

Agenda for 2025 Semi-Annual Portfolio Performance Report Review

Date: November 6, 2025
Time: 9:30-3:00 PT
Location: Virtual

Register for the Meeting >

https://us02web.zoom.us/webinar/register/WN_LBIvQ7DSTfKyCTYv7FIClg

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 2024 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.caeec.org/semi-annual-pppr>

Time	Topic + Description	Presenter
9:30	Welcome	Facilitator
9:35	Performance Overview Summary of portfolio performance across PAs	Energy Division
<i>For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public. 10 min for Regional Q&A.</i>		
9:50	Southern CA Performance Review A. I-REN B. SoCalREN C. SDREN D. SCE E. SoCalGas	A. Benjamin Druyon B. Lujuana Medina C. Aisha Cervantes-Cissna D. Erica Keating E. Darren Hanway

Time	Topic + Description	Presenter
	F. SDG&E G. Regional Q&A	F. Kelvin Valenzuela G. All SoCal PAs
11:35	Lunch (40)	
12:15	NorCal Performance Review A. BayREN B. NREN C. PG&E D. MCE E. Regional Q&A	A. Jane Elias B. Patricia Terry C. Lisa Hunter D. Alice Havenar-Daughton E. All NorCal PAs
1:25	Central CA Performance Review A. 3C-REN B. CCR REN C. Regional Q&A	A. Alejandra Tellez B. Jordan Garbayo C. All Central CA PAs
2:05	Break	
2:10	Key Themes	Facilitator
2:45	Wrap Up	Facilitator
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 all 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 Slido² 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)

¹ For more information, visit [Zoom Support](#)

² Tutorial for Slido Q&A: <https://www.slido.com/features-live-qa#event-example>

- 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.