2024 Annual Portfolio Performance Report Review Agenda

Date: **August 5, 2025**
Time: **9:30am - 3:00pm PT**
Location: **Virtual**

Register for the Meeting >

Register at (URL): TBD

Overview

In accordance with D.23-06-055, the CAEECC hosts the Annual Portfolio Performance Report Review Sessions for Portfolio Administrators (PAs) to report highlights, learnings, and findings on their 2024 programs. This meeting will provide insight into the progress of programs since the presentation at the Semi-Annual Portfolio Performance Report Review Session.

Objectives

- Identify challenges & opportunities
- Identify who might problem solve (CAEECC, Portfolio Administrator (PA), or other) in a timely fashion
- Ensure transparent review, tracking, and dialogue of portfolios to maximize cost-effectiveness

Agenda

Supporting materials can be found on the CAEECC website:
https://www.caeecc.org/8-5-2025-pppr-mtg

Time	Dur	Topic + Description	Presenter
9:30	5	**Welcome & Introduction** Meeting goals and approach	Facilitator and Co-Chair
9:35	15	**Performance Overview** Summary of portfolio performance across PAs & Setting the stage with Q&A	Energy Division
9:50	30	**Central CA Performance Review** A. **CCRREN** B. **3CREN** C. **Regional Q&A** *For each PA presenting: 10 min presentation + 5*	**CCRREN:** 1-2 slides presented by Facilitation Team, 5 mins

Time	Dur	Topic + Description	Presenter
		min Q&A from CAEECC Members then the Public. *10 min for Regional Q&A*	**3CREN:**
10:20	45	**Southern CA IOUs Performance Review** A. **SCE** B. **SoCalGas** C. **SDG&E** *For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public.*	**SCE:** **SoCalGas:** **SDG&E:**
11:05	45	**Southern CA RENs/CCA Performance Review** A. **SDREN** B. **I-REN** C. **SoCalREN** D. **Regional Q&A** *For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public.* *10 min for Regional Q&A*	**SDREN:** 1-2 slides presented by Facilitation Team, 5 mins **I-REN:** **SoCalREN:**
11:50	35	**Lunch**	
12:25	60	**NorCal Performance Review** A. **NRREN** B. **PG&E** C. **MCE** D. **BayREN** E. **Regional Q&A** *For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public.* *10 min for Regional Q&A*	**NRREN:** 1-2 slides presented by Facilitation Team, 5 mins **PG&E:** **MCE:** **BayREN:**
1:25	10	**Break**	
1:35	60	**Key Themes** A. Open Q&A/Discussion B. Summary of Key Themes and Segmentation	Facilitator
2:35	5	**Wrap Up**	Facilitator

Time	Dur	Topic + Description	Presenter
		A. Overview of PPRR B. Next Steps	
3:00		*Adjourn*	

How to Engage

This meeting will be held on Zoom Webinar. We encourage you to use the desktop or web client of Zoom over the mobile app or dial-in mechanisms.[1] **Please ensure your Zoom client is [updated to the latest version](#)** to ensure <u>all</u> the features and functionalities are available to you for a seamless zoom experience.

CAEECC Members can engage verbally during Question and Input of the Sessions.

Non-CAEECC Members can engage via Slido[2] during Question and Input of the Sessions. A Slido link will be provided during the meeting via the Meeting Chat.

- Questions & Input can be added at any point during the presentations.
  - Use Slido Q&A for Questions (character limit is 300)
  - Use Slido Polls for Input (no character limit), there will be a poll per PA
- Questions & Input can be added at any point during the PA presentation.
- Please tag your Questions according to the PA Presenter.
- Questions can be upvoted to uplift common questions.
- Due to limited time, only a few questions may be addressed during the meeting.
- All Slido questions that weren't answered in the Questions & Input segments will be included in the Meeting Summary. PAs will be asked to respond to as many questions as they can in the Meeting Summary.

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[1] For more information, visit [Zoom Support](#)
[2] Tutorial for Slido Q&A: https://www.slido.com/features-live-qa#event-example