Agenda: Semi-Annual Portfolio Performance Report Review

For the 2026 Program Year

Date: November 4, 2026
Time: 9:00am-12:00pm PT
Location: Virtual

Register for the Meeting

https://us02web.zoom.us/meeting/register/7H-2XCyVQ_iRNc6qA0O6iQ

Overview

In accordance with D.23-06-055, the CAEECC hosts Semi-Annual Portfolio Performance Report Review Sessions for Portfolio Administrators (PAs) to report highlights, learnings, and findings on their 2026 programs. This meeting will provide insight into the progress of programs since the presentation on the prior year's Annual Report.

Objectives

- Highlight trends in PA portfolios
- Get input from CAEECC on possible course corrections
- Bring PA proposals for discussion (at least 3 months prior to filing)
- Optional use of Working Groups or Task Forces to tackle challenges raised in the Annual Report

Agenda

Supporting materials can be found on the CAEECC website:
https://www.caeecc.org/11-4-2026-semi-annual-pprr

Time	Topic + Description	Presenter
9:00am	**Meeting Welcome & Housekeeping & Background**	Facilitator
9:10	**Energy Division Presentation: Quantitative Overview Across All PAs + Q&A**	Pamela Rittelmeyer (CPUC)
9:25	**Challenge of Reduced and Changing Deemed Measures** Decreasing eligibility and savings values of deemed measures may impact sectors that certain PAs rely on most, whereas other PAs have the balance and flexibility to rely on other sectors. The impact of changes to gas appliance measures may impact 2027-2028 outcomes, meaning there are more limited measures available to balance TSB and TRC.	Panelists: • SoCalGas • SCE • SDG&E • SoCalREN • Implementer(s) TBD

Time	Topic + Description	Presenter
10:25	Break	
10:35	**Continuous Portfolio Improvement** ● Lightning presentations by all PAs ● Member + Public Input & Discussion	All PAs
11:45	**Next Steps, Themes, & Wrap Up** Summarize trends in PA portfolios; brainstorm possible course corrections (including possible PA proposals and/or use of Working Groups or Task Forces)	Facilitator and All
12:00	**Meeting Adjourned**	