



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: Inland Regional Energy Network (I-REN) ID # 246

Utility type:

☒ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Casey Dailey

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EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

11/4/25

Advice Letter (AL) #: 8-E/8-G

Tier Designation: 2

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

Keywords (choose from CPUC listing):

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

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

D.21-11-013, D. 21-05-031 OP 10, D.23-06-055, D.25-08-034, Resolution E-5387, Resolution E-5351

Does AL replace a withdrawn or rejected AL?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

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A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: 12/30/25

No. of tariff sheets:

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

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

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

Tariff schedules affected: None

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:
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Clear Form

ENERGY Advice Letter Keywords

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



iren.gov

November 4, 2025

California Public Utilities Commission
Energy Division Tariff Unit
505 Van Ness Ave.
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San Francisco, CA 94102-3298

I-REN Advice Letter 8-E/8-G

(Inland Regional Energy Network ID #246)

Tier Designation

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

Subject

I-REN 2024-2027 Energy Efficiency Portfolio Mid-Cycle Advice Letter

I. Purpose

The purpose of this Tier 2 advice letter is to provide a mid-cycle review of the portfolio and savings forecast of the Inland Regional Energy Network (I-REN) portfolio following the approval of its portfolio in Decision (D.)23-06-055 and modified in D.24-09-031. Ordering Paragraph (OP) 10 of D.21-05-031 directed portfolio administrators (PAs) to submit their mid-cycle advice letters (MCAL) on September 1, 2025. On August 22, 2025, the Executive Director of the Commission granted an extension for all PAs to submit their Tier 2 advice letters 60 days after the issuance date of the decision adopting energy efficiency (EE) goals for 2026-2037, to be issued in R.25-04-010. On September 5, 2025, the Commission issued D.25-08-034 Decision Adopting Energy Efficiency Goals for 2026-2037, making the new deadline for MCAL submittal November 4, 2025. This MCAL is timely filed in compliance with the Commission's deadline extension granted to all PAs.

We are a network of partners, including the Coachella Valley Association of Governments, the San Bernardino Council of Governments, and the Western Riverside Council of Governments, formed to serve the cities and communities of our region.



II. Background

Initiated in 2019, the proposed Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments (WRCOG), Coachella Valley Association of Governments (CVAG), and San Bernardino Council of Governments (SBCOG) that serve the counties of San Bernardino and Riverside. In February 2021, I-REN applied for REN PA status to offer a portfolio of programs serving the Public Sector, Codes & Standards, and Workforce Education & Training, with governance from WRCOG as administrative lead agency as well as SBCOG and CVAG.¹ I-REN was approved by the CPUC on November 18, 2021, in D.21-11-013 with a budget of \$65,577,932 to be funded through program years 2022 to 2027.

Collectively known as the Inland Empire, the I-REN service area of the counties of Riverside and San Bernardino counties includes 11% of California's population, but its geographic arrangement, population, and distance from the state's major metropolitan areas result in inconsistent and insufficient service to the region. Further, the region is distinct from other southern California areas—particularly Los Angeles—with its own robust character, culture, climate zones, and identity.

Historically, the Inland Empire has faced challenges in receiving equitable opportunities to participate in energy efficiency and advanced energy. As dedicated representatives of local government, I-REN consortium members bring established connections from their work serving this region to be able to provide support to fill gaps in existing energy efficiency services. With the implementation of its first business plan I-REN is establishing locally administered programs and services to ensure ratepayers in this region can become active participants in meeting California energy efficiency goals and equitably benefit from ratepayer-funded energy efficiency.

In approving I-REN in D.21-11-013, the Commission stated that I-REN's business plan complies with the requirements of D.12-11-015 and D.19-12-021 for targeting hard-to-reach customers, filling gaps, and complementing other program administrators' portfolios.² Moreover, the Commission indicated that I-

¹ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget, February 26, 2021.

² D.21-11-013 Conclusion of Law (COL) 4.

REN's "focus on equity and serving disadvantaged and underserved communities is welcome and consistent with the Commission's ESJ Action Plan."³

In response to I-REN's 2021 business plan, the Commission granted I-REN a unique, six-year portfolio period of 2022 through 2027 to align I-REN with the new four-year cycle framework adopted following I-REN's original business plan submittal. In D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan, the Commission ordered that I-REN shall align its budget advice letter filings with the other program administrators' filing schedule, beginning with the September 1, 2023, Portfolio True-Up advice letter covering program years 2024 through 2027.⁴

On October 16, 2023 I-REN submitted its True-Up Advice Letter (TUAL) (I-REN Advice Letter 3-E/3-G) with budget forecast revisions include rolling over unspent funds from 2022-2023, allocating funding for integrated demand-side management (IDSM), and distinguishing between program implementation costs and portfolio administration PA costs. I-REN also updated its savings and total system benefit forecasts at that time, informed by updated inputs from I-REN's implementer contracted for its resource program. I-REN's TUAL was accepted by CPUC as of February 7, 2024 with effective date November 15, 2023.

In preparing this MCAL I-REN has followed Commission direction and adhered to stakeholder guidance and best practices wherever available to inform revisions to its budget and updates to savings forecasts for 2026-2027. Savings and Total System Benefit forecasts have been adjusted and run against 2026 Cost-Effectiveness Tool (CET) Avoided Cost Version (2024/E-5328), informed by updated inputs from I-REN's implementer contracted for its resource program. I-REN is not opening or closing any programs at this time. This MCAL also provides an update on I-REN's progress related to metrics for each segment of its portfolio, I-REN's response to evaluator recommendations, and community engagement indicators as developed by the Joint PAs.

³ D.21-11-013 COL 7.

⁴ D.21-11-013 OP 7.

A. Regulatory Filing Requirements

1. D.21-05-031

The Mid-Cycle Advice Letter (MCAL) requirement was adopted in D.21-05-031 which requires that each year on September 1, in the odd years when the energy efficiency potential and goals have been adopted by the Commission, each EE PA shall file either a portfolio true-up (prior to the start of the four-year portfolio) or mid-cycle review (in year two of a four-year portfolio) Tier 2 advice letter adjusting technical inputs, forecasts, and portfolio to account for the changes in energy efficiency potential and goals.

D.21-05-031 requires that each PA's MCAL must meet the criteria listed below. I-REN's MCAL meets the criteria relevant for each segment of the portfolio.

- 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).
- 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.

2. D.23-06-055

Additional requirements for the MCAL were adopted in D.23-06-055, including the following:

- OP 16. Beginning with the mid-cycle budget advice letter submissions due in 2025, all portfolio administrators shall include specific descriptions of how they have incorporated or otherwise addressed impact evaluation recommendations for specific Commission studies released after 2022.

- OP 24. Portfolio administrators shall develop indicators to measure community engagement, and should include them in their Mid-Cycle advice letters in 2025.

I-REN's MCAL complies with these requirements. For details on how I-REN is addressing impact evaluation recommendations, please see Tab_A3 RTR Descriptions in the spreadsheet component of the MCAL submittal, as well as Attachment C – PA Response to Recommendations. For details regarding indicators developed by the Joint PAs for measuring community engagement, please see Attachment B – Community Engagement Indicators Results.

3. D.25-08-034

The Commission approved D.25-08-034 on August 28, 2025, adopting total system benefit and energy savings goals for the four large investor-owned utilities in the state.⁵ The Commission's policy objective is to adopt “realistic and aggressive, yet achievable” energy efficiency goals. While the Commission's Potential & Goals Study and accompanying decision does not currently set goals for REN PAs, I-REN looks to the study and decision for the data and findings included, and for important insights regarding the state's potential for energy efficiency and market conditions affecting PAs' ability to achieve that potential.

In the decision, the Commission acknowledges the “considerable uncertainty with respect to the continued availability of IRA tax credits and to federal tariffs' impacts on supply chains, as well as timing and adoption of the ZEAS,” saying “[w]e agree with parties that recommend adopting the most conservative estimates in light of these unusually uncertain circumstances, which can negatively impact cost-effectiveness of energy efficiency measures.”⁶ The Commission adopts the more conservative Scenario 2, which anticipates a statewide decrease in TSB in the near term for 2026. The Commission declines to adopt Scenario 3 that assumes increased fuel substitution adoption—acknowledging that the Commission has not yet considered or adopted policy recommendations that would be required to pursue the more aggressive pathway. The Commission also offers a reminder that goals in the decision are a floor rather than a ceiling, and that PAs should strive to exceed their goals.⁷

⁵ D.25-08-034 OP 1, FOF 3.

⁶ D.25-08-034 at 12-13.

⁷ D.25-08-034 at 12-14.

4. D.21-09-037

D.21-09-037 established that non-IOU PAs may propose to revise their goals and savings forecast in the true-up or mid-cycle advice letters, stating that any such proposal must specifically identify the factor(s) impacting the proposed revision. I-REN has revised its goals and savings forecast in this MCAL and has identified factors impacting the proposed revisions as detailed in MCAL sections including but not limited to the following:

- Chapter III Section A. Portfolio Overview
- Chapter III Section B. Summary of Forecasted Portfolio Impacts

5. D.25-xx-xxx (natural gas phase out #2)

Note: at the time of MCAL submittal, the decision on Phase 2 of the natural gas energy efficiency incentives phaseout has not yet been issued by CPUC.

B. Contents of this Filing

The contents of this MCAL are as follows:

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- Attachment D – CEDARS Filing Confirmation

⁸ Please see CEDARS for excel version of Attachment A.

III. Discussion

A. Portfolio Overview

1. Recent CPUC Decision or Guidance Impacting EE Portfolio

CPUC guidance impacting I-REN's portfolio includes recent Resolutions as well as the recent Potential and Goals decision, each of which are described in more detail elsewhere in this MCAL and summarized below.

- D.25-08-034 Decision Adopting Energy Efficiency Goals for 2026-2037: As described in section A. Regulatory Filing Requirements, the Commission's Potential & Goals Study and accompanying decision does not currently set goals for REN PAs. However, I-REN looks to the study and decision for the data and findings included, and for important insights regarding the state's potential for energy efficiency and market conditions affecting PAs' ability to deliver on that potential. In the decision, the Commission acknowledges the "considerable uncertainty" in the energy efficiency landscape at present. I-REN's updated MCAL forecast reflects those challenges as I-REN has observed during program operations over the past year.
- Resolution E-5351 was issued on June 12, 2025, clarifying indicators and reporting timelines. I-REN reviewed the resolution and updated its tracking process and indicators to comply with the resolution. I-REN is well situated to fulfill its obligations to track progress toward the equity and market support indicators with tracking set to begin in Q4 2025 and reporting to occur with the Q4 claims filing, as directed in the resolution. See the Segment Metrics subsection within Chapter IV Energy Efficiency Portfolio Details for additional information on I-REN's segment metrics.
- Resolution E-5387 adopted September 18, 2025, approved I-REN's proposed IDSM activities to begin immediately upon adoption of the resolution.⁹ I-REN proposed an IDSM budget of \$1,620,000 in its advice letter, with IDSM dollars allocated for each year from 2024 through 2027. Due to the timing of the Resolution in 2025, unspent 2024 IDSM budget prior to Advice Letter approval has been reallocated to program years 2026-2027 in the MCAL budget. The IDSM budget for 2025 remains fixed at

⁹ RESOLUTION E-5387 Ordering Paragraph 2.

the TUAL amount as directed in the MCAL guidance. See the IDSM subsection within Chapter IV Energy Efficiency Portfolio Details for additional information on I-REN's IDSM plans.

2. Forecast Approach

I-REN presents an updated total system benefit and energy savings forecast in this MCAL submittal. The I-REN energy efficiency program portfolio includes one resource program designed to deliver energy savings: the Public Buildings Normalized Metered Energy Consumption (Public Sector NMEC) program. This program is within the equity segment of I-REN's portfolio and is designed to target public buildings in hard-to-reach, disadvantaged, and underserved communities, with a special emphasis on community-serving facilities and resilience centers.

I-REN's savings forecast approach takes into account lessons learned from program operations to date, in combination with Commission guidance and implementer experience. The resulting proposed forecast of total system benefit and energy savings is more conservative than the prior TUAL estimates, reflecting a balance between realistic program expectations while setting goals I-REN strives to achieve and exceed if possible. This approach aligns with the Commission's directives in D.25-08-034, regarding the significant level of uncertainty currently impacting energy efficiency markets and savings potential.

This MCAL also includes an updated budget forecast for program years 2026-2027. The approach for updating the budget forecast involved accounting for actual unspent carryover from 2023 as well as actual expenditures and carryover from 2024.¹⁰ Actual year-to-date expenditures for 2025 Q1-2 informed an estimation of expenditures for 2026-2027. Carryover from 2023-2024 was then applied to 2026-2027 to cover remaining vendor contract commitments through December 2027. Program year 2025 budget amounts were maintained according to approved TUAL amounts per CPUC guidance regarding the MCAL template.

The resulting budget forecast reflects shifts within market sectors to align with expected levels of effort to continue pursuing and achieving individual program

¹⁰ Note: I-REN's six-year portfolio period and authorized budget differs from other PAs authorized via D.23-06-055. See Portfolio Budget Summary for additional information.

goals and objectives. The budget forecast also reflects carryover of unspent IDSM dollars that were allocated for 2024 in the TUAL, given the timing of IDSM advice letter approval.

For additional details please see the Portfolio Changes section that follows.

3. Portfolio Changes

I-REN's program portfolio composition remains the same as filed in its business plan application and TUAL, with six existing programs in three sectors: Public, Codes and Standards (C&S), and Workforce Education and Training (WE&T). I-REN's portfolio includes one equity-segment resource program designed to deliver energy savings: the Public Sector Normalized Metered Energy Consumption (NMEC) program.

As of the time of this MCAL submittal, I-REN has not made any updates or corrections to its program segmentation. I-REN's public sector programs are categorized within the equity segment, and its WE&T programs are categorized as market support. I-REN's C&S programs remain separate as previously defined in D.12-05-015.

I-REN's portfolio does not include programs within the resource acquisition segment and thus is not subject to the direction in D.23-06-055 regarding transitioning programs to use NMEC;¹¹ however, I-REN's resource program in the equity segment was already established in the business plan as an NMEC program.

Portfolio changes reflected in this MCAL consist of savings and budget forecast adjustments, as described in the Forecast Approach section. The following sections describe I-REN programs along with relevant changes.

I-REN-CS-001: C&S Training and Education Program

I-REN's Codes & Standards (C&S) Training and Education Program launched in spring 2023 and continues providing trainings tailored to the needs of local AHJs and the building industry to support, understand, and effectively implement energy efficiency codes and standards. The program includes outreach to engage, educate and involve regional construction firms and building departments, and support compliance and enforcement within regional energy

¹¹ D.23-06-055 at 41-42, OP 20.

efficiency programs and customers. The program continues to grow and is now offering regional C&S forums in collaboration with Southern California Edison and other industry experts, and has recently launched Spanish-language simulcasts of C&S trainings.

Changes to the program in this MCAL consist of budget adjustments as described in the Forecast Approach section and accompanying MCAL tables and budget filing.

IREN-CS-002: C&S Technical Support Program

I-REN's Codes and Standards (C&S) Technical Support Program is a non-resource program launched in 2023 to develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance.

Changes to the program in this MCAL consist of budget adjustments as described in the Forecast Approach section and accompanying MCAL tables and budget filing.

IREN-PUBL-001: Technical Assistance and Strategic Energy Planning Program

I-REN's Technical Assistance and Strategic Energy Planning (TA) Program public sector offerings launched in 2023, ramped up to full implementation in 2024, and continues to grow in 2025. I-REN's TA Program offers customized and objective project management, financial, and engineering services through a concierge-style approach that helps agencies meet their climate, energy, and resiliency goals. Program offerings include customized technical assistance for energy efficiency projects from project identification to completion, along with strategic energy planning and benchmarking.

The Program guides public agencies through applicable energy programs, including I-REN's Public Buildings NMEC Program, and has established referral processes in place if a project is better suited to other PAs' offerings in the region such as SoCalREN or SCE. The TA program also provides the operational framework for I-REN's approved IDSM activities to be launched in the months ahead.

Changes to the program in this MCAL consist of budget forecast adjustments as described in the Forecast Approach section and accompanying MCAL tables and budget filing. One important learning from the program's ramp up in recent

years is that public sector customers in I-REN territory are interested in pursuing energy efficiency and integrated demand side management projects, but continue to lack the staff capacity to take on the management of these projects in-house. To address this challenge, I-REN has adjusted its public sector budget to devote additional funding to the TA program for continued support needed to shepherd projects through the Public Buildings Normalized Metered Energy Consumption (NMEC) Program pipeline. I-REN also provides energy fellowships within its Workforce Education & Training offerings, placing fellows at local agencies to serve as energy project champions and work with the public sector programs to help enable projects to move forward.

I-REN-PUBL-002: Public Buildings NMEC Program

I-REN's Public Buildings NMEC Program launched in 2023, ramped up to full implementation in 2024, and continues to grow in 2025. Also known as Cash for Kilowatts, I-REN's NMEC Program is an equity segment resource offering that provides incentives for meter-based savings with a special focus on holistic energy projects at community-serving resiliency facilities.

Changes to the program in this MCAL consist of budget and savings forecast adjustments as described in the Forecast Approach section and accompanying MCAL tables and budget filing. The Cash for Kilowatts Program savings forecasts previously included in I-REN's true-up advice letter (TUAL) are updated now that the program has two years of implementation experience serving the region's Equity customers. Gradual agency uptake, average public agency project timelines, limited public agency capacity and resources, small project sizes, and external factors such as tariffs and federal funding cuts account for a decrease in the electric savings forecast.

Additionally, limitations on the availability of Southern California Gas Company (SCG) gas interval data and the ability to pass NMEC modeling requirements account for a decrease in the gas savings forecast. The incentive budget for program years 2026-2027 is higher than what was reported in the TUAL, as prior unspent budget has been incorporated into the MCAL budget. I-REN plans to continue efforts to incentivize agencies to act via attractive incentive rates and bonus incentives where applicable.

I-REN-WET-001: WE&T Training and Education Program

I-REN's Training and Education Program is a market support segment offering that ramped up in early 2024. I-REN completed an assessment of the current

training marketplace in the Inland Empire and has begun partnering with local providers, including higher education providers, high schools, adult schools, professional training companies, and industry experts to tailor content to be relevant to the region's needs and ensure that disadvantaged communities are a focus.

Changes to the program in this MCAL consist of budget adjustments as described in the Forecast Approach section and accompanying MCAL tables and budget filing.

IREN-WET-002: WE&T Workforce Development Program

I-REN continues to convene and collaborate with state, regional, and local stakeholders, including workforce investment boards (WIBs) and economic development departments to develop a unified mission around the region's energy efficiency workforce, highlighting pathways for job seekers to enter the green jobs market and to increase access for disadvantaged communities.

As part of its workforce development offering, I-REN offers fellowships that place fellows at host cities to implement energy efficiency, resiliency, and climate action plan-related activities within I-REN jurisdictions. Interest in this offering has continued to grow in 2024 and 2025, with increased applications from potential fellows and host agencies. For 2025-2026 I-REN has placed 24 fellows at local jurisdictions for an 11-month term and is adding a new partial-term cohort option for 8-month placements due to increasing interest in recent months.

Crucially, I-REN energy fellows also play a key role in supporting I-REN's equity goals, acting as energy efficiency champions and supporting staff capacity at local agencies to take on public sector energy efficiency projects. Along with increased focus and aligned budget adjustments for the public sector TA program to support the growing pipeline of public sector NMEC projects, I-REN has also adjusted its workforce development budget to accommodate this increased level of interest and support needed.

Changes to the program in this MCAL consist of budget adjustments as described in the Forecast Approach section and accompanying MCAL tables and budget filing.

B. Summary of Forecasted Portfolio Impacts

1. Portfolio Budget Summary

I-REN's portfolio budget summary is presented in the tables that follow. Budgets for 2026 and 2027 have been adjusted as described in the Forecast Approach section.

**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					\$ -
2	Commercial Sector					\$ -
3	Industrial Sector					\$ -
4	Agricultural Sector					\$ -
5	Public Sector			\$34,925,638		\$34,925,638
6	Cross Cutting Sector					
7	Emerging Tech					\$ -
8	WE&T		\$12,425,923			\$12,425,923
9	Finance					\$ -
10	Codes & Standards				\$7,136,490	\$7,136,490
11	Portfolio Support		\$672,385	\$1,725,465	\$375,448	\$2,773,297
12	OBFL Loan Pool					
13	Portfolio Subtotal [2]	\$-	\$13,098,308	\$36,651,103	\$7,511,938	\$57,261,349
	[1] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast.					
	[2] Excludes EM&V and Portfolio Oversight.					

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$-	\$-	\$-	\$-	\$ -
2	Market Support	\$1,265,357	\$3,299,149	\$ 4,915,867	\$ 3,617,935	\$ 13,098,308
3	Equity	\$4,514,208	\$8,397,047	\$11,198,939	\$12,540,910	\$ 36,651,103

4	Codes and Standards	\$943,869	\$1,826,214	\$ 2,246,794	\$ 2,495,060	\$7,511,938
5	EM&V (PA and ED)	\$-	\$563,434	\$765,067	\$777,246	\$2,105,746
6	Total Budget w/o OBF Loan Pool	\$6,723,434	\$14,085,844	\$19,126,667	\$19,431,151	\$59,367,095
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					84%
8	OBF Loan Pool Addition	\$-	\$-	\$-	\$-	\$ -
9	Budget excluding Portfolio Oversight	\$6,723,434	\$14,085,844	\$19,126,667	\$19,431,151	\$59,367,095
10	ED Portfolio Oversight	\$-	\$-	\$-	\$-	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$6,723,434	\$14,085,844	\$19,126,667	\$19,431,151	\$59,367,095
12	Approved Budget Cap ^[4]					\$65,577,932

[4]NOTE: I-REN has a six-year cap, per D.21-11-013 p.21-22 and OP 2; D.23-06-055 Footnote 80 at p.93.

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

Line	Year	PG&E		SDG&E		SCE	SCG
		Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2	2024					5,210,661	1,512,772
3	2025					10,916,529	3,169,315
4	2026					14,823,167	4,303,500
5	2027					15,059,142	4,372,009
6	Total					46,009,499	13,357,596

2. Total System Benefit Forecast

I-REN's updated Total System Benefit (TSB) forecast is presented below.

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					\$-
2	Market Support					\$-
3	Equity	\$101,864	\$572,750	\$621,543	\$842,052	\$2,138,208
4	Total TSB Forecast	\$101,864	\$572,750	\$621,543	\$ 842,052	\$2,138,208
5	CPUC TSB Goal					\$-
6	TSB Forecast / TSB Goal ^[1]	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[1] TSB Goals are set for IOUs, N/A for I-REN

3. Portfolio Cost Effectiveness Forecast

REN PAs are not subject to a cost-effectiveness threshold, as established and reaffirmed by the Commission in numerous decisions.¹² However, I-REN strives to manage its portfolio with an eye toward long-term cost efficiency, while balancing the importance of its mission to serve equity communities.

As the Commission established in D.19-12-021, REN PAs—as local governments—have a unique and appropriate role in energy efficiency program administration, and this role is distinct from other types of PAs. The Commission describes that “[t]he particular areas of unique capacities local governments may bring in the delivery of energy efficiency include, but may not be limited to, public sector buildings, issues surrounding building code compliance, and treating or delivering energy efficiency services to hard-to-reach customers.”

In alignment with Commission guidance, I-REN's portfolio consists of interrelated public sector, codes and standards, and workforce programs that aim to build capacity in the region to sustain an equitable clean energy economy for the long term. Within its portfolio of six programs, I-REN has one program that delivers energy savings: the IREN-PUBL-002: Public Buildings NMEC Program, within the equity sector. This program strongly relies on support from I-REN's other equity segment program, IREN-PUBL-001: Technical Assistance and Strategic Energy Planning Program, as well as the IREN-WET-002: WE&T Workforce Development Program in the market support segment, to supplement local agencies' staff

¹² See, for example, D.12-11-015 COL 14; D.19-12-021 at 37-38; D.21-05-031 COL 8 and 9.

capacity to move NMEC projects forward through I-REN's equity resource program.

In D.23-06-055, the Commission reaffirmed the purpose of equity programs as achieving benefits that cannot as readily be monetized, saying that instead of applying a cost-effectiveness threshold to equity programs, CPUC prefers to assess the specific benefits and outcomes they achieve, whether or not they can be monetized. I-REN's equity segment programs deliver a wide array of comprehensive benefits in addition to energy savings, as described in I-REN's 2024 Annual Report, including non-energy and capacity-building benefits as well as audits identifying millions of dollars in utility bill savings that I-REN's public sector equity programs can help agencies realize. For example, in 2024 I-REN supported 12 agencies (100% of which were underserved and/or HTR agencies) secure over \$1.8 million in Energy Efficiency and Conservation Block Grant (EECBG) funding through targeted support during the application process, which amounted to approximately 30% of all EECBG funds allocated to I-REN member agencies.

The tables in this section present I-REN's updated cost-effectiveness forecast which aligns with the overall approach described earlier in the Forecast Approach and Portfolio Changes section of the MCAL.

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	-	-	-
2		Market Support	-	-	-
3		Equity	0.05	0.06	0.05
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including C&S</i>	0.03	0.04	0.03
6		<i>Excluding C&S</i>	0.04	0.04	0.04

[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	
			Base	High	Base	High	Base	High
1								
2	Segment	Resource Acquisition	-	-	-	-	-	-
3		Market Support	-	-	-	-	-	-
4		Equity	0.07	0.08	0.09	0.09	0.08	0.08
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	<i>Including</i> C&S	0.04	0.05	0.06	0.06	0.05	0.05
7		<i>Excluding</i> C&S	0.05	0.05	0.06	0.07	0.06	0.06

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

Not applicable. I-REN does not currently offer any statewide programs. As a non-utility PA, I-REN is not subject to third-party program compliance requirements, as established in D.16-08-019, Ordering Paragraphs 10, 11, and 12.

5. Market Support and Equity Forecast

I-REN's market support and equity segment budget forecast is shown in the table that follows. Note that REN PA expenditures are not limited to a certain percentage of the portfolio budget, as are IOU and CCA PAs per D.21-05-031 Conclusion of Law 8 and Ordering Paragraph 4.

The RENs are exempted from this requirement because of the nature of their portfolios, which is already different from the other program administrators. RENs, by their nature and primary purposes, are more likely to have a greater share of their portfolio devoted to market support and/or equity programs. Therefore, those portions of their budgets will not be subjected to an up-front limitation.¹³

¹³ D.21-05-031 at 23.

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	\$12,425,923	\$57,261,349	22%	30%
2	Equity	\$34,925,638		61%	
3	Market Support + Equity	\$47,351,561		83%	

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

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

I-REN's Codes & Standards programs contribute to increased code compliance through education and outreach efforts to improve code knowledge. Energy savings achieved through those efforts are currently claimed by the IOU PAs.

7. Non-Advocacy C&S Budget Forecast

I-REN's Codes & Standards programs consist of education, outreach, and technical support for improving code knowledge and compliance. Table 1.1a - MCAL Updated Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 [1]) may be referenced to see I-REN's full C&S budget. I-REN's C&S programs are non-advocacy and non-IOUs are not subject to the cumulative cap.

IV. Energy Efficiency Portfolio Details

A. Segment Metrics

D.23-06-055 adopted objectives and indicators for the equity and market support segments and designated how often indicators should be reported (quarterly or annually) and at what level (segment or whole portfolio). I-REN was an active participant in the Equity and Market Support Working Group formed by the California Energy Efficiency Coordinating Committee to clarify the indicators through a stakeholder process, and joined with other PAs and stakeholders to draft the resulting May 1, 2024 joint PA advice letter (I-REN Advice Letter 5-E/5-G) as ordered in D.23-06-055 Ordering Paragraph 11. The

joint PA advice letter clarified the equity and market support indicators, proposed changes to the common metrics adopted in D.18-05-041, recommended a methodology to determine indicator baselines, and laid out a suggested schedule for tracking and reporting of equity and market support indicators and updated common metrics and indicators.

I-REN worked proactively in 2024 to adopt an internal framework—including methodology and data collection resources and processes—to prepare for tracking these indicators in anticipation of the forthcoming resolution from CPUC and reporting requirements to follow. Resolution E-5351 was issued on June 12, 2025 clarifying indicators and reporting timelines. I-REN reviewed the resolution and updated its tracking process and indicators to comply with the resolution.

I-REN is well situated to fulfill its obligations to track progress toward equity and market support indicators with tracking set to begin in Q4 2025 and reporting to occur with the Q4 claims filing, as directed in the resolution. Relatedly, I-REN has also been an active participant in the joint PA effort to develop equity and market support goal constructs, as directed by D.23-06-055 Ordering Paragraph 25. This effort began in 2024 and the joint advice letter (I-REN Advice Letter 7-E/7-G) was submitted on August 1, 2025.

I-REN anticipates reporting on equity and market support indicators including but not necessarily limited to those shown below. I-REN may also continue to track select metrics and indicators that were paused or discontinued in the resolution, if helpful for internal purposes, e.g., number of collaborations to jointly develop or share training materials or resources.

I-REN Equity & Market Support (MS) Segment Indicators

Indicator Description	Codes & Standards (C&S)	Public Sector (Equity)	Workforce Edu. & Training (MS)
Equity			
Count of equity target participants in equity segment, by sector		✓	
Sum of equity target participants' expected first-year bill savings in equity segment, by sector		✓	
Count of equity target participants in market support segment, by sector			✓

Indicator Description	Codes & Standards (C&S)	Public Sector (Equity)	Workforce Edu. & Training (MS)
Count of equity target participants in resource acquisition segment, by sector		✓	
Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment		✓	
Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment		✓	
Sum of all equity segment participants' kW savings in equity segment		✓	
Sum of all equity segment participants' therm savings in equity segment		✓	
Sum of all equity segment participants' TSB in equity segment		✓	
Median of equity target participants' expected first-year bill savings in equity segment, by sector		✓	
Percent of equity target participants in equity segment, by sector		✓	
Market Support			
Number of partners by type and purposes			✓
Number of unique participants by sector that complete training	✓		✓
Percentage of partners that have taken action supporting energy efficiency by type			✓
Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency	✓		✓
Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships	✓		✓
Assessed value of the partnership by partners			✓
Percent of participation relative to eligible target population for curriculum	✓		✓

Indicator Description	Codes & Standards (C&S)	Public Sector (Equity)	Workforce Edu. & Training (MS)
Percent of total WE&T program participants that meet the definition of disadvantaged worker			✓

B. Program Changes

I-REN has updated its budget and savings forecast as outlined in the Portfolio Overview section and is not introducing new programs or making changes to its existing portfolio.

C. Program Closures

1. Programs Closed between TUAL and MCAL

I-REN has not closed any programs between TUAL and MCAL.

2. Programs to be Closed in 2026-2027

I-REN has no current plans to close any programs.

3. Programs to be Closed Upon Completion of Commitments

I-REN has no current plans to close any programs.

D. EM&V (2024-2027)

I-REN developed a draft workplan for Evaluation, Measurement, & Verification (EM&V) of its programs and published the draft workplan for public comment on May 14, 2025. I-REN's EM&V plan outlines six research studies, two per sector. These studies, conducted in partnership with California State University, San Bernardino, will guide program improvements, expand participation, and strengthen equity and workforce outcomes.

After publishing the final workplan¹⁴ on June 18, 2025, I-REN launched its evaluation studies. As those studies progress, findings are used to assess past

¹⁴ [I-REN Evaluation, Measurement, & Verification Plan for 2022-2027 Energy Efficiency Portfolio](#), June 18, 2025.

performance and inform continuous improvement of program as well as guide strategic planning for I-REN's forthcoming Business Plan Application filing in 2026.

Note: the table below includes zeroes, per instructions in the Joint PA and Energy Division MCAL template. I-REN's EM&V budget is shown in the accompanying MCAL spreadsheet.

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

Year	PA	Total Budget w/o EM&V	EM&V Total	EM&V CPUC	EM&V PA	Total Budget w/ EM&V
2024	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2024	IOU share of ED Portfolio Oversight	0	0	0	0	0
2024	ADD RENs (IOUs only)	0	0	0	0	0
2025	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2025	IOU share of ED Portfolio Oversight	0	0	0	0	0
2025	ADD RENs (IOUs only)	0	0	0	0	0
2026	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2026	IOU share of ED Portfolio Oversight	0	0	0	0	0
2026	ADD RENs (IOUs only)	0	0	0	0	0
2027	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2027	IOU share of ED Portfolio Oversight	0	0	0	0	0
2027	ADD RENs (IOUs only)	0	0	0	0	0
	Total	0	0	0	0	0

E. Cost Recovery

Not applicable to REN PAs.

1. Unspent Funds

As described in the Background section of this MCAL and in the prior TUAL submittal, I-REN's portfolio period is unique in that I-REN is funded for 2022-2027, as noted in D.23-06-055.¹⁵ In D.21-05-031, after I-REN's business plan submittal and prior to its approval, the Commission established a new paradigm that eliminated the annual funding authorization process, instead authorizing a four-

¹⁵ D.23-06-055 at 93, footnote 80: I-REN did not file an application as part of this proceeding because its 2022-2027 budget was already approved in D.21-11-013. I-REN's budget is included here for completeness only, as I-REN's total authorized budget cap is \$65,577,932 over the funding period of 2022-2027.

year portfolio period in which PAs can consider their budgets to be fungible across the portfolio period.¹⁶ In D.21-11-013 the Commission specifically addressed the unique situation of I-REN's funding period vis a vis the other PAs and the new guidance in D.21-05-031:

In this case, we are considering the initial I-REN business plan near the end of 2021. Given this timing, it would be unreasonable to require I-REN to file another business plan only a few months later in February 2022 along with the other program administrators, as required by D.21-05-031.

...In addition, we appreciate that I-REN and its local government sponsors have invested significant effort in developing and vetting the business plan proposal before us now, and we therefore intend to consider it fully in this decision. As discussed further below in this decision, we intend to fund a significant effort for I-REN. As with previous REN and non-REN program administrators, it often takes time for new program administrators and programs to ramp up and begin to deliver benefits to customers, and it is only fair to give I-REN the opportunity to hit its stride before asking it to make another portfolio filing.

For all of these reasons, we choose Option 2, funding I-REN's efforts through the end of 2027. We also note that the business plans of the other program administrators were originally approved for an eight-year period in 2018, and we are moving toward a four-year portfolio funding approach consistent with D.21-05-031. Therefore, approving I-REN for a six-year period splits the difference and allows for a reasonable transition to the new paradigm, given that I-REN's proposal was filed under the prior rules.¹⁷

Based on the guidance in D.21-05-031, D.21-11-013, and D.23-06-055, on October 16, 2023 I-REN submitted its TUAL (I-REN Advice Letter 3-E/3-G) with budget forecast revisions that included rolling over actual and forecasted unspent funds from 2022-2023, allocating funding for integrated demand-side management (IDSM), and distinguishing between program implementation costs and portfolio administration PA costs. I-REN also updated its savings and total system benefit forecasts at that time, informed by updated inputs from I-REN's implementer contracted for its equity-segment resource program. I-REN's

¹⁶ D.21-05-031 at 31.

¹⁷ D.21-11-013 at 10-11.

TUAL was accepted by CPUC as of February 7, 2024 with effective date November 15, 2023.

At the time of TUAL submittal, 2023 had not yet come to a close, so I-REN relied upon forecasted spent vs. unspent for the TUAL budget adjustments to 2024-2027. Now, as part of the MCAL submittal and budget adjustments, I-REN's actual expenditures from 2023 as well as 2024 are known and unspent is fully accounted for in the MCAL budget forecast updates for 2026-2027.

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

Line		PY 2022	PY 2023	PY 2024	TOTAL 2017-2024
1	Unspent & Uncommitted	\$ 8,873,621.00	\$ 4,992,240.00	\$ 4,285,513.00	\$ 18,151,374.00
2	EM&V	\$ 114,441.00	\$ 115,604.00	\$ 458,706.00	\$ 688,751.00
3	Total	\$ 8,988,062.00	\$ 5,107,844.00	\$ 4,744,219.00	\$ 18,840,125.00
4	Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2025 Rate Offset				
5	EM&V - PA Funds	\$ 31,471.28	\$ 31,791.10	\$ 126,144.15	\$ 189,407
6	EM&V - CPUC Funds	\$ 82,969.73	\$ 83,812.90	\$ 332,561.85	\$ 499,344
7	IOU Program Funds	\$ 8,873,621.00	\$ 4,992,240.00	\$ 4,285,513.00	\$ 18,151,374
8	Total	\$ 8,988,062.00	\$ 5,107,844.00	\$ 4,744,219.00	\$ 18,840,125

2. Integrated Demand-Side Management (IDSM) Budget

D.23-06-055 created an option for PAs to allocate up to 2.5 percent or \$4 million of their energy efficiency budgets to provide an operational complement for integrated demand side management (IDSM) in 2024-2027, for programs proposed via Tier 2 advice letter in March 2024.

In its IDSM Advice Letter (I-REN Advice Letter 4-E/4-G) submitted March 14, 2024, I-REN proposed to expand its technical assistance service offerings to include non-energy efficiency DER measures, to provide I-REN member agencies with comprehensive unbiased support from a trusted advisor and “go-to” resource to help make informed holistic energy decisions. Expanded technical assistance services include comprehensive project support offerings such as integrated DER audits, performance specifications, procurement support, funding and financing analyses and application support, and construction support for DER measures.

Additionally, I-REN will integrate DER capacity building in the region through engagement and outreach activities through workshops, webinars, and case studies to increase public sector awareness and pursuit of resilient permanent load shedding opportunities. Through this expansion, I-REN agencies will unlock new opportunities to fund and finance energy and resilience projects, resulting in realized energy and cost savings and improved resilience and operations, thereby creating an overall more resilient community and Inland region.

Resolution E-5387 adopted September 18, 2025 approved I-REN's proposed IDSM activities to begin immediately upon adoption of the resolution.¹⁸ I-REN proposed an IDSM budget of \$1,620,000 in its advice letter, with IDSM dollars allocated for each year from 2024 through 2027. Due to the timing of the Resolution in 2025, unspent 2024 IDSM budget prior to Advice Letter approval has been reallocated to 2026-2027 in the MCAL budget. The IDSM budget for 2025 remains fixed at the TUAL amount as directed in the MCAL guidance.

I-REN IDSM Budget

Technical Assistance IDSM Budget	2024	2025	2026	2027	Total
DER Audits	0	25	30	45	100
IDSM Budget	0	\$405,000	\$515,000	\$ 700,000	\$1,620,000

Estimated TA cost/DER audit: \$16,200

F. CEDARS Discrepancies (optional)

I-REN is not aware of any CEDARS discrepancies at this time.

V. List of Attachments

Attached hereto are the following:

- Attachment A – Appendices from Excel Template in PDF
- Attachment B – Community Engagement Indicators Results
- Attachment C – PA Response to Recommendations
- Attachment D – CEDARS Filing Confirmation

¹⁸ RESOLUTION E-5387 Ordering Paragraph 2.

VI. Protest

Anyone may protest this Advice Letter. The Protest must state the grounds upon which it is based. The Protest must be made in writing and received by the Commission within 20 days of the date this Advice Letter was filed with the Commission, or November 24, 2025. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

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

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

Casey Dailey
Director of Energy & Environmental Programs
Western Riverside Council of Governments
1955 Chicago Avenue
Suite 200
Riverside, California 92507
Office: (951) 405-6720
E-mail: cdailey@wrcog.us

VII. Effective Date

I-REN requests that this Tier 2 advice filing become effective on regular notice December 4, 2025, which is 30 calendar days from the date of this filing.

VIII. Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically to service lists for R.13-11-005, A.22-02-005, and R.25-04-010 and uploaded to the CPUC Energy Division Advice Letter database (cpucadviceletters.org). Address changes to the General Order 96-B service list should be directed to Casey Dailey at cdailey@wrcog.us or by calling (951) 405-6720. For changes to all other 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/ Chris Gray_____

Chris Gray
Deputy Executive Director
Western Riverside Council of
Governments (WRCOG)
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iren.gov

Inland Regional Energy Network (I-REN)
Advice Letter 8-E/8-G
2024-2027 Mid-Cycle Advice Letter
Attachment A – Appendices from Excel Template in
PDF

We are a network of partners, including the Coachella Valley Association of Governments, the San Bernardino Council of Governments, and the Western Riverside Council of Governments, formed to serve the cities and communities of our region.



Please note that I-REN has a unique, 6-year portfolio period and budget cap, per D.21-11-013 p.21-22 and OP 2, and D.23-06-055 footnote 80 at p.93. I-REN's portfolio cycle began in 2022 and ends with 2027. Because the 2023 TUAL required a forecast of total spend for PY2023, the underspend resulting from the 2023 forecast minus the 2023 actuals has been accounted for in this MCAL. For additional details please see MCAL narrative and other tabs in this budget filing spreadsheet.

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

Line	Budget Category	Resource Acquisition	Market Support	Equity	Codes & Standards	Total
1	Residential Sector	\$ -	\$ -	\$ -	\$ -	\$ -
2	Commercial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ -	\$ -	\$ -
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WEAT	\$ -	\$ -	\$ -	\$ -	\$ -
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ -	\$ -
11	Portfolio Support	\$ -	\$ -	\$ -	\$ -	\$ -
12	CMF Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal [2]	\$ -	\$ -	\$ -	\$ -	\$ -

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

Line	Budget Category	Resource Acquisition	Market Support	Equity	Codes & Standards	Total
1	Residential Sector	\$ -	\$ -	\$ -	\$ -	\$ -
2	Commercial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ -	\$ -	\$ -
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WEAT	\$ -	\$ -	\$ -	\$ -	\$ -
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ -	\$ -
11	Portfolio Support	\$ -	\$ -	\$ -	\$ -	\$ -
12	CMF Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal [2]	\$ -	\$ -	\$ -	\$ -	\$ -

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

Line	Budget Category	Resource Acquisition	Market Support	Equity	Codes & Standards	Total
1	Residential Sector	\$ -	\$ -	\$ -	\$ -	\$ -
2	Commercial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ -	\$ -	\$ -
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WEAT	\$ -	\$ -	\$ -	\$ -	\$ -
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ -	\$ -
11	Portfolio Support	\$ -	\$ -	\$ -	\$ -	\$ -
12	CMF Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal [2]	\$ -	\$ -	\$ -	\$ -	\$ -

Table 1.2a - MCAL Total Cost Recovery Request, Including RENECCA and Other Costs (DOU Only)

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

[1] Funding reserved for EE technical consultants pursuant to D 23-06-05 OP 9

[2] Rural REN was split into two RENs in D 24-09-01 and budgets were adjusted to account for split and timing of when REN started

Table 1.2b - TUAL Total Cost Recovery Request, Including RENECCA and Other Costs (DOU Only)

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

[1] Funding reserved for EE technical consultants pursuant to D 23-06-05 OP 9

[2] Rural REN was split into two RENs in D 24-09-01 and budgets were adjusted to account for split and timing of when REN started

Table 1.2c - Change Total Cost Recovery Request, Including RENECCA and Other Costs (DOU Only)

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

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

Line	Spending Budget & Cost Recovery Request	2023 Unspent Funds	2024	2025	2026	2027	2024-2027
1	DOU (excluding fuel substitution budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	DOU Budget forecasted to support fuel substitution	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	Total cost recovery request for DOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	DOU Pre-2024 Estimated Unspent & Uncommitted Funds to Offset 2024-2027 Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	Total Cost Recovery Request for DOU Portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	Available electric and gas	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	Electric portion for cost recovery including fuel substitution	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	Gas portion for cost recovery including fuel substitution	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	Total electric portion for cost recovery for DOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Total gas portion for cost recovery for DOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total DOU portfolio cost recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Electric and gas cost recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	Gas cost recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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

Line	Unspent & Uncommitted	PY 2027	PY 2028	PY 2029	PY 2030	PY 2031	PY 2032	PY 2033	PY 2034	TOTAL 2027-2034
1	EMV	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	EMV	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	Unspent & Uncommitted Pre-2023 EMV and IDU Program Funds for 2024-2027 Rate Offset	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	EMV - PA Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	EMV - CCA Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	IDU Program Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Please see notes on Table 1.6 below regarding IREN's unique portfolio period and unspent funding carryover.

Table 1.5 - 4 Year Funding Sources - RENECCA (RENECCA Only)

Line	Year	PG&E Electric \$	Gas \$	SDGRE Electric \$	Gas \$	SC Electric \$	Gas \$
1	2024	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	2025	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	2026	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	2027	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Table 1.6 - Mid-Cycle Asset Letter Funding Breakdown (All PA)

Line	Year	2024 Reported Expenditures	2024 Carryover Funding	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset	2024-2027 Funding Total
1	2024	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	2025	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	2026	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	2027	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[1] Funding committed in 2024 but not yet spent will be carried forward into future years of the funding cycle as funding that is being internally moved to future years. Additionally, since IREN's portfolio cycle began in 2022, and the 2023 TUAL required a forecast of total spent for PY2023, the interperiodally restocking from the 2023 forecast minus the 2023 actuals has also been included in the carryover. 2,415,779 is carried over from 2022, while 4,344,218 is carried over from 2024. 56% of both years unspent was carried over to 2025 and 44% was carried over to 2027.

[2] Does not include actual expenditures from 2023 and 2022 which align with IREN's six-year funding cycle.

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

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 101,864	\$ 572,750	\$ 621,543	\$ 842,052	\$ 2,138,209
4	Total TSB Forecast	\$ 101,864	\$ 572,750	\$ 621,543	\$ 842,052	\$ 2,138,209
5	CPUC TSB Goal					\$ -
6	<i>TSB Forecast / TSB Goal^[1]</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[1] TSB Goal set in decion D.25-08-034. NOTE: the CPUC Potential & Goals Study and Decision do not set goals for RENs.

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	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 172,737	\$ 572,750	\$ 741,243	\$ 955,931	\$ 2,442,661
4	Total TSB Forecast	\$ 172,737	\$ 572,750	\$ 741,243	\$ 955,931	\$ 2,442,661
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -	\$ -
6	<i>TSB Forecast / TSB Goal^[2]</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016. NOTE: the CPUC Potential & Goals Study and Decision do not set goals for RENs.

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	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ (70,873)	\$ -	\$ (119,700)	\$ (113,879)	\$ (304,452)
4	Total TSB Forecast	\$ (70,873)	\$ -	\$ (119,700)	\$ (113,879)	\$ (304,452)
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -	\$ -
6	<i>TSB Forecast / TSB Goal^[3]</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[3] Difference in % of goals achieved from the TUAL to the MCAL. NOTE: the CPUC Potential & Goals Study and Decision do not set goals for RENs.

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 ^[2]					-
3	<i>GWh Forecast/Target</i>					<i>#DIV/0!</i>
4	MW Forecast					-
5	MW CPUC Target ^[3]					-
6	<i>MW Forecast/Target</i>					<i>#DIV/0!</i>
7	MMThm Forecast					-
8	MMThm CPUC Target ^[4]					-
9	<i>MMThm Forecast/Target</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[1] TSB Goal set in decion D.25-08-034. NOTE: the CPUC Potential & Goals Study and Decision do not set goals for RENs. Note also that savings related to REN C&S programs are currently claimed by IOU PAS.

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 ^[1]					-
2	GWh CPUC Target ^[2]					-
3	<i>GWh Forecast/Target</i>					<i>#DIV/0!</i>
4	MW Forecast					-
5	MW CPUC Target ^[3]					-
6	<i>MW Forecast/Target</i>					<i>#DIV/0!</i>
7	MMThm Forecast					-
8	MMThm CPUC Target ^[4]					-
9	<i>MMThm Forecast/Target</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016. NOTE: the CPUC Potential & Goals Study and Decision do not set goals for RENs. Note also that savings related to REN C&S programs are currently claimed by IOU PAS.

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 ^[1]	-	-	-	-	-
2	GWh CPUC Target ^[2]	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	0%	0%	0%	0%	<i>#DIV/0!</i>
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target ^[3]	-	-	-	-	-
6	<i>MW Forecast/Target</i>	0%	0%	0%	0%	<i>#DIV/0!</i>
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[4]	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[3] Difference in % of goals achieved from the TUAL to the MCAL. NOTE: the CPUC Potential & Goals Study and Decision do not set goals for RENs. Note also that savings related to REN C&S programs are currently claimed by IOU PAS.

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	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ 1,265,357	\$ 3,299,149	\$ 4,915,867	\$ 3,617,935	\$ 13,098,308
3	Equity	\$ 4,514,208	\$ 8,397,047	\$ 11,198,939	\$ 12,540,910	\$ 36,651,103
4	Codes and Standards	\$ 943,869	\$ 1,826,214	\$ 2,246,794	\$ 2,495,060	\$ 7,511,938
5	EM&V (PA and ED)	\$ -	\$ 563,434	\$ 765,067	\$ 777,246	\$ 2,105,746
6	Total Budget w/o OBF Loan Pool	\$ 6,723,434	\$ 14,085,844	\$ 19,126,667	\$ 19,431,151	\$ 59,367,095
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					84%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 6,723,434	\$ 14,085,844	\$ 19,126,667	\$ 19,431,151	\$ 59,367,095
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 6,723,434	\$ 14,085,844	\$ 19,126,667	\$ 19,431,151	\$ 59,367,095
12	Approved Budget Cap^[4]					\$ 65,577,932

[4] NOTE: I-REN has a six-year cap, per D.21-11-013 p.21-22 and OP 2; D.23-06-055 Footnote 80 at p.93.

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ 2,979,532	\$ 3,299,149	\$ 3,374,649	\$ 3,418,519	\$ 13,071,849
3	Equity	\$ 6,288,477	\$ 8,397,047	\$ 9,292,014	\$ 10,343,585	\$ 34,321,123
4	Codes and Standards	\$ 1,740,936	\$ 1,826,214	\$ 1,850,278	\$ 1,862,863	\$ 7,280,292
5	EM&V (PA and ED)	\$ 458,706	\$ 563,434	\$ 604,873	\$ 651,040	\$ 2,278,053
6	Total Budget w/o OBF Loan Pool	\$ 11,467,652	\$ 14,085,844	\$ 15,121,814	\$ 16,276,007	\$ 56,951,316
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					83%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 11,467,652	\$ 14,085,844	\$ 15,121,814	\$ 16,276,007	\$ 56,951,316
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 11,467,652	\$ 14,085,844	\$ 15,121,814	\$ 16,276,007	\$ 56,951,316

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ (1,714,175)	\$ 0	\$ 1,541,218	\$ 199,416	\$ 26,459
3	Equity	\$ (1,774,270)	\$ (0)	\$ 1,906,925	\$ 2,197,325	\$ 2,329,980
4	Codes and Standards	\$ (797,067)	\$ (0)	\$ 396,516	\$ 632,197	\$ 231,646
5	EM&V (PA and ED)	\$ (458,706)	\$ 0	\$ 160,194	\$ 126,206	\$ (172,306)
6	Total Budget w/o OBF Loan Pool	\$ (4,744,218)	\$ 0	\$ 4,004,853	\$ 3,155,144	\$ 2,415,779
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					98%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (4,744,218)	\$ 0	\$ 4,004,853	\$ 3,155,144	\$ 2,415,779
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (4,744,218)	\$ 0	\$ 4,004,853	\$ 3,155,144	\$ 2,415,779

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	-	-	-
2		Market Support	-	-	-
3		Equity	0.05	0.06	0.05
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.03	0.04	0.03
6		<i>Excluding</i> C&S	0.04	0.04	0.04

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

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	-	-	-
2		Market Support	-	-	-
3		Equity	0.06	0.07	0.07
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.04	0.04	0.04
6		<i>Excluding</i> C&S	0.04	0.05	0.05

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	-	-	-
2		Market Support	-	-	-
3		Equity	(0.00)	(0.01)	(0.02)
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	(0.00)	(0.01)	(0.01)
6		<i>Excluding</i> C&S	(0.00)	(0.01)	(0.01)

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	-	-	-	-	-	-
3		Market Support	-	-	-	-	-	-
4		Equity	0.07	0.08	0.09	0.09	0.08	0.08
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	<i>Including</i> C&S	0.04	0.05	0.06	0.06	0.05	0.05
7		<i>Excluding</i> C&S	0.05	0.05	0.06	0.07	0.06	0.06

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]		\$ 56,951,316	0%	20%
2	Third-party ^[2]		\$ 56,951,316	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

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

Change

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

Line	Budget Category	Expenditures			Performance		
		(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget ^[6]	(e) Cap Percentage	(f) Target %
1	Administrative Costs						
2	PA ^[1]	\$ 6,516,823		\$ 6,516,823	11.3%		
3	Non-PA Third Party & Partnership ^[2]	\$ -		\$ -	0.0%		
4	PA & Non-PA Target Exempt Programs ^[3]			\$ -			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 2,311,663		\$ 2,311,663	4.0%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 10,750,000		\$ 10,750,000			
9	Non Incentives and Non Rebates	\$ 36,062,862		\$ 36,062,862	62.4%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)			\$ -			
11	EM&V Costs (PA and ED) ^[4]	\$ 2,105,746	\$ -	\$ 2,105,746	3.6%		
11a	EM&V - PA	\$ 579,080		\$ 579,080			
11b	EM&V - ED	\$ 1,526,666		\$ 1,526,666			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 57,747,095	\$ -	\$ 57,747,095			
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) ^[6]			\$ 57,747,095			
16	ED Portfolio Oversight ^[10]			\$ -			
17	EE-Funded IDSM						
	Multi-DER IDSM ^[7]	\$ 1,620,000		\$ 1,620,000			
18	PA Spending Budget Request			\$ 59,367,095			

[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.



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Inland Regional Energy Network (I-REN)
Advice Letter 8-E/8-G
2024-2027 Mid-Cycle Advice Letter
Attachment B – Community Engagement Indicators
Results

We are a network of partners, including the Coachella Valley Association of Governments, the San Bernardino Council of Governments, and the Western Riverside Council of Governments, formed to serve the cities and communities of our region.



Community Engagement Indicators Findings and Recommendations Memo

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

July 31, 2025

Prepared by BluePoint Planning

Background

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

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

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

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

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

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

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

Introduction

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

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

¹ D.23-06-055 at 67-69.

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

Purpose for Indicators

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

Long-Term Outcomes

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

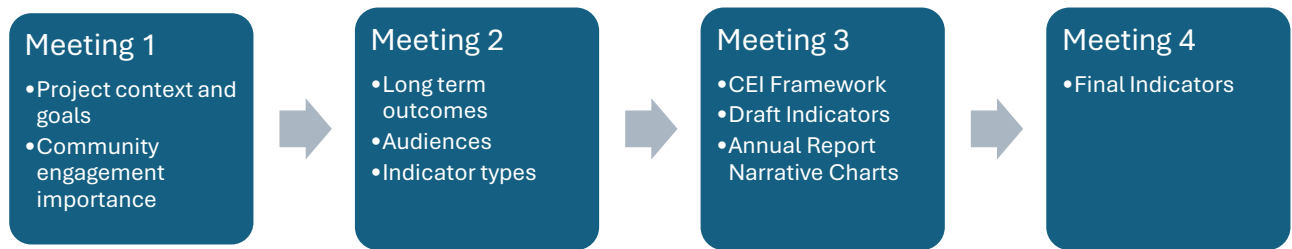
- **Relevance** – Programs are designed to address community needs while being accessible to participants.
- **Trust** – A continued relationship and sense of trust is fostered between engagement audiences (including program participants) and the PA / third party (3P) implementers.
- **Impact** – Equity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

Overarching PA Considerations and Concerns

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

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

Portfolio Administrators Engagement Process



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

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

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

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

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

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

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

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

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

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

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

Engagement Audiences

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

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

Indicator Types

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

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

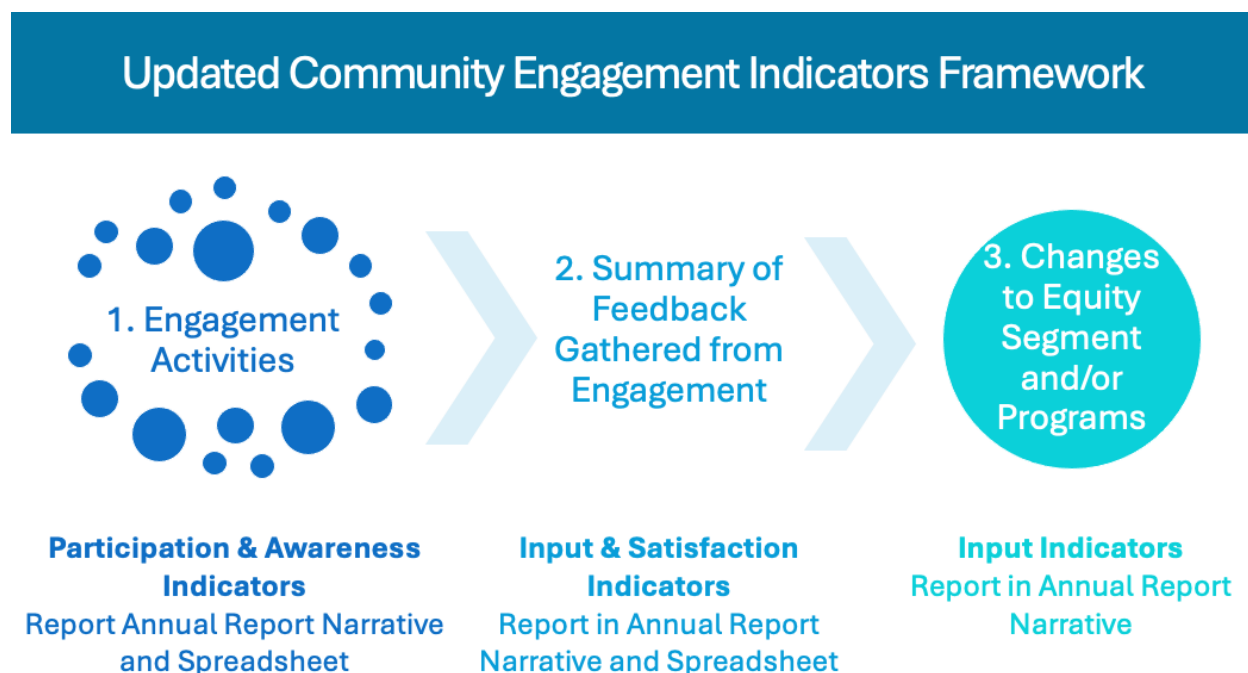
Input (qualitative and quantitative) – The amount and quality of feedback from program audience members, including changes to program design based on that feedback.

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

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

Indicator Framework

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



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

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

Indicator List

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

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

Consensus Indicators

The following four indicators received support from all PAs.

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

Non-Consensus Indicators

The following indicators received mixed support from PAs.

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

Best Practices

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

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

Reporting

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

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

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

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

Key Definitions

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

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

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

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

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

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

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

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

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

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

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

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

Appendix – OP24 Implementation Survey Results

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

Summary of Survey Results

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

Survey Results

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



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



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



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



6. Treatment of non-consensus indicators?



Agreed Upon Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No
Engagement Activities							
Participation	Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context for PAs to add about their engagement activities	Provide context to the overall annual engagement for the equity segment each year.	Summary Narrative	Description of engagement activities relevant to equity segment, including types of activities conducted, number of activities, audiences targeted, number of people reached, outreach methods, and any additional context, such as using trusted messengers, using appropriate language, or providing supports to participants, like gift cards and food.	Annual Report Narrative	12	0
Summary of Feedback							
Input	Number of people who provided feedback relevant to the equity segment	Track the number of people who provided equity segment feedback. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people who provided feedback relevant to the equity segment during engagement activities.	Annual Report Spreadsheet	12	0
Input	Feedback themes from engagement activities relevant to the equity segment	Understand input from engagement activities related to the equity segment to then help make program changes if needed.	List of key themes	List of key themes sentences from all equity segment engagement activities feedback in the Annual Report Key Themes Chart.	Annual Report Narrative	12	0
Changes to Program							
Input	Changes to equity segment program design as needed, based on feedback	Ensure feedback for equity segment programs is informing equity segment programming.	Summary Narrative	Thematic summary of description of changes that were addressed and incorporated into equity segment programs in the Annual Report Program Changes Chart.	Annual Report Narrative	12	0
Additional Potential Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No
Engagement Activities							
Participation	Number of people in all engagement activities relevant to the equity segment	Track equity segment engagement. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people in all engagement activities relevant to the equity segment annually.	Annual Report Spreadsheet	7	5
Participation	People in partners' engagement activities relevant to the equity segment	Understand how effective partners are in engaging and building trust with equity segment populations.	Percent	Percentage determined by the number of participants in partners' engagement activities divided by the number of participants in all engagement activities. Partners would be required to track their engagement numbers.	Annual Report Spreadsheet	6	6
Input	Funding for partners' engagement activities related to the equity segment	Assess how funding correlates with how effective partners are in engaging and building trust with equity segment population.	Dollars	Amount of money spent to fund partners' engagement activities related to equity segment. Funding includes stipends, grants, contracts, etc. to support partners' engagement for equity segment.	Annual Report Spreadsheet	6	6
Awareness	People reached through online, telephone, or other outreach for the equity segment	Assess awareness of equity programs from equity segment population.	Percent	Percentage of emails opened from email campaign, rate of social media clicks, likes and shares, or percentage of text campaigns clicked in equity segment outreach.	Annual Report Spreadsheet	6	6
Awareness	Equity segment inquiries	Assess awareness of equity programs from equity segment population.	Count	Total number of unique submissions of interest forms on websites, number of calls, number of emails, or forms for more information across all equity segment programs. Note: Using unique QR codes on materials and webpages to track inquiries is recommended.	Annual Report Spreadsheet	7	5
Summary of Feedback							
Satisfaction	Equity segment participant satisfaction survey responses	Provides the count of surveys.	Count	Total number of completed surveys.	Annual Report Spreadsheet	6	6
Satisfaction	Rating from equity segment participant satisfaction surveys	Understand participant satisfaction with equity segment programs.	Numerical Rating	Average post-participation satisfaction rating for equity segment and/or programs using standard rating system of 1 (poor) to 5 (excellent).	Annual Report Spreadsheet	6	6

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

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

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



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Inland Regional Energy Network (I-REN)
Advice Letter 8-E/8-G
2024-2027 Mid-Cycle Advice Letter
Attachment C – PA Response to Recommendations

We are a network of partners, including the Coachella Valley Association of Governments, the San Bernardino Council of Governments, and the Western Riverside Council of Governments, formed to serve the cities and communities of our region.



CALMAC ID	Study Name	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	(PA Response)	PA Response Notes	Proposed RTR Implementation				
				Choose:	Examples:	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 equity-focused multipliers that target low-income participants, DACs, and environmental justice areas	All RENs	Accepted	I-REN's public sector programs aim to support CPUC policies and the state's decarbonization goals by incentivizing deep, holistic energy saving projects at critical community facilities. I-REN's Technical Assistance program works with agencies to identify all energy efficiency opportunities available at their facilities to ensure agencies are electrification-ready. In addition, I-REN offers varying levels of incentives based on the depth of savings and whether the facility serves a critical community need. I-REN's incentive program offers an normalized metered energy consumption (NMEC) pathway, in which electrification measures can be incentivized if they meet California NMEC Rulebook guidelines. Both programs are Equity programs, focused on serving underserved and hard-to-reach customers.	Implement programs as planned	Ongoing	In Progress		IREN-PUBL-001 IREN-PUBL-002
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	Other	N/A. I-REN does not currently offer residential sector programs.	N/A	N/A	N/A	N/A	N/A
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	I-REN is in close coordination with other utilities and stakeholders that implement Public Sector programs, including leading recurring Portfolio Administrator Sector Coordination (PASC) meetings to share best practices and identify opportunities for collaboration and alignment. In addition, I-REN and SoCalREN hold bi-monthly coordination meetings to discuss their public sector programs and ensure no duplication of program services. REN also collaborates with the IOUs servicing the I-REN region (SCE and SCG) to promote IOU-led party programs for the sectors I-REN does not administer in its current portfolio.	PASC meetings will be continue to be held each quarter and in alignment with guidelines established in JCMs. Bimonthly coordination meetings with SoCalREN will continue to be held.	Quarterly/bimonthly.	In Progress		IREN-PUBL-001 IREN-PUBL-002 IREN-CS-001 IREN-CS-002 IREN-WET-001 IREN-WET-002*
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	I-REN's representatives attend sector-specific coordination meetings as defined in the JCMs. During such meetings, I-REN directs program implementer representatives to lead any action items or next steps identified during the meetings. All meeting minutes and action items are documented and made available to future evaluators. I-REN will consider adding a RACI table to its program implementation plans where applicable.	PASC meetings will be continue to be held each quarter and in alignment with guidelines established in JCMs.	Quarterly/bimonthly.	In Progress		IREN-PUBL-001 IREN-PUBL-002 IREN-CS-001 IREN-CS-002 IREN-WET-001 IREN-WET-002*
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	N/A. I-REN does not currently offer residential sector programs.	N/A	N/A	N/A	N/A	N/A



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Inland Regional Energy Network (I-REN)
Advice Letter 8-E/8-G
2024-2027 Mid-Cycle Advice Letter
Attachment D – CEDARS Filing Confirmation

We are a network of partners, including the Coachella Valley Association of Governments, the San Bernardino Council of Governments, and the Western Riverside Council of Governments, formed to serve the cities and communities of our region.



CEDARS FILING SUBMISSION RECEIPT

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

PA: Inland Regional Energy Network (IREN)

Budget Filing Year: 2027

Submitted: 09:56 on 04 Nov 2025

By: Jesse Farber-Eger

Advice Letter Number: 8-E/8-G

* Portfolio Budget Filing Summary *

- TRC: 0.04
- PAC: 0.04
- TRC (no admin): 0.16
- PAC (no admin): 0.19
- RIM: 0.04
- SCB: 0.06
- SCH: 0.06
- Budget: \$19,431,150.35
- TotalSystemBenefit: \$842,051.74
- ElecBen: \$839,656.69
- GasBen: \$2,395.05
- WaterEnergyBen: \$0.00
- OtherBen: \$0.00
- TRCCost: \$20,215,339.75
- PACCost: \$19,174,987.02
- RIMCost: \$21,375,589.02
- SCBCost: \$20,321,215.76
- SCHCost: \$20,321,215.76

* Programs Included in the Budget Filing *

- IREN-CS-001: C&S; Training and Education Program
- IREN-CS-002: C&S; Technical Support Program
- IREN-CS-PortfolioSupport: PORTFOLIO ADMIN-CODES & STANDARDS
- IREN-EMV-001: IREN EM&V;

- IREN-Equity-PortfolioSupport: PORTFOLIO ADMIN-EQUITY
- IREN-IDSM-Equity-001: Equity IDSM
- IREN-MS-PortfolioSupport: PORTFOLIO ADMIN-MARKET SUPPORT
- IREN-PUBL-001: Technical Assistance and Strategic Energy Planning Program
- IREN-PUBL-002: Public Buildings NMEC Program
- IREN-WET-001: WE&T; Training and Education Program
- IREN-WET-002: WE&T; Workforce Development Program

CEDARS FILING SUBMISSION RECEIPT

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

PA: Inland Regional Energy Network (IREN)

Budget Filing Year: 2026

Submitted: 09:55 on 04 Nov 2025

By: Jesse Farber-Eger

Advice Letter Number: 8-E/8-G

* Portfolio Budget Filing Summary *

- TRC: 0.03
- PAC: 0.03
- TRC (no admin): 0.15
- PAC (no admin): 0.18
- RIM: 0.03
- SCB: 0.04
- SCH: 0.05
- Budget: \$19,126,667.27
- TotalSystemBenefit: \$621,543.20
- ElecBen: \$621,543.20
- GasBen: \$0.00
- WaterEnergyBen: \$0.00
- OtherBen: \$0.00
- TRCCost: \$19,736,818.11
- PACCost: \$18,927,355.39
- RIMCost: \$20,579,856.77
- SCBCost: \$19,819,196.60
- SCHCost: \$19,819,196.60

* Programs Included in the Budget Filing *

- IREN-CS-001: C&S; Training and Education Program
- IREN-CS-002: C&S; Technical Support Program
- IREN-CS-PortfolioSupport: PORTFOLIO ADMIN-CODES & STANDARDS
- IREN-EMV-001: IREN EM&V;

- IREN-Equity-PortfolioSupport: PORTFOLIO ADMIN-EQUITY
- IREN-IDSM-Equity-001: Equity IDSM
- IREN-MS-PortfolioSupport: PORTFOLIO ADMIN-MARKET SUPPORT
- IREN-PUBL-001: Technical Assistance and Strategic Energy Planning Program
- IREN-PUBL-002: Public Buildings NMEC Program
- IREN-WET-001: WE&T; Training and Education Program
- IREN-WET-002: WE&T; Workforce Development Program