding the methodologies and template. To date, SDREN has been actively conducting third-party implementer solicitations with program launch scheduled for late 2025 through early 2026. Therefore, SDREN will not have any baselines or values to report for the adopted indicators. However, SDREN will work with its implementers, once contracted, to establish data collection methods and associated reporting protocols for indicators and metrics.

Decision 23-06-055 also requires the following activities related to segment metrics:

²³ D.19-12-021, OP 2, requires proposals for new RENs to be submitted via a motion and must include a description of its new and unique value to contribute to California’s energy, climate, and/or equity goals. The decision also states, “The RENs shall also propose savings goals and metrics assigned with their unique value, as well as a methodology for measuring progress toward their metrics, in their business plans [...]” Unique value metrics are the mechanism by which RENs do this.

- PAs must complete a study that would establish indicators in the market support segment that would specifically track awareness, knowledge, attitude and behavior (“AKAB”). This study is not yet complete; as such, those AKAB indicators are not reflected in the accompanying MCAL Excel spreadsheet, but SDREN will follow Commission guidance and incorporate directives into its portfolio once finalized.
- PAs must develop equity segment community engagement indicators (“CEI”) for inclusion in the 2025 MCAL. The CEIs are included in Attachment B.
- The IOU PAs must complete a study on non-energy benefit (“NEB”) indicators for the equity segment by October 1, 2026, to start tracking and reporting the NEBs beginning with the Q1 2028 quarterly report. The study is currently underway.²⁴
- By March 1, 2025, the PAs are to submit a Tier 3 advice letter that “defines the process for proposing and adopting long-term market support and equity goals”, “defines options for [...] goal constructs for market support and equity segments” and “defines what study process is necessary to quantify goals”.²⁵ Energy Division subsequently granted an extension for the advice letter deadline. Consequently, the Tier 3 advice letter²⁶ was submitted on August 1, 2025. As of the writing of this MCAL, the Commission has yet to rule on the advice letter. Additionally, the study that will quantify the equity and market support goals will not be completed in time for incorporation into this MCAL.

SDREN’s six UVMs are contained in Attachment F; changes between the UVMs as presented in its 2024-2031 Business Plan Portfolio Application can be found in said attachment.

2. New Programs

The SDREN portfolio consists of ten programs and has no new programs to report.

3. Program Changes

“Program changes” in this context refers to D.21-05-031, which states: “[A] program is making a change in a market sector or a change in implementation or delivery strategy, then that program change constitutes a new program and the program administrator shall be required to file a new Tier 2 advice letter for approval of the program.”²⁷

SDREN has no program changes to report since the August 2024 approval of its portfolio.

²⁴ D.23-06-055 at OPs 17-19.

²⁵ *Id.* at OP 25.

²⁶ AL 002-E, San Diego Regional Energy Network: PG&E’s Filing on Behalf of the Energy Efficiency Portfolio Administrators for Goal Constructs Associated with Equity and Market Support Indicators [Pursuant to D.23-06-044, Ordering Paragraph 25].

²⁷ D.21-05-31 at p. 47, OP 12.

4. Program Closures

a. Programs Closed between TUAL and MCAL

SDREN was not an authorized PA when inaugural true-up advice letters were due. As such, SDREN is using values from its 2024-2031 Business Plan Application, approved in August 2024, as proxies. SDREN does not have any program closures to report since its Business Plan Application was approved.

b. Programs to be Closed in 2026-2027

SDREN does not currently have any program closures planned for 2026-2027.

c. Programs to be Closed Upon Completion of Commitments

SDREN does not have any program closures upon completion of commitments to report at this time.

5. Evaluation, Measurement, and Verification (2024-2027)

SDREN will use its portion of the evaluation, measurement and verification (“EM&V”) PA funds to improve its portfolio of programs and ensure data is collected to adequately support evaluation needs. SDREN anticipates it will develop a comprehensive EM&V Work Plan by end-of-year 2026, which will further describe its research activities. Planned EM&V studies, as described in Exhibit 2 of the SDREN 2028-2031 Business Plan Application, include:

- Leading an SDREN unique value metrics and goals study as described in the Key Metrics and Outcomes section.
- Supporting a study to set goals for the market support and equity segment indicators. Coordinating with existing workforce assessments to determine gaps that could be supported through SDREN EM&V efforts towards prioritization of workforce development for electrification.

Table C: Annual Breakdown of EM&V Budgets

Per guidance from Energy Division, RENs may leave Table C blank and populate the cells with zero values; however, they are to include Table C for consistency with other PAs’ MCALs. In accordance with that guidance, SDREN provides Table C below.

Year	Portfolio Administrator (PA)	Total Budget w/o EM&V	EM&V Total (4% of Total Budget w/o EM&V)	EM&V ED	EM&V PA	Total Budget w/ EM&V
2024	PA, excluding ED Portfolio Oversight ²⁸	0	0	0	0	0
2024	PA share of ED Portfolio Oversight	0	0	0	0	0
2024	SDREN (IOUs only)	0	0	0	0	0
2025	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2025	PA share of ED Portfolio Oversight	0	0	0	0	0
2025	SDREN (IOUs only)	0	0	0	0	0
2026	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2026	PA share of ED Portfolio Oversight	0	0	0	0	0
2026	SDREN (IOUs only)	0	0	0	0	0
2027	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2027	PA share of ED Portfolio Oversight	0	0	0	0	0
2027	SDREN (IOUs only)	0	0	0	0	0
	Total	0	0	0	0	0

²⁸ Portfolio Oversight refers to the Energy Efficiency Technical Consultant hired by ED, per OP 9 of D.23-06-055. Per OP 9, this expense only applies to IOUs: “Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall make available to Commission staff \$1 million annually in reimbursable funding for purposes of portfolio oversight consulting and technical support, in the same manner as evaluation, measurement, and verification funding is currently budgeted. The funding shall be used for the purposes described in Section 5.1 of this decision.” See pages 26-29 of D.23-06-055 for more details.

6. Cost Recovery (IOU Only)

This space is intentionally blank.

Gas/Electric Split (applicable to PG&E & SDG&E)

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

Line	PG&E		SDG&E		SCE	SCG	
1	Year	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2	2024		\$ 6,341,088	\$ 9,511,632			
3	2025		\$ 13,102,294	\$ 19,653,441			
4	2026		\$ 14,412,524	\$ 21,618,786			
5	2027		\$ 15,853,777	\$ 23,780,665			
6	Total	-	49,709,683	74,564,524	-	-	-

7. Unspent Funds

SDREN was not an authorized PA until August 2024. For this reason, SDREN does not have values to populate Table 1.4.

Table 1.4 Prior Years Unspent Funds as of August 2024 (All PA) - Not applicable to SDREN as it was not an authorized PA until August 2024

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

SDREN was authorized \$15,852,720 for Program Year (PY) 2024 and spent \$313,781 of that authorized budget, as there were only four months remaining in 2024 upon SDREN's authorization, and the budget for PY 2024 was intended to cover 6 months. The unspent PY 2024 funds is \$15,538,939. This is captured as carryover in Table 1.6 below.

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

Line	Year	2024 Reported Expenditures	2024 Carryover Funding	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset	2024-2027 Funding Total
1	2024	\$313,781						\$313,781
2	2025			\$32,755,736				\$32,755,736
3	2026		\$7,769,469		\$36,031,310			\$43,800,779
4	2027		\$7,769,470			\$39,634,441		\$47,403,911

[7] Funding from 2024 not yet spent and will be carried forward into future years of the funding

8. Integrated Demand-Side Management (IDSM) Budget

Resolution E-5387 approved the IDSM ALs filed by existing PAs in March 2024. SDREN included several readily implementable multi-DER IDSM strategies throughout its authorized 2024-2031 Business Plan Application. SDREN provides additional details about these IDSM strategies in the bullets in the "EE-Multi-DER" section below.

- **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.

SDREN does not intend to utilize EE-DR funds.

- **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.

SDREN's authorized 2024-2031 Business Plan Application contained multi-DER IDSM strategies and integrated throughout its portfolio. IDSM activities associated with SDREN's programs are summarized below. SDREN is committed to exploring additional ways to integrate IDSM opportunities into its portfolio to optimize peak load shift and leverage its portfolio to maximize contributions to reliability. Those strategies are summarized as follows:

- Small Medium Business (SMB) Energy Coach
 - Educate each SMB on the value of EE and IDSM.
- Efficient Refrigeration Program
 - Share IDSM informational materials and resources to participants.
- Energy Pathways Program
 - Provide IDSM education/training in academic offerings.
 - Connect high school students to opportunities in IDSM fields.
 - Leverage supplemental funding opportunities to enhance or expand STEAM or IDSM program services.
 - Needs assessment to identify barriers to accessing positions in IDSM careers.
- Workforce Training and Capacity Building
 - Create no-cost employer-led EE and IDSM training programs for essential and emerging industry skills.
 - IDSM-deploying employers to upskill the existing workforce and enable HTR and underserved participants to access high-quality jobs in the clean energy economy.
 - Identify or create additional EE and IDSM accredited training or certification opportunities.
- Codes and Standards
 - Provide IDSM education and technical support to code officials and participating contractors.
- Climate Resilience Leadership
 - Coordinate with the C&S community to simplify and streamline permitting processes for IDSM and DERs.
 - Offer financial assistance services to identify, apply for, and secure funding for EE and IDSM projects
 - Promote IDSM technologies and programs.
- Single-Family Program
 - Focus on EE and IDSM offerings and educational opportunities.
- Multifamily
 - Focus on EE and IDSM offerings and educational opportunities.

- Provide EE and IDSM education and advisory services to property owners, property management companies, and tenants to address the split incentive challenge.
- Provide financial resources to help secure external funding and financing, including for IDSM opportunities.

9. CEDARS Discrepancies (Optional)

As noted in previous sections, SDREN is using figures from its 2024–2031 Business Plan Application as proxies for True-Up Advice Letter values, since it was not an authorized PA at the time TUALs were due. Consistent with guidance in the MCAL template, SDREN’s goals are sourced from its authorizing decision. Initial solicitation timelines have been adjusted to allow for thorough procurement and contracting processes; accordingly, 2024 and 2025 goals have been revised in this MCAL to reflect program launches beginning in 2026. SDREN remains committed to achieving its established goals. As implementers are onboarded, they are made aware of these goals, consulted on strategies to meet them (e.g., sample measure mixes), and informed of corrective actions that will occur if programs underperform.

Because program implementation will begin in 2026, the measures ultimately supported and installed may differ from current forecasts in CEDARS, reflecting implementer expertise and evolving market conditions.

Accordingly, SDREN’s forecasts in CEDARS represent the best available information and reasonable assumptions in the absence of contracted third-party implementers. Final program offerings and installed measures will be refined once implementer input is incorporated.

CONCLUSION

SDREN appreciates the opportunity to provide these updated technical inputs and forecasts to reflect the Commission’s recent changes to energy efficiency potential and goals. For questions regarding this MCAL, please see the contact information listed below.

PROTESTS AND RESPONSES

Anyone wishing to protest this AL filing may do so by letter via U.S. Mail, or electronically, which must be received no later than 20 days after the date of this AL filing. Protests should be submitted to:

CPUC, Energy Division
 Attention: Tariff Unit
 505 Van Ness Avenue
 San Francisco, CA 94102
 Email: EDTariffUnit@cpuc.ca.gov

In addition, protests and all other correspondence regarding this AL should be transmitted electronically to the attention of:

Aisha Cervantes-Cissna
Senior Policy Manager
San Diego Community Power
PO Box 12716
San Diego, CA 92112
Email: Acissna@sdcommunitypower.org

and

Sheena Tran
Associate Director of Programs
San Diego Community Power
PO Box 12716
San Diego, CA 92112
Email: Stran@sdcommunitypower.org

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

NOTICE

A copy of this AL has been distributed to the service lists of R.13-11-005 and R.25-04-010.

Respectfully submitted,

/s/ Aisha Cervantes-Cissna

Aisha Cervantes-Cissna
Senior Policy Manager
San Diego Community Power
Acissna@sdcommunitypower.org

Copy (via e-mail): EDTariffUnit@cpuc.ca.gov
Service Lists – R.13-11-005 and R.25-04-010

ATTACHMENT A
MCAL Spreadsheet Tabs

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	\$-	\$-	\$ 31,414,499	\$-	\$ 31,414,499
2	Commercial Sector	\$ 14,831,384	\$-	\$ 16,479,649	\$-	\$ 31,311,033
3	Industrial Sector	\$-	\$-	\$-	\$-	\$-
4	Agricultural Sector	\$-	\$-	\$-	\$-	\$-
5	Public Sector	\$-	\$ 19,276,745	\$ 1,648,265	\$-	\$ 20,925,010
6	Cross Cutting Sector					
7	Emerging Tech	\$-	\$-	\$-	\$-	\$-
8	WE&T	\$-	\$ 17,302,883	\$-	\$-	\$ 17,302,883
9	Finance	\$-	\$-	\$-	\$-	\$-
10	Codes & Standards	\$-	\$-	\$-	\$ 6,591,560	\$ 6,591,560
11	Portfolio Support	\$ 1,647,931	\$ 4,064,403	\$ 5,504,713	\$ 732,396	\$ 11,949,443
12	OBF Loan Pool					\$-
13	Portfolio Subtotal [2]	\$ 16,479,315	\$ 40,644,031	\$ 55,047,126	\$ 7,323,956	\$ 119,494,428

[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	\$-	\$-	\$31,414,499	\$-	\$31,414,499
2	Commercial Sector	\$14,831,384	\$-	\$16,479,649	\$-	\$31,311,033
3	Industrial Sector	\$-	\$-	\$-	\$-	\$-
4	Agricultural Sector	\$-	\$-	\$-	\$-	\$-
5	Public Sector	\$-	\$19,276,745	\$1,648,265	\$-	\$20,925,010
6	Cross Cutting Sector					
7	Emerging Tech	\$-	\$-	\$-	\$-	\$-
8	WE&T	\$-	\$17,302,883	\$-	\$-	\$17,302,883
9	Finance	\$-	\$-	\$-	\$-	\$-
10	Codes & Standards	\$-	\$-	\$-	\$6,591,560	\$6,591,560
11	Portfolio Support	\$1,647,931	\$4,064,403	\$5,504,713	\$732,396	\$11,949,443
12	OBF Loan Pool					
13	Portfolio Subtotal [2]	\$16,479,315	\$40,644,031	\$55,047,126	\$7,323,956	\$119,494,428

[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					
2	Commercial Sector					
3	Industrial Sector					
4	Agricultural Sector					
5	Public Sector					
6	Cross Cutting Sector					
7	Emerging Tech					
8	WE&T					
9	Finance					
10	Codes & Standards					
11	Portfolio Support					
12	OBF Loan Pool					
13	Portfolio Subtotal [2]					

[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							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							

[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							
2							
3							
4							
4							
4							
4							
8							
9							
10							
11							
12							
13							
14							
15							
4							

[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	
8	Electric portion for cost recovery (excluding fuel sub budget)	
9	Fuel sub applicable electric split	
10	Electric portion for cost recover (fuel sub budget)	
11	Total electric portion for cost recovery for IOU portfolio	
12	Total Gas portion for cost recovery for IOU portfolio	
13	Electric split (with fuel sub)	
14	Gas split (with fuel sub)	

Table 1.4 Prior Years Unspt Funds as of August 2024 (All PA) - Not applicable to SDREN as it was not an authorized PA until August 2024

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)

Line	PG&E		SDG&E		SCE	SCG	
1	Year	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2	2024		\$6,341,088	\$9,511,632			
3	2025		\$13,102,294	\$19,653,441			
4	2026		\$14,412,524	\$21,618,786			
5	2027		\$15,853,777	\$23,780,665			
6	Total	\$ -	49,709,683	74,564,524	\$ -	\$ -	\$ -

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

Line	Year	2024 Reported Expenditures	2024 Carryover Funding ⁷	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for	2024-2027 Funding Total
1	2024	\$313,781						\$313,781
2	2025			\$32,755,736				\$32,755,736
3	2026		\$7,769,469		\$36,031,310			\$43,800,779
4	2027		\$7,769,470			\$39,634,441		\$47,403,911

[7] Funding from 2024 not yet spent and will be carried forward into future years of the funding cycle.

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	\$ -	\$1,979,434	\$2,945,582	\$3,291,248	\$8,216,264
2	Market Support	\$ -	\$1,753,895	\$2,203,212	\$2,733,100	\$6,690,207
3	Equity	\$ -	\$1,132,454	\$2,429,851	\$2,737,001	\$6,299,306
4	Total TSB Forecast	\$ -	\$4,865,783	\$7,578,645	\$8,761,349	\$21,205,777
5	CPUC TSB Goal		\$4,865,783	\$6,168,331	\$7,160,300	\$18,194,414
6	<i>TSB Forecast / TSB Goal^[1]</i>	<i>#DIV/0!</i>	100%	123%	122%	117%

[1] TSB Goal set in decisons D.24-08-003

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		\$1,979,434	\$2,624,811	\$2,824,697	\$7,428,942
2	Market Support		\$1,753,895	\$2,230,875	\$2,841,538	\$6,826,308
3	Equity		\$1,132,454	\$1,312,645	\$1,494,065	\$3,939,164
4	Total TSB Forecast		\$4,865,783	\$6,168,331	\$7,160,300	\$18,194,414
5	CPUC TSB Goal		\$4,865,783	\$6,168,331	\$7,160,300	\$18,194,414
6	<i>TSB Forecast / TSB Goal^[2]</i>		100%	100%	100%	100%

[2] TSB Goal set in decision D. 24-08-003

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	\$ -	\$ -	\$ 320,771	\$ 466,551	\$ 787,322
2	Market Support	\$ -	\$ -	\$ (27,663)	\$ (108,438)	\$ (136,101)
3	Equity	\$ -	\$ -	\$ 1,117,206	\$ 1,242,936	\$ 2,360,142
4	Total TSB Forecast	\$ -	\$ -	\$ 1,410,314	\$ 1,601,049	\$ 3,011,363
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -	\$ -
6	<i>TSB Forecast / TSB Goal^[3]</i>	<i>#DIV/0!</i>	0%	23%	22%	17%

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

Table 2.2a - MCAL Updated Annual and Cumulative Codes and Standards Savings Forecast (not applicable to RENs)

Line	Savings Unit	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
------	--------------	----------------	--------------	---------	---------	------------

1	GWh CPUC ^[1]	
2	GWh CPUC Target ^[1]	
3	<i>GWh Forecast/Target</i>	
4	MW Forecast	
5	MW CPUC Target ^[1]	
6	<i>MW Forecast/Target</i>	
7	MMThm Forecast	
8	MMThm CPUC Target ^[1]	
9	<i>MMThm Forecast/Target</i>	

Table 2.2b - TUAL Annual and Cumulative Codes and Standards Savings Forecast (not applicable to RENs)

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

[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						
2						
3						
4						
5						
6						
7						

8	
9	

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

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$43,270	\$4,343,600	\$5,807,324	\$6,285,121	\$16,479,315
2	Market Support	\$106,714	\$10,713,000	\$14,322,943	\$15,501,374	\$40,644,031
3	Equity	\$144,570	\$14,508,800	\$19,398,895	\$20,994,862	\$55,047,127
4	Codes and Standards	\$19,227	\$1,930,500	\$2,580,937	\$2,793,292	\$7,323,956
5	EM&V (PA and ED)	\$-	\$1,259,836	\$1,690,680	\$1,829,262	\$4,779,778
6	Total Budget w/o OBF Loan Pool	\$313,781	\$32,755,736	\$43,800,779	\$47,403,911	\$124,274,207
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					77%
8	OBF Loan Pool Addition	\$-	\$-	\$-	\$-	\$-
9	Budget excluding Portfolio Oversight	\$313,781	\$32,755,736	\$43,800,779	\$47,403,911	\$124,274,207
10	ED Portfolio Oversight	\$-	\$-	\$-	\$-	\$-
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$313,781	\$32,755,736	\$43,800,779	\$47,403,911	\$124,274,207
12	Approved Budget Cap ^[4]					\$124,274,207

[4] Decision 24-08-003 OP1

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$2,102,000	\$4,343,600	\$4,777,960	\$5,255,755	\$16,479,315
2	Market Support	\$5,184,000	\$10,713,000	\$11,784,300	\$12,962,731	\$40,644,031
3	Equity	\$7,023,000	\$14,508,800	\$15,959,680	\$17,555,648	\$55,047,128
4	Codes and Standards	\$934,000	\$1,930,500	\$2,123,550	\$2,335,905	\$7,323,955
5	EM&V (PA and ED)	\$609,720	\$1,259,836	\$1,385,820	\$1,524,402	\$4,779,778
6	Total Budget w/o OBF Loan Pool	\$15,852,720	\$32,755,736	\$36,031,310	\$39,634,441	\$124,274,207
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					77%
8	OBF Loan Pool Addition					\$-
9	Budget excluding Portfolio Oversight	\$15,852,720	\$32,755,736	\$36,031,310	\$39,634,441	\$124,274,207

10	ED Portfolio Oversight					\$-
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$15,852,720	\$32,755,736	\$36,031,310	\$39,634,441	\$124,274,207

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	(\$2,058,730)	\$-	\$1,029,364	\$1,029,366	\$0
2	Market Support	(\$5,077,286)	\$-	\$2,538,643	\$2,538,643	\$0
3	Equity	(\$6,878,430)	\$-	\$3,439,215	\$3,439,214	(\$1)
4	Codes and Standards	(\$914,773)	\$-	\$457,387	\$457,387	\$1
5	EM&V (PA and ED)	(\$609,720)	\$-	\$304,860	\$304,860	0
6	Total Budget w/o OBF Loan Pool	(\$15,538,939)	\$-	\$7,769,469	\$7,769,470	\$0
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					0%
8	OBF Loan Pool Addition	\$-	\$-	\$-	\$-	\$-
9	Budget excluding Portfolio Oversight	(\$15,538,939)	\$-	\$7,769,469	\$7,769,470	\$0
10	ED Portfolio Oversight	\$-	\$-	\$-	\$-	\$-
11	Total Portfolio Budget w/ ED Portfolio Oversight	(\$15,538,939)	\$-	\$7,769,469	\$7,769,470	\$0

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.48	0.57	0.17
2		Market Support	0.21	0.21	0.17
3		Equity	0.16	0.15	0.12
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.22	0.22	0.14
6		<i>Excluding</i> C&S	0.23	0.23	0.15

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

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.58	0.69	0.3
2		Market Support	0.21	0.21	0.2
3		Equity	0.11	0.1	0.1
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.2	0.2	0.17
6		<i>Excluding</i> C&S	0.22	0.21	0.18

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	-0.1	-0.12	-0.13
2		Market Support	0	0	-0.03
3		Equity	0.05	0.05	0.02
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.02	0.02	-0.03
6		<i>Excluding</i> C&S	0.01	0.02	-0.03

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	0.57	0.6	0.59	0.61	0.58	0.6
3		Market Support	0.28	0.28	0.32	0.32	0.3	0.3
4		Equity	0.27	0.27	0.25	0.25	0.26	0.26
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	<i>Including</i> C&S	0.29	0.3	0.3	0.3	0.3	0.3
7		<i>Excluding</i> C&S	0.31	0.32	0.32	0.32	0.31	0.32

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

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

Line	Budget Category	Expenditures			Cap & Target Performance		
		(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget ^[6]	(e) Cap Percentage	(f) Target %
1	Administrative Costs						
2	PA ^[1]			\$-	0.00%	10.00%	
3	Non-PA Third Party & Partnership ^[2]			\$-	0.00%		10.00%
4	PA & Non-PA Target Exempt Programs ^[3]	\$11,949,443		\$11,949,443			
5	Marketing and Outreach Costs						
6	Marketing & Outreach		\$5,686,833	\$5,686,833	4.80%		6.00%
7	Direct Implementation Costs						
8	Incentives and Rebates		\$41,495,608	\$41,495,608			
9	Non Incentives and Non Rebates		\$36,436,536	\$36,436,536	30.50%		20.00%
10	Target Exempt (Non Incentives and Non Rebates)		\$23,926,008	\$23,926,008			
11	EM&V Costs (PA and ED) ^[4]	\$-	\$-	\$-	0.00%	4.00%	
11a	EM&V - PA	\$-		\$-			
11b	EM&V - ED	\$-		\$-			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$11,949,443	\$107,544,985	\$119,494,428			
13	Total Third-Party Qualifying Costs ^[5]				0.00%		60.00%
14	OBF Loan Pool Addition			\$-			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[8]			\$119,494,428			
16	ED Portfolio Oversight ^[10]			\$-			
17	EE-Funded IDSM					2.50%	
	Multi-DER IDSM ^[7]						
18	PA Spending Budget Request			\$119,494,428			

[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

[3] Target Exempt Programs include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for

[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-

[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

[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;

[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

[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

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)	PA Response Notes	Proposed RTR Implementation				
CALMAC ID	Study Name	Recommendations	If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	Next Steps: For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines. For each rejected recommendation, document the reason provided for rejection. Outline any potential follow-up actions or considerations for the future.	Timeline: Set deadlines for the completion of each action. Include a start date and end date when possible.	Status: Track the status of each action item (e.g., Not Started, In Progress, Completed).	Notes: Add notes for any additional information or updates.	Impacted Programs: Identify which programs (program IDs) would be impacted by the action items.
Overall conclusions and recommendations						Proposed Next Steps				
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 equity-focused multipliers that target low-income participants, DACs, and environmental justice areas	All RENs	Accepted - SDREN's electrification incentives will be designed to complement existing offerings in the market to ensure benefits are effectively targeted to hard-to-reach and underserved customers and removing barriers to adoption.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Program measures and incentive levels will be finalized in collaboration with SDREN's program implementers during the Q4 2025 pre-launch phase.	Electrification incentives are expected to be finalized and available to customers beginning in Q1 2026.	Not started	SDREN is currently undergoing solicitations to contract with third-party implementers	SDREN-01-COM-SMB SDREN-02-COM-ERF SDREN-03-COM-MAP SDREN-01-PUB-CRL SDREN-01-RES-MFM SDREN-02-RES-SFM
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 - SDREN's multifamily program is not yet available in the market and is expected to launch and begin customer enrollments in 2026; however, SDREN will agendize discussion of best practices (once obtained from program experience) for serving the multifamily sector with SDG&E in upcoming sector coordination calls.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Agendize discussion for future residential sector coordination call.	Q1 2026 through Q4 2027	Not started	SDREN and SDG&E have recurring coordination meetings; Sector-level coordination meetings are anticipated to begin in Q4 2025.	SDREN-01-RES-MFM
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 - SDREN and SDG&E have established a Joint Cooperation Memo and held several coordination meetings. Sector-Level Coordination Plans, including multifamily, will be established by Q1 2026.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	SDREN & SDG&E establish sector-level coordination meeting schedule, and begin drafting Coordination Plans.	Sector-level coordination meetings are anticipated to begin in Q4 2025 and will be held on an ongoing basis.	In progress	None	SDREN-01-COM-SMB SDREN-02-COM-ERF SDREN-03-COM-MAP SDREN-01-CS-CSS SDREN-01-WET-EPP SDREN-02-WET-BRC SDREN-01-PUB-CRL SDREN-02-PUB-TRE SDREN-01-RES-MFM SDREN-02-RES-SFM
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 - SDREN fully agrees with this recommendation. SDREN staff will lead coordination with SDG&E and implementers will be incorporated on a case-by-case basis. The Sector-Level Coordination Plans will include organization chart and/or RACIs for clarification of roles & responsibilities.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Sector-level coordination meetings are anticipated to begin in Q4 2025 and will continue at least monthly through the duration of SDREN's program timelines. SDREN and SDG&E will establish Sector-Level Coordination Plans by Q1 2026 and will revisit annually to ensure coordination efforts are documented accurately.	Sector-level coordination meetings are anticipated to begin in Q4 2025.	In Progress	None	SDREN-01-COM-SMB SDREN-02-COM-ERF SDREN-03-COM-MAP SDREN-01-CS-CSS SDREN-01-WET-EPP SDREN-02-WET-BRC SDREN-01-PUB-CRL SDREN-02-PUB-TRE SDREN-01-RES-MFM SDREN-02-RES-SFM
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 - SDREN's Single-Family Program is not in market yet; however, it is anticipated to offer a suite of direct installation (DI) measures at no-cost to hard-to-reach and underserved customers as well as incentives to help fill cost gaps.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Program measures and incentive levels will be finalized in collaboration with SDREN's third-party implementers during the Q4 2025 pre-launch phase.	Single-family direct installation and incentives are expected to be finalized and available to customers beginning in Q1 2026.	Not started	None	SDREN-02-RES-SFM

ATTACHMENT B
Community Engagement Indicators
Findings and Recommendations Memo

Community Engagement Indicators Findings and Recommendations Memo

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

July 31, 2025

Prepared by BluePoint Planning

Background

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

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

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

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

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

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

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

Introduction

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

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

¹ D.23-06-055 at 67-69.

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

Purpose for Indicators

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

Long-Term Outcomes

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

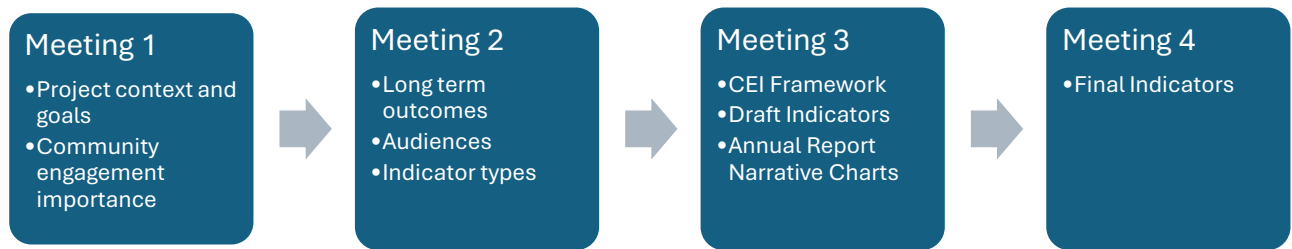
- **Relevance** – Programs are designed to address community needs while being accessible to participants.
- **Trust** – A continued relationship and sense of trust is fostered between engagement audiences (including program participants) and the PA / third party (3P) implementers.
- **Impact** – Equity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

Overarching PA Considerations and Concerns

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

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

Portfolio Administrators Engagement Process



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

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

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

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

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

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

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

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

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

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

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

Engagement Audiences

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

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

Indicator Types

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

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

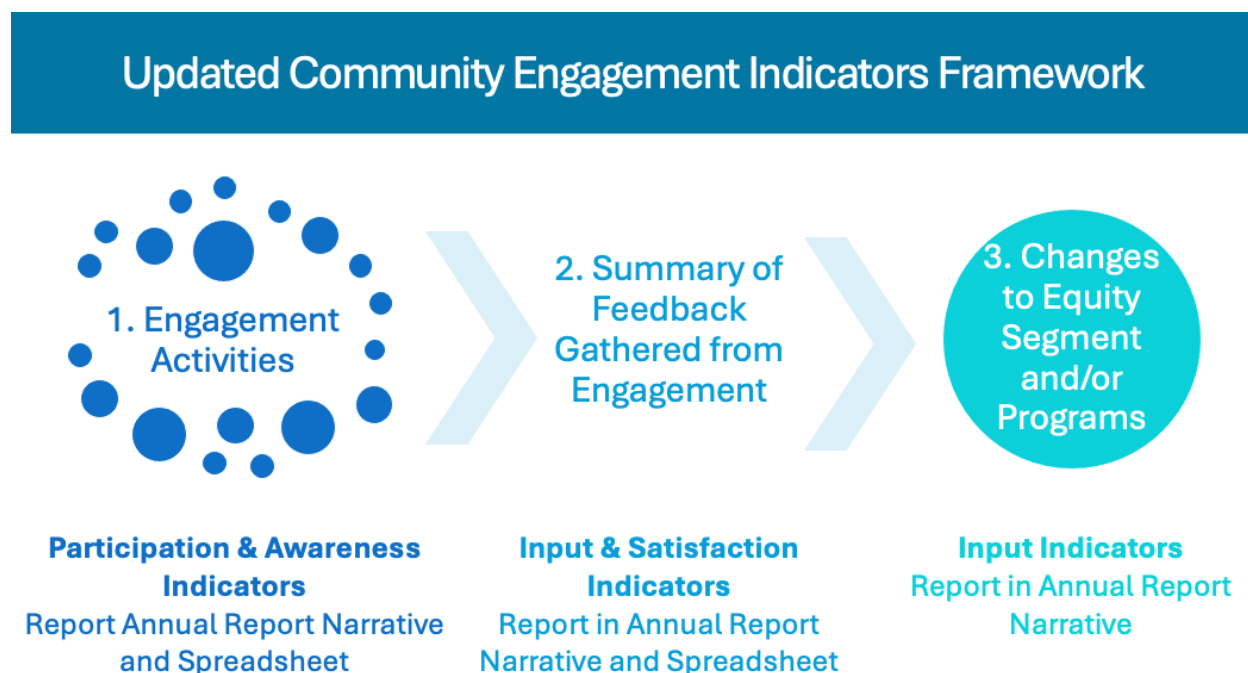
Input (qualitative and quantitative) – The amount and quality of feedback from program audience members, including changes to program design based on that feedback.

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

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

Indicator Framework

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



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

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

Indicator List

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

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

Consensus Indicators

The following four indicators received support from all PAs.

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

Non-Consensus Indicators

The following indicators received mixed support from PAs.

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

Best Practices

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

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

Reporting

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

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

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

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

Key Definitions

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

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

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

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

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

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

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

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

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

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

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

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

Appendix – OP24 Implementation Survey Results

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

Summary of Survey Results

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

Survey Results

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



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



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



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



6. Treatment of non-consensus indicators?



AGREED-UPON COMMUNITY ENGAGEMENT INDICATORS

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

ADDITIONAL POTENTIAL COMMUNITY ENGAGEMENT INDICATORS

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

ENGAGEMENT ACTIVITIES SUMMARY (TABLE IS POPULATED WITH EXAMPLE ENTRIES)

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

ANNUAL REPORT KEY THEMES (TABLE IS POPULATED WITH EXAMPLE ENTRIES)

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

ANNUAL REPORT PROGRAM CHANGES (IF ANY; TABLE IS POPULATED WITH EXAMPLE ENTRIES)

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

ATTACHMENT C
Response to Recommendations

Appendix 3 - RTR Implementation Descriptions per D.23-06-055

ID staff request that PAs describe their progress on recommendations from PY 2022 onwards evaluations that impact programs in the current budget cycle.

CALMAC ID	Study Name	Recommendations (Verbatim from Final Report)	Recommendation Recipient	PA Response	PA Response Notes	Proposed RTR Implementation				
						Next Steps:	Timeline:	Status:	Notes:	Impacted Programs:
			If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.	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.
Overall conclusions and recommendations										
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 equity-focused multipliers that target low-income participants, DACs, and environmental justice areas.	All RENs	Accepted - SDREN's electrification incentives will be designed to complement existing offerings in the market to ensure benefits are effectively targeted to hard-to-reach and underserved customers and removing barriers to adoption.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Program measures and incentive levels will be finalized in collaboration with SDREN's program implementers during the Q4 2025 pre-launch phase.	Electrification incentives are expected to be finalized and available to customers beginning in Q1 2026.	Not started	SDREN is currently undergoing solicitations to contract with third-party implementers.	SDREN-01-COM-SMB SDREN-02-COM-ERF SDREN-03-COM-MAP SDREN-01-PUB-CRL SDREN-01-RES-MFM SDREN-02-RES-SFM
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 - SDREN's multifamily program is not yet available in the market and is expected to launch and begin customer enrollments in 2026; however, SDREN will agenzize discussion of best practices (once obtained from program experience) for serving the multifamily sector with SDG&E in upcoming sector coordination calls.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Agendize discussion for future residential sector coordination call.	Q1 2026 through Q4 2027	Not started	SDREN and SDG&E have recurring coordination meetings; sector-level coordination meetings are anticipated to begin in Q4 2025.	SDREN-01-RES-MFM
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 - SDREN and SDG&E have established a Joint Cooperation Memo and held several coordination meetings. Sector-Level Coordination Plans, including multifamily, will be established by Q1 2026.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	SDREN & SDG&E establish sector-level coordination meeting schedule, and begin drafting Coordination Plans.	Sector-level coordination meetings are anticipated to begin in Q4 2025 and will be held on an ongoing basis.	In progress	None	SDREN-01-COM-SMB SDREN-02-COM-ERF SDREN-03-COM-MAP SDREN-01-CS-CSS SDREN-01-WET-EPF SDREN-02-WET-BRC SDREN-01-PUB-CRL SDREN-02-PUB-TRE SDREN-01-RES-MFM SDREN-02-RES-SFM
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 - SDREN fully agrees with this recommendation. SDREN staff will lead coordination with SDG&E and implementers will be incorporated on a case-by-case basis. The Sector-Level Coordination Plans will include organization chart and/or RACI for clarification of roles & responsibilities.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Sector-level coordination meetings are anticipated to begin in Q4 2025 and will continue at least monthly through the duration of SDREN's program timelines. SDREN and SDG&E will establish Sector-Level Coordination Plans by Q1 2026 and will revisit annually to ensure coordination efforts are documented accurately.	Sector-level coordination meetings are anticipated to begin in Q4 2025.	In Progress	None	SDREN-01-COM-SMB SDREN-02-COM-ERF SDREN-03-COM-MAP SDREN-01-CS-CSS SDREN-01-WET-EPF SDREN-02-WET-BRC SDREN-01-PUB-CRL SDREN-02-PUB-TRE SDREN-01-RES-MFM SDREN-02-RES-SFM
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 - SDREN's Single-Family Program is not in market yet; however, it is anticipated to offer a suite of direct installation (DI) measures at no-cost to hard-to-reach and underserved customers as well as incentives to help fill cost gaps.	SDREN programs are currently under design; as such, these recommendations are being proactively accepted. No program changes needed.	Program measures and incentive levels will be finalized in collaboration with SDREN's third-party implementers during the Q4 2025 pre-launch phase.	Single-family direct installation and incentives are expected to be finalized and available to customers beginning in Q1 2026.	Not started	None	SDREN-02-RES-SFM

ATTACHMENT D
CEDARS Receipts



Outlook

CEDARS 2026 budget filing submitted for SDRN

From cedars@sound-data.com <cedars@sound-data.com>

Date Wed 10/29/2025 10:00 AM

To Aisha Cissna <acissna@sdcommunitypower.org>

CEDARS FILING SUBMISSION RECEIPT

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

PA: San Diego REN (SDRN)

Budget Filing Year: 2026

Submitted: 10:00 on 29 Oct 2025

By: Alyson Scurlock

Advice Letter Number: 003-E

*** Portfolio Budget Filing Summary ***

- TRC: 0.21
- PAC: 0.21
- TRC (no admin): 0.71
- PAC (no admin): 0.67
- RIM: 0.18
- Budget: \$43,800,779.61
- TotalSystemBenefit: \$7,578,644.72
- ElecBen: \$4,733,246.63
- GasBen: \$4,572,796.71
- OtherBen: \$0.00
- TRCCost: \$44,341,479.41
- PACCost: \$45,015,868.70

*** Programs Included in the Budget Filing ***

- SDRN-01-COM-SMB: SMB Energy Coach
- SDRN-01-CS-CSS: Codes & Standards
- SDRN-01-EMV: SDREN EMV
- SDRN-01-PUB-CRL: Climate Resilience Leadership
- SDRN-01-RES-MFM: Multifamily

- SDRN-01-WET-EPP: Energy Pathways Program
- SDRN-02-COM-ERF: Efficient Refrigeration
- SDRN-02-PUB-TRE: Tribal Engagement
- SDRN-02-RES-SFM: Single-Family
- SDRN-02-WET-BRC: Workforce Training and Capacity Building
- SDRN-03-COM-MAP: Market Access Program
- SDRN_CS_PortfolioSupport: Portfolio Admin-Codes & Standards
- SDRN_EQ_PortfolioSupport: Portfolio Admin-Equity
- SDRN_MS_PortfolioSupport: Portfolio Admin-Market Support
- SDRN_RA_PortfolioSupport: Portfolio Admin-Resource Acquisition

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CEDARS Administrator

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CEDARS 2027 budget filing submitted for SDRN

From cedars@sound-data.com <cedars@sound-data.com>

Date Wed 10/29/2025 10:01 AM

To Aisha Cissna <acissna@sdcommunitypower.org>

CEDARS FILING SUBMISSION RECEIPT

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

PA: San Diego REN (SDRN)

Budget Filing Year: 2027

Submitted: 10:01 on 29 Oct 2025

By: Alyson Scurlock

Advice Letter Number: 003-E

* Portfolio Budget Filing Summary *

- TRC: 0.21
- PAC: 0.22
- TRC (no admin): 1.13
- PAC (no admin): 1.33
- RIM: 0.19
- Budget: \$47,403,910.47
- TotalSystemBenefit: \$8,761,348.88
- ElecBen: \$5,283,612.29
- GasBen: \$5,547,917.90
- OtherBen: \$0.00
- TRCCost: \$50,730,055.39
- PACCost: \$49,246,809.72

* Programs Included in the Budget Filing *

- SDRN-01-COM-SMB: SMB Energy Coach
- SDRN-01-CS-CSS: Codes & Standards
- SDRN-01-EMV: SDREN EMV
- SDRN-01-PUB-CRL: Climate Resilience Leadership
- SDRN-01-RES-MFM: Multifamily

- SDRN-01-WET-EPP: Energy Pathways Program
- SDRN-02-COM-ERF: Efficient Refrigeration
- SDRN-02-PUB-TRE: Tribal Engagement
- SDRN-02-RES-SFM: Single-Family
- SDRN-02-WET-BRC: Workforce Training and Capacity Building
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- SDRN_CS_PortfolioSupport: Portfolio Admin-Codes & Standards
- SDRN_EQ_PortfolioSupport: Portfolio Admin-Equity
- SDRN_MS_PortfolioSupport: Portfolio Admin-Market Support
- SDRN_RA_PortfolioSupport: Portfolio Admin-Resource Acquisition

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CEDARS Administrator

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ATTACHMENT E
Report on Demographic Reporting

Background

D.23-06-055 OP 23 requires “Portfolio administrators shall work with the Reporting Policy Coordination Group 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.”

Questions within Section 7.7 include:

1. What are the most feasible options to accurately assess energy efficiency program participation by different demographic groups? Are there more efficient or less costly methods (i.e., using geographic, census, survey, or other data) of regularly assessing demographic participation in energy efficiency programs compared to collecting information from each program participant?
2. What, if any, demographic data is already being collected (and for which programs)?
3. What types of demographic data could be collected for energy efficiency program participation?
4. For which segments, sectors, and programs should this data be collected?
5. Where should this data be reported and stored?
6. What should be the timeline for PAs to begin reporting participation by demographic group?
7. What should the frequency be for reporting demographic participation data?

Process

To undertake this process, the Reporting PCG was engaged at the January 2025 meeting, and was provided information on OP 23, which requires a joint report. The following steps were identified to produce the OP 23 report:

Step 1: Establish a separate Reporting PCG working group to develop the report. PG&E was the lead PA in facilitating the working group.

Step 2: Have a kick-off meeting to discuss the requirements of OP23 and establish the process. Meet monthly thereafter.

Step 3: Develop a data collection template to collect each PA’s response to each question.

Step 4: Discuss areas of consensus and non-consensus to find common ground.

^[1] California Energy Data and Reporting System: [Home - CEDARS](#)

Step 5: Review a draft of the report with the Reporting PCG at the June 2025 PCG meeting.

Step 6: Report is finalized by the lead and sent to PAs and Energy Division Staff.

PA Responses

Each PA's individual responses to the questions are provided in excel attachment "D.23-06-055 OP23 PA Data Collection.xlsx." A summary where PAs had consensus and where differing viewpoints occurred is provided in the discussion below.

Discussion

1. What are the most feasible options to accurately assess energy efficiency program participation by different demographic groups? Are there more efficient or less costly methods (i.e., using geographic, census, survey, or other data) of regularly assessing demographic participation in energy efficiency programs compared to collecting information from each program participant?

The majority of PAs agree that using geographic and publicly available data is a cost-effective and scalable method for assessing energy efficiency program participation by demographic groups. They emphasize that demographic data collection should be voluntary and not a requirement for program participation. One way to achieve this is for PAs to provide the census tract for each project as part of the site information in CEDARS^[1] claims. This approach avoids adding survey burdens to PAs and leverages existing data, such as census tracts and utility account information, to analyze demographic participation without requiring new or invasive data requests from customers. As an additional data collection method, NREN suggests gathering demographic data through registration questions, surveys, and market assessments but acknowledges the limitations of low response rates.

While CCRREN agrees with using geographic and publicly available data, they suggest using mapping software to layer addresses on census tracts and propose that demographic data collection be included in EM&V study workplans. 3C-REN supports CCRREN's approach for programs that already collect addresses, noting that collecting clean address data for programs that do not already collect it, such as workforce programs, could require a significant timeline.

^[1] California Energy Data and Reporting System: [Home - CEDARS](#)

Lastly, SCE argues that using public demographic data cannot accurately assess the actual breakdown of participants. Instead, they advocate for direct data collection or sampling if an individual breakdown of participants is required by the CPUC. SoCalREN also agrees with SCE's position and are also advocating for direct data collection or sampling if an individual breakdown of participants is required.

2. What, if any, demographic data is already being collected (and for which programs)?

As this is program specific, please refer to the attached spreadsheet for each PA's response.

3. What types of demographic data could be collected for energy efficiency program participation?

PAs are mostly aligned on the types of demographic data that could be collected including customer IDs for participating customers that can be linked to geographical and other customer information such as rate code, CARE/FERA/ESA participation, NEM participation, census block group, preferred billing language, dwelling types, service types, and annual usage amounts. The census block group data point can be used to further link to disadvantaged community status, overall census data, average community incomes, and average age and race demographics within a given community. SoCalREN notes that census data can provide extensive insights into where projects are being implemented and helps identify which communities benefit most from the programs. There is also a consensus on the need for voluntary surveys to avoid creating barriers to participation.

CCRREN emphasizes that demographic data beyond what is currently required for participation in various programs should be collected during EM&V and be defined and agreed upon in the approved EM&V work plan. SCE believes that any demographic data could be requested but notes that verifying and trusting the collected data is a challenge and could lead to reduced participation. Lastly, SDG&E adds that additional data collection should only occur for local and regional programs participants, not statewide participants.

4. For which segments, sectors, and programs should this data be collected?

PAs agree that demographic data is most applicable to analyze Residential, Public, and Commercial Programs. 3C-REN, SDREN, SoCalREN, NREN, and IREN include Workforce Education & Training (WE&T) programs in their scope. 3C-REN highlights that customer IDs might not be applicable for WE&T programs where participants register for classes without

^[1] California Energy Data and Reporting System: [Home - CEDARS](#)

providing utility customer IDs. PG&E also notes that they do not currently report participants of WE&T programs into CEDARS.

CCRREN offers caution in the approach for commercial and public sectors, stating that demographics of those entities must be tailored to their organizational structure to mitigate data on the individual. In addition, CCRREN suggests that data should be collected during EM&V starting with the residential sector and expanding to commercial and public sectors in a phased-out approach.

Lastly, PG&E notes that demographic analysis may provide little insight within programs with randomly selected treatment and control groups (such as home energy reports) but that including these programs can be useful for analyzing groups at the portfolio level.

5. Where should this data be reported and stored?

PAs agree that required data points should be collected in claims and emphasize the importance of minimizing changes to the current reporting process. There is also consensus around collecting minimal information like census block groups that can later be tied to other demographic information by evaluators. SDG&E suggests that the new proposed Site Information data could be used to enhance CEDARS visualizations and improve access to program performance data.

CCRREN recommends that demographics collected during EM&V should be stored using existing structures to link values to claims data. They advise against adding additional reporting data points, arguing that site and participant addresses can be easily mapped onto census tract polygons. They believe that the benefits of collecting and reporting census tract data in claims data do not justify the costs to ratepayers, especially since this mapping can be done at scale afterward. Finally, I-REN, BayREN, CCRREN, and 3C-REN assert that the responsibility for mapping addresses to census tracts should lie with the CPUC, not the PAs.

Lastly, SoCalREN does not agree that the responsibility for mapping addresses to census tracts should lie with the CPUC, not the PAs. Census tract data is publicly available and there are many existing tools that can be leveraged that are specific to PA service territory. PAs should be responsible for this type of data mapping and reporting.

6. What should be the timeline for PAs to begin reporting participation by demographic group?

There is broad alignment that PAs should report demographic group participation only after clear CPUC guidance and 6 months to implement new collection processes. SoCalREN notes that if their recommendation to use existing PII for demographic assessment is

^[1] California Energy Data and Reporting System: [Home - CEDARS](#)

adopted, an added benefit would be the ability to apply a consistent methodology across PAs and over time to claims from previous years, with no additional effort required from PAs. SCE believes the timeline for PAs to begin reporting should coincide with the next available Application period and the requirements and guidance should be included in the Decision for that Application period to ensure consistency throughout the application period. Lastly, CCRREN states that no additional demographic information or timelines are necessary if their recommendations are adopted.

7. What should the frequency be for reporting demographic participation data?

PAs agree that annual reporting for metrics and quarterly reporting for claims related data should be sufficient. BayREN notes that if additional data is required or project/measure-level reporting is not necessary, annual reporting would be appropriate. BayREN foresees challenges in providing meaningful aggregate demographics in the Annual Report and believes that claims data offers more valuable insights for analysis.

If CCRREN's recommendations are adopted, where Site Address is used to map against census tract data in aggregate and additional demographics are collected during EM&V, no further demographic information is needed, and therefore no specific timelines are applicable. 3C-REN is in support of CCRREN's recommendation for programs that already collect addresses, but notes that this is not possible for programs that do not already collect address information or collect address information that is not reported into CEDARS (e.g., for WE&T and C&S participants).

Conclusion

The PAs thank the CPUC for the opportunity to provide feedback on this important issue. We collectively would like to ensure that the path taken provides (1) the most consistent method for tracking this information among PAs' programs and (2) that any data collected is done in an administratively responsible manner, to maximize the value to ratepayers. The PAs request the CPUC will continue to engage with the Reporting PCG as policy around this topic is developed.

^[1] California Energy Data and Reporting System: [Home - CEDARS](#)

ATTACHMENT F

Unique Value Metrics

San Diego Regional Energy Network: MCAL Unique Value Metrics

MCAL

Metric/Indicator	Measurement	Description	Target 2024	Target 2025	Target 2026	Target 2027
Metric	Percent	Energy costs as a result of program participation	n/a	n/a	100%	100%
Indicator	kbtu	EE savings channeled to non-SDREN programs	n/a	n/a	n/a	n/a
Metric	Percent	% of customers channeled to non-SDREN programs	n/a	n/a	50%	50%
Metric	Percent	Programs/communities (% of total budget spend)	n/a	n/a	50%	50%
Indicator	Count	Count of newly educated or credentialed individuals	n/a	n/a	n/a	n/a
Metric	Percent	Customers served	n/a	n/a	75%	75%

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Metric/Indicator	Measurement	Description	Target 2024	Target 2025	Target 2026	Target 2027
Metric	Percent	Energy costs as a result of program participation	100%	100%	100%	100%
Indicator	kbtu	EE savings channeled to non-SDREN programs	n/a	n/a	n/a	n/a
Metric	Percent	% of customers channeled to non-SDREN programs	50%	50%	50%	50%
Metric	Percent	Programs/communities (% of total budget spend)	50%	50%	50%	50%
Indicator	Count	Count of newly educated or credentialed individuals	n/a	n/a	n/a	n/a
Metric	Percent	Customers served	75%	75%	75%	75%