

Full CAEECC Quarterly Meeting #50

Hosted by the California Energy Efficiency Coordinating Committee (CAEECC)

Meeting Date: June 9, 2026

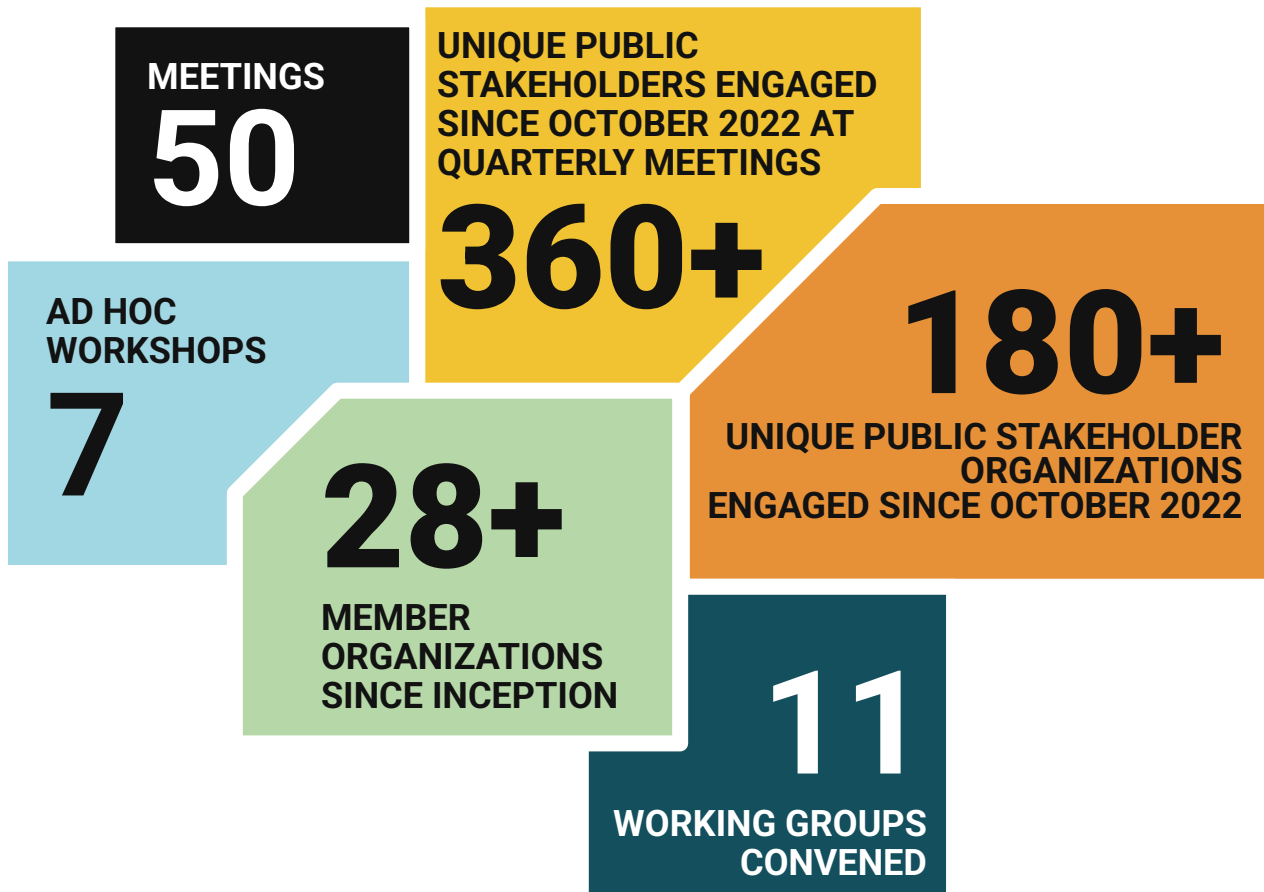
Location: Hybrid (Zoom, San Francisco, Los Angeles)

Last updated June 8, 2026

**CONGRATS
CAEECC!**



since 2016



Outcomes from Facilitated CAEECC Processes

Market Transformation Working Group (2018-2021) proposed recommendations which ultimately led to the development of the statewide Market Transformation Initiative and an independent administrator

EE Filing Working Group (2019-2021) led to numerous foundational process improvements and policies in D.21-05-031, including segmenting energy efficiency program portfolios into resource acquisition, market support, and equity; and changes to the rolling portfolio framework and regulatory process

Equity and Market Support Metrics Working Groups (2023-2024) proposed recommendations that helped lay the foundation for two new portfolio segments

Contract Terms & NMEC/EM&V Working Group (2018) created a standard template used by all PAs in solicitations, allowing more streamlined solicitations by firms across PAs

And More!

Review of Business Plan Applications
(2018) Workforce Standards
(2025) Community Engagement Workshop



Welcome & Background

Introductions + Agenda

How to Participate

Welcome & Background

Introductions + Agenda

Welcome!



Virtual

Attendees
(read by Suhaila
Sikand)



San Francisco

Attendees
(read by Katie
Abrams)



Los Angeles

Attendees
(read by Michelle
Vigen Ralston)

Today's Agenda

View Details in Agenda Document

Welcome & Announcements

10:00 - 10:10 AM

Energy Division Updates

10:10 - 10:40 AM

01

CAEECC Workshops and Committees

10:40 - 11:30 AM

02

Policy Issue Proposals for Possible CAEECC Engagement

12:30 - 1:45 PM

03

CAEECC Business Items

1:45 - 2:00 PM

04

Optional Assembly

2:00 - 2:15 PM

← Lunch!



Meeting Goals

1

Learn about Energy
Division's relevant updates

2

Discuss updates and next
steps for CAEECC
Workshops and Committees

3

Discuss and decide next
steps on proposed CAEECC
engagement regarding
Business Application Policy
Proposals

00: Welcome & Background

How to Participate

We're joining from ONLINE and IN-PERSON



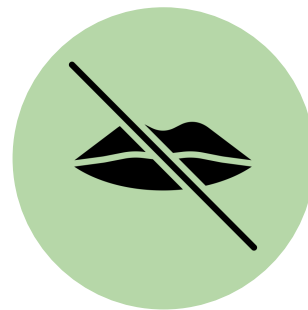
SF Emcee:
Katie
Virtual Emcee:
Suhaila
LA Emcee:
Michelle



Chat is only for
technical issues.
No substantive
comments.

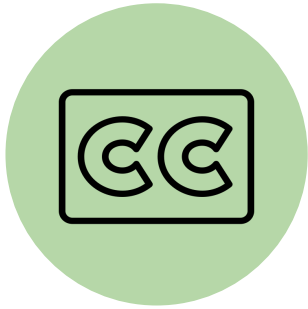


All Attendees:
Reactions +
Raise Hand



In-Person:
No side
conversations!
Unmute & mute
mics!

Virtual Participants



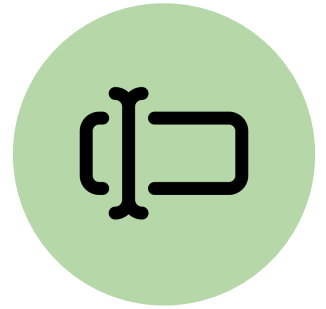
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captioning is
available



Share your **video**
if possible



Mute yourself
when you're not
speaking.



Rename yourself
with your
Representation &
Pronouns



When the Public Can Participate

These are the dedicated Public input opportunities, as indicated on the agenda with “*”:

- * Energy Division Updates
- * Workshop on Workforce Standards Updates & Next Steps
- * Proposals and Discussion on CAEECC engagement of policy issues
- * CAEECC Business Items
- * Optional Assembly

How the Public Can Participate:



Use the **chat function** at dedicated times on the agenda, as announced by the Facilitator



Please **add your name/attribution** to your question to support facilitation.

Groundrules



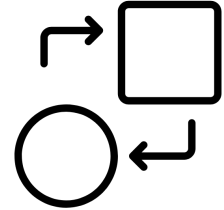
Attend all
meetings



Do your
homework



Materials are
posted 3 days
in advance



Propose
alternatives



Proposed Meeting Norms

1. Make space, take space (share the mic).
2. Stories shared here stay here; what is learned here leaves here.
3. Share your unique perspective: share your unpopular opinion!
4. Generative thinking: "yes, and" instead of "yes, but".
5. Listen from the "We", speak from the "I".
6. Offer what you can; ask for what you need.
7. Be inquisitive.
8. Assume best intent.
9. Be empowered to share impact.

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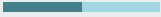
04

Optional Assembly

2:00 - 2:15 PM

← Lunch!

01



Energy Division Updates

Energy Division Staff Updates

CAEECC Q2 Meeting, 6/9/26



California Public
Utilities Commission

Energy Division Energy Efficiency Activity

Proceeding Activity

- **6/19** Business Plan Pre-hearing conference

Other EE work

- **6/30** Deemed measure packages due
- Completed: Custom SEM and NMEC 2024 Evaluation

Upcoming

- **6/16** Workshop: Customs Process Review Continuous Improvement

Business Plan Applications: Regulatory Context (D.21-05-031, OP 5)

All current **EE program administrators** shall **file applications** on February 15, 2022 for program year 2024, and **every 4-years** after that, containing the following elements:

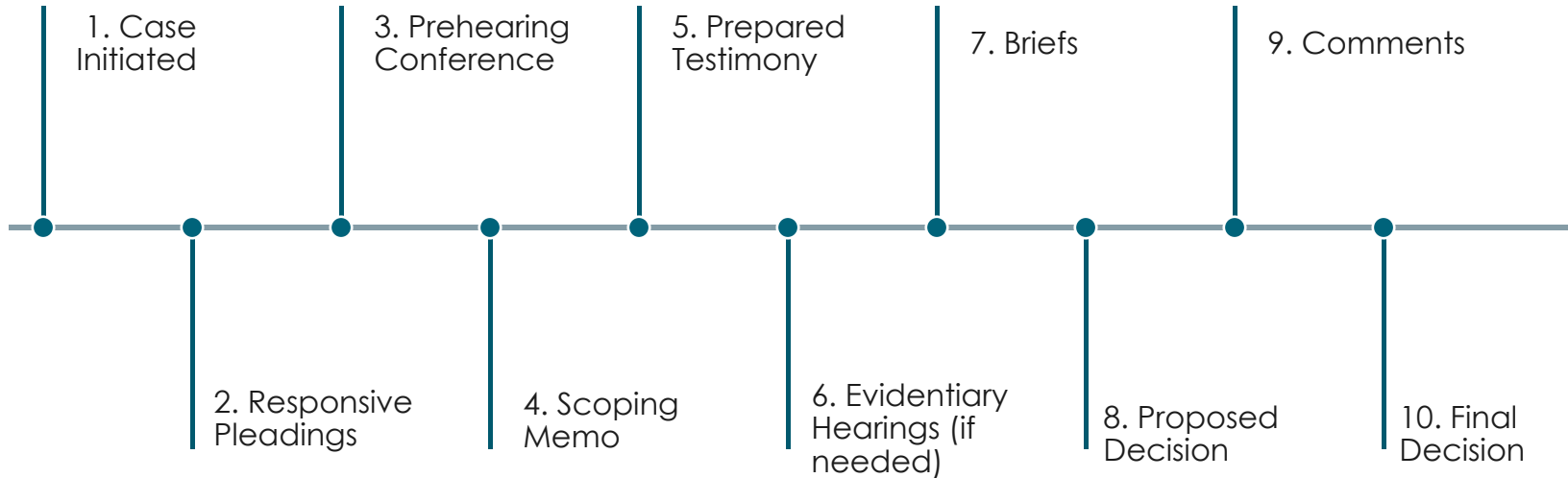
- a) **A business plan** to cover an **8-year period**. The business plan shall serve as a strategic plan for the EE efforts of the program administrator, and shall contain sector-level strategies, metrics, and an 8-year budget.
- b) **A 4-year program portfolio**, beginning with program year 2024. This portion of the **Application** shall contain: detailed sector and program strategies; annual budgets, totaling to a 4-year revenue requirement; cost-effectiveness showings over the four-year period; and implementation plans, or links to them, for all programs that are currently operating or planned to operate during the four-year portfolio period, with the exception of 3P programs where the contract has not yet been awarded.

High Level (*Possible*) Proceeding Schedule*

- 2028-2035 Business Plan Applications Filed – **By 3/16/2026**
- Protests/Responses – **May 1, 2026**
- Replies – **May 18, 2026**
- Pre-Hearing Conference – **June 19, 2026**
- Scoping Memo
- Testimony (Intervenor and Rebuttal)
- Briefs (Opening and Reply)
- Proposed Decision (2027)
- Final Decision (2027)

*Based on A.22-02-005 Scoping Memo Timeline

Formal Procedural Steps



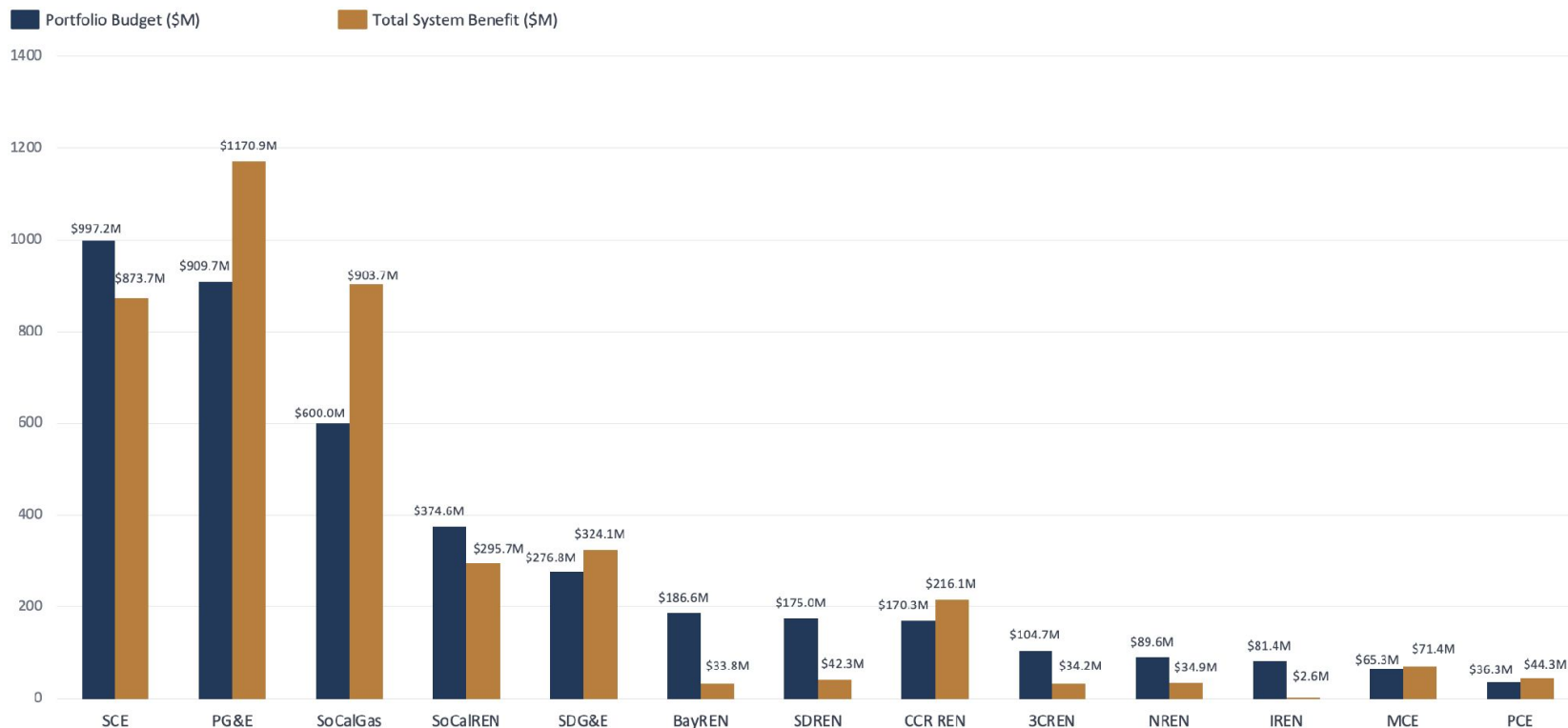
Scoping Memo

- Issued by the Assigned Commissioner.
- The Assigned Commissioner determines the scope/list of issues that will be considered in the proceeding, as well as the schedule, via Ruling with support from the assigned ALJ.
- Parties may weigh-in to inform the scope of the proceeding prior to issuance of the Scoping Memo and Ruling at the pre-hearing conference or via responsive pleadings.
- If issues are not in scope, they cannot later be resolved in the proceeding.
- Scoping Memo is generally issued 20-45 days after the pre-hearing conference.

Other Opportunities to Provide Comment

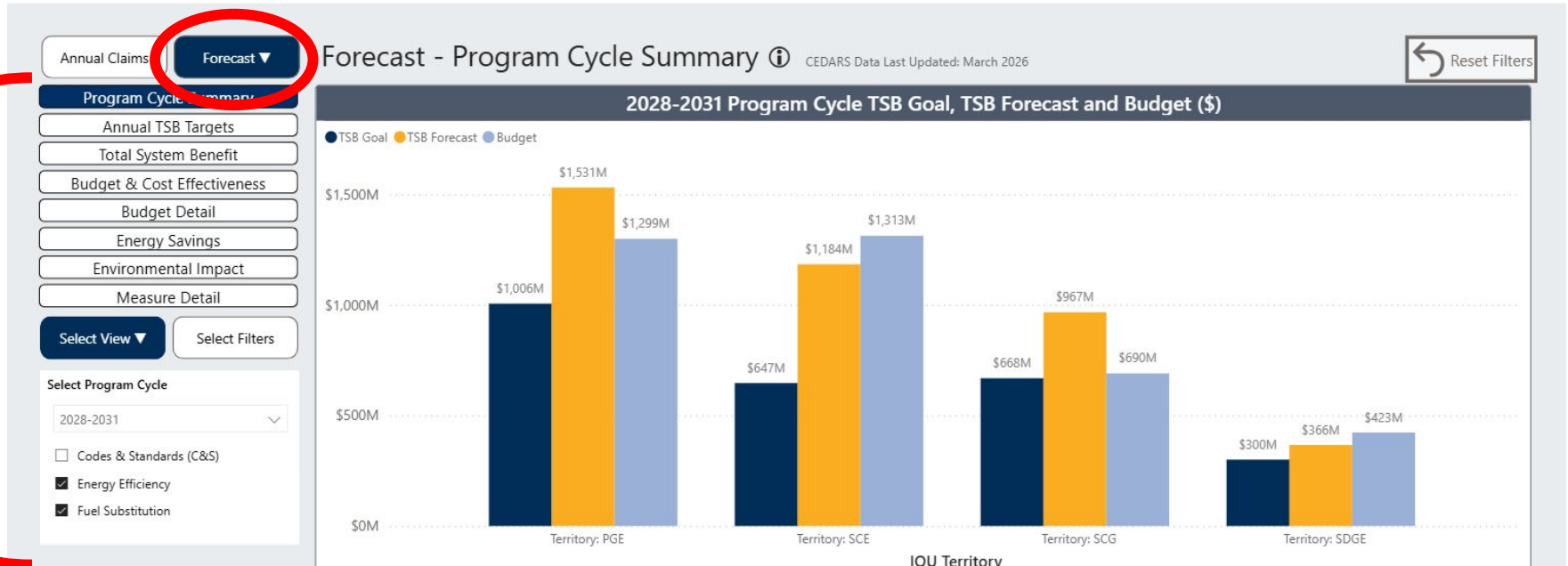
- Public Comment at a Commission Voting Meeting
- Online Public Comment Portal on the CPUC [A2603009 Docket Card](#)
- Become a party/ file a motion for party status (if not already) to comment in the Proposed Decision Comment Period

TSB and Portfolio Budget, 2028-2031 (All PAs)



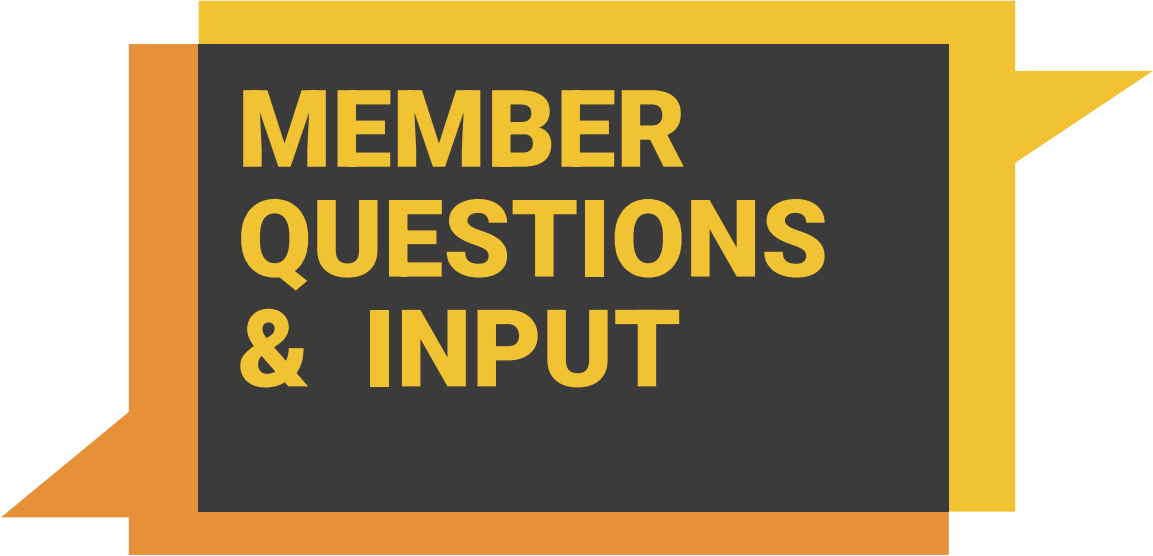
Data source: CEDARS Dashboards

CEDARS.cpuc.ca.gov --> "Data Tab"



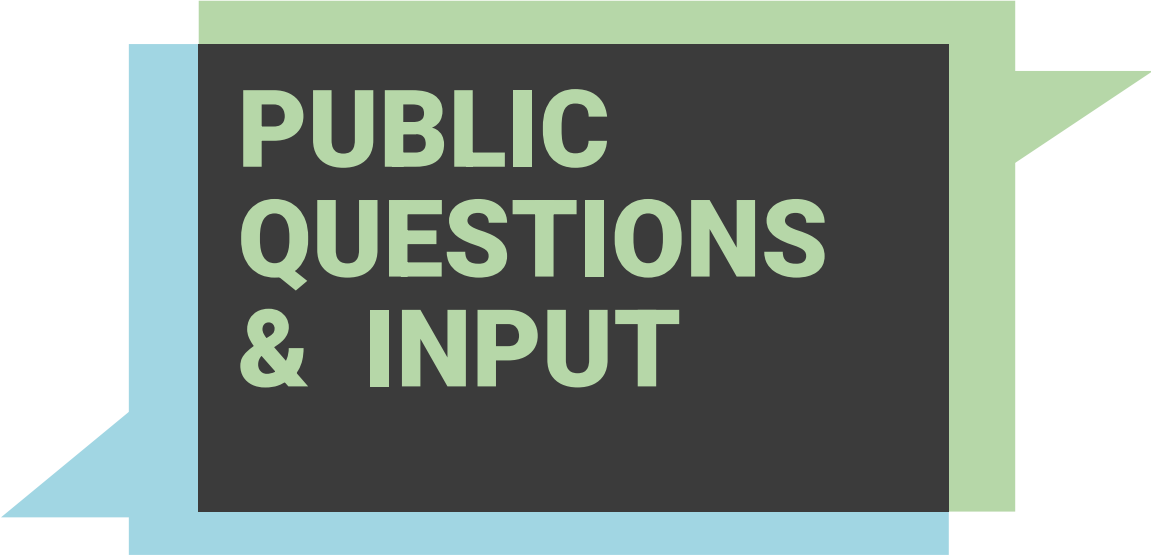
Questions?





MEMBER QUESTIONS & INPUT

*Raise your hand in the virtual
room*



PUBLIC QUESTIONS & INPUT

*Use the chat to share your comment or question.
Please include your name and affiliation.*

*Time permitting, if we need clarification, we may
request a question be conveyed verbally.*

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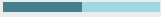
04

Optional Assembly

2:00 - 2:15 PM

← Lunch!

02



CAEECC

Workshops and Committees

- Workforce Standards
Workshop (5/18/26)
- Equity Advisory Committee
Final Memo

2A: CAEECC Workshops & Committees

Workforce Standards Workshop

Workshop Purpose & Highlights



Workshop Purpose

To establish a common understanding of the opportunities, benefits, challenges, and perspectives of different interested parties re: applying workforce standards to energy efficiency/electrification programs.

Note the purpose isn't to problem-solve although brainstorming solutions is encouraged.

Workshop Highlights

90

participants representing 52 organizations, including 19 CAEECC members, 8 representatives of three ex-Officio members and 63 members of the public

8

speakers representing PA experiences, evaluation, legislation and regulations, workforce training, Union and non-Union workers, and certifying agencies

4

presentation topics addressing SB.350 responsible contractor policy, CPUC D.18-10-008, implementation challenges and opportunities



Breakout Room Discussion Topics

The workshop explored challenges, opportunities and solutions for these topics.

- A. Top Challenges in Meeting Workforce Standards for HVAC/Lighting Contractors
- B. Incentive Threshold Requirements
- C. Contractor Credentialing Requirements
- D. Contractor Verification, the Importance of Quality Assurance and Consumer Protection
- E. Market Participation, Equity and Access: Who Gets Left Out
- F. Coordination on Contractor Requirements: Across PAs and at the State Level

Workshop Evaluation Scores

Evaluation Question Summaries	Avg.
Objectives of the workshop were accomplished.	5.1
Presentations and background documents were clear and helpful.	5.2
This workshop was an inclusive and trusting environment.	5.1
The facilitators were effective in running the workshop.	5.2
Overall, the workshop format was smooth and effective.	5.4
Overall, this Workshop was successful.	5.1

Scores are 1-6 scale, where 1 is "strongly disagree" and 6 is "strongly agree"; and 3.5 is mid-point of 1-6 scale

Scores based on responses from 15 members and 5 stakeholders

Workshop Recommendations Most Applicable to CAEECC Members



Recommendation: Increased Coordination

- **Coordination across PAs and State Organizations:** Need to ensure that PAs and state organizations (e.g. CEC, CPUC, LWDA, CSLB) are aligned with workforce standards guidelines, and pathways to achievement. Standards need to be top down.
- **Strengthen CPUC, PA and Contractor Coordination on Workforce Standards**
 - Align on requirements, training, and verification, with formal labor and industry input before PA program launch
 - Leverage unions and non-union contractors as the workforce development arm of industry
 - Use unions and non-union contractors to help PAs identify and verify qualified contractors and installers
 - Contractors (inc. Unions) and RENS to coordinate on regional workforce challenges through shared information, training and job placement



Recommendation for PA Consideration: Program Design Ideas to Enhance Workforce Standards Compliance

PAs should ensure workforce standards are in place in their programs and there is compliance.

- **Rebates Linked to Compliance:** Rebate and incentive payouts should be tied to workforce standard compliance.
- **Require Forms to Verify Credentials:** Require forms that include first and last names of workers, list of contractors they have worked for, name of apprenticeship programs, credentials and years received.
- **Utilize Centralized Verification Portals:** Leverage centralized databases (e.g. CALCTP or DIR apprenticeship databases or websites available by county listing HVAC technicians) to verify technician qualifications.



Recommendation for PA Consideration: Addressing Rural, Equity & Accessibility Challenges

- **Addressing Rural Geography Gaps in Contractors:** RENs and CCAs can play a significant role in driving workforce standards by ensuring accessible pathways for rural contractors to obtain required training.
- **Make credentialing accessible:** Subsidies for credentialing, more opportunities for learning on the job, shadowing and mentorship and regional training opportunities are needed (e.g. BayREN, AMBAG and SMUD mentorship and shadowing program)
- **Contractors, Unions, and REN Partnerships:** Partner to address regional workforce challenges through information sharing, and coordination on training and job opportunities.



Recommendation for CPUC Consideration: Incentive Thresholds

- **Extend Incentive Thresholds Requirements to Residential Projects:** Extend workforce standards to residential projects and include in incentive threshold requirements.
- **Keep Thresholds Low & Avoid Inflation Adjustments:** Many projects are small, so low thresholds help ensure standards are met. Don't tie thresholds to inflation; rebates do not rise with it.
- **Differentiate Equity vs Non-Equity Thresholds:** Implement multi-tiered thresholds based on equity vs. non-equity projects to ensure disadvantaged communities receive program benefits.



For a list of detailed Workforce Standards
Workshop recommendations - see the Meeting
Summary posted to CAEECC

<https://www.caeec.org/5-18-2026-workforce-standards-workshop>

Next Steps from Workshop



How does CAEECC want to follow-up on Workshop Outcomes and Recommendations?

Possible Options:

1. Share meeting summary, recommendations and outcomes with relevant agencies (e.g. CEC, CPUC, CSLB, Contractor orgs, Unions etc)?
2. Working group series to tackle specific workforce standard issues and recommendations?
3. Other recommendations from CAEECC members?

**MEMBER
AND PUBLIC
INPUT ON
NEXT STEPS**

*Raise your tent card in person;
or hand in the virtual room*

2B: CAEECC Working Groups and Workshops

Equity Advisory Committee Update



01

Composition, Diversity, Equity, and Inclusion WG

Adopt a JEDI framework for CAEECC and its influence on programs.



02

Evolving CAEECC WG

Closing reflections from WG Members recommended an Evolved CAEECC advisory committee.



03

CAEECC Quarterly Meeting Discussions

2024 Q4 Meeting
Near Term Equity Recommendations proposed (creation of EAC)

2025 Q1/Q2 Meeting
CAEECC approves creation of EAC and its Scope as a *pilot*.



04

Equity Advisory Committee

EAC created, members recruited, and meetings conducted from July 2025 - May 2026



About the Equity Advisory Committee (EAC)

During the 2025-2026 pilot, the EAC focused on advising Portfolio Administrators and Energy Division on **Equity Best Practices**.

The Volunteer Members were tasked with:

- Sorting through CEDARS equity programs to understand scope & scale
- Attending Equity sections of CAEECC Quarterlies and PPRR Meetings
- Providing informal recommendations to PAs on best practices and optional informal recommendations to CPUC



About EAC cont.

EAC Volunteer Members

Amaury Berteaud

Brooke Wright

Chris Pilek

Julia Hatton

Facilitation Team

Michelle Vigen Ralston

Suhaila Sikand

Katie Abrams

Special thanks to the 7+ CAEECC Members and 20+ Public Members who attended meetings!!

July - Sept 2025	Oct - Dec 2025	Jan - May 2026	June 1, 2026
Background Analysis <i>EAC Members reviewed the preliminary CEDARS analysis on equity programs, attended CAEECC Meeting Equity Highlights, and reviewed an NEB study analysis.</i>	Initial Recommendations to CAEECC PAs <i>EAC Members drafted and sent via memo on Dec 19 2025, Initial Recommendations for consideration ahead of PA Business Plan filings anticipated in early 2026.</i>	Draft of Additional Recommendations for CAEECC PAs <i>EAC Members are drafting additional recommendations on Equity Best Practices and near-term solutions to make portfolios stronger and better integrate equity across them.</i>	Final Recommendations Sent to CAEECC <i>EAC Members sent a Final Memo to CAEECC Members.</i>

Available on Meeting Page



Through these recommendations, the EAC hopes to strengthen California's energy efficiency portfolio to be more accessible, have a broader impact, and to be more responsive to the needs of California's diverse communities.

1

Simplify and Clarify Program Eligibility to Build Trust with Program Participants

2

Strengthen Use of Data to Evaluate Equity Outcomes

3

Integrate Equity into Portfolio Design & Planning

4

Expand Equity Value through Workforce, Education, & Training (WE&T) Program Integrations

1

Simplify and Clarify Program Eligibility to Build Trust with Program Participants

The full impact of Equity programs remains limited due to complicated eligibility verification process, narrow program outreach methods, and unclear requirements on how to serve low-income (LI) customers alongside income-qualified programs.

Building trust in Equity programs and achieving Equity objectives should include prioritizing targeted outreach over participant-specific eligibility, simplifying application of eligibility criteria, and nurturing cross coordination with income-qualified programs.

2

Strengthen Use of Data to Evaluate Equity Outcomes

Because Equity programs help reduce participation barriers for Market Support (MS) and Resource Adequacy (RA) programs, they are often undervalued or not credited for their role in achieving savings. Solutions include:

- Establishing contribution flags
- Formalizing referral tracking
- Distinguishing “reach” from “service”
- Incorporating affordability / net energy impact/benefit values

3

Integrate Equity into Portfolio Design & Planning

Equity program best practices should be able to seamlessly integrate in broader portfolio planning and design. A venue could support more rapid translation of Equity program learnings across the portfolio. Adjusting portfolio planning timelines can ensure Equity programs can be responsive to the gaps in the portfolio at large.

4

Expand Equity Value through Workforce, Education, & Training (WE&T) Program Integrations

WE&T must be more fully integrated into the broader EE portfolio to maximize its demonstrate value. Workforce readiness could translate more directly into high job placement, job retention, and quality jobs with greater integration into program implementation. Contractor diversity can be enhanced through project pipeline bundling, reducing contractor administrative paperwork, and encouraging prime-subcontractor partnerships support minority and small contractors.

Additional Topics for Consideration

The EAC identified several topics for continued discussion and consideration, perhaps in another round of EAC.

- **Portfolio Administrator (PA) Policy Recommendations in Business Plans**
Review and respond to/build upon Policy Recommendations from business plans to further equity in portfolios.
- **Community-Designed Energy Efficiency Programs**
Understand and promote best practices for community co-designed programs.
- **Self-Install Incentives and Equity Considerations**
Consider trade-offs and potential related to self-install programs to advance equity.

**EAC envisions a portfolio that is more accessible,
more adaptive, and more capable of meeting the
needs of California's diverse communities.**

Recommendations offer tangible steps to strengthen
program portfolios, enhance cost-effectiveness, and
advance California's climate, affordability, and
workforce goals.

Ripe for Discussion

Later today, CAEECC will discuss possible engagement on Business Plan Policy Recommendations. The EAC highlights these specific recommendations in recognition of the conversation.

Cost-Effectiveness

- **Properly Value Non-Energy Benefits (NEBs) and Intangible Impacts** - distinguish between IOU-facing and customer-facing benefits and focus on common participant pain points
- **Use Existing Metrics to Assess Portfolio-Wide Equity Outcomes** - improve the consistency, comparability, and analytical use of existing data. Standardize the meaning of “service.”
- **Value Workers from WE&T Programs in Program Metrics** - Reform metrics to reflect value derived from integrated workforce development and implementation.

Workforce

- **Meaningfully Expand Participation by Small and BIPOC Implementers** - engage small and BIPOC implementers. Reduce hurdles for participation.

Lunch until 12:30

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Optional Assembly

2:00 - 2:15 PM

← Lunch!

Policy Issue Proposals for Possible CAEECC Engagement

- A. Cost Effectiveness Framework Reform
- B. Fuel Switching
- C. Compliance Improvement
- D. Integrated Demand Side Management

Where are these topics from and what rules govern “Discretionary” Topics

CAEECC Members and Co-Chairs proposed 4 “discretionary topics” for possible CAEECC engagement

CAEECC GROUND RULES:

IV. CAEECC ISSUE/TOPIC SELECTION

B. Discretionary Issues/Topics:

- iii. For discretionary issues/topics identified either by the CPUC or CAEECC where a new Working Group or Ad Hoc Workshop is proposed and after the opportunity of sharing of perspectives of CAEECC Members, at least 2/3 of CAEECC Member organizations agree that CAEECC should take on, and for a Working Group at least 1/3 of CAEECC Member organizations plan to participate (no minimum participation for Ad Hoc Workshops). (This rule does not cover topics taken on by CAEECC Subcommittees).



Approach

1. **Presentations & Member Clarifying Questions** (*no changes to proposals*)
 - a. Cost Effectiveness Framework Reform
 - b. Fuel Switching
 - c. Compliance Improvement
 - d. Integrated Demand Side Management
2. **Seek consensus (if needed, vote with proposed amendments)**
 - a. $\frac{2}{3}$ Member orgs agree CAEECC should take on topic
 - b. If WG at least $\frac{1}{3}$ orgs plan to participate

3: Policy Issue Proposals for Possible CAEECC Engagement



PROPOSAL A

Cost-Effectiveness Framework Reform

Cost-Effectiveness Framework Reform



Problem

The current primary cost-effectiveness test, Total Resource Cost test, undervalues benefits by including participant costs and by failing to fully capture NEB/Is; the TRC disadvantages equity programs; is distinct from cost-effectiveness metrics used for other DERs, and has been flagged as problematic by the State Auditor's findings.

Relation to Business Plan Applications:

- Challenges with TRC, participant costs, consideration of PAC, SCT, NEBs (Various)
- NTG and NEB policy for Equity, perhaps NMEC (Various)
- CPUC Workshop on cost-effectiveness (SDREN)
- 3C-REN Equity Principles + REN Total Benefit Metric (SoCalREN)

Cost-Effectiveness Framework Reform



Purpose

Seek alignment on proposals (and arguments) to reform the current cost-effectiveness framework and submit recommendations to the CPUC through the appropriate proceeding(s). Aim to bridge the gap amongst stakeholders and think through operational considerations.



Expected Outcome

- Greater understanding of proposals CAEECC members have put forward; pursue alignment on proposals
- Recommended reforms on CE framework and operationalization

Cost-Effectiveness Framework Reform



Scoped Topics

- **Participant costs** in TRC, proposing PAC
- **Non-energy benefits**/impacts in TRC, or use of SCT **Equity principles** for cost-effectiveness - align Equity & Market Support indicators, NEB/Is, AKAB for RENs
- **Affordability metrics** and ratios; while also seeking to limit and simplify number of metrics



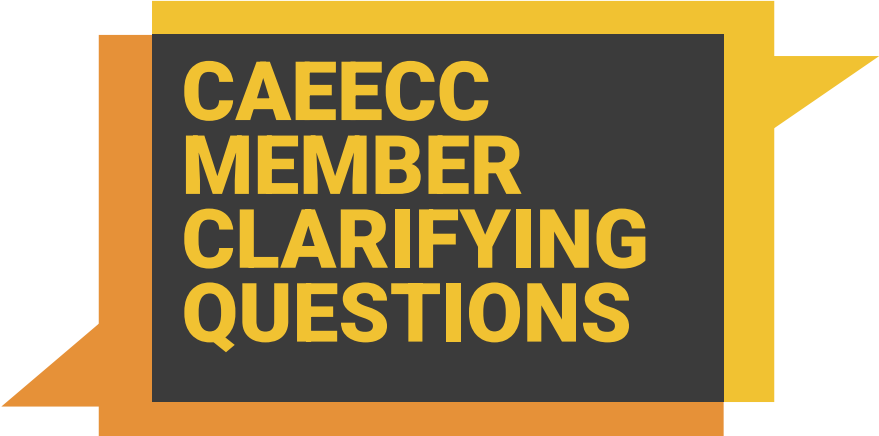
Timing

By ~Fall 2026, Deadline
TBD based on Scoping
Memo



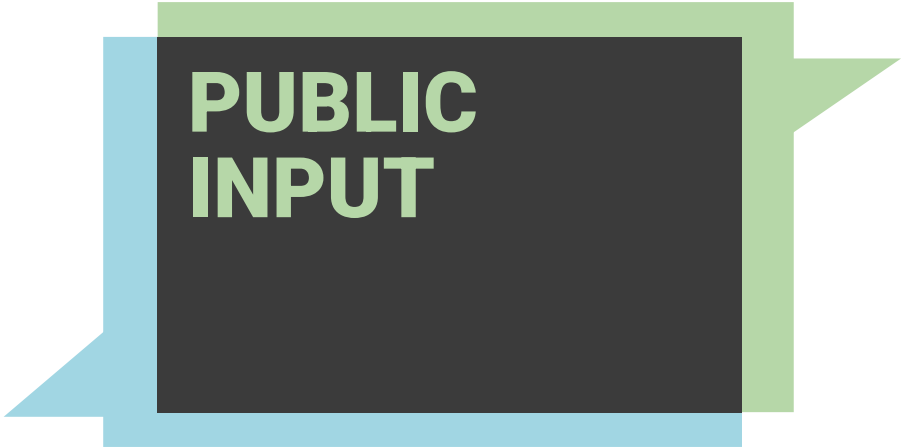
Venue

~3 Working Group
Meetings w/
subcommittees



CAEECC MEMBER CLARIFYING QUESTIONS

*Raise your hand in the virtual
room*



PUBLIC INPUT

*Use the **chat** to share your comment or question.
Please include your name and affiliation.*

*Timing - Public can use the chat at any time during
this session to provide input, which will be elevated at
the conclusion of the 4 presentations*

3: Policy Issue Proposals for Possible CAEECC Engagement



PROPOSAL B

Expanding Fuel-Switching Eligibility

Expanding Fuel-Switching Eligibility



Problem

Current EE program rules limit fuel-switching eligibility to utility-delivered energy (called fuel substitution), which hampers decarbonization goals and excludes rural, remote, disadvantaged communities, and hard-to-reach customers.

Relation to Business Plan Applications:

- **SoCalREN, NREN, CCR REN, PG&E** - Proposals to allow incentives for fuel-switching from unregulated fuels to support electrification (where switching is cost-effective, reduces GHGs, and advances equity)
- **SoCalGas** - Proposal to allow incentives for propane to fossil gas fuel switching and natural gas generation installations in select circumstances (vulnerable customers in high-fire-risk areas and medical baseline customers subject to PSPS events)

Expanding Fuel-Switching Eligibility



Purpose

Seek consensus on a **proposal to expand EE incentive eligibility to fuel switching projects replacing non-regulated fuels** (e.g. propane, fuel oil), aligning program rules with state climate mandates and equity commitments

Submit **recommendations to the CPUC** through the appropriate proceeding(s).



Expected Outcome

Policy proposal for CPUC consideration of how to operationalize fuel switching incentive eligibility

Note: need to consider impacts if this topic is scoped into current EE proceeding; also consider making a motion to the CPUC.

Expanding Fuel-Switching Eligibility



Scoped Topics

- Scope of non-regulated fuels, measures and geographic considerations for proposed incentive rule changes
- Process for determining reporting on energy savings and GHGs from fuel switching
- Program eligibility and training for PAs and contractors



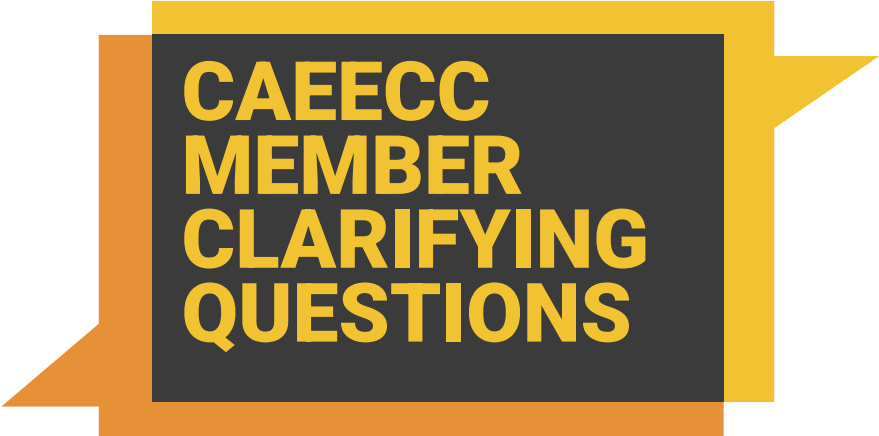
Timing

~ Summer/Fall 2026
(no specific deadline)



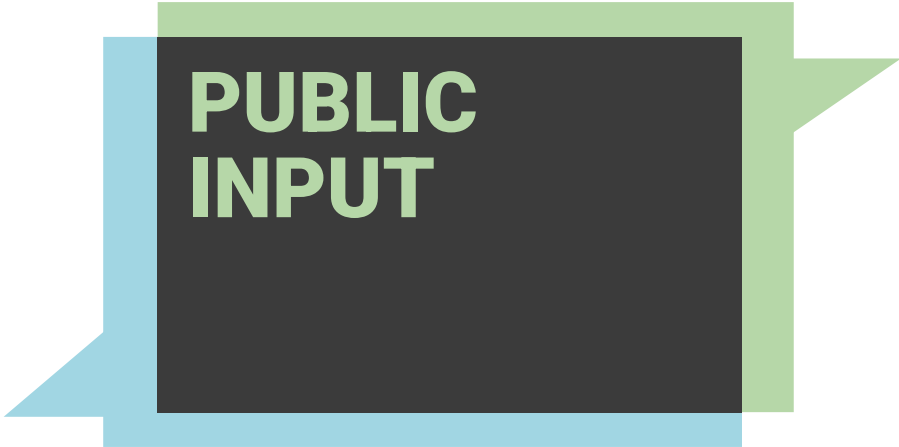
Venue

2-3 hour workshop +
possible working group
if warranted



CAEECC MEMBER CLARIFYING QUESTIONS

*Raise your hand in the virtual
room*



PUBLIC INPUT

*Use the **chat** to share your comment or question.
Please include your name and affiliation.*

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3: Policy Issue Proposals for Possible CAEECC Engagement



PROPOSAL C

Compliance Improvement

Policy Proposal for CAEECC Engagement

Compliance Improvement



Problem

Title 24 applies to a billion square feet of construction per yr. However, noncompliance is estimated at 10-20% for new construction and 30%+ for alterations. This costs Californians several billion dollars a year. The distribution of noncompliance is not equal; disadvantaged communities have greater challenges properly implementing the rules. Contractors who adhere to code are being underbid by those who do not.

Relation to Business Plan Applications:

Claimed savings from Title 24 represent a significant share of savings for IOU efficiency portfolios. Furthermore, compliance studies can be overinterpreted and/or result in inaccuracies.

Policy Proposal for CAEECC Engagement

Compliance Improvement



Purpose

- Build stakeholder and PA common understanding of the issues and opportunities.
- Elevate equity implications of uneven code enforcement and impacts on advancing EE in such communities.
- Review perceived rules and perceived roadblocks to addressing the problem. Determine if those roadblocks are overstated or should be removed.



Expected Outcome

- Greater understanding and alignment on issue, as well as impact on the EE portfolio, state energy efficiency planning, workforce development, etc.
- Explore interest in code compliance opportunities.
- Explore better portfolio-wide coordination.

Policy Proposal for CAEECC Engagement

Compliance Improvement



Scoped Topics

- Current understanding of compliance levels, sources of technical misunderstanding
- How Code & Standards savings claims shape discussions about compliance
- Overlapping responsibilities between the CEC, CPUC, IOUs (excluding SoCalGas), RENS, and local building departments
- Equity and Workforce Implications
- Might lead to further discussion on EE code baseline



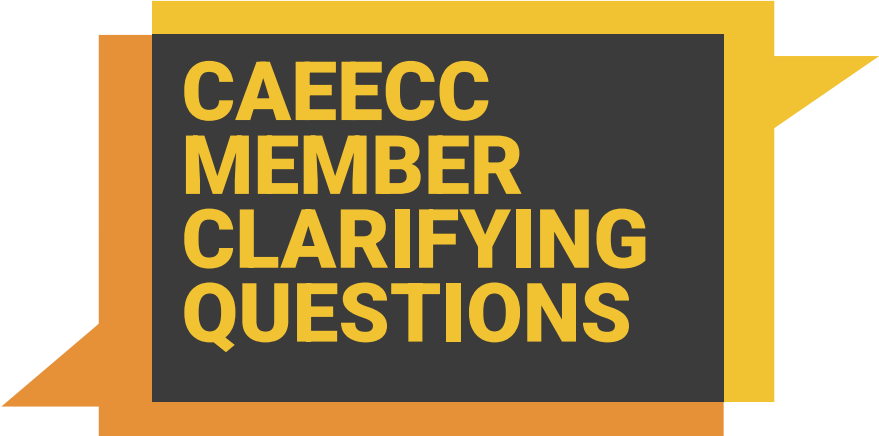
Timing

TBD



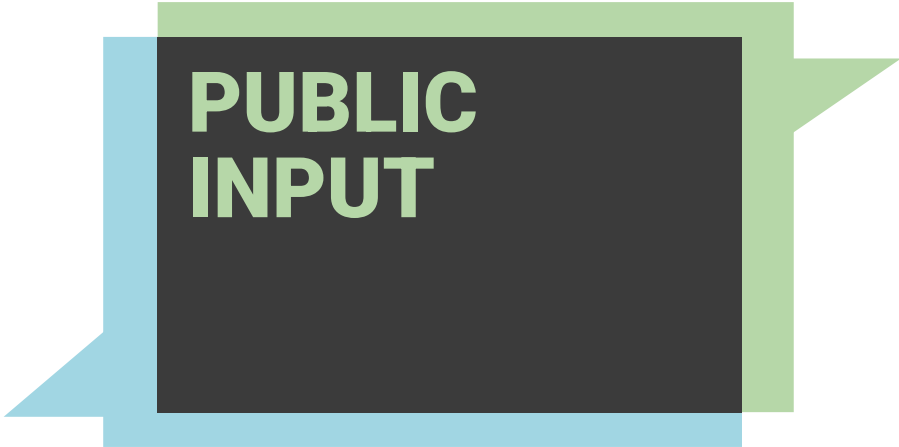
Venue

Two 3-hour **workshops**, separated by ~1 month.



CAEECC MEMBER CLARIFYING QUESTIONS

*Raise your hand in the virtual
room*



PUBLIC INPUT

*Use the **chat** to share your comment or question.
Please include your name and affiliation.*

*Timing - Public can use the chat at any time during
this session to provide input, which will be elevated at
the conclusion of the 4 presentations*

3: Policy Issue Proposals for Possible CAEECC Engagement



PROPOSAL D

Integrated Demand Side Management (IDSM)

Integrated Demand Side Management



Problem

Policy and budget ambiguity, and approval processes have constrained IDSM deployment, limiting its ability to provide compounded benefits by serving as a program coordination tool across energy efficiency, demand response, distributed energy resources, and other grid services.

Relation to Business Plan Applications:

- 3C-REN, BayREN, PG&E, PCE, MCE

Integrated Demand Side Management



Purpose

Seek alignment on proposals to strengthen, clarify, and formalize IDSM in EE in the next portfolio cycle



Expected Outcome

Proposed reforms/
recommendations to IDSM
framework to be considered in next
portfolio cycle

Integrated Demand Side Management



Scoped Topics

Overview of current IDSM deployments; scope of missing guidance (e.g., eligible activities, budget allocation, reporting requirements); ideas on streamlining program activity with multiple funding sources; identifying data access and reporting issues



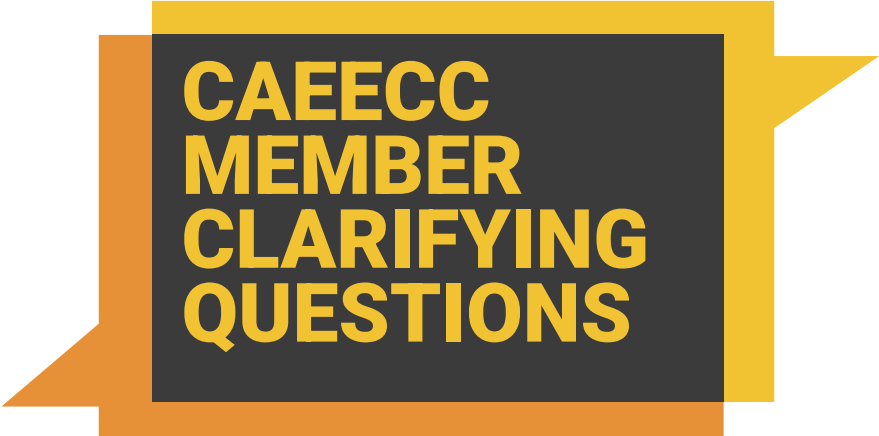
Timing

Fall 2026 or later



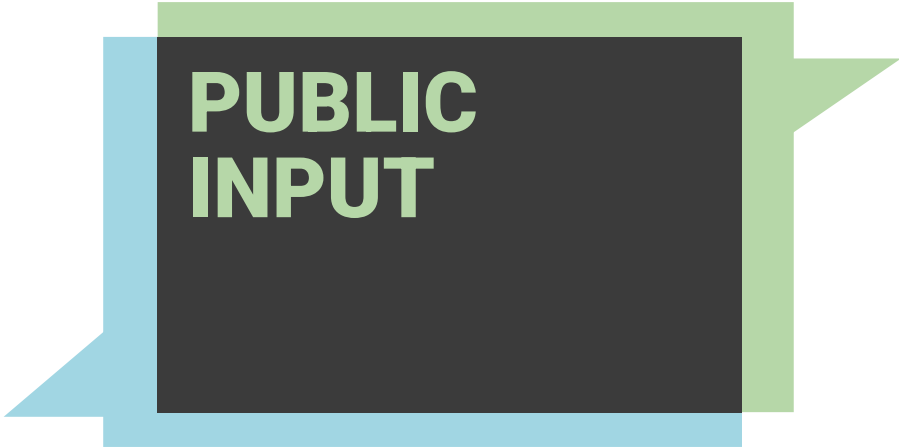
Venue

2-3 hour Workshop followed by working group if warranted



CAEECC MEMBER CLARIFYING QUESTIONS

*Raise your hand in the virtual
room*



PUBLIC INPUT

*Use the **chat** to share your comment or question.
Please include your name and affiliation.*

*Timing - Public can use the chat at any time during
this session to provide input, which will be elevated at
the conclusion of the 4 presentations*

3: Policy Issue Proposals for Possible CAEECC Engagement

Which topic(s), if any, should CAEECC engage on?

Process for Deciding Which Topic(s), if any, for CAEECC to Engage On



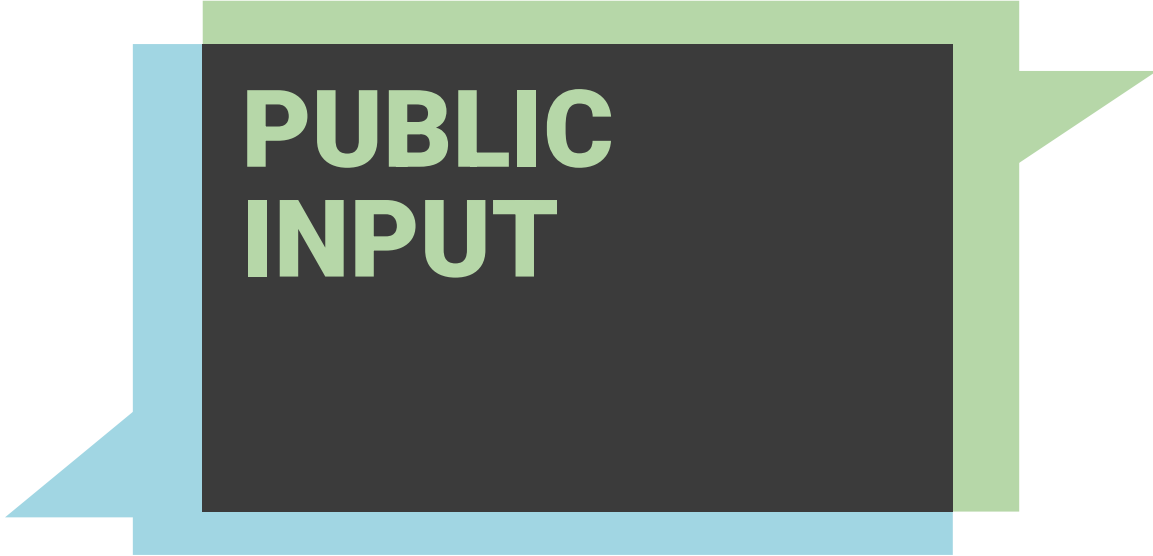
**1 Vote Per
CAEECC Member
Organization**



**Ex-Officio Does
Not Vote**

but can participate in
discussion beforehand

per CAEECC Groundrules



PUBLIC INPUT

*Use the **chat** to share your comment or question.
Please include your name and affiliation.*

*Time permitting, if we need clarification, we may
request a question be conveyed verbally.*



CAEECC MEMBER DISCUSSION + VOTING

*Raise your hand in the virtual
room*

Policy Proposal **A (as-is)** - need $\frac{2}{3}$ vote + $\frac{1}{3}$ participation for working group

VOTING: Cost-Effectiveness Framework Reform



Purpose

Seek alignment on proposals (and arguments) to reform the current cost-effectiveness framework and submit recommendations to the CPUC through the appropriate proceeding(s). Aim to bridge the gap amongst stakeholders and think through operational considerations.



Timing

By ~Fall 2026, Deadline TBD based on Scoping Memo



Venue

~3 Working Group Meetings w/ subcommittee process

Policy Proposal **B (as-is)** - need $\frac{2}{3}$ vote for workshop

VOTING: Expanding Fuel-Switching Eligibility



Purpose

Seek consensus on a proposal to expand EE incentive eligibility to fuel switching projects replacing non-regulated fuels (e.g. propane, fuel oil), aligning program rules with state climate mandates and equity commitments

Submit recommendations to the CPUC through the appropriate proceeding(s).



Timing

~ Summer/Fall 2026
(no specific deadline)



Venue

2-3 hour workshop +
possible working group
if warranted

Policy Proposal **C (as-is)** - need $\frac{2}{3}$ vote for workshop

VOTING: Compliance Improvement



Purpose

- Build stakeholder, including buildings departments, and PA common understanding of the issue/opportunity.
- Elevate equity implications of uneven code enforcement and impacts on advancing EE in such communities.
- Review perceived rules and perceived roadblocks to addressing the problem to determine if those roadblocks are overstated or should be removed.



Timing

TBD



Venue

Two 3-hour **workshops**, separated by ~1 month.

Policy Proposal **D (as-is)** - need $\frac{2}{3}$ vote for workshop

VOTING: Integrated Demand Side Management



Purpose

Seek alignment on proposals to strengthen, clarify, and formalize IDSM in EE in the next portfolio cycle



Timing

Fall 2026 or later



Venue

2-3 hour Workshop followed by working group if warranted

Today's Agenda

View Details in Agenda Document

Welcome & Announcements

10:00 - 10:10 AM

Energy Division Updates

10:10 - 10:40 AM

01

CAEECC Workshops and Committees

10:40 - 11:30 AM

02

Policy Issue Proposals for Possible CAEECC Engagement

12:30 - 1:45 PM

03

CAEECC Business Items

1:45 - 2:00 PM

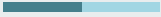
04

Optional Assembly

2:00 - 2:15 PM

← Lunch!

04



CAEECC Business Items

1. Website Update
2. Q3 Proposed Meeting Topics

4: CAEECC Business

Website Update

CAEECC has hired a Contractor to refresh the Website for greater accessibility, user interface, and navigation.



01

Planning & Discovery

Content audit and wireframing.

CAEECC feedback at the 7/30 PPRR



02

Design & Development

Template development, accessibility, and mobile design.



03

Migration & Launch

Content migration, user testing, and launch of updated website.

Updates to PA Documents Page

01

Adding CalMTA Solicitations

02

Pulling PA Documents from Service List

No need for PAs to send documents except for:

- Market Rate Implementation Plan Webinar Slides
- Program Closure Webinar Slides

4: CAEECC Business

Q3 2026 Proposed Meeting Topics



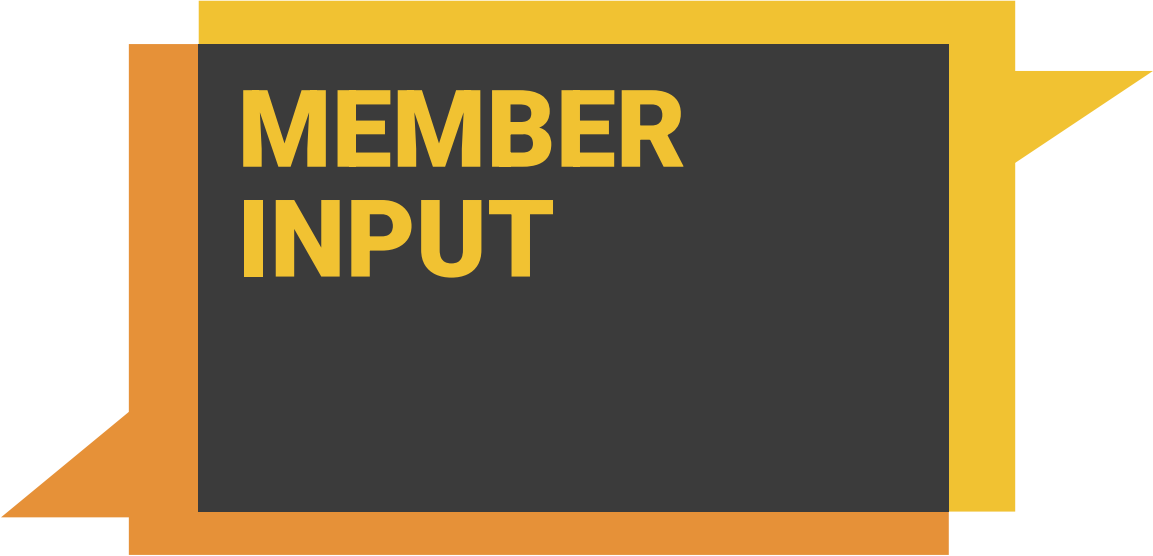
Upcoming Quarterly Meeting Proposed Topics

Q3 Main Assembly:

- Followups on any new topic(s)
CAEECC decided to engage on
based on today's meeting
- Business Plan Application
updates
- CalTF Updates and Discussion
- Possible presentations from
ETA CCAs

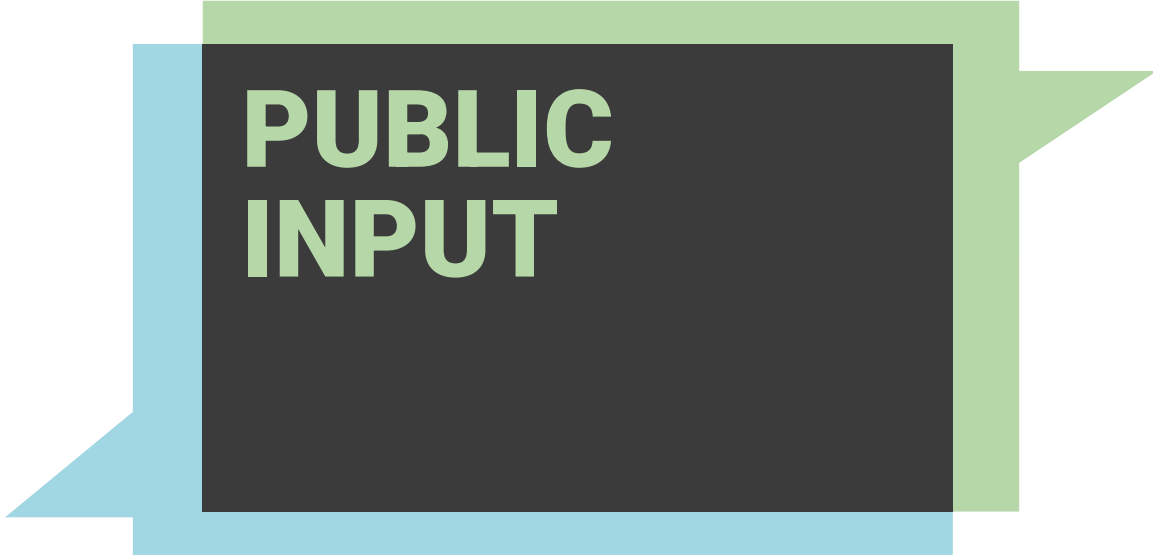
Q3 Optional Assembly:

- CEDARS update



MEMBER INPUT

*Raise your hand in the virtual
room*

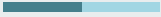


PUBLIC INPUT

*Use the chat to share your comment or question.
Please include your name and affiliation.*

*Time permitting, if we need clarification, we may
request a question be conveyed verbally.*

04



Main Assembly Wrap Up

PA Solicitation Reminder

2026 Meeting Dates

Evaluations

Next Steps

PA Solicitations are included in the Appendix. Please email the contacts provided for any questions regarding them.

2026 Meeting Dates

Date	Meeting	Location
7/30 (Th)	Portfolio Performance Report Review (Annual 2025)	Virtual
9/23 (W)	Q3 Full CAEECC Meeting #51	Virtual, SF
11/4 (W)	Portfolio Performance Report Review (Semi-Annual)	Virtual
12/9 (W)	Q4 Full CAEECC Meeting #52	Virtual, SF, LA

3/12/2026 Meeting Evaluation Scores

Evaluation Question Summaries	Avg.
Objectives of the meeting were accomplished.	5.4
Presentations and background documents were clear and helpful.	5.3
This meeting was an inclusive and trusting environment.	5.4
The facilitators were effective in running the meeting.	5.7
Overall, the meeting format was smooth and effective.	5.7
Overall, this Full CAEECC meeting was successful.	5.3

Scores are 1-6 scale, where 1 is "strongly disagree" and 6 is "strongly agree"; and 3.5 is mid-point of 1-6 scale

Scores based on responses from 16 members and 0 stakeholders

Facilitation Team and Co-Chairs reviewed and debriefed comments from respondents

Q2 Meeting Follow Up



Complete evaluations
today and latest by
June 16, 2026 COB



6/16/2026
Draft meeting
summary posted on
CAEECC website

CAEECC Main Assembly Has Ended

Welcome & Announcements

10:00 - 10:10 AM

Energy Division Updates

10:10 - 10:40 AM

01

CAEECC Workshops and Committees

10:40 - 11:30 AM

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CAEECC Business Items

1:45 - 2:00 PM

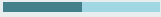
04

Optional Assembly

2:00 - 2:15 PM

← Lunch!

05



Optional Assembly

CalMTA Update

05: Optional Assembly

CalMTA Update



Statewide market transformation update

Q2 Full CAEECC Meeting
June 9, 2026

CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations.

CalMTA portfolio progress



FIRST TRANCHE



Room Heat
Pumps
Approved for
market
deployment



Induction
Cooking
Approved for
market
deployment

UPCOMING – SECOND TRANCHE



Residential
Heat Pump
Water
Heating



Commercial
Rooftop Units
(heat pump
RTUS)



Commercial
Replacement
& Attachment
Window
Solutions

IN DEVELOPMENT



Foodservice
Water
Heating
Systems
(inc. HPWH)



Commercial
Building
Efficiency
Accelerator

120V plug-in ready

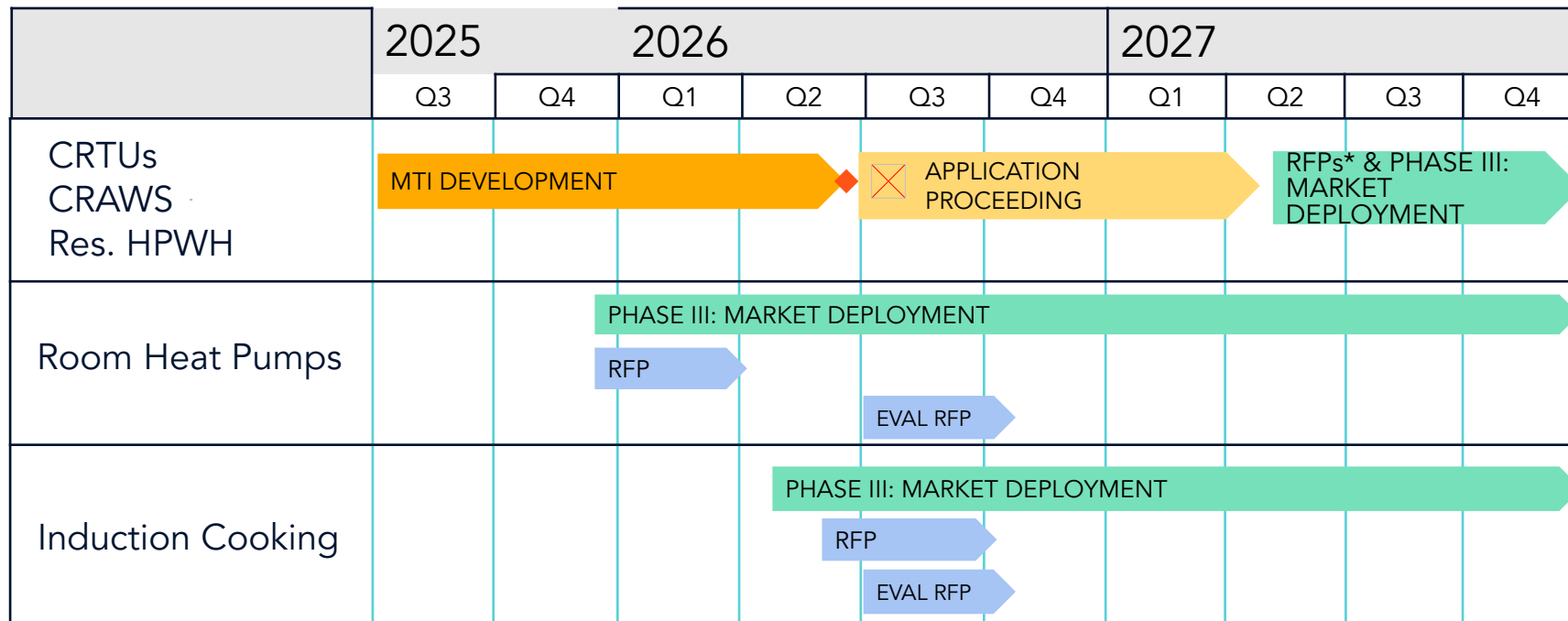
Fuel substitution

Residential

Commercial

Existing buildings

Timelines for MTIs being discussed



*For approved initiatives

Room Heat Pumps MTI



- Finalizing contract with third-party implementation team
- Implementation activities will focus on:
 - 1) Engaging RHP manufacturers on product development improvements
 - 2) Engaging multifamily building owners to increase market demand
 - 3) Building consumer market awareness
 - 4) Engaging HVAC distributor and retail partners on RHP stocking and sales
 - 5) Coordination with other California programs

CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations.



Induction Cooking MTI



- MTI Plan revised to focus on accelerating market development of 120V induction products
- Approved for market deployment by the CPUC in May!
- Implementation RFP open through July 17
- Implementation activities will include similar strategies to Room Heat Pumps MTI, as both are emerging 120V electric technologies – targeting manufacturer, retail channel, and property manager/building owner engagement

CalMTA is a program of the California Public Utilities Commission and is administered by Resource Innovations.

Second tranche application overview



- Expands statewide MTI portfolio into commercial sector by increasing availability and affordability of:
 - Heat pump RTUs with connected controls and variable-speed fans
 - Innovative window products that enable a cost-effective “envelope-first” approach to improved building energy performance
- Residential HPWH MTI focuses on support for new form factors, building scale though market segmentation, and centralizing data and resources

MTI*	TSB	TRC
Residential HPWH	\$501M	1.67
CRTUs	\$595M	2.65
CRAWS	\$509M	1.31

**Preliminary results*

MTIs seek to align with and complement other California programs



"MTIs and resource acquisition programs that are coordinated can achieve synergies and deeper savings than either approach may be able to accomplish on its own."

CPUC D.25-11-023



External program coordination approach seeks to minimize duplication of efforts and maximize opportunities for collaboration



MTI strategies are designed to enable a holistic market-level approach that yields greater benefits for all



Appendix E of MTI Plans describes coordination approach for specific program types, including the reciprocal support CalMTA can offer

Continued coordination with EE portfolios and Business Plans



- Planned continuation of statewide programs that provide significant opportunities for collaboration and leverage – emerging technology, res./non-res. new construction, HVAC, commercial WH, etc.
- Exciting new programs planned to address renter/multifamily needs – aligned with first two MTIs – and support decarbonization (HPs and other decarbonization approaches are MTI focus areas)
- Expansion of REN & CCA contributions to the EE portfolio creates new channels for engagement and leverage during market deployment



Transformative Energy Solutions for the public good

Market transformation is a proven approach that works to remove market barriers so that energy efficient, equitable, and climate-friendly approaches become the new standard practice for all Californians.

Sign up for updates at: calmta.org/subscribe/

Questions? Email sgupta@calmta.org

Follow us on
LinkedIn:



**MEMBER
AND PUBLIC
INPUT ON
NEXT STEPS**

*Raise your tent card in person;
or hand in the virtual room*



Appendix

- A. PA Solicitation Updates
- B. Policy Proposal
Appendices

Appendix A

Portfolio Administrator Solicitation Updates

2026 Solicitation Timeline

IOU	Year		2026											
	Quarter		Q1			Q2			Q3			Q4		
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 4)												

Calendar Year	Program Solicitations	IDEEA 365 Solicitations
2027	Small/Medium Commercial Program Community Language Efficiency Outreach Program Single Family Direct Install Program Retail Channel Support Program Agricultural Energy Efficiency Program	Continuous

- ❖ Program review underway; solicitations forthcoming.

PG&E 2024 – 2026 Solicitation Schedule*

Year		2024									2025												2026						
Quarter		Q2			Q3			Q4			Q1			Q2			Q2			Q4			Q1			Q2			Q3
Month		Apr	Feb	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Local	2024 Summer Reliability																												
Local Res & Comm	Zonal Electrification – Pilot 1																												
Local Res & Comm	Zonal Electrification – Pilot 2																												
Local Residential	Res. Electrification Equity																												
Local Commercial	Comm. Energy Mgmt. (SEM Expansion)																												
Local Residential	Res. Whole Home Load Management																												
Statewide WE&T	SW WE&T Career and Workforce Readiness																												
Statewide Commercial	SW HVAC																												

Legend:	
	RFA Prep
	RFA
	RFP Prep
	RFP
	Contract Negotiation
	AL (if applicable) + Approval + IP

Recently Launched Programs:

- None

Advice Letters Under Review:

- None

Contract Execution:

- SW WE&T Career & Workforce Readiness
- SW HVAC

Terminated Solicitations:

- None

Kicking-off Negotiations:

- None

In-flight Solicitations:

- None

Upcoming in 2026:

- TBD

*Subject to change, pending any modifications and/or approvals from the Commission related to PG&E's Energy Efficiency program administration.

SCE Solicitation Timeline

Segment	Year		2026												2027											
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
MS	Statewide Programs	Statewide Electric Emerging Technologies v2		RFA Prep			RFA			RFP Prep	RFP					Contracting				T2 AL	IP					
RA	Statewide Programs	Higher Education v2								RFP Prep	RFP					Contracting					T2 AL	IP				
RA	Local Customer Programs	Public Sector v2										RFP Prep	RFP				Contracting					T2 AL	IP			

Today

LEGEND:

RFA Prep

RFA/RFI

RFP Prep

RFP

Contract Negotiation

AL (if applicable) + Approval + IP

In-Flight Solicitations:

- Statewide Electric Emerging Technologies

Proposed Solicitations:

- Public Sector
- Higher Education

SDG&E Solicitation Update Q2 2026 CAEECC Meeting



Solicitation Status: No active solicitations.

Changes to program status: SDG&E submitted Advice Letter 4815-E/3504-G to close its Plug Load and Appliance program in March 2026. The Advice Letter was suspended for 120 days effective April 9, 2026

Contact Information: Stacie Risley: SRisley@sdge.com



Appendix B

Policy Proposal Appendices



Appendix: Overview of Cost-Effectiveness Framework Reform

What is it?

Energy Efficiency portfolios are subject to cost-effectiveness. The primary test used is the Total Resource Cost (TRC) test. Other tests used (for information) include the Program Administrator Cost (PAC) Test and Societal Cost Test (SCT). Results across these tests express different levels of cost-effectiveness.

Why is it important?

The specific test used, and the inputs that define the test used, determine what costs and benefits are expressed and therefore determine what energy efficiency is available to fund. If the inputs to the test do not reflect the benefits and costs that are important to measure, it can incorrectly limit or expand energy efficiency program offerings.



Appendix: CE Reform 5/19 Conversation

Questions and Clarifications

Should CAEECC work only on how programs can affect the test results, or on the test/framework itself?

Non energy benefits *and impacts* (NEI, used at the CEC); should consider discount rate

It's not clear whether this topic will be taken up outside of CAEECC if CAEECC does not take it up

Should consider affordability, but also seek to limit number of metrics

Suggested Changes

Focus on the test/framework itself

Refer to NEB/I

Add consideration of Affordability metrics

Update timing to ideally be done by Fall 2026, in time for BP PA testimony (expected Q3/Q4)



Appendix: Overview of Expanding Fuel-Switching Eligibility

What is it?

Fuel **substitution** is when all or a portion of the existing energy use is converted from one CPUC-regulated fuel to another CPUC-regulated fuel.

Fuel **switching** involves non-utility fuels such as propane or fuel oil converting to CPUC-regulated fuels.

Why is it important?

- 3.5% of CA residents use *non-regulated fuels* (propane, heating oil etc) and propane can contribute to high fire risk in wildfire prone areas

Appendix B: Policy Proposal Appendices

Compliance Improvement



Appendix: Overview of Compliance Improvement

What is it?

Title 24 Part 6 is California's building energy code. It is designed to reduce wasteful energy consumption in newly constructed and altered buildings – anything that should pull a permit. However, the complexity of Title 24 has exceeded the capacity of building departments to manage and enforce the Standards.

Why is it important?

Enforcement challenges, compliance errors, and intentional noncompliance are all leading to inconsistent implementation of a foundational energy policy. More ambitious compliance improvement efforts can close the gap.



Appendix: T24 Compliance 5/19 Conversation

Questions and Clarifications

Opportunity to address workforce standards, ratepayer benefits, equity through efforts that ensure code is not just policy but reality.

Challenges with code enforcement creates uneven bidding environment for implementers and contractors.

Can we have a transparent conversation about where we are at and what we can do to improve code compliance?

Recognize contribution of local governments, regional programs in C&S.

Suggested Changes

Focus on building alignment around problem statement and explore willingness to address it.

Consider including low income program contractors, program implementers in DAC, labor and those closest to the ground will be most interested.



CEC estimate for ~20% of Title 24

2022 Energy Code Cost of Noncompliance

		1. Annual Site Electricity Savings [GWh] ¹	2. Annual Site Gas Savings [MTherms] ¹	3. 30-Year Economic Benefits to CA [LSC\$] ²	4. Staff Estimated Noncompliance Rates [%]	5. Savings Not Realized Due to Process & Performance	6. Staff Estimated 30-Year Cost of Noncompliance [Columns 3x4x5]
Building Sector							
Newly Constructed	Single-Family	-48.54	5.27	\$970M	10-20%	50%	\$73M (7.5%)
	Multifamily	116.77	3.81	\$1,135M	10-20%	50%	\$85M (7.5%)
	Nonresidential	511.04	2.21	\$2,332M	20-60%	50%	\$466M (20%)
Alterations	Single-Family	91.22	0.81	\$611M	70-90%	50%	\$244M (40%)
	Multifamily	126.94	0.24	\$891M	70-90%	50%	\$357M (40%)
	Nonresidential	398.35	0.23	\$1,955M	70-90%	50%	\$782M (40%)
Covered Processes		369.36	1.82	\$4,218M	20-60%	50%	\$844M (20%)
Totals		1,565.14	14.39	\$12,112M			\$2,851M / yr

These savings are for the new measures adopted in the 2022 Energy Code cycle only.

impacts from noncompliance are not equally distributed

Title 24 Acceptance Testing Rate for Commerical Construction as Related to Per Capita Income

