



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: Southern California Regional Energy Network #940

Utility type:

☒ ELC ☒ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Lujana Medina

Phone #: (323) 391-8537

E-mail: LMedina@isd.lacounty.gov

E-mail Disposition Notice to: LMedina@isd.lacounty.gov

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)
11/04/2025

Advice Letter (AL) #: 23-E/23-G

Tier Designation: 2

Subject of AL: SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK FILING
ON MID-CYCLE ADVICE LETTER

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 #:
Decision (D.)23-06-055

Does AL replace a withdrawn or rejected AL?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

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? ☐ Yes ☒ No

If yes, specification of confidential information:

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

Resolution required? ☒ Yes ☐ No

Requested effective date: 10/30/25

No. of tariff sheets: N/A

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

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

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

Tariff schedules affected: N/A

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: N/A

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: Lujana Medina
Title: Division Manager
Utility/Entity Name: County of Los Angeles Office

Telephone (323) 391-8537
Facsimile (xxx) xxx-xxxx:
Email: LMedina@isd.lacounty.gov

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

Clear Form

ENERGY Advice Letter Keywords

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



County of Los Angeles INTERNAL SERVICES DEPARTMENT

1100 North Eastern Avenue
Los Angeles, California 90063

"Trusted Partner and Provider of Choice"

Telephone: (323) 267-2101
FAX: (323) 264-7135

November 4, 2025

Advice Letter 23-E/23-G
(CPUC Identification #940)

Public Utilities Commission of the State of California

**SUBJECT: COMPLIANCE FILING REGARDING SOUTHERN CALIFORNIA REGIONAL
ENERGY NETWORK 2024-2027 MID-CYCLE ADVICE LETTER**

I. PURPOSE

The Southern California Regional Energy Network (SoCalREN) submits its 2024-2027 Energy Efficiency (EE) portfolio Mid-Cycle Advice Letter (MCAL) by Tier 2 Advice Letter (AL) to the California Public Utilities Commission (CPUC or Commission), in compliance with Decision (D.) 21-05-031, D.23-06-055, and guidance from the Commission's Energy Division (ED) Staff. This MCAL follows the format provided by ED, and required tables per ED guidance are included in Attachment A.

This MCAL provides budget information, updated forecast, programmatic adjustments, and updated supporting documentation for EE programs SoCalREN will offer in program years 2024-2027. In addition, the MCAL includes responses to impact evaluation recommendations from relevant Commission studies released post 2022 and recommended updates to its portfolio segmentation. Last, SoCalREN to support Ordering Paragraph 24 submits additional supplemental recommendations regarding Community Engagement Indicators which is included Attachment B.

II. BACKGROUND

A. Regulatory Requirements

The Mid-Cycle Advice Letter (MCAL) requirement was adopted in Decision D.21-05-031 with the requirement that each year on September 1, in the odd years when the EE potential and goals

have been adopted by the Commission, each EE program administrator (PA) shall file either a portfolio true-up (prior to the start of a four-year portfolio) or a mid-cycle review (in year two of a four-year portfolio) Tier 2 AL adjusting technical inputs, forecasts, and portfolio to account for the changes in energy efficiency potential and goals.¹ Due to the timing of adoption of the new potential and goals ruling, on August 22, 2025, the Executive Director of the CPUC extended the deadline for all PAs to 60 days after the adoption of the updated potential and goals. D.25-08-034 adopting goals was issued on September 5, 2025.

D.23-06-055 approved PA Business Plans and required the following updates in the true-up and mid-cycle advice letters:

- Guidance in D.21-05-031, such as adjustments to forecasts stemming from updated input, including TSB goals, avoided cost calculator updates, new database for energy efficiency (DEER) values, etc.;
- Updated statewide allocations and resulting budgets (within the authorized cap) and savings forecasts; and
- Updates or corrections to program segmentation.²
- The IOUs [investor-owned utilities] should reflect the updated statewide funding contributions in their 2023 True-Up advice letters.³
- D.25-08-034 established updated EE potential and goals for 2028–2031 and provides interim technical guidance for 2024–2027. While quantitative targets primarily apply to IOUs and CCAs, RENs align with statewide methodologies for analytical consistency and program design.

B. Filing Requirements

D.21-05-031 requires that each PA Mid-Cycle AL meet the following criteria:

- The program administrator's portfolio must meet the 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 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).

¹ D.21-05-031, Ordering Paragraph (OP) 10.

² D.23-06-055, p. 97.

³ *Id.*, Conclusion of Law (COL) 6.

- For IOUs: the statewide and third-party contribution percentage requirements must be met.
- The advice letters also must include a report on the progress against metrics relevant for each segment of the portfolio.⁴

In addition, D.23-06-055 requires:

- The Mid-Cycle advice letter should include updates based on the following:
 - Guidance in D.21-05-031, such as adjustments to forecasts stemming from updated input, including TSB goals, avoided cost calculator updates, new database for energy efficiency (DEER) values, etc.;
 - Updated statewide allocations and resulting budgets (within the authorized cap) and savings forecasts; and
 - Updates or corrections to program segmentation.
- All portfolio administrators to include specific descriptions of how they have incorporated or otherwise addressed impact evaluation recommendations [OP 16].
- Portfolio administrators to work with the Reporting Policy Coordination Group ("PCG") to jointly submit a report addressing the demographic questions in Section 7.7 of this decision by no later than September 1, 2025. Based on analysis included in the report, the portfolio administrators shall propose, in their next portfolio proposals due in 2026, their preferred approaches to regular reporting of demographic energy efficiency program participation information. This report was submitted by PG&E via email on August 6, 2025 [OP 23].
- Portfolio administrators are to develop indicators to measure community engagement and should include them in their Mid-Cycle advice letters in 2025. After the advice letters are addressed by the Commission, the portfolio administrators shall report on the adopted community engagement indicators in their annual reports. The joint PA report on community engagement indicators is included in the 2025 PG&E Mid-Cycle advice letter [OP 24].
- IOU PAs will incorporate goals from D. 25-08-034 adopted goals for 2026-2037 by IOU territory into the MCAL. REN achievements will be allocated to IOU territories.

⁴ D.21-05-031, pp. 42 – 43.

C. Contents of this Filing

The SoCalREN Mid-Cycle AL contains all required Commission requirements and is organized as follows:

- Purpose
- Background
 - Regulatory Filing Requirements
 - Filing Requirements
 - Content of this filing
- Discussion
 - Portfolio Overview
 - Summary of Forecasted Portfolio Impacts
- Energy Efficiency Portfolio Details
 - Segmentation Metrics
 - Program Changes
 - Program Closures
 - EM&V
- Protest
- Effective Date
- Notice

In addition to the information above, SoCalREN's MCAL includes the following materials:

- Attachment A – Appendices from MCAL Excel Worksheet
- Attachment B – SoCalREN Community Engagement Indicators Results
- Attachment C – PA Response to Recommendations
- Attachment D – CEDARS Filing Confirmation

III. DISCUSSION

A. Portfolio Overview

1. Recent CPUC Decisions impacting EE Portfolios

- i. **Decision (D.) 25-01-006**, issued January 22, 2025, resolved all outstanding energy efficiency matters within **Rulemaking (R.) 13-11-005** and formally closed that proceeding. Its successor, **R.25-04-010**, now addresses energy efficiency portfolio issues, having completed the Pre-Hearing Conference on June 17, 2025, and awaiting the release of the Scoping Memo and Ruling.
- ii. **Resolution E-5351**, adopted June 12, 2025, clarifies and revises indicators and metrics for energy efficiency portfolios in compliance with **D.23-06-055**. SoCalREN will begin collecting and reporting the applicable indicator data

described in the resolution and will coordinate with the Commission and the Reporting Program Coordination Group to address any outstanding items.

- iii. **Integrated Demand-Side Management (IDSM) – Resolution E-5387,** Resolution E-5387 approved SoCalREN's Tier 3 Advice Letter 18-E/18-G, establishing the Multi-DER IDSM framework for the 2024–2027 portfolio. The framework integrates energy efficiency (EE) with other distributed energy resources (DERs) such as energy storage, electric vehicles, and distributed generation, and provides pathways for technical assistance, audits, project development, and planning support.

SoCalREN is implementing IDSM activities through existing programs, including:

- **DER in Disadvantaged Communities Project Delivery Program (DER DAC PDP – SCR-PUBL-B2):** Provides EE–DER audits, IDSM project proposals, technical specifications support, and funding/financing assistance.
- **Energy Resiliency Action Plan (ERAP – SCR-PUBL-B6):** Supports long-term energy resilience planning for critical facilities, delivering EE–DER audits, “shovel-ready” projects, and reports tailored to agency priorities.

No new IDSM programs are proposed at this time. All IDSM activities continue under approved budget caps and support ongoing portfolio goals of load flexibility, decarbonization, resilience, and equitable access to clean energy. Additional details on IDSM activities and program implementation are provided later in this Advice Letter.

- iv. **Heat Pump Water Heater (HPWH) Guidance:** SoCalREN reviewed updated guidance memos issued on 2/28/25 (SWWH-028) and revised on 4/28/25, which reduced the eligible capacity values for the A.O. Smith CAHP-120 commercial heat pump water heater. This adjustment primarily affected energy savings calculations for public sector programs, while also having a smaller impact on residential sector applications. Comparable guidance was issued for multifamily uses of the same measure package on 6/6/24. Because SoCalREN administers programs using this measure across both public and residential sectors, these updates required an adjustment of expected measure

contributions in program forecasts and savings estimates, with the most significant revisions occurring for public sector initiatives.

2. Summary of SoCalREN's Forecast Approach

As part of the MCAL planning process, SoCalREN developed an optimized portfolio that aims to drive deep energy savings. SoCalREN's portfolio also continues to support the Commission's objectives for RENs to serve hard-to-reach customers and to fill gaps within the EE portfolios. To continue optimizing its portfolio for its goals and requirements, SoCalREN proposes the following high-level adjustments to its 2024-2027 EE portfolio, as compared to its October 2023 TUAL:

- Optimizing measures and programs that result in claimable savings to expand benefits and cost-effectiveness;
- Continuing to reduce portfolio costs by leveraging third-party implementation within in its portfolio in support of third-party proposed, designed, and delivered programs;
- Adjusting for inflationary cost increases.

SoCalREN's approach to optimizing its portfolio included both a bottoms-up and a top-down approach. For its bottom-up strategy, SoCalREN assessed the measure mix offerings for each of its continuing and newly authorized programs to determine if any changes were necessary, including deemed values in electronic Technical Reference Manual (eTRM) as well as custom values. These included assessing changes since the last filed TUAL, such as net-to-gross ratios, effective useful life (EUL) and remaining useful life values, load shapes, and other factors. Programs were then optimized by measure mix to reflect these changes while striving to maximize achievable TSB, TRC, and energy savings while working within authorized budgets per D.23-06-055. SoCalREN then assessed impacts at the program and sector level, and finally at the portfolio level to determine the preferred approach. The preferred approach is reflected in this MCAL.

3. Summary of SoCalREN's Portfolio Modifications

Since the TUAL filing, SoCalREN has refined its portfolio to enhance delivery efficiency, increase flexibility, and better address participant and community needs.

The updated cost-effectiveness forecast for SoCalREN's 2024–2027 portfolio reflects improved performance compared to the TUAL filing, driven by a greater emphasis on higher-value measures and incorporation of an updated optimized measure mix per program. Under both the Base and High scenarios, the Resource Acquisition segment achieves a Societal Cost Test (SCT)

ratio exceeding 1.0, demonstrating strong economic performance while maintaining a focus on equity and hard-to-reach markets.

Additionally, SoCalREN identified several opportunities to reduce administrative costs and duplication in the current market. SoCalREN integrated its Public Agency NMEC (Metered Savings) Program into its Public Agency Streamlined Savings Pathway Program (SSP) to maintain service continuity while simplifying administration. The Codes & Standards and California Green Business Network programs were not pursued and identified as services already being provided in the market based on collaborative efforts with IOU partners. Resources from these programs were then funneled into programs with high impact and actionable saving deliverables. Last, SoCalREN examined its portfolio for improvements regarding program segmentation and identified a few programs that should be equity programs and thus exclusive to equity/HTR customers.

Overall, these portfolio modifications reflect SoCalREN's continued commitment to innovation, efficiency, equity, and alignment with statewide energy efficiency policy objectives and goals.

B. Summary of Forecasted Portfolio Impacts

For its top-down strategy, SoCalREN assessed the distribution of budget, TSB, and other metrics at both the sector and segment level to reflect a balanced portfolio that aligns with its core values and with the CPUC's objectives for RENs to serve hard-to-reach customers and fill gaps.

Table 1 shows the 2024-2027 portfolio impacts from SoCalREN's MCAL optimization process.

Table 1: Summary of 2024-2027 SoCalREN Portfolio Impacts

	Budget	Total System Benefit	Total Resource Cost	Net GWh	Net MW	Net MMTHERMS
TUAL	\$ 221,040,773	\$ 103,422,806	0.32	126.11	62.50	2.49
MCAL	\$ 221,040,773	\$ 111,318,095	0.45	62.78	27.46	4.29
MCAL less TUAL	\$ (0)	\$ 7,895,290	0.13	-63.33	-35.05	1.80

1. Portfolio Budget Summary

Table 1.1a below summarizes the updated budget allocations by segment and sector, with total forecasted expenditures remaining consistent with prior filings and the business plan decision authorization.

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	\$ 30,125,243	\$ 9,548,813	\$ 7,007,182	\$ -	\$ 46,681,238
2	Commercial Sector	\$ -	\$ 4,656,467	\$ 24,967,609	\$ -	\$ 29,624,076
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ 6,477,363	\$ 2,092,500	\$ 8,740,176	\$ -	\$ 17,310,039
5	Public Sector	\$ 23,339,773	\$ 50,607,280	\$ 16,594,200	\$ -	\$ 90,541,253
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ 4,529,457	\$ 6,037,055	\$ -	\$ 10,566,512
9	Finance	\$ -	\$ 1,654,200	\$ 2,003,001	\$ -	\$ 3,657,201
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 2,097,000	\$ 2,097,000
11	Portfolio Support	\$ 4,315,750	\$ 8,067,822	\$ 5,386,644	\$ 273,942	\$ 18,044,158
12	OBF Loan Pool					\$ -
13	Portfolio Subtotal [2]	\$ 64,258,129	\$ 81,156,539	\$ 70,735,867	\$ 2,370,942	\$ 218,521,477

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

[2] excludes EM&V and Portfolio Oversight

Table 2.3a below summarizes the updated budget allocations by sector and year, including budgets allocated for portfolio oversight. The Market Support and Equity, percent of Total budget increased by 4% since the last TUAL filing (from 63% TO 67%). This reflects SoCalREN's continued emphasis and improvement to prioritize equity within its portfolio while balancing direct impacts in the industry.

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual ⁵	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 11,094,110	\$ 14,647,041	\$ 18,361,836	\$ 20,155,142	\$ 64,258,129
2	Market Support	\$ 10,971,822	\$ 19,052,710	\$ 26,770,811	\$ 24,361,195	\$ 81,156,539
3	Equity	\$ 3,689,533	\$ 18,368,285	\$ 23,332,655	\$ 25,345,394	\$ 70,735,867
4	Codes and Standards	\$ 40,942	\$ 720,000	\$ 810,000	\$ 800,000	\$ 2,370,942
5	EM&V (PA and ED)	\$ 1,582,504	\$ 2,203,341	\$ 2,532,688	\$ 2,757,337	\$ 9,075,870
6	Total Budget w/o OBF Loan Pool	\$ 27,378,911	\$ 54,991,377	\$ 71,807,990	\$ 73,419,068	\$ 227,597,347
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					67%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 27,378,911	\$ 54,991,377	\$ 71,807,990	\$ 73,419,068	\$ 227,597,347
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 27,378,911	\$ 54,991,377	\$ 71,807,990	\$ 73,419,068	\$ 227,597,347
12	Approved Budget Cap ⁽⁴⁾					\$ 227,597,351

[4] Decision 23-06-055 OPS

[5] Does not include commitments from prior years

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

Line	PG&E	SDG&E	SCE	SCG	Gas \$
1	Year	Electric \$	Gas \$	Electric \$	Gas \$
2	2024			23,436,349	3,942,563
3	2025			50,830,829	8,550,980
4	2026			57,709,430	9,708,128
5	2027			62,846,726	10,572,346
6	Total	-	-	194,823,332	32,774,019

2. Total System Benefit Forecast

The updated Total System Benefit (TSB) forecast is shown below in Table 2.1a. SoCalREN continues its proven approach to market support and equity program implementation while complementing its portfolio with resource acquisition programs designed to fill gaps in the portfolio and target hard-to-reach customers. These programs are designed to deliver TSB, which will increase over the four-year term of the portfolio. The revisions incorporate updated measure packages, the most recent Avoided Cost Calculator results, and adjustments to reflect increased participation in measures that have demonstrated or are projected to achieve higher market adoption rates.

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	\$ 9,265,703	\$ 19,146,224	\$ 21,886,388	\$ 28,052,719	\$ 78,351,034
2	Market Support	\$ 171,300	\$ 3,475,789	\$ 1,474,107	\$ 1,472,113	\$ 6,593,309
3	Equity	\$ -	\$ 4,113,849	\$ 10,439,397	\$ 11,820,507	\$ 26,373,752
4	Total TSB Forecast	\$ 9,437,003	\$ 26,735,862	\$ 33,799,891	\$ 41,345,339	\$ 111,318,095
5	CPUC TSB Goal	\$ 14,306,473	\$ 26,735,862	\$ 29,353,146	\$ 33,027,324	\$ 103,422,806
6	<i>TSB Forecast / TSB Goal^[1]</i>	66%	100%	115%	125%	108%

[1] TSB Goal from SoCalREN's True-Up Advice Letter, 17E-17G

3. Portfolio Cost Effectiveness Forecast

Tables 3a and 3d below present the updated cost-effectiveness forecast for SoCalREN's 2024–2027 portfolio. Compared to the TUAL filing, this MCAL forecast reflects improved cost-effectiveness, driven by a greater emphasis on higher-value measures and incorporation of the updated Avoided Cost Calculator. The Resource Acquisition segment achieves a Societal Cost Test (SCT) ratio exceeding 1.0 under both the Base and High scenarios.

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.79	1.17	0.57
2		Market Support	0.07	0.08	0.08
3		Equity	0.42	0.42	0.29
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.45	0.55	0.36
6		Excluding C&S	0.45	0.55	0.36

[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	1.34	1.36	1.66	1.64	1.50	1.50
3		Market Support	0.06	0.07	0.08	0.07	0.07	0.07
4		Equity	0.73	0.73	0.76	0.75	0.74	0.74
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	Including C&S	0.71	0.73	0.86	0.85	0.79	0.79
7		Excluding C&S	0.72	0.73	0.87	0.86	0.80	0.80

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

This section does not apply to Regional Energy Networks (RENs), such as SoCalREN.

5. Market Support and Equity Forecast

As illustrated below, Market Support and Equity segment programs represent roughly two-thirds of SoCalREN's forecasted budget for the 2024–2027 period. Consistent with Commission direction, RENs are exempt from the 30 percent limitation on Market Support and Equity expenditures applicable to other portfolio administrators.

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	\$81,156,539	\$227,597,347	36%	30%
2	Equity	\$70,735,867		31%	
3	Market Support + Equity	\$151,892,406		67%	

1 – Does not include OBF Loan Pool or ED Portfolio Oversight

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

SoCalREN does not have any savings forecasted from C&S.

7. Non-Advocacy C&S Budget Forecast

The cap for non-advocacy codes & standards applies only to IOUs.

IV. 2024-2027 ENERGY EFFICIENCY PORTFOLIO DETAILS

A. Segment Metrics

SoCalREN administers programs across all portfolio segments and has reviewed each program to identify the appropriate segment-specific metrics for tracking performance. In alignment with CPUC Resolution E-5351, adopted in June 2025, which established refined indicators for equity and market support segments and streamlined common metrics, SoCalREN will begin reporting these metrics starting in Q4 and in the 2025 Annual Report. This resolution also directed the Reporting PCG to finalize methodologies and develop a reporting template for metrics not yet available in CEDARS. SoCalREN is actively preparing to use the finalized template to ensure consistent collection and reporting of segment-specific, common, and value metrics across its portfolio

B. Program Changes

To improve portfolio efficiencies and consolidate offerings, SoCalREN's Streamlined Savings Pathway (SSP) program has been updated to fully incorporate the strategy pathway for project delivery regarding Normalized Metered Energy Consumption (NMEC) projects beginning in January 2025. This program enhancement is a key element of SoCalREN's strategy to streamline offerings, reduce administrative burden, and provide a more cohesive and flexible experience for Public Agency participants.

Previously focused on delivering custom and deemed incentives for energy efficiency projects, the SSP program now also accommodates site-level NMEC projects. By housing all incentive pathways — custom, deemed, and NMEC — within a single program structure, SoCalREN ensures greater accessibility and simplified participation for agencies with diverse project needs and varying levels of data availability.

This program update reinforces SoCalREN's ongoing commitment to responsive program design and equitable, uninterrupted service delivery for Public Sector customers across the region.

C. Program Closures

1. Programs Closed between TUAL and MCAL

The following programs were identified as programs no longer needed to fill gaps in the market and will not be formally pursued to be implemented within the SoCalREN portfolio.

- **Codes & Standards – SCR-CST-F1:** SoCalREN's Codes & Standards program design has been found to overlap significantly with existing programs offered by partner IOUs, other local agencies, and organizations. To avoid redundancies in the market and ensure efficient use of resources, constituents who would be served by SoCalREN's Codes & Standards program will instead be directed to and supported through these established Codes & Standards programs. This approach allows SoCalREN to focus on complementary initiatives while leveraging the expertise and infrastructure of existing programs within its territory.
- **California Green Business Network- SCR-COM-E2:** The CA Green Business Network Program was deemed unnecessary as a standalone program. Instead, SoCalREN is utilizing the California Green Business Network certification tool for business certification as a resource for our Commercial small and medium business strategy for select local agencies through its Small Business Energy Advisor program in its Commercial Sector.

2. Programs to be Closed in 2026-2027

Not applicable.

3. Programs to be Closed Upon Completion of Commitments

SoCalREN's Public Agency NMEC Program, also known as the Metered Savings Program (MSP), was a resource acquisition initiative that delivered performance-based incentives for Public Sector energy efficiency projects using a normalized metered energy consumption (NMEC) approach. To streamline program offerings and reduce administrative costs associated with maintaining separate programs, SoCalREN closed the MSP effective January 2025. This closure was part of a broader effort to consolidate

programs while maintaining service continuity for Public Agency customers—with no impact on NMEC services or incentives during the transition.

Following the closure, NMEC project applications are now being submitted under SoCalREN's Streamlined Savings Pathway (SSP) program. SSP is a Resource Acquisition offering that previously provided custom and deemed incentives for Public Agency energy efficiency projects, and now fully incorporates the NMEC pathway. This integration enhances program flexibility and supports SoCalREN's ability to meet its Total System Benefits (TSB) targets. MSP program commitments from previous program years that have not completed construction will also be supported by the SSP program moving forward.

This streamlined approach reinforces SoCalREN's commitment to efficiency, clarity, and uninterrupted service delivery for its Public Sector partners.

D. Evaluation Measurement & Verification (EM&V)

EM&V funds will be used to improve SoCalREN's portfolio of programs and ensure that the programs are collecting data to support evaluation needs.

A comprehensive workplan is developed at the beginning of each program year to identify the study needs in the portfolio, determine the timeframe, and allocate the budget per study. The annual workplan may include updates or build upon studies conducted in previous years. The workplan will include the following four types of research activities:

- Evaluability Studies to ensure that the program goals are well defined and plausible (given the program activities in the logic model), that targets are set, and that the program is cost efficiently collecting data to support future impact studies and/or metrics.
- Process Evaluation Studies to examine how to improve the programs and/or improve the participant experience.
- Market Studies to understand gaps in the market, understand how to better serve target audiences, or understand new services.
- Ad Hoc Research Support to support quick turn-around research, provide direct SoCalREN support, or assist with other needs such as providing or reviewing information for CPUC-led studies.

SoCalREN expects the nature of the work to change over the four-year period. In 2024-2025, a large part of SoCalREN's EM&V funds will be spent on evaluability studies since many programs are new.

E. Cost Recovery

SoCalREN will continue cost recovery as discussed in D.23-06-055.⁵ Any costs associated with Integrated Demand Side Management (IDSM) strategies are discussed above and included in Attachment A within tab A2.

1. Unspent Funds

Funds carried over from 2024 are included in the MCAL budget forecasts as shown below in Table 1.6. SoCalREN forecasted budgets include no unspent/uncommitted funds prior to 2024.

Table 1.6 - Mid-Cycle Advice Letter Funding Breakdown (ALL PAs)^[7]

Line	Year	2024 Reported Expenditures	2024 Carryover Funding ⁸	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset
1	2024	\$ 27,378,912					
2	2025		\$ 4,390,432	\$ 54,991,377			
3	2026		\$ 3,711,984		\$ 63,705,574		
4	2027		\$ 3,079,568			\$ 70,339,504	

[7] Includes PA and ED EM&V

[8] Funding committed in 2024 but not yet spent will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years.

2. Integrated Demand-Side Management (IDSM) Budget

Resolution E-5387 approved SoCalREN's Tier 3 Advice Letter 18-E/18-G, establishing the Multi-DER IDSM framework for the 2024–2027 portfolio. The framework integrates energy efficiency (EE) with other distributed energy resources (DERs) such as energy storage, electric vehicles, and distributed generation, and provides pathways for technical assistance, audits, project development, and planning support.

SoCalREN is implementing IDSM activities through existing programs, including:

- **DER in Disadvantaged Communities Project Delivery Program (DER DAC PDP – SCR-PUBL-B2):** Provides EE–DER audits, IDSM project proposals, technical specifications support, and funding/financing assistance.
- **Energy Resiliency Action Plan (ERAP – SCR-PUBL-B6):** Supports long-term energy resilience planning for critical facilities, delivering EE–DER audits, “shovel-ready” projects, and reports tailored to agency priorities.

⁵ D.23-06-055, p. 16, COL 13.

All IDSM activities continue under approved budget caps and support ongoing portfolio goals of load flexibility, decarbonization, resilience, and equitable access to clean energy. Additional details on IDSM activities and program implementation are provided later in this Advice Letter.

3. EE-DR (Energy Efficiency – Demand Response Integration):

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.

At present, SoCalREN does not have any programs utilizing EE funds for Demand Response (DR) integration. This is consistent with Commission direction in D.23-06-055, which indicated that IDSM funding should not be used for event-based DR approaches, and with Resolution E-5387, which approved SoCalREN's IDSM framework without authorizing specific DR program activities.

While the approved framework provides a mechanism for future EE–DR integration, SoCalREN has not launched any EE–DR programs during this portfolio period (2024–2027). Instead, SoCalREN continues to assess opportunities for load flexibility, demand management, and energy savings synergies that could support future EE–DR pilots through a separate Tier 2 Advice Letter filing, when market conditions and Commission policy permit.

4. 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.

The following SoCalREN programs are currently and plan to continue utilizing EE-multi-DER funds:

- Distributed Energy Resources in Disadvantaged Communities Project Delivery Program (DER DAC PDP) - SCR-PUBL-B2: The DER DAC PDP offers EE and DER audits, comprehensive IDSM project proposals, DER technical specifications support, and funding/financing application support for DER projects, including assistance with applying for IRS Direct Pay funding.
- Energy Resiliency Action Plan (ERAP) - SCR-PUBL-B6: ERAP supports long-term energy resilience planning at critical community facilities through EE and DER audits and the delivery of ERAP reports which contain “shovel-ready” EE and DER projects, grid outage data, EV fleet analyses, and additional outputs tailored to agency priorities.

F. CEDARS Discrepancies (optional)

SoCalREN anticipates making use of new and updated measure packages when they become available in 2026 and 2027.

Protests

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

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

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

Lujuana Medina
Environmental Initiatives
Division Manager
County of Los Angeles Office
1100 North Eastern Avenue
Los Angeles, CA 90063-3200
(323) 393-8537
LMedina@isd.lacounty.gov

Effective Date

Per D.21-05-031 and D.23-06-055 this Advice Letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. The SoCalREN respectfully requests that this Advice Letter be made effective on December 3, 2025, which is 30 calendar days after the date filed.

Notice

A copy of this Advice Letter is being sent to the Commission's service lists for R.13-11-005 and A.22-02-005 (et al.). For changes to R.13-11-005 or A.22-02-005 (et al.) service lists, please contact the Commission's Process Office at 415-703-2021 or by electronic mail at process_office@cpuc.ca.gov.

Respectfully Submitted,

/s/ Lujuana Medina

Lujuana Medina, Division Manager
Environmental Initiatives Division
County of Los Angeles Office
1100 North Eastern Avenue
Los Angeles, CA 90063-3200
(323) 393-8537
LMedina@isd.lacounty.gov

Attachment A

Appendices from MCAL Excel Worksheet

1.1a - MCAL Updated Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 [1])

Budget Category	Program Segment				Total
	Resource Acquisition	Market Support	Equity	Codes & Standards	
Residential Sector	\$ 30,125,243	\$ 9,548,813	\$ 7,007,182	\$ -	\$ 46,681,238
Commercial Sector	\$ -	\$ 4,656,467	\$ 24,967,609	\$ -	\$ 29,624,076
Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
Agricultural Sector	\$ 6,477,363	\$ 2,092,500	\$ 8,740,176	\$ -	\$ 17,310,039
Public Sector	\$ 23,339,773	\$ 50,607,280	\$ 16,594,200	\$ -	\$ 90,541,253
Cross Cutting Sector					
Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
WE&T	\$ -	\$ 4,529,457	\$ 6,037,055	\$ -	\$ 10,566,512
Finance	\$ -	\$ 1,654,200	\$ 2,003,001	\$ -	\$ 3,657,201
Codes & Standards	\$ -	\$ -	\$ -	\$ 2,097,000	\$ 2,097,000
Portfolio Support	\$ 4,315,750	\$ 8,067,822	\$ 5,386,644	\$ 273,942	\$ 18,044,158
OBF Loan Pool					\$ -
Portfolio Subtotal [2]	\$ 64,258,129	\$ 81,156,539	\$ 70,735,867	\$ 2,370,942	\$ 218,521,477

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

[2] excludes EM&V and Portfolio Oversight

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

Budget Category	Program Segment				Total
	Resource Acquisition	Market Support	Equity	Codes & Standards	
Residential Sector	\$ 40,815,799	\$ 7,797,742	\$ -	\$ -	\$ 48,613,541
Commercial Sector	\$ -	\$ 5,315,446	\$ 23,077,498	\$ -	\$ 28,392,944
Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
Agricultural Sector	\$ 7,258,549	\$ 2,677,500	\$ 9,870,257	\$ -	\$ 19,806,306
Public Sector	\$ 21,772,031	\$ 49,822,732	\$ 18,318,749	\$ -	\$ 89,913,512
Cross Cutting Sector					
Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
WE&T	\$ -	\$ 8,366,000	\$ 1,974,000	\$ -	\$ 10,340,000
Finance	\$ -	\$ 2,104,200	\$ 2,196,100	\$ -	\$ 4,300,300
Codes & Standards	\$ -	\$ -	\$ -	\$ 2,682,000	\$ 2,682,000
Portfolio Support	\$ 3,140,461	\$ 6,176,435	\$ 4,857,979	\$ 298,000	\$ 14,472,875
OBF Loan Pool					
Portfolio Subtotal [2]	\$ 72,986,840	\$ 82,260,054	\$ 60,294,583	\$ 2,980,000	\$ 218,521,477

[2] excludes EM&V and Portfolio Oversight

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

Budget Category	Change-Program Segment				Total
	Resource Acquisition	Market Support	Equity	Codes & Standards	
Residential Sector	\$ (10,690,556)	\$ 1,751,072	\$ 7,007,182	\$ -	\$ (1,932,303)
Commercial Sector	\$ -	\$ (658,979)	\$ 1,890,111	\$ -	\$ 1,231,132
Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
Agricultural Sector	\$ (781,185)	\$ (585,000)	\$ (1,130,081)	\$ -	\$ (2,496,267)
Public Sector	\$ 1,567,741	\$ 784,548	\$ (1,724,549)	\$ -	\$ 627,741
Cross Cutting Sector					
Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
WE&T	\$ -	\$ (3,836,543)	\$ 4,063,055	\$ -	\$ 226,512
Finance	\$ -	\$ (450,000)	\$ (193,099)	\$ -	\$ (643,099)
Codes & Standards	\$ -	\$ -	\$ -	\$ (585,000)	\$ (585,000)
Portfolio Support	\$ 1,175,289	\$ 1,891,387	\$ 528,665	\$ (24,058)	\$ 3,571,283
OBF Loan Pool					\$ -
Portfolio Subtotal [2]	\$ (8,728,711)	\$ (1,103,515)	\$ 10,441,284	\$ (609,058)	\$ (0)

[2] excludes EM&V and Portfolio Oversight

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

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
Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ava Community Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CleanPowerSF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Peninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SD REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Collected 2024 Recovery						\$ -
Expected 2025 Recovery						\$ -
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

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

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
Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	
Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ava Community Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CleanPowerSF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Peninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SD REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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

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

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

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
Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ava Community Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CleanPowerSF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Peninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SD REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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

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

1.3 Portfolio Cost Recovery Request by Fuel (IOU Only)

Spending Budget & Cost Recovery Request	2023 Unspent Funds	2024	2025	2026	2027	2024-2027
IOU (excluding fuel substitution budget)		\$ -	\$ -	\$ -	\$ -	\$ -
IOU Budget forecasted to support fuel sub		\$ -	\$ -	\$ -	\$ -	\$ -
Total cost recovery request for IOU portfolio (excluding offset)		\$ -	\$ -	\$ -	\$ -	\$ -
IOU Pre-2024 Estimated Unspent & Uncommitted Funds to Offset 2024-2027 Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Cost Recovery Request for IOU Portfolio (including offset)	\$ -	\$ -	\$ -	\$ -	\$ -	
Applicable electric split						
Applicable gas split	100%	100%	100%	100%	100%	
Electric portion for cost recovery (excluding fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Fuel sub applicable electric split	100%	100%	100%	100%	100%	
Electric portion for cost recover (fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total electric portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Gas portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Electric split (with fuel sub)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
Gas split (with fuel sub)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	

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

	PY 2017	PY 2018	PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024	TOTAL 2017-2024
Unspent & Uncommitted								\$ 11,022,059	\$ 11,022,059
EM&V								\$ 159,925	\$ 159,925
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,181,984	\$ 11,181,984
Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2024-2027 Rate Offset									
EM&V - PA Funds									\$ -
EM&V - CPUC Funds									\$ -
IOU Program Funds									\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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

	PG&E		SDG&E		SCE	SCG
Year	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2024					\$ 23,436,349	\$ 3,942,563
2025					\$ 50,830,829	\$ 8,550,980
2026					\$ 57,709,430	\$ 9,708,128
2027					\$ 62,846,726	\$ 10,572,346
Total	\$ -	\$ -	\$ -	\$ -	\$ 194,823,332	\$ 32,774,019

1.6 - Mid-Cycle Advice Letter Funding Breakdown (ALL PAs)^[7]

Year	2024 Reported Expenditures	2024 Carryover Funding ⁸	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset	2024-2027 Funding Total
2024	\$ 27,378,912						\$ 27,378,912
2025		\$ 4,390,432	\$ 54,991,377				\$ 59,381,809
2026		\$ 3,711,984		\$ 63,705,574			\$ 67,417,558
2027		\$ 3,079,568			\$ 70,339,504		\$ 73,419,072

[7] Includes PA and ED EM&V

[8] Funding committed in 2024 but not yet spent will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years.

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	\$ 9,265,703	\$ 19,146,224	\$ 21,886,388	\$ 28,052,719	\$ 78,351,034
2	Market Support	\$ 171,300	\$ 3,475,789	\$ 1,474,107	\$ 1,472,113	\$ 6,593,309
3	Equity	\$ -	\$ 4,113,849	\$ 10,439,397	\$ 11,820,507	\$ 26,373,752
4	Total TSB Forecast	\$ 9,437,003	\$ 26,735,862	\$ 33,799,891	\$ 41,345,339	\$ 111,318,095
5	CPUC TSB Goal	\$ 14,306,473	\$ 26,735,862	\$ 29,353,146	\$ 33,027,324	\$ 103,422,806
6	<i>TSB Forecast / TSB Goal</i> ^[1]	66%	100%	115%	125%	108%

[1] TSB Goal from SoCalREN's True-Up Advice Letter, 17E-17G

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	\$ 12,028,280	\$ 20,200,321	\$ 23,028,470	\$ 26,236,181	\$ 81,493,252
2	Market Support	\$ 986,101	\$ 3,475,789	\$ 2,465,022	\$ 2,425,101	\$ 9,352,013
3	Equity	\$ 1,292,092	\$ 3,059,752	\$ 3,859,654	\$ 4,366,042	\$ 12,577,540
4	Total TSB Forecast	\$ 14,306,473	\$ 26,735,862	\$ 29,353,146	\$ 33,027,324	\$ 103,422,806
5	CPUC TSB Goal	\$ 14,306,473	\$ 26,735,862	\$ 29,353,146	\$ 33,027,324	\$ 103,422,806
6	<i>TSB Forecast / TSB Goal</i> ^[1]	100%	100%	100%	100%	100%

[1] TSB Goal from SoCalREN's True-Up Advice Letter, 17E-17G

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	\$ (2,762,577)	\$ (1,054,097)	\$ (1,142,082)	\$ 1,816,538	\$ (3,142,218)
2	Market Support	\$ (814,801)	\$ (0)	\$ (990,915)	\$ (952,987)	\$ (2,758,704)
3	Equity	\$ (1,292,092)	\$ 1,054,097	\$ 6,579,742	\$ 7,454,465	\$ 13,796,212
4	Total TSB Forecast	\$ (4,869,471)	\$ (0)	\$ 4,446,745	\$ 8,318,015	\$ 7,895,290
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -	\$ -
6	<i>TSB Forecast / TSB Goal</i> ^[3]	-34%	0%	15%	25%	8%

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

Table 2.2a - MCAL Updated Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[1]					-
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>					

[1] TSB Goal from SoCalREN's True-Up Advice Letter, 17E-17G

Table 2.2b - TUAL Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[2]					-
2	GWh CPUC Target ^[2]	-	-			-
3	<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	GWh CPUC ^[3]	-	-	-	-	-
2	GWh CPUC Target ^[3]	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	0%	0%	0%	0%	0%
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target ^[3]	-	-	-	-	-
6	<i>MW Forecast/Target</i>	0%	0%	0%	0%	0%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[3]	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	0%	0%	0%	0%	0%

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

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 11,094,110	\$ 14,647,041	\$ 18,361,836	\$ 20,155,142	\$ 64,258,129
2	Market Support	\$ 10,971,822	\$ 19,052,710	\$ 26,770,811	\$ 24,361,195	\$ 81,156,539
3	Equity	\$ 3,689,533	\$ 18,368,285	\$ 23,332,655	\$ 25,345,394	\$ 70,735,867
4	Codes and Standards	\$ 40,942	\$ 720,000	\$ 810,000	\$ 800,000	\$ 2,370,942
5	EM&V (PA and ED)	\$ 1,742,425	\$ 2,203,341	\$ 2,372,771	\$ 2,757,337	\$ 9,075,874
6	Total Budget w/o OBF Loan Pool	\$ 27,538,832	\$ 54,991,377	\$ 71,648,073	\$ 73,419,068	\$ 227,597,351
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					67%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 27,538,832	\$ 54,991,377	\$ 71,648,073	\$ 73,419,068	\$ 227,597,351
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 27,538,832	\$ 54,991,377	\$ 71,648,073	\$ 73,419,068	\$ 227,597,351
12	Approved Budget Cap ^[4]					\$ 227,597,351

[4] Decision 23-06-055 OP5

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 15,696,484	\$ 16,843,188	\$ 18,547,169	\$ 21,899,999	\$ 72,986,840
2	Market Support	\$ 18,422,601	\$ 19,898,710	\$ 21,532,001	\$ 22,406,741	\$ 82,260,054
3	Equity	\$ 6,599,739	\$ 15,326,138	\$ 16,393,279	\$ 21,975,427	\$ 60,294,583
4	Codes and Standards	\$ 650,000	\$ 720,000	\$ 810,000	\$ 800,000	\$ 2,980,000
5	EM&V (PA and ED)	\$ 1,742,425	\$ 2,203,341	\$ 2,372,771	\$ 2,757,337	\$ 9,075,874
6	Total Budget w/o OBF Loan Pool	\$ 43,111,249	\$ 54,991,377	\$ 59,655,221	\$ 69,839,504	\$ 227,597,351
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					63%
8	OBF Loan Pool Addition					\$ -
9	Budget excluding Portfolio Oversight	\$ 43,111,249	\$ 54,991,377	\$ 59,655,221	\$ 69,839,504	\$ 227,597,351
10	ED Portfolio Oversight					\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 43,111,249	\$ 54,991,377	\$ 59,655,221	\$ 69,839,504	\$ 227,597,351

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ (4,602,374)	\$ (2,196,147)	\$ (185,333)	\$ (1,744,858)	\$ (8,728,711)
2	Market Support	\$ (7,450,779)	\$ (846,000)	\$ 5,238,810	\$ 1,954,454	\$ (1,103,515)
3	Equity	\$ (2,910,206)	\$ 3,042,147	\$ 6,939,375	\$ 3,369,968	\$ 10,441,284
4	Codes and Standards	\$ (609,058)	\$ -	\$ -	\$ -	\$ (609,058)
5	EM&V (PA and ED)	\$ -	\$ -	\$ -	\$ -	\$ -
6	Total Budget w/o OBF Loan Pool	\$ (15,572,417)	\$ -	\$ 11,992,853	\$ 3,579,564	\$ (0)
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					4%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (15,572,417)	\$ -	\$ 11,992,853	\$ 3,579,564	\$ (0)
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (15,572,417)	\$ -	\$ 11,992,853	\$ 3,579,564	\$ (0)

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	1.34	1.36	1.64	1.66	1.50	1.50
3		Market Support	0.06	0.07	0.07	0.08	0.07	0.07
4		Equity	0.73	0.73	0.75	0.76	0.74	0.74
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	Including C&S	0.71	0.73	0.85	0.86	0.79	0.79
7		Excluding C&S	0.72	0.73	0.86	0.87	0.80	0.80

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

Line	Budget Component	Third Party Budget	Cumulative Total Budget w/o OBF Loan Pool	Contribution Percentage	Minimum Threshold
1	Statewide ^[1]		\$ 227,597,351	0%	20%
2	Third-party ^[2]		\$ 227,597,351	0%	60%

[1] SW program definition per D.16-08-019, OP 24, OP 38, & OP 39.

[2] Third party program definition per D.16-08-019, OP 10, includes SW third-party budgets

[1] Updated Forecasts for 2024-2027 include 2024 Actuals, 2025 TUAL Forecast, and Updated forecasts for 2026 and 2027.

Please ensure that on Table A1, each IOU lists all of the SW program and the asosciated IOU specific budget.

Appendix 1 - 2024 - 2027 Program Portfolio Budget and Targets

(a) Program ID	(b) Program Name	(c) Target Exempt	(d) Program Type	(e) Business Sector
SCR-AGR-G1	Agriculture Project Delivery Program	Yes	Core PA	Agricultural Sector
SCR-AGR-G2	Rural-HTR Agricultural DI	No	Core PA	Agricultural Sector
SCR-AGR-G3	Agriculture Retrofit	No	Core PA	Agricultural Sector
SCR-CBDC-01	SoCalREN Community Based Design Collaborative	Yes	Core PA	Portfolio Support
SCR-COM-E2	California Green Business Network	Yes	Core PA	Commercial Sector
SCR-COM-E3	Food Desert Energy Efficiency Equity Program	Yes	Core PA	Commercial Sector
SCR-COM-E4	Small & Medium Business Energy Advisory (SMBEA)	Yes	Core PA	Commercial Sector
SCR-COM-E5	Small Commercial Direct Install Program	No	Core PA	Commercial Sector
SCR_CS_PortfolioSupport	Codes & Standards Portfolio Support PA Costs	Yes	Core PA	Portfolio Support
SCR-CST-F1	Codes and Standards Compliance Enhancement Prog	Yes	Core PA	Codes & Standards
SCR_EQ_PortfolioSupport	Equity Portfolio Support PA Costs	Yes	Core PA	Portfolio Support
SCR-FIN-C1	Public Agency Revolving Loan Fund	Yes	Core PA	Finance
SCR-FIN-C3	Rural-HTR Agriculture Finance Assistance Program	Yes	Core PA	Finance
SCR_MS_PortfolioSupport	Market Support Portfolio Support PA Costs	Yes	Core PA	Portfolio Support
SCR-PUBL-B1	Energy Efficiency Project Delivery Program	Yes	Core PA	Public Sector
SCR-PUBL-B10	Water Infrastructure Program	No	Core PA	Public Sector
SCR-PUBL-B2	Distributed Energy Resource Disadvantaged Commur	Yes	Core PA	Public Sector
SCR-PUBL-B3	Public Agency NMEC Program	No	Core PA	Public Sector
SCR-PUBL-B4	Streamlined Savings Program	No	Core PA	Public Sector
SCR-PUBL-B5	Rural-HTR Public Agency Direct Install	No	Core PA	Public Sector
SCR-PUBL-B6	Energy Resiliency Action Plan	Yes	Core PA	Public Sector
SCR-PUBL-B7	Regional Partner Initiatives	Yes	Core PA	Public Sector
SCR-PUBL-B8	Water & Wastewater Strategic Energy Management	No	Core PA	Public Sector
SCR-PUBL-B9	Underserved Schools Strategic Energy Management	No	Core PA	Public Sector
SCR_RA_PortfolioSupport	Resource Acquisition Portfolio Support PA Costs	No	Core PA	Portfolio Support
SCR-RES-A1	Multifamily Program	No	Core PA	Residential Sector
SCR-RES-A4	Residential Kits4Kids	No	Core PA	Residential Sector
SCR-RES-A5	Small HTR Multifamily Direct Install	No	Core PA	Residential Sector
SCR-WET-D2	ACES Pathway	Yes	Core PA	WE&T
SCR-WET-D3	Green Path Careers	Yes	Core PA	WE&T
SCR-WET-D4	WE&T Opportunity HUB	Yes	Core PA	WE&T
SCR-WET-D5	Agriculture WE&T	Yes	Core PA	WE&T
SCR-WET-D6	E-Contractor Academy	Yes	Core PA	WE&T
SCR-EMV-01	SoCalREN EM&V	Yes	Core PA	EM&V
Total				

Updated MCAL Forecasts ^[1]

TUAL Filing

(f) Portfolio Segment	(l) Budget	(m) TSB	(n) GWh	(o) MW	(p) MMThm	(g) Budget	(h) TSB	(i) GWh	(j) MW	(k) MMThm
Market Support	\$ 2,092,500	\$ -	-	-	-	\$ 2,677,500	\$ -	-	-	-
Equity	\$ 8,740,176	\$ 3,817,514	1.44	0	0	\$ 9,870,257	\$ 3,969,885	2.35	0.07	0.249
Resource Acquisition	\$ 6,477,363	\$ 23,341,037	18.20	11	0	\$ 7,258,549	\$ 22,411,624	40.65	42.59	-
Market Support	\$ 2,250,158	\$ -	-	-	-	\$ 1,500,000	\$ -	-	-	-
Market Support	\$ 555,002	\$ -	-	-	-	\$ 2,221,282	\$ -	-	-	-
Equity	\$ 14,065,598	\$ 4,927,588	3.44	1	0	\$ 13,967,498	\$ 1,976,629	2.62	0.33	(0.008)
Market Support	\$ 4,101,465	\$ -	-	-	-	\$ 3,094,164	\$ -	-	-	-
Equity	\$ 10,902,011	\$ 7,243,983	0.08	0	0	\$ 9,110,000	\$ 1,224,865	1.78	0.08	(0.000)
Codes & Standards	\$ 273,942	\$ -	-	-	-	\$ 298,000	\$ -	-	-	-
Codes & Standards	\$ 2,097,000	\$ -	-	-	-	\$ 2,682,000	\$ -	-	-	-
Equity	\$ 5,386,644	\$ -	-	-	-	\$ 4,857,979	\$ -	-	-	-
Equity	\$ 2,003,001	\$ -	-	-	-	\$ 2,196,100	\$ -	-	-	-
Market Support	\$ 1,654,200	\$ -	-	-	-	\$ 2,104,200	\$ -	-	-	-
Market Support	\$ 5,817,664	\$ -	-	-	-	\$ 4,676,435	\$ -	-	-	-
Market Support	\$ 36,675,859	\$ -	-	-	-	\$ 33,484,767	\$ -	-	-	-
Resource Acquisition	\$ 6,825,430	\$ 6,843,956	15.01	3	0	\$ 8,596,280	\$ 6,555,529	14.43	1.30	0.007
Equity	\$ 4,257,850	\$ -	-	-	-	\$ 4,608,206	\$ -	-	-	-
Resource Acquisition	\$ 2,857,320	\$ 3,850,381	6.10	1	(0)	\$ 5,533,656	\$ 10,709,526	17.35	2.60	-
Resource Acquisition	\$ 13,657,023	\$ 11,793,268	3.56	1	1	\$ 7,642,096	\$ 10,686,232	6.77	2.18	0.706
Equity	\$ 7,579,642	\$ 3,454,612	(2.48)	0	0	\$ 8,242,080	\$ 3,964,833	(2.82)	0.13	0.454
Market Support	\$ 5,226,066	\$ -	-	-	-	\$ 5,843,000	\$ -	-	-	-
Market Support	\$ 2,172,921	\$ -	-	-	-	\$ 2,612,500	\$ -	-	-	-
Market Support	\$ 6,532,434	\$ 5,617,422	15.70	8	-	\$ 7,882,465	\$ 5,767,443	17.97	9.50	-
Equity	\$ 4,756,708	\$ 1,450,171	4.02	1	-	\$ 5,468,462	\$ 1,441,328	5.88	1.57	-
Resource Acquisition	\$ 4,315,750	\$ -	-	-	-	\$ 3,140,461	\$ -	-	-	-
Resource Acquisition	\$ 30,125,243	\$ 32,522,392	(5.19)	0	2	\$ 31,416,953	\$ 26,838,284	10.81	0.80	0.691
Market Support	\$ 9,548,813	\$ 975,888	1.13	0	0	\$ 7,797,742	\$ 3,584,570	4.82	0.06	0.206
Equity	\$ 7,007,182	\$ 5,479,884	1.78	1	0	\$ 9,398,846	\$ 4,292,057	3.51	1.30	0.182
Equity	\$ 2,839,883	\$ -	-	-	-	\$ 1,974,000	\$ -	-	-	-
Equity	\$ 3,197,172	\$ -	-	-	-	\$ 3,337,000	\$ -	-	-	-
Market Support	\$ 1,748,400	\$ -	-	-	-	\$ 2,274,800	\$ -	-	-	-
Market Support	\$ 705,000	\$ -	-	-	-	\$ 874,200	\$ -	-	-	-
Market Support	\$ 2,076,057	\$ -	-	-	-	\$ 1,880,000	\$ -	-	-	-
EM&V	\$ 2,519,296	\$ -	-	-	-	\$ 2,519,296	\$ -	-	-	-
	\$ 221,040,773	111,318,095	62.78	27	4	\$ 221,040,773	103,422,806	126.11	62.50	2.487

Change

(q) Budget	(r) TSB	(s) GWh	(t) MW	(u) MMThm	(v) Change Notes
\$ (585,000)	\$ -	-	\$ -	\$ -	Reduced budget due to ramp-up.
\$ (1,130,081)	\$ (152,371)	(0.91)	\$ (0)	\$ 0	Reduced budget and savings due to ramp-up.
\$ (781,185)	\$ 929,412	(22.45)	\$ (31)	\$ 0	Reduced budget due to ramp-up; updated measure mix.
\$ 750,158	\$ -	-	\$ -	\$ -	Additional budget for initial development and implementation support
\$ (1,666,280)	\$ -	-	\$ -	\$ -	Reduced budget due to planned closure.
\$ 98,100	\$ 2,950,960	0.83	\$ 0	\$ 0	Increase from updated measure mix.
\$ 1,007,301	\$ -	-	\$ -	\$ -	Reduced budget due to ramp-up.
\$ 1,792,011	\$ 6,019,118	(1.70)	\$ 0	\$ 0	Increased budget due to market demand; updated measure mix.
\$ (24,058)	\$ -	-	\$ -	\$ -	Reduced budget due to planned closure.
\$ (585,000)	\$ -	-	\$ -	\$ -	Reduced budget due to planned closure.
\$ 528,665	\$ -	-	\$ -	\$ -	Increased budget due to program budget reallocation.
\$ (193,099)	\$ -	-	\$ -	\$ -	Reduced budget due to updated forecast.
\$ (450,000)	\$ -	-	\$ -	\$ -	Reduced budget due to ramp-up.
\$ 1,141,229	\$ -	-	\$ -	\$ -	Increased budget due to program budget reallocation.
\$ 3,191,092	\$ -	-	\$ -	\$ -	Increased budget to support expanded strategies.
\$ (1,770,850)	\$ 288,427	0.59	\$ 1	\$ 0	Reduced budget due to ramp-up; updated measure mix.
\$ (350,356)	\$ -	-	\$ -	\$ -	Reduced budget due to updated program strategies.
\$ (2,676,336)	\$ (6,859,145)	(11.25)	\$ (2)	\$ (0)	Reduced budget due to closure and consolidating program with SCR-PUBL-B4.
\$ 6,014,927	\$ 1,107,036	(3.21)	\$ (1)	\$ 0	Increased budget due to market demand; updated measure mix, and incorporation of NMEC pathway.
\$ (662,438)	\$ (510,222)	0.33	\$ (0)	\$ (0)	Increased budget due to market demand; updated measure mix.
\$ (616,934)	\$ -	-	\$ -	\$ -	Reduced budget due to updated forecast.
\$ (439,579)	\$ -	-	\$ -	\$ -	Increased budget due to updated forecast.
\$ (1,350,031)	\$ (150,022)	(2.27)	\$ (1)	\$ -	Reduced budget due to ramp-up; updated measure mix.
\$ (711,754)	\$ 8,843	(1.87)	\$ (0)	\$ -	Reduced budget due to ramp-up; updated measure mix.
\$ 1,175,289	\$ -	-	\$ -	\$ -	Increased budget due to program budget reallocation.
\$ (1,291,710)	\$ 5,684,108	(16.00)	\$ (1)	\$ 1	Reduced budget due to market demand; increased incentive budget to capture additional savings./.
\$ 1,751,072	\$ (2,608,682)	(3.69)	\$ (0)	\$ (0)	Increased budget to reflect market demand; no forecasted savings due to limited measure mix
\$ (2,391,665)	\$ 1,187,827	(1.74)	\$ (1)	\$ 0	Reduced budget due to updated forecast; updated measure mix.
\$ 865,883	\$ -	-	\$ -	\$ -	Increased budget due to updated forecast.
\$ (139,828)	\$ -	-	\$ -	\$ -	Reduced budget due to updated forecast.
\$ (526,400)	\$ -	-	\$ -	\$ -	Reduced budget due to updated forecast.
\$ (169,200)	\$ -	-	\$ -	\$ -	Reduced budget due to updated forecast.
\$ 196,057	\$ -	-	\$ -	\$ -	Increased budget due to updated forecast.
\$ 0	\$ -	-	\$ -	\$ -	
\$ (0)	7,895,290	(63.33)	(35)	2	

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

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

		Expenditures			Cap & Target		
Line	Budget Category	(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget ^[6]	(e) Cap Percentage	(f) Target %
1	Administrative Costs						
2	PA ^[1]	\$ 4,299,136		\$ 4,299,136	1.9%	10.0%	
3	Non-PA Third Party & Partnership ^[2]			\$ -	0.0%		10.0%
4	PA & Non-PA Target Exempt Programs ^[3]	\$ 12,089,312		\$ 12,089,312			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 11,573,369		\$ 11,573,369	5.2%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 95,695,093		\$ 95,695,093			
9	Non Incentives and Non Rebates	\$ 37,406,746		\$ 37,406,746	16.9%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)	\$ 57,457,816		\$ 57,457,816			
11	EM&V Costs (PA and ED) ^[4]	\$ 2,519,296		\$ 2,519,296	1.1%	4.0%	
11a	EM&V - PA	\$ 2,519,296		\$ 2,519,296			
11b	EM&V - ED			\$ -			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 221,040,769		\$ 221,040,769			
13	Total Third-Party Qualifying Costs ^[5]				0.0%		60.0%
14	OBF Loan Pool Addition			\$ -			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[8]			\$ 221,040,769			
16	ED Portfolio Oversight ^[10]			\$ -			
17	EE-Funded IDSM					2.5%	
	Multi-DER IDSM ^[7]	\$ 4,000,000					
18	PA Spending Budget Request			\$ 221,040,769			

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

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

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

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

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

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

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

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

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

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

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

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

Attachment B

SoCalREN Community Engagement Indicators Results

Community Engagement Indicator Project Summary

In alignment with CPUC Decision D.23-06-055, which states that “portfolio administrators shall develop indicators to measure community engagement and should include them in their Mid-Cycle advice letters in 2025,” SoCalREN held a focus group with community-based organizations (CBOs) to inform our development of indicators that reflect effective community engagement in program design, implementation, and evaluation. The final indicators submitted jointly by PAs reflect the process that Blue Point Strategies led with all program administrators, informed by the insight that SoCalREN gained from our focus group, as described in this letter.

As outlined in the Decision, the indicators must assess not only the quantity of community engagement efforts but also their quality and relevance. Additionally, consistent with Commission guidance, indicators must avoid oversimplification; they should clearly articulate who was engaged and how they were engaged, rather than aggregating data across different engagement strategies or target audiences. We believe that the final proposed indicators accomplish this.

To ensure the indicators are grounded in real-world experience, SoCalREN convened a diverse group of CBOs in a focus group held on May 22, 2025. Focus group participants represented a broad range of sectors—including social services, environmental and racial justice, early childhood education, and community empowerment. Despite their varied areas of focus, all participants shared a common commitment to direct, meaningful engagement with the communities they serve.

The insight shared during the SoCalREN focus group was thoughtful and impactful, directly shaping the development of the indicators SoCalREN initially drafted and later shared with the lead consulting group, Blue Point Planning. These SoCalREN draft indicators influenced and helped guide the final recommended indicators that all PAs are submitting and that SoCalREN fully supports.

As noted, SoCalREN’s focus group participants shared best practices for community engagement that were captured and integrated into the final recommended indicators, listed in the attached appendix. A sample of these best practices include the following:

- Ensure engagement actions, such as holding listening sessions, forums and focus groups, tabling at community events, etc., take place regularly and occur within and/or include target communities.
- Engagement actions occur in the language of the participants and use what are called “trusted messengers”—people who are known to and trusted by the participants.
- Where possible, authentic engagement should provide supports to participants so that they can take the time to join, such as food, gift cards, childcare, etc.

- Listen to ideas from community residents and program participants, and ensure that programs adapt based on input.
- Program evaluation is essential, and while our recommendation is that CEDARS reporting of this proposed indicator be optional, SoCalREN frequently utilizes satisfaction and other surveys to ascertain program effectiveness and outcomes.

In addition to informing specific metrics, the discussion with the SoCalREN focus group participants surfaced valuable insights that may not all become indicators but that can support program improvement. For example, several CBOs emphasized the importance of cultivating leadership skills among community members as a strategy for fostering long-term engagement and improving program outcomes. Although such leadership development may fall outside the scope of the CEDARS reporting framework, these lessons will inform and strengthen SoCalREN's overall programmatic approach.

Proposed Indicators:

Indicator Type	Indicator
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
Summary of Feedback	
Input	Number of people who provided feedback relevant to the equity segment
Input	Feedback themes from engagement activities relevant to the equity segment
Changes to Program	
Input	Changes to equity segment program design as needed, based on feedback

On reporting, SoCalREN's recommendations differ somewhat from the Blue Point Planning recommendations. We believe it is essential to tie all elements of engagement actions to the specific programs that do the engagement—not just on feedback themes and changes to program. All reporting would, therefore, be delineated based on the program, (unless engagement is done for SoCalREN as a whole), rather than reflect a cumulative annual number or narrative that does not tie directly to the program.

The chart we recommend for tracking outcomes, with an example (for illustration purposes), is as follows:

Program	Engagement type	Supports for Participants	Number of engagement actions per type	Number of participants per engagement action	Total number of participants in all engagement per type	Themes from engagement	Changes made to program
Workforce education and training Hub	Focus groups	Lunch provided; token gift cards provided. Interpreters available. Transportation offered for those who needed it.	6	10	60	Hub should include EE jobs listing for workers Hub should include live training events	Hub will include jobs listing Hub will include links to live training done by SoCalREN and by outside groups

SoCalREN Focus Group Participants:

Name of Organization

Areas of Focus

Trust South LA	Affordable housing, anti-gentrification advocacy
SAJE (Strategic Actions for a Just Economy)	Environmental, social, and economic justice
AllForKids / The Community Coalition Children's Bureau	Child abuse prevention and early childhood supports
Community Coalition	Racial, economic, and social equity
California Native Vote Project	Community empowerment and civic engagement
Plaza Community Services	Early childhood education and community development



Attachment C

PA Response to Recommendations

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.
CPU0372.01	PY 2022 Regional Energy Networks Impact	RENs are in the unique position of being able to support more effectively CPUC policies and California's larger decarbonization goals through innovative solutions and scalable activities. For this reason, RENs should consider increasing efforts to create a pathway to electrification such as higher incentives and rebates, varying levels of incentives, and equityfocused multipliers that target low-income participants, DAGs, and environmental justice areas	All RENs	Accepted	SoCalREN leverages multiple funding sources to increase customer incentives and rebates. SoCalREN looks to enable customer use of outside funding, and in particular has built relationships to coordinate with the TECH Clean California program for the initiative mentioned above, so customers are able to layer SoCalREN and TECH incentives. Since forging this partnership and since this evaluation, SoCalREN has successfully completed joint projects with TECH. As part of this partnership, SoCalREN helps facilitate a smooth handoff for the customer to TECH. SoCalREN has also created partnerships with local heat pump manufacturers to train its team. SoCalREN in turn trains its contractors and installers, providing overviews of the technology, demonstrating how the technology works, and explaining its benefits. The new created Portfolio Administrator Sector Coordination (PASC) meetings, as detailed in the latest Joint Cooperation Memo (JCM), is the RENs and all participating Southern California PA's newly refocused plan to accomplish the recommendations of enhanced sharing of success stories and other important data. The Residential sector (which includes multifamily) is included in this process. Topics discussed in PASC meetings will include, but are not limited to, new programs entering and exiting the market and amendments (e.g. program changes) that may impact how the programs possibly conflict or compete with each other (e.g. overlap), PA staffing, key customer contact updates, customer confusion, successes that are repeatable through best practices, data sharing, and potential overlap with new market trends or policies.	Regarding creating pathways to electrification, SoCalREN's public sector program started offering higher incentives for heat pump water heaters during the 2023 program year to increase adoption rates given some lag compared to adoption rates in the Bay Area. Underserved/hard-to-reach agencies were eligible for up to 100% of project costs.	Ongoing	In Progress		SCR-COM-E4 SCR-COM-E5 SCR-PUBL-B1 SCR-PUBL-B4 SCR-PUBL-B5 SCR-PUBL-B6 SCR-RES-A1 SCR-RES-A5 SCR-WET-D6
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	The new created Portfolio Administrator Sector Coordination (PASC) meetings, as detailed in the latest Joint Cooperation Memo (JCM), is the RENs and all participating Southern California PA's newly refocused plan to accomplish the recommendations of enhanced sharing of success stories and other important data. The Residential sector (which includes multifamily) is included in this process. Topics discussed in PASC meetings will include, but are not limited to, new programs entering and exiting the market and amendments (e.g. program changes) that may impact how the programs possibly conflict or compete with each other (e.g. overlap), PA staffing, key customer contact updates, customer confusion, successes that are repeatable through best practices, data sharing, and potential overlap with new market trends or policies.		Ongoing	In Progress		SCR-RES-A1
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	As discussed in its response to the recommendation above, the PASC will serve as the primary joint forum for PAs to share best practices, challenges, and align on program details and coordination. This includes dedicated meetings on the Residential sector, which includes multifamily.		Ongoing	In Progress		SCR-RES-A1
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	As detailed in the JCM, PASC attendees will ideally include at least one direct representative from each PA organization and may include third-party implementers and PA Policy Leads. Members will encourage the appropriate implementers and other individuals to attend as needed. The meetings will prioritize a virtual approach to foster inclusivity across the region. Each PASC meeting has a designated PA coordinator, who is responsible for taking and sharing notes, and including action items and their assigned owners. As recommended, attendance at the PASC meetings will be documented.		Ongoing	In Progress	SoCalREN proactively coordinates with PAs offering programs in overlapping territory to develop coordination approaches to reduce customer confusion and ensure there is no duplication of services.	All
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	Other	Not applicable to SoCalREN.					

Attachment D

CEDARS Filing Confirmation

CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Regional Energy Network (SCR)

Budget Filing Year: 2026

Submitted: 07:55 on 04 Nov 2025

By: Tim Olsen

Advice Letter Number: 23-E/23-G

* Portfolio Budget Filing Summary *

- TRC: 0.49
- PAC: 0.54
- TRC (no admin): 1.21
- PAC (no admin): 1.63
- RIM: 0.47
- SCB: 0.72
- SCH: 0.73
- Budget: \$70,093,989.75
- TotalSystemBenefit: \$33,799,891.32
- ElecBen: \$10,116,539.17
- GasBen: \$31,035,728.65
- WaterEnergyBen: \$81,750.02
- OtherBen: \$5,040.23
- TRCCost: \$84,378,754.29
- PACCost: \$75,758,851.92
- RIMCost: \$127,425,959.71
- SCBCost: \$88,039,833.45
- SCHCost: \$88,318,021.28

* Programs Included in the Budget Filing *

- SCR-AGR-G1: Agriculture Project Delivery Program
- SCR-AGR-G2: Rural-HTR Agricultural DI
- SCR-AGR-G3: Agriculture Retrofit
- SCR-CBDC-01: SoCalREN Community Based Design Collaborative

- SCR-COM-E2: California Green Business Network
- SCR-COM-E3: Food Desert Energy Efficiency Equity Program
- SCR-COM-E4: Small & Medium Business Energy Advisory (SMBEA)
- SCR-COM-E5: Small Commercial Direct Install Program
- SCR_CS_PortfolioSupport: Codes & Standards Portfolio Support PA Costs
- SCR-CST-F1: Codes and Standards Compliance Enhancement Program
- SCR-EMV-01: SoCalREN EM&V;
- SCR_EQ_PortfolioSupport: Equity Portfolio Support PA Costs
- SCR-FIN-C1: Public Agency Revolving Loan Fund
- SCR-FIN-C3: Rural-HTR Agriculture Finance Assistance Program
- SCR_MS_PortfolioSupport: Market Support Portfolio Support PA Costs
- SCR-PUBL-B1: Energy Efficiency Project Delivery Program
- SCR-PUBL-B10: Water Infrastructure Program
- SCR-PUBL-B2: Distributed Energy Resource Disadvantaged Communities Program
- SCR-PUBL-B3: Public Agency NMEC Program
- SCR-PUBL-B4: Streamlined Savings Program
- SCR-PUBL-B5: Rural-HTR Public Agency Direct Install
- SCR-PUBL-B6: Energy Resiliency Action Plan
- SCR-PUBL-B7: Regional Partner Initiatives
- SCR-PUBL-B8: Water & Wastewater Strategic Energy Management
- SCR-PUBL-B9: Underserved Schools Strategic Energy Management
- SCR_RA_PortfolioSupport: Resource Acquisition Portfolio Support PA Costs
- SCR-RES-A1: Multifamily Program
- SCR-RES-A4: Residential Kits4Kids
- SCR-RES-A5: Small HTR Multifamily Direct Install
- SCR-WET-D2: ACES Pathway
- SCR-WET-D3: Green Path Careers
- SCR-WET-D4: WE&T; Opportunity HUB
- SCR-WET-D5: Agriculture WE&T;
- SCR-WET-D6: E-Contractor Academy

CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Regional Energy Network (SCR)

Budget Filing Year: 2027

Submitted: 07:56 on 04 Nov 2025

By: Tim Olsen

Advice Letter Number: 23-E/23-G

* Portfolio Budget Filing Summary *

- TRC: 0.58
- PAC: 0.63
- TRC (no admin): 1.37
- PAC (no admin): 1.69
- RIM: 0.5
- SCB: 0.86
- SCH: 0.87
- Budget: \$71,426,867.95
- TotalSystemBenefit: \$41,345,339.32
- ElecBen: \$11,401,146.42
- GasBen: \$37,285,459.95
- WaterEnergyBen: \$50,283.93
- OtherBen: \$7,658.80
- TRCCost: \$83,645,789.23
- PACCost: \$76,852,441.26
- RIMCost: \$135,495,378.85
- SCBCost: \$87,185,870.52
- SCHCost: \$87,420,286.27

* Programs Included in the Budget Filing *

- SCR-AGR-G1: Agriculture Project Delivery Program
- SCR-AGR-G2: Rural-HTR Agricultural DI
- SCR-AGR-G3: Agriculture Retrofit
- SCR-CBDC-01: SoCalREN Community Based Design Collaborative

- SCR-COM-E2: California Green Business Network
- SCR-COM-E3: Food Desert Energy Efficiency Equity Program
- SCR-COM-E4: Small & Medium Business Energy Advisory (SMBEA)
- SCR-COM-E5: Small Commercial Direct Install Program
- SCR_CS_PortfolioSupport: Codes & Standards Portfolio Support PA Costs
- SCR-CST-F1: Codes and Standards Compliance Enhancement Program
- SCR-EMV-01: SoCalREN EM&V;
- SCR_EQ_PortfolioSupport: Equity Portfolio Support PA Costs
- SCR-FIN-C1: Public Agency Revolving Loan Fund
- SCR-FIN-C3: Rural-HTR Agriculture Finance Assistance Program
- SCR_MS_PortfolioSupport: Market Support Portfolio Support PA Costs
- SCR-PUBL-B1: Energy Efficiency Project Delivery Program
- SCR-PUBL-B10: Water Infrastructure Program
- SCR-PUBL-B2: Distributed Energy Resource Disadvantaged Communities Program
- SCR-PUBL-B3: Public Agency NMEC Program
- SCR-PUBL-B4: Streamlined Savings Program
- SCR-PUBL-B5: Rural-HTR Public Agency Direct Install
- SCR-PUBL-B6: Energy Resiliency Action Plan
- SCR-PUBL-B7: Regional Partner Initiatives
- SCR-PUBL-B8: Water & Wastewater Strategic Energy Management
- SCR-PUBL-B9: Underserved Schools Strategic Energy Management
- SCR_RA_PortfolioSupport: Resource Acquisition Portfolio Support PA Costs
- SCR-RES-A1: Multifamily Program
- SCR-RES-A4: Residential Kits4Kids
- SCR-RES-A5: Small HTR Multifamily Direct Install
- SCR-WET-D2: ACES Pathway
- SCR-WET-D3: Green Path Careers
- SCR-WET-D4: WE&T; Opportunity HUB
- SCR-WET-D5: Agriculture WE&T;
- SCR-WET-D6: E-Contractor Academy