

November 4, 2025

ADVICE 5670-E
(U 338-E)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA
ENERGY DIVISION

SUBJECT: Southern California Edison Company's Energy Efficiency
Program and Portfolio Mid-Cycle Advice Letter for Program
Years 2024–2027

In compliance with the California Public Utilities Commission's (Commission or CPUC) Decision (D.) 21-05-031,¹ and related Commission decisions, including D.23-06-055² and D.23-08-005,³ Southern California Edison Company (SCE) hereby submits its Energy Efficiency (EE) Program Mid-Cycle Advice Letter (MCAL) for Program Years (PY) 2024–2027 (Four-Year Portfolio Period). SCE also hereby submits related changes to its tariffs. The revised tariff sheets are attached hereto in Attachment E.

I. Purpose

SCE submits this MCAL to comply with the Commission directive that SCE submit a mid-point advice letter to true-up its approved 2024–2027 EE portfolio. This filing ensures continued alignment with Commission-adopted EE goals, updated technical inputs, and evolving priorities.

This MCAL provides updated forecasts of budgets, energy savings, Total System Benefits (TSB), and cost-effectiveness metrics based on the most recent updates to the Avoided Cost Calculator (ACC), Database for Energy Efficiency Resources (DEER)⁴, and other technical inputs. In accordance with D.21-05-031, this advice letter demonstrates that SCE continues to comply with the key Commission requirements that the resource acquisition segment of the portfolio achieve a forecasted Total Resource Cost (TRC) ratio of at least 1.0, combined budget for market support and equity programs remains within the 30% cap, and 60% of the portfolio is composed of third-

¹ D.21-05-031, Ordering (OP) 10, pp. 41-43, 83.

² D.23-06-055, OP 16, 24, pp.123-126.

³ D.23-08-005, p. 15.

⁴ Resolution E-5350. *Approval of the Database for Energy-Efficient Resources updates for Program Years 2026–2027 and revised version for Program Years 2025 and 2024.*
<https://cedars.cpuc.ca.gov/deer-resources/>

party designed and delivered programs. SCE has also successfully managed over 200 distinct additional compliance requirements stemming from CPUC decisions.

Additionally, this filing incorporates guidance from D.23-06-055, including:

- Descriptions of how SCE has incorporated or addressed impact evaluation recommendations from Commission studies released after 2022;⁵
- Progress on adopted indicators for equity and market support segments; and⁶
- Proposed indicators to measure community engagement within the equity segment.⁷

This MCAL is intended to support continued regulatory transparency, accountability, and performance optimization for the remainder of the 2024–2027 portfolio cycle.

Additionally, SCE modifies Preliminary Statement, Part FF, Public Purpose Adjustment Mechanism (PPPAM), to reflect an inadvertent omission of the EE Financing Funding amounts and update the latest program cycle budgets to reflect what is shown in Table H below.

II. Background

A. Key Regulatory Requirements

The following are key regulatory requirements adopted by the Commission that relate to the submittal of the MCAL by EE Program Administrators (PAs):

1. D.21-05-031 requires PAs to submit an MCAL to adjust technical inputs, forecasts, and portfolios to account for the changes in EE Goals, which were adopted by the Commission after the Application filing.⁸
2. D.23-06-055 requires the MCAL to include updates based on guidance in D.21-05-031, such as adjustments to forecasts stemming from updated input, including TSB goals, ACC updates, new database for EE DEER values, etc.; updated statewide (SW) allocations and resulting budgets (within the authorized cap) and savings forecasts; and updates or corrections to program segmentation.
3. D.25-08-034 adopted new EE goals for 2024–2037 requiring SCE to adjust its TSB goals for 2024–2027.

⁵ D.21-05-031, OP 10, p. 83.

⁶ D.23-06-055, OP 11, 25, pp. 122, 126.

⁷ D.25-08-034, OP 1, p. 27.

⁸ D.21-05-031 required the MCAL to be submitted on September 1, 2025; however, the Executive Director of the Energy Division provided an extension, which allows all relevant PAs to submit the MCAL 60 days after the issuance of the Potentials and Goals decision, D.25-08-034, which is November 4, 2025.

B. Table of Contents

The contents of this MCAL are consistent with the guidance provided by Commission staff in the MCAL template.

I.	Purpose	1
II.	Background	2
	A. Key Regulatory Requirements	2
	B. Contents of MCAL	3
III.	Discussion	4
	A. Portfolio Overview	4
	1. Recent CPUC Decisions and Guidance Impacting EE Portfolio	4
	2. Forecast Approach	6
	3. Portfolio Changes	7
	B. Summary of Forecasted Portfolio Impacts	10
	1. Portfolio Budget Summary	10
	2. TSB Forecast	11
	3. Portfolio Cost-Effectiveness Forecast	12
	4. SW and Third-Party Compliance	13
	5. Market Support and Equity Forecast	14
	6. Codes and Standards Savings Forecast	14
	7. Non-Advocacy Codes and Standards Budget Forecast	15
IV.	EE Portfolio Details	15
	A. Segment Metrics	15
	B. Program Changes	15
	C. Program Closures	16
	1. Programs Closed between TUAL and MCAL	16
	2. Programs to be Closed in 2026-2027	17
	3. Programs to be Closed Upon Completion of Commitments	17
	D. EM&V (2024–2027)	17
	E. Cost Recovery & Ratemaking Treatment	18
	1. Unspent Funds	20
	2. Integrated Demand-Side Management (IDSM) Budget	21
	F. California Energy Data and Reporting System (CEDARS) Discrepancies	22

Attachment A – Appendices from Excel Template in PDF⁹
Attachment B – Community Engagement Indicators Results
Attachment C – PA Response to Recommendations
Attachment D – CEDARS Filing Confirmation
Attachment E – Revised Preliminary Statement Part FF (PPPAM)

III. Discussion

A. Portfolio Overview

1. Recent CPUC Decisions and Guidance Impacting EE Portfolio

This MCAL reflects SCE's continued responsiveness to evolving external market challenges and regulatory conditions, including significant changes in measure eligibility and associated savings and TSB values along with modifications to documentation requirements to substantiate savings claims, which directly influence SCE and its implementers' ability to deliver cost-effective EE programs and meet the Commission's TSB goals. These developments have created instability and uncertainty for program implementers, which in many cases, led to measure concentration and the need to revise third-party implemented contract goals and deliverables. While SCE's overall sector and segment strategies remain consistent with its approved 2024–2031 Business Plan Application (Application), this MCAL incorporates key adjustments to TSB forecasts and budgets based on updated DEER and ACC values, EE goals adopted in D.25-08-034, market conditions, actual performance, and portfolio management experience since the True-Up Advice Letter (TUAL) was filed.¹⁰

In February 2025, the State's Audit Office issued findings from an audit on the CPUC's oversight of EE programs. The report noted that the costs to operate efficient programs frequently outweighed the reported benefits, which results in utilities using ratepayer dollars for EE programs that do not perform well. In the development of this MCAL, SCE has considered customer affordability and the value of programs by taking a targeted, three-pronged approach to strengthen portfolio performance where SCE has direct influence:

1. Enhanced Implementer Support and Engagement – SCE has increased its technical and operational support to help implementers better understand complex requirements and improve claimable savings. This includes the use of more frequent collaboration, expanded engineering support, clear documentation expectations, account manager support for implementers who opt in, and tools to monitor program progress and performance.

⁹ Please see CEDARS for Excel version of Attachment A.

¹⁰ SCE 2024–2027 TUAL, ADVICE 5123-E-A, submitted, November 3, 2023.

2. Refined Solicitation Strategy – To reduce delivery and concentration risk, SCE is designing solicitations to encourage a more diverse and distributed set of implementers. While this may increase administrative costs, SCE seeks to avoid over-concentration in a single sector with any single vendor where possible. Further, SCE recognizes the importance of minimizing customer costs while maximizing benefits, and therefore SCE encourages third-party bidders to propose customer programs with customer benefits that are forecasted to outweigh the anticipated costs. Future solicitations will continue to be more narrowly scoped in accordance with pay for performance methodologies that promote accountability, enable early utility oversight, and ensure the all-in program costs are forecasted to result in a cost-effectiveness ratio of at least 1.0 for resource acquisition programs.
3. Targeted Re-solicitations and Portfolio Adjustments – SCE is preparing new solicitations for underrepresented or underperforming sectors. These new offerings are intended to address gaps and ensure ongoing alignment with portfolio goals. SCE is also evaluating whether it can continue to comply with the Commission's third-party implementer requirements while also assuming the role of program implementer, to address underserved sectors and gaps that third-party implementers are unable or unwilling to fill (i.e., measures or sectors that are not profitable).

SCE has incorporated zero-emission technologies, and specifically electric heat pumps, into its portfolio. In 2024, SCE's portfolio delivered approximately 1,300 installations of heat pumps in its service area, and that success has continued throughout 2025. Heat pumps and other zero-emission technologies are critical to the advancement of building decarbonization.

In April of 2025, CPUC's Energy Division (ED) issued a guidance memorandum regarding heat pump measures (revised twice) that made meaningful strides toward allowing for greater adoption of these technologies. SCE notes that EE is complex, and Commission decisions cannot address all EE requirements; thus, there are many guidance decisions that are made by the ED, and the PAs require timely decisions, guidance, and approvals from the ED. Delays in necessary guidance or approvals, as well as any significant deviation from the ED's bus stop process, risk undermining SCE's and its implementers' progress on measure installations. These issues introduce uncertainty that can slow adoption rates, disrupt program continuity, and hinder California's broader clean energy goals.

In D.23-06-055, OP 24, the PAs were directed to develop indicators to measure community engagement and to incorporate these indicators into the MCAL for review and potential adoption by the Commission. The proposed indicators along with the Community Engagement Indicator Findings and Recommendations, are provided in Attachment B.

2. Forecast Approach

SCE's forecasting methodology remains consistent with the approach SCE set forth in its Application. As described below and in the Application, the forecasting methodology utilizes four distinct frameworks, based on the various ways that TSB is achieved in the EE Portfolio: 1) existing contracts, 2) expected future contracts, 3) SW programs, and 4) SCE-led programs.

As with any forecast, these forecasts reflect inherent uncertainties, many of which are outside SCE's control. In particular, various changes and updates to regulatory and policy requirements by the Energy Division, particularly when not expected, may significantly alter the accuracy of SCE's forecasts because SCE makes its assumptions based on the then-current requirements. Final savings and budgets also will vary based on what bidders ultimately propose and third-party implementers deliver under an existing or future contract. Finally, factors such as evolving market conditions, technology adoption, and changes in measure eligibility can significantly impact the EE landscape. To account for these variables, SCE aims to structure its portfolio within reasonable and achievable performance boundaries.

1. Existing Contracts

For active contracts, SCE's forecasting methodology primarily relies on the energy savings that third-party implementers are contracted to deliver. While the Commission requires the implementer, not SCE, to design and deliver programs through competitive bids, SCE carefully reviews the proposed energy savings forecasts to ensure they are reasonable and works with implementers to adjust their forecasts as needed to account for any known evolving regulatory and market conditions. These adjustments form the basis for any budget changes. Given the evolving nature of the third-party model, SCE believes these forecasts reasonably reflect expected future performance.

2. Expected Future Contracts

For solicitations currently underway or planned, SCE employs a traditional forecasting methodology to estimate potential. These methods include assessing market size, penetration rates, pricing, technical viability, and customer expectations. This analysis is informed by data from legacy SCE programs, bidder proposals, and historical benchmarks, allowing SCE to develop a conservative estimate of what can realistically be achieved.

3. SW Programs

SCE has solicited and continues to solicit third-party contracts and forecast budgets and savings, as described in the "Existing Contract" and "Future Contract" sections for SW programs administered by SCE. For SW programs

administered by other Investor-Owned Utilities (IOUs), SCE adopts the budget provided by the lead IOU and the savings allocations assigned in D.23-06-055.

While this allocation model supports consistency across IOUs and SW programs, it also introduces some challenges and risks in meeting TSB goals. For example, 25% of SCE's 2024 TSB was projected to come from the SW New Construction program. However, actual performance did not meet forecasted expectations. Fortunately, stronger-than-anticipated results from SCE's Comprehensive Commercial Program helped offset this shortfall, supporting overall goal achievement.

SCE recognizes that variability in program performance can impact goal attainment and remains committed to working collaboratively with other IOUs to strengthen forecasting and implementation efforts. In alignment with Commission guidance, this MCAL has been updated to reflect the revised allocation shares for these programs.

4. SCE-Led Programs

SCE's reliance on SCE-Led programs to achieve TSB has declined as new third-party solicited programs have been launched through competitive solicitations. Currently, SCE directly manages the design and delivery of approximately 31% of its EE portfolio. To forecast savings from these programs, SCE evaluates historical performance, evolving market conditions, and customer expectations. For example, SCE developed the Comprehensive Energy Efficiency Resource (CEER) program to support cost-effective projects that include measures not covered by third-party implementer programs.

3. Portfolio Changes

SCE's EE portfolio is continuously under internal evaluation to prioritize programs that deliver quantifiable cost-effective savings, realize significant and necessary market impact, and contribute to emissions reductions. This strategy is intended to promote customer affordability, optimize program performance, and advance California's decarbonization objectives by, among other things, promoting building electrification. While PAs await a CPUC decision on how to continue to phase out incentives for gas measures in the EE market, SCE's portfolio is focused on supporting the state's policy direction by accelerating the deployment of zero-emission technologies (i.e., heat pumps), consistent with California's long-term climate and energy goals.

Table 2 below displays a comparison of SCE's Application compared to our TUAL and MCAL.

Table A - Comparison of SCE's 2024–2027 Budget Application versus 2024–2027 MCAL (Numbers shown in aggregate)

Portfolio Performance (w/Codes and Standards)	Target/Cap	24-27 Application	24-27 True-Up	24-27 Mid-Cycle	True-up vs. Mid-Cycle	% Var.
Budget (\$ million)	\$1,675	\$1,560	\$1,182	\$1,212	\$30	-3%
TSB (\$ million)¹¹	\$552.24	\$3,624	\$4,698	\$4,771	\$73	2%
TRC (RA Segment)	1.0 minimum	1.18	1.07	1.08	0.01	1%
Energy Savings (GWh)	N/A	6,579	5,359	5,047	-312	-6%
Demand Savings (MW)	N/A	1,134	1,164	1,038	-126	-11%
GHG Reduction (million tons)	N/A	1.15	1.86	1.82	-0.04	-2%
Third-Party Compliance (%)	60% minimum	69%	68% ¹²	69%	0.01	1%
SW Compliance (%)	20% minimum	13%	25%	23%	-0.02	-8%
Market Support & Equity (%)	30% maximum	25%	27%	25%	0.02	-7%
Portfolio Administration (%)	10% maximum	4.5%	6%	7%	0.01	17%

SCE continuously reviews the programs in its portfolio to track performance, address potential risks, and ensure alignment between ratepayer investments and benefits consistent with the broader EE vision. This review process applies across all segments, including Resource Acquisition, Market Support, Equity, Codes and Standards and Evaluation, Measurement and Verification (EM&V). Learning from prior challenges, SCE continues to assess the balance of risks associated with portfolio concentration in a small number of implementers for TSB delivery against the risks of contracting with more implementers, which may decrease economies of scale as well as relying on untested implementers.¹³ In doing so, SCE also evaluates policies and requirements, such as those related to third-party or SW programs that may affect portfolio cost-effectiveness.

Several implementation barriers continue to impact program delivery:

¹¹ D.25-08-034, pp.19-24.

¹² The third-party compliance percentage shown here is an aggregate of the four-year period. SCE is aware that the compliance requirement, directed in D.18-01-004, is an annual requirement. As discussed in Section IV.E, SCE's TUAL (5123-E-A) SCE forecasted that 58% of its 2024 portfolio budget was contracted to third-party implementers, as defined by the Commission.

¹³ SCE supports and is focused on supplier diversity; however, based on experience, SCE must also ensure that each third-party implementer is financially and technically capable of cost-effectively implementing complex EE programs.

- Measure eligibility changes, such as the expiration or revision of high-impact measures, have led to significant program and contract-level disruptions. These changes often occurred after contracts were executed and approved, requiring program design changes and contract amendments.
- Customer acquisition and project development remain challenging for some third-party implementers, particularly where trust-building and coordination are required for complex or technical projects. To address this challenge, third-party implementers now have access to SCE's account management services for initial introductions should they opt in for this support; however, some projects may benefit from a higher level of support from account representatives to help ensure their success, which may go beyond the standard scope of SCE resources.
- Program overlap and duplication continue to be a challenge for SCE's portfolio and, in some cases, lead to customer confusion and/or implementers stating that the overlap is causing them to fall short of their contractual obligations. Implementers face increased competition with other portfolio administrator offerings that are not held to the same regulatory and financial requirements (i.e., cost-effectiveness requirements), as well as increased administrative and other costs related to closer coordination needed to avoid duplication and double-dipping where there are overlapping programs.
- Custom project review processes particularly influence documentation, continue to delay savings realization and have discouraged implementer and customer participation in certain sectors.

To support implementers in navigating these issues, SCE has developed additional tools, such as measure checklists and implementation guides, and has increased communication around expectations for project documentation. These efforts aim to reduce project cycle times and help implementers deliver more savings to the portfolio. Additionally, SCE allows for program materials to be co-branded with SCE's corporate trademark, and SCE account managers are facilitating customer introductions, which help to bolster program credibility in the market. While portfolio delivery continues to face meaningful challenges, SCE is working collaboratively with third-party implementers and applying practical solutions to improve performance within the current regulatory framework. Overall, this MCAL reflects a recalibration of budgets and savings forecasts in line with those operational realities, while maintaining focus on delivering customer value, supporting grid needs, and achieving Commission goals.

B. Summary of Forecasted Portfolio Impacts

1. Portfolio Budget Summary

SCE requested budget approval of up to \$1.56 billion in the 2024-2027 Application.¹⁴ D.23-06-055 authorized a total of \$1.68 billion¹⁵. In aggregate, SCE's MCAL forecast for the portfolio period to date meets all savings goals, minimum compliance targets, and spending caps. In compliance with Resolution E-5350, SCE notes that funding for the Electronic Technical Reference Manual (eTRM) and the California Technical Forum (CalTF) are accounted for in Portfolio Support.

**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 and Standards	
1	Residential Sector	\$146,810,783	\$69,979,139	\$19,379,016	-	\$236,168,938
2	Commercial Sector	\$417,908,956	\$43,951,378	\$9,049,960	-	\$470,910,293
3	Industrial Sector	\$73,333,619	\$3,688,333	-	-	\$77,021,951
4	Agricultural Sector	\$10,896,613	\$2,686,422	-	-	\$13,583,035
5	Public Sector	\$32,524,903	\$11,050,562	-	-	\$43,575,465
6	Cross Cutting Sector					
7	Emerging Tech	-	\$59,959,814	-	-	\$59,959,814
8	WE&T	-	\$32,786,274	\$4,043,830	-	\$36,830,104
9	Finance	-	\$15,323,424	-	-	\$15,323,424
10	Codes & Standards	-	-	-	\$84,214,406	\$84,214,406
11	Portfolio Support	\$58,092,114	\$19,258,142	\$2,706,865	\$6,275,815	\$86,332,937
12	OBF Loan Pool					\$29,258,627
13	Portfolio Subtotal ^[2]	\$739,566,987	\$258,683,488	\$35,179,671	\$90,490,221	\$1,153,178,995

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

[2] Excludes EM&V and Portfolio Oversight

¹⁴ SCE's 2022 Application (A.) 22-03-007, p. 6.

¹⁵ D.23-06-055 Table 7, p. 92. SCE's original budget request of \$1.56 billion was adjusted to account for \$1.99 million for ED Portfolio Oversight and 2024–2027 Statewide Allocation adjustments.

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	\$128,884,759	\$192,711,992	\$176,737,470	\$241,232,767	\$739,566,987
2	Market Support	\$48,226,101	\$70,832,725	\$68,422,909	\$71,201,753	\$258,683,488
3	Equity	\$4,656,208	\$19,194,838	\$7,951,604	\$3,377,021	\$35,179,671
4	Codes and Standards	\$32,997,874	\$20,276,228	\$18,747,527	\$18,468,592	\$90,490,221
5	EM&V (PA and ED)	\$11,034,103	\$15,061,490	\$14,082,095	\$16,831,417	\$57,009,105
6	Total Budget w/o OBF Loan Pool	\$225,799,045	\$318,077,273	\$285,941,605	\$351,111,550	\$1,180,929,473
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					25%
8	OBF Loan Pool Addition	\$(741,373)	\$9,000,000	\$12,000,000	\$9,000,000	\$29,258,627
9	Budget excluding Portfolio Oversight	\$225,057,672	\$327,077,273	\$297,941,605	\$360,111,550	\$1,210,188,100
10	ED Portfolio Oversight	\$497,600	\$497,600	\$497,600	\$497,600	\$1,990,400
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$225,555,272	\$327,574,873	\$298,439,205	\$360,609,150	\$1,212,178,500
12	Approved Budget Cap ^[4]					\$1,674,812,208

[4] Decision 23-06-055 OP 5

2. TSB Forecast

Table 2.1a below sets forth SCE's forecasted annual and cumulative TSB for the four-year portfolio period (2024–2027). The Four-Year Portfolio Plan initially forecasted a cumulative total of \$3.7 billion TSB in the Application and trued-up to \$4.8 billion TSB in the TUAL filed in 2023.¹⁶ As part of this MCAL, SCE is now forecasting a lower cumulative total TSB of \$987 million excluding Codes & Standards, but still expects to exceed TSB goals by approximately 79%.

¹⁶ SCE's 2022 Application (A.) 22-03-007, p. 3. SCE 2024–2027 TUAL, November 3, 2023, p. 15.

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	\$148,123,946	\$241,296,159	\$218,960,416	\$287,828,043	\$896,208,565
2	Market Support	\$733,503	\$72,057,984	\$6,946,869	\$8,739,800	\$88,478,156
3	Equity	\$23,963	\$611,325	\$1,215,405	\$30,035	\$1,880,729
4	Total TSB Forecast	\$148,881,412	\$313,965,469	\$227,122,690	\$296,597,879	\$986,567,450
5	CPUC TSB Goal	\$112,534,778	\$117,062,964	\$145,208,902	\$177,437,507	\$552,244,151
6	<i>TSB Forecast / TSB Goal^[1]</i>	132%	268%	156%	167%	179%

[1] TSB goal set in D.25-08-034

3. Portfolio Cost-Effectiveness Forecast

Table 3a below sets forth SCE’s cumulative forecasted cost-effectiveness ratios for the four-year portfolio period (2024–2027). SCE expects to meet the 1.0 minimum TRC for the resource acquisition segment each year within the 2024–2027 portfolio period.

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.08	1.18	0.65
2		Market Support	0.39	0.47	0.44
3		Equity	0.06	0.07	0.08
4		Codes and Standards (C&S)	1.77	46.50	0.96
5	Portfolio	<i>Including C&S</i>	1.44	3.96	0.83
6		<i>Excluding C&S</i>	0.88	0.96	0.60

Pursuant to D.24-07-015 OP 4¹⁷, Table 3d below shows the Societal Cost Test (SCT) results for SCE’s portfolio for 2026-2027.

¹⁷ D.24-07-015, OP 4, pp. 47-48

Table 3d – Societal Cost Test for 2026-2027

Line			2026 Societal Cost Base	2026 Societal Cost High	2027 Societal Cost Base	2027 Societal Cost High	2 Yr Societal Cost Base Total	2 Yr Societal Cost High Total
1	Segment	Resource Acquisition	1.44	1.47	1.51	1.54	1.48	1.51
2		Market Support	0.17	0.17	0.17	0.17	0.17	0.17
3		Equity	0.28	0.28	0.01	0.01	0.21	0.21
4		Codes and Standards (C&S)	2.49	2.56	2.39	2.44	2.44	2.50
5	Portfolio	<i>Including</i> C&S	1.96	2.02	1.89	1.93	1.92	1.97
6		<i>Excluding</i> C&S	1.11	1.14	1.20	1.22	1.16	1.18

4. SW and Third-Party Compliance

SCE navigates SW Program compliance requirements in close coordination with the other IOUs. In SCE's TUAL, SCE highlighted the unique challenges facing SW programs, and those challenges persist.¹⁸ Currently, the lead PA holds significant influence over the key metrics of a SW Program, including TSB, TRC, and segment. The resulting impacts can be substantial for individual IOUs, each of which may have unique portfolio considerations that deserve thoughtful attention. SCE continues to partner with other IOUs to ensure SW programs account for individual IOU portfolio needs and to strengthen forecasting and implementation efforts to minimize potential negative consequences of under delivery.

Table 4 – Portfolio Statewide and Third-Party Contribution Percentage Requirements

Line	Budget Component	Third Party Budget	Cumulative Total Budget w/o OBF Loan Pool	Contribution Percentage	Minimum Threshold
1	Statewide ^[1]	\$271,404,008	\$1,182,919,873	23%	20%
2	Third-party ^[2]	\$813,104,206	\$1,182,919,873	69%	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

¹⁸ Advice 5123-E-A, p. 13.

5. Market Support and Equity Forecast

SCE forecasts and claims its portion of the savings from its suite of market support and equity programs (DACMO, REA, Simplified Savings, etc.). Below table highlights budget allocations across the Market Support and Equity program space.

Table B - Market Support & Equity Segment Budget 2024–2027

Line	Segment	Authorized Budget	Total Budget ^[1]	Percentage (%) of Budget	Cap (IOU and ATA CCA only)
1	Market Support	\$258,683,488	\$1,180,929,473	22%	30%
2	Equity	\$35,179,671		3%	
3	Total (Market Support + Equity)	\$293,863,159		25%	

Note: ATA CCA – Appy to administer Community Choice Aggregator

[1] Does not include OBF Loan Pool or ED Portfolio Oversight

6. Codes and Standards Savings Forecast

SCE forecasts and claims its portion of the savings from SW advocacy subprograms (SW Building Codes Advocacy, SW Appliance Standards Advocacy, and SW National, and International Standards Advocacy), as determined by the SW lead, Pacific Gas & Electric (PG&E). SCE maintains close coordination with PG&E on these programs; however, since PG&E is the lead PA for these SW programs, please refer to PG&E's MCAL for additional details.

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	1,225	1,046	848	763	3,882
2	GWh CPUC Target	1,071	1,008	798	713	3,590
3	<i>GWh Forecast/Target</i>	114%	104%	106%	107%	108%
4	MW Forecast	250	211	171	156	788
5	MW CPUC Target	187	172	138	121	618
6	<i>MW Forecast/Target</i>	134%	122%	124%	129%	128%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	0%	0%	0%	0%	0%

7. Non-Advocacy Codes and Standards Budget Forecast

In its SCE 2024–2031 EE Application, SCE states that it administers the three local non-advocacy Codes and Standards subprograms (Compliance Improvement, Reach Codes, Planning and Coordination). SCE invests in local efforts to help accelerate adoption and compliance of codes and standards and inform future codes and standards. SCE’s non-advocacy budget percentage is shown in the table below and remains below the cumulative cap of 70%.

Table C – Non-Advocacy Codes and Standards Budget 2024–2027

Line	Cumulative Non-Advocacy C&S Program Budget	Cumulative Total C&S Budget	Percentage of Budget	Cumulative Cap
1	\$58,237,115	\$90,490,221	64.4%	70.0%

IV. EE Portfolio Details

A. Segment Metrics

SCE’s MCAL reflects the revised goals from D.25-04-010 seeking to maximize TSB, particularly within the Resource Acquisition segment. SCE continues to track traditional kWh, kW and therm savings by program, sector, and segment and will report on metrics and targets for the applicable program years as part of the EE Annual Report filing. Pursuant to D.23-06-055, the Commission’s intent is for the goals development process for the market support and equity segments to follow a timeline that aligns goals adoption to the next portfolio cycle beginning in 2028. SCE continues to work with other PAs and interested stakeholders in the development process of the market support and equity metrics, which were proposed in Advice 5095-G/7664-E.

B. Program Changes

SCE will be extending two programs as described in Table D below.

Table D - New and Extended Programs¹⁹

Program Name	Change	Description
Legacy Emerging Technologies Program	Extension	This SCE-administered local program was anticipated to reach completion by December 31, 2025, as reported in SCE’s TUAL.

¹⁹ Programs that were approved via separate Advice Letter following SCE’s TUAL submission in 2023 are not included.

Program Name	Change	Description
		Due to unforeseen circumstances, an anticipated five projects will require extensions due to delays such as onboarding site hosts, contracting, and producing prototype equipment. The additional time will allow for the collection and analysis of critical seasonal data to ensure project outcome and quality. Most of the projects will be completed in 2026, with one or two potentially extending into 2027. Updates will be provided on the program as progress continues.
SW Electric Emerging Technologies Program	Extension	The SW Electric Emerging Technologies Program (SWEETP) is a cross-cutting market support program that supports EE and decarbonization goals by identifying and promoting emerging and underutilized technologies and solutions as described in SCE's Application. Now in its fourth and final delivery year for committing to new projects, SCE is requesting additional budget and an extension of the program's commitment through 2027. All remaining active projects are expected to be closed out by 2029. This extension will enable continued progress toward California's clean energy objectives while ensuring a thoughtful and strategic plan for the program.

C. Program Closures

1. Programs Closed between TUAL and MCAL

Since the filing of the TUAL, several programs have closed due to the natural transition of legacy SCE-led programs to third-party implementers, consistent with Commission requirements that 60% or more of the portfolio be designed and delivered by third-party implementers. In addition, the Commercial Behavioral Program, which was never launched to the public, has closed by mutual agreement of SCE and the implementer. The following table provides details on these program closures:

Table E - MCAL Program Closures

Program ID	Program Name	Replacement Program ID	Replacement Program Name
Programs transitioned from SCE-led to third-party			
SCE-13-SW-001G	Residential Direct Install Program	SCE_3P_2025R_002	Residential Energy Solutions (RES)
SCE-13-TP-001	Comprehensive Manufactured Homes Program	SCE_3P_2025R_002	Residential Energy Solutions (RES)
SCE-13-SW-001A	Home Energy Advisor Program	SCE_3P_2025R_001	Customer Home Engagement for

Program ID	Program Name	Replacement Program ID	Replacement Program Name
			Energy Reduction (CHEER) Program
Closed Programs			
SCE_3P_2020RCI_003	Commercial Behavioral Program	None	None

2. Programs to be Closed in 2026-2027

SCE does not anticipate closing any programs that were launched after filing the TUAL.

3. Programs to be Closed Upon Completion of Commitments

SCE plans to close the following programs upon completion of their commitments.

Table F - MCAL Program Closures Upon Completion of Commitments

Program ID	Program Name	Replacement Program ID	Replacement Program Name
SCE-13-SW-003D	Legacy Strategic Energy Management	SCE_3P_SEM_004 SCE_3P_SEM_004A	SPARKe Industrial / Agricultural Program
SCE-13-L-003I	Public Sector Performance-Based Retrofit High Opportunity	SCE_3P_2021AGPUB_002	Public Energy Performance Program

D. EM&V (2024–2027)

SCE's Portfolio will include EM&V activities designed to support both its core program offerings and pilot initiatives. These activities will employ innovative and rigorous methodologies to generate evidence-based insights that inform strategic decisions. EM&V efforts will focus on the following key areas of SCE's portfolio: Resource Acquisition, Codes and Standards, and Equity & Market Support programs.

The primary responsibilities of EM&V include: 1) collaborating with CPUC staff and their evaluators to facilitate successful ex post evaluations; 2) providing strategic evaluation support through data collection, analysis, and dissemination of findings to inform business operations and ensure regulatory compliance; and 3) assessing SCE's programs using CPUC-approved methods to evaluate effectiveness and support portfolio success.

Table G - Annual Breakdown of EM&V Budgets

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 ²⁰	\$214,023,569	\$9,956,707	\$7,400,186	\$2,556,521	\$223,980,276
2024	IOU share of ED Portfolio Oversight	\$497,600	-	-	-	\$497,600
2024	ADD RENS (IOUs only)	\$30,425,174	\$1,354,898	\$1,077,396	\$277,503	\$31,780,073
2025	PA, excluding ED Portfolio Oversight	\$312,015,783	\$13,150,753	\$9,575,572	\$3,575,181	\$325,166,536
2025	IOU share of ED Portfolio Oversight	\$497,600	-	-	-	\$497,600
2025	ADD RENS (IOUs only)	\$63,290,671	\$2,642,876	\$1,910,737	\$732,139	\$68,933,546
2026	PA, excluding ED Portfolio Oversight	\$283,859,510	\$11,827,480	\$8,574,923	\$3,252,557	\$295,686,990
2026	IOU share of ED Portfolio Oversight	\$497,600	-	-	-	\$497,600
2026	ADD RENS (IOUs only)	\$85,366,228	\$3,254,092	\$2,254,615	\$999,477	\$88,620,320
2027	PA, excluding ED Portfolio Oversight	\$343,280,133	\$14,303,339	\$10,369,921	\$3,933,418	\$357,583,472
2027	IOU share of ED Portfolio Oversight	\$497,600	-	-	-	\$497,600
2027	ADD RENS (IOUs only)	\$87,722,492	\$3,495,116	\$2,528,078	\$967,038	\$91,217,608
	Total	\$1,421,973,960	\$59,985,261	\$43,691,428	\$16,293,833	\$1,481,959,221

E. Cost Recovery & Ratemaking Treatment

Pursuant to D.23-06-055, SCE's authorized revenue requirement for the 2024–2027 EE Portfolio is \$1,675 million,²¹ which includes an EE Financing Program revenue requirement of \$40 million, a SW EE Program revenue requirement of \$66 million, and a Franchise Fees and Uncollectible (FF&U) expense amount of \$19.8 million. SCE is also authorized to collect \$258 million for RENS activities in SCE's service area.

Based on the updated forecasts for this MCAL, Table 1.2A sets forth SCE's and the RENS' and CCAs' total remaining revenue requirement and other costs for 2026 and

²⁰ D.23-065-055, pp. 26-29. Portfolio oversight refers to the monitoring, evaluation, and accountability processes established by the CPUC to ensure that energy efficiency portfolio administrators design, implement, and report on their programs in alignment with Commission objectives, including regular reporting, technical assessments, and stakeholder engagement.

²¹ D.23-06-055, pp. 92-94.

2027. SCE reduced its revenue collection for 2026 to \$240.2 million and 2027 to \$260.7 million (excluding FF&U), reflecting the lower funding needed for portfolio implementation and administration. This represents a reduction of \$243.5. and \$221.9 million, respectively for 2026 and 2027 from SCE's authorized revenue requirement for those years of \$483.7 and \$482.6M.

Table 1.2a – MCAL Total Cost Recovery Request, Including REN/CCA and Other Costs

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	\$1,153,178,995	\$1,990,400	\$13,317,677	\$35,920,602	\$(207,729,603)	\$996,678,071
2	SoCal REN	\$187,054,384	-	\$2,156,514	\$5,612,434	\$(1,599,104)	\$193,224,228
3	3C-REN	\$23,691,068	-	\$236,321	\$623,027	\$(8,050,383)	\$16,500,033
4	I-REN	\$44,377,545	-	\$448,788	\$1,183,166	-	\$46,009,499
5	RREN Central ⁶	\$6,977,088	-	\$80,627	\$210,085	-	\$7,267,800
6	RREN North ⁶						-
7	Bay-REN (SW Program) ⁷	\$4,704,480	-	\$53,906	\$142,114	-	\$4,900,500
8	Ava Community Energy						-
9	CleanPowerSF						-
10	Marin Clean Energy						-
11	Peninsula Clean Energy						-
12	Redwood Coast Energy Authority						-
13	SD REN						-
14	San Jose Clean Energy						-
15	Sonoma Clean Power						-
16	Total	\$1,419,983,560	\$1,990,400	\$16,293,833	\$43,691,427	\$(217,379,090)	\$1,264,580,131
17	Collected 2024 Recovery						\$286,304,963
18	Expected 2025 Recovery						\$477,466,701

19	Remaining Cost Recovery						500,808,467
----	--	--	--	--	--	--	--------------------

[4] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast.

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

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

[7] Bay-REN budget amount included per disposition pursuant to BayREN's AL 28-E.

The Four-Year Portfolio Period EE revenue requirements for SCE's EE, EE Financing and SW EE Programs are shown Table H below. SCE will collect the Revenue based on the table below.

Table H – SCE Annual EE Revenue Requirement

Balancing Account	2024 (\$M)	2025 (\$M)	2026 (\$M)	2027 (\$M)	Total (\$M)
PEEBA	\$270.9	\$460.0	\$219.3	\$231.2	\$1,181.2
SWEEBA	\$13.8	\$14.6	\$17.8	\$27.9	\$74.2
EEFPBA	\$1.6	\$2.8	\$3.0	\$1.5	\$9.0
Total	\$286.3	\$477.5	\$240.4	\$260.7	\$1,264.6

SCE is not proposing any changes to the ratemaking proposed in A.22-03-007. SCE will continue to use the Public Purpose Programs Adjustment Mechanism (PPPAM),²² the PEEBA, the EEFPBA, and the SW EE Balancing Account (SWEEBA) to facilitate the recovery of the amounts authorized in D.23-06-055.

1. Unspent Funds

Table 1.4 - shows the source funding for the unspent funds that will be used to offset revenue collection established in this document.

²² In the consolidated revenue requirement and rate change advice letter implementing the annual funding amounts approved in this advice letter, SCE will include tariff modifications to Preliminary Statement Part FF, PPPAM, to set forth the approved amounts.

Table 1.4 – Prior Years Unspent Funds as of August 2024

Line		PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024
1	Unspent & Uncommitted	\$(1,542,094)	\$(1,247,609)	\$(1,833,429)	\$(3,347,968)	\$(200,189,978)	\$(9,090,968)
2	EM&V	\$(33,600)	\$(24,640)	\$(33,893)	\$(34,911)	-	-
3	Total	\$(1,575,694)	\$(1,272,249)	\$(1,867,322)	\$(3,382,879)	\$(200,189,978)	\$(9,090,968)
4	Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2025 Rate Offset						
5	EM&V - PA Funds	-	-	-	-	-	-
6	EM&V – CPUC Funds	-	-	-	-	-	-
7	IOU Program Funds	-	-	-	-	-	-

2. Integrated Demand-Side Management (IDSM) Budget

The IDSM budget, authorized in Decision (D.) 18-05-041 and reaffirmed by D.23-06-055²³, allocated annual funding from 2018 through 2025 to advance EE and demand response integration initiatives. For the residential sector, each IOU was allocated \$1 million annually. In the non-residential sector, a total of \$20 million per year was distributed among IOU PAs based on load share as discussed in SCE’s 2024–2031 EE Application.²⁴ SCE’s share of this funding is \$79.3 million and is detailed in Table I below:

Table I - IDSM Budget (\$000)

Sector	2018	2019	2020	2021	2022	2023	2024	2025	2018-2025 Total
Non-Residential	\$ 7.780	\$ 8.360	\$ 8.871	\$ 8.678	\$ 8.961	\$ 9.253	\$ 9.554	\$ 9.864	\$ 71.321
Residential	\$ 1.000	\$ 1.000	\$ 1.000	\$ 1.000	\$ 1.000	\$ 1.000	\$ 1.000	\$ 1.000	\$ 8.000
Total	\$ 8.780	\$ 9.360	\$ 9.871	\$ 9.678	\$ 9.961	\$ 10.253	\$ 10.554	\$ 10.864	\$ 79.321

SCE did not request additional funding for 2024 and 2025 in the TUAL as limited activity was planned for those years. Instead, available unspent and uncommitted funds from prior years were used to cover the 2024-2025 IDSM budget. SCE did not collect additional revenue requirement for IDSM in rates in 2024 and 2025.²⁵ As of June 30, 2025, SCE spent approximately \$5.8M of the available \$57.9 million in total IDSM funds collected from customers.²⁶ As the funding will sunset at the end of 2025, SCE intends to return any unspent and uncommitted funding through the 2025 Energy Resource

²³ D.23-06-055, pp. 77-80.

²⁴ *Id.*

²⁵ See Advice 5123-E-A, Appendix 2, row 17, which reflects \$0 for EE-Funded IDSM.

²⁶ This reflects the budget total from 2018-2023, which was later repurposed in the 2024-25 EE budget.

Recovery Account (ERRA) Compliance Review Application that will be filed in April 2026, unless otherwise ordered by the Commission.

EE Multi-Distributed Energy Resources (DER)

SCE is setting aside \$15 million per year in funding in preparation for developing specific multi-DER program proposals to be filed during program years 2026–2027. With the approval of SCE’s Multi-DER Advice Letter via CPUC Resolution E-5387 issued on September 18, 2025, SCE intends to use this funding to support the development of cost-effective, multi-DER Resource Acquisition programs, while maintaining a balance of Market Support and Equity initiatives. Resolution E-5387 clarifies that SCE is required to submit subsequent Advice Letters, including Tier 2 filings, prior to any program commencement. While the Resolution did not provide explicit guidance on filing requirements for programs that support TSB but lack an EE component, SCE may pursue additional filings to address such program types as part of its multi-DER strategy. The funding is expected to include a mix of third-party implemented programs and SCE implemented programs.

The \$15M annual placeholder budget has been allocated to Market Support in this MCAL. Actual individual multi-DER program budgets, savings, and program category will be determined as program Advice Letters are submitted to the CPUC’s Energy Division, and upon approval, budgets will be allocated to the appropriate category (e.g., Resource Acquisition, Market Support, or Equity).

F. California Energy Data and Reporting System (CEDARS)

Discrepancies

The total budgets represented on the CEDARS Dashboards for 2026 and 2027 do not include SCE’s portion of the Portfolio Oversight budget as required from D.23-06-055 and the On-Bill Financing budget request. The table below shows the reconciliation of the two-year budgets from Table T-2.3a and CEDARS.

Table J – MCAL Versus CEDARS discrepancies²⁷

	2026	2027
CEDARS Dashboard Total Budget	\$285,941,605	\$351,111,550
OBF Loan Pool	\$12,000,000	\$9,000,000
Portfolio Oversight	\$497,600	\$497,600
Total SCE Budget (Table T2.3a)	\$298,439,205	\$360,609,150

ATTACHMENTS

This advice letter contains attachments as listed below:

- Attachment A – Appendices from Excel Template in PDF²⁸
- Attachment B – Community Engagement Indicators Results
- Attachment C – PA Response to Recommendations
- Attachment D – CEDARS Filing Confirmation
- Attachment E – Revised Preliminary Statement Part FF (PPPAM)

TIER DESIGNATION

Pursuant to OP 10 of D.21-05-031, this advice letter is submitted with a Tier 2 designation.

EFFECTIVE DATE

This advice letter will become effective on December 4, 2025, the 30th calendar day after the date submitted.

NOTICE

Anyone wishing to protest this advice letter may do so only electronically. Protests must be received no later than 20 days after the date of this advice letter. Protests should be submitted to the CPUC Energy Division at:

E-mail: EDTariffUnit@cpuc.ca.gov

²⁷ Reported portfolio expenditures from 2024 Approved budget are \$8,527,077.87 for Programs + \$50,707.01 for EM&V for Total Portfolio Expenditures of \$8,578,784.88. The amount reported for the purpose of the MCAL budget includes PA EM&V Budget Unspent Committed of \$47,010.55 and CPUC EM&V budget of \$257,619.02. This amount excludes 2024 Expenditures from pre-2024 budgets of \$1,867,794.60.

²⁸ Please see CEDARS for Excel version of Attachment A.

In addition, protests and all other correspondence regarding this advice letter should also be sent electronically to the attention of:

Connor Flanigan
Managing Director, State Regulatory Operations
Southern California Edison Company
E-mail: AdviceTariffManager@sce.com

and

Adam Smith
Director, Regulatory Relations
c/o Karyn Gansecki
E-mail: Karyn.Gansecki@sce.com

There are no restrictions on who may submit a protest, but the protest shall set forth specifically the grounds upon which it is based and must be received by the deadline shown above.

In accordance with General Rule 4 of GO 96-B, SCE is serving copies of this advice letter to the interested parties shown on the attached GO 96-B, R.13-11-005, and A.22-02-005 et. al. service lists. Address change requests to the GO 96-B service list should be directed by electronic mail to AdviceTariffManager@sce.com or at (626) 302-6838. 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.

To view other SCE advice letters submitted with the Commission, log on to SCE's web site at <https://www.sce.com/wps/portal/home/regulatory/advice-letters>.

For questions, please contact Mara Portlock at (626) 302-7218 or by electronic mail at mara.portlock@sce.com.

Southern California Edison Company

/s/ Connor Flanigan
Connor Flanigan

CF:mkp:lp



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: Southern California Edison Company (U 338-E)

Utility type:

☒ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Darrah Morgan

Phone #: (626) 302-2086

E-mail: AdviceTariffManager@sce.com

E-mail Disposition Notice to: AdviceTariffManager@sce.com

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 5670-E

Tier Designation: 2

Subject of AL: Southern California Edison Company's Energy Efficiency Program and Portfolio Mid-Cycle Advice Letter for Program Years 2024–2027

Keywords (choose from CPUC listing): Compliance, Energy Efficiency

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.21-05-031, D.23-06-055 and D.23-08-005

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

Summarize differences between the AL and the prior withdrawn or rejected AL:

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: 12/4/25

No. of tariff sheets: -3-

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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: See Attachment 1

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets: None

¹Discuss in AL if more space is needed.

Protests and correspondence regarding this AL are to be sent via email and are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

California Public Utilities Commission
Energy Division Tariff Unit Email:
EDTariffUnit@cpuc.ca.gov

Contact Name: Connor Flanigan
Title: Managing Director, State Regulatory Operations
Utility/Entity Name: Southern California Edison Company

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email: AdviceTariffManager@sce.com

Contact Name: Adam Smith c/o Karyn Gansecki
Title: Director, Regulatory Relations
Utility/Entity Name: Southern California Edison Company

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email: karyn.gansecki@sce.com

CPUC
Energy Division Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Clear Form

ENERGY Advice Letter Keywords

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

Cal P.U.C. Sheet No.	Title of Sheet	Cancelling Cal P.U.C. Sheet No.
90739-E	PRELIMINARY STATEMENT FF Sheet 6	89258-E
90740-E	TABLE OF CONTENTS Sheet 1	90280-E
90741-E	TABLE OF CONTENTS Sheet 2	90600-E

Attachment A

Appendices From Excel Template in PDF Format

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 and Standards	
1	Residential Sector	\$ 146,810,783	\$ 69,979,139	\$ 19,379,016	\$ -	\$ 236,168,938
2	Commercial Sector	\$ 417,908,956	\$ 43,951,378	\$ 9,049,960	\$ -	\$ 470,910,293
3	Industrial Sector	\$ 73,333,619	\$ 3,688,333	\$ -	\$ -	\$ 77,021,951
4	Agricultural Sector	\$ 10,896,613	\$ 2,686,422	\$ -	\$ -	\$ 13,583,035
5	Public Sector	\$ 32,524,903	\$ 11,050,562	\$ -	\$ -	\$ 43,575,465
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ 59,959,814	\$ -	\$ -	\$ 59,959,814
8	WE&T	\$ -	\$ 32,786,274	\$ 4,043,830	\$ -	\$ 36,830,104
9	Finance	\$ -	\$ 15,323,424	\$ -	\$ -	\$ 15,323,424
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 84,214,406	\$ 84,214,406
11	Portfolio Support	\$ 58,092,114	\$ 19,258,142	\$ 2,706,865	\$ 6,275,815	\$ 86,332,937
12	OBF Loan Pool					\$ 29,258,627
13	Portfolio Subtotal [2]	\$ 739,566,987	\$ 258,683,488	\$ 35,179,671	\$ 90,490,221	\$ 1,153,178,995

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

[2] excludes EM&V and Portfolio Oversight

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 145,293,638	\$ 66,111,600	\$ 19,927,705	\$ -	\$ 231,332,942
2	Commercial Sector	\$ 290,142,159	\$ 47,019,205	\$ 16,179,863	\$ -	\$ 353,341,227
3	Industrial Sector	\$ 148,784,003	\$ 8,055,609	\$ -	\$ -	\$ 156,839,612
4	Agricultural Sector	\$ 13,705,820	\$ 3,897,977	\$ -	\$ -	\$ 17,603,796
5	Public Sector	\$ 48,484,690	\$ 17,838,606	\$ -	\$ -	\$ 66,323,296
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ 54,116,518	\$ -	\$ -	\$ 54,116,518
8	WE&T	\$ -	\$ 37,918,558	\$ 4,385,402	\$ -	\$ 42,303,960
9	Finance	\$ -	\$ 16,874,047	\$ -	\$ -	\$ 16,874,047
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 76,433,991	\$ 76,433,991
11	Portfolio Support	\$ 45,867,579	\$ 18,268,505	\$ 2,926,329	\$ 5,571,715	\$ 72,634,128
12	OBF Loan Pool					\$ 36,500,000
13	Portfolio Subtotal [2]	\$ 692,277,889	\$ 270,100,624	\$ 43,419,299	\$ 82,005,706	\$ 1,124,303,517

[2] excludes EM&V and Portfolio Oversight

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

Line	Budget Category	Change-Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 1,517,145	\$ 3,867,539	\$ (548,689)	\$ -	\$ 4,835,995
2	Commercial Sector	\$ 127,766,796	\$ (3,067,827)	\$ (7,129,903)	\$ -	\$ 117,569,066
3	Industrial Sector	\$ (75,450,385)	\$ (4,367,276)	\$ -	\$ -	\$ (79,817,661)
4	Agricultural Sector	\$ (2,809,207)	\$ (1,211,555)	\$ -	\$ -	\$ (4,020,762)
5	Public Sector	\$ (15,959,787)	\$ (6,788,044)	\$ -	\$ -	\$ (22,747,831)
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ 5,843,296	\$ -	\$ -	\$ 5,843,296
8	WE&T	\$ -	\$ (5,132,284)	\$ (341,572)	\$ -	\$ (5,473,856)
9	Finance	\$ -	\$ (1,550,622)	\$ -	\$ -	\$ (1,550,622)
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 7,780,415	\$ 7,780,415
11	Portfolio Support	\$ 12,224,535	\$ 989,638	\$ (219,464)	\$ 704,100	\$ 13,698,809
12	OBF Loan Pool					\$ (7,241,373)
13	Portfolio Subtotal [2]	\$ 47,289,099	\$ (11,417,136)	\$ (8,239,628)	\$ 8,484,515	\$ 36,116,851

[2] excludes EM&V and Portfolio Oversight

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

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	\$ 1,153,178,995	\$ 1,990,400	\$ 13,317,677	\$ 35,920,602	\$ (207,729,603)	\$ 996,678,071
2	SoCal REN	\$ 187,054,384	\$ -	\$ 2,156,514	\$ 5,612,434	\$ (1,599,104)	\$ 193,224,228
3	3C-REN	\$ 23,691,068	\$ -	\$ 236,321	\$ 623,027	\$ (8,050,383)	\$ 16,500,033
4	I-REN	\$ 44,377,545	\$ -	\$ 448,788	\$ 1,183,166	\$ -	\$ 46,009,499
5	RREN Central ⁶	\$ 6,977,088	\$ -	\$ 80,627	\$ 210,085	\$ -	\$ 7,267,800
6	RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	Bay-REN (SW Program) ⁷	\$ 4,704,480	\$ -	\$ 53,906	\$ 142,114	\$ -	\$ 4,900,500
8	Ava Community Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	CleanPowerSF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Peninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	SD REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Total	\$ 1,419,983,560	\$ 1,990,400	\$ 16,293,833	\$ 43,691,427	\$ (217,379,090)	\$ 1,264,580,131
17	Collected 2024 Recovery						\$ 286,304,963
18	Expected 2025 Recovery						\$ 477,466,701
19	Remaining Cost Recovery						\$ 500,808,467

[4] 2024 Actuals and the 2025 TUAL forecast are used in the updated forecast

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

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

[7] Bay-REN budget amount included per disposition pursuant to BayREN's AL 28-E.

Table 1.2b - TUAL Total Cost Recovery Request, Including REN/CCA and Other Costs (IOU 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	\$ 1,124,303,517	\$ 1,990,400	\$ 12,882,645	\$ 33,963,335	\$ (187,223,889)	\$ 985,916,009
2	SoCal REN	\$ 187,010,680	\$ -	\$ 2,156,010	\$ 5,611,123	\$ (1,599,104)	\$ 193,178,709
3	3C-REN	\$ 23,568,400	\$ -	\$ 270,054	\$ 711,962	\$ (8,050,383)	\$ 16,500,033
4	I-REN	\$ 34,692,544	\$ -	\$ 397,520	\$ 1,048,004	\$ -	\$ 36,138,068
5	RREN Central ⁶	\$ 33,333,786	\$ -	\$ 350,006	\$ 1,038,902	\$ -	\$ 34,722,694
6	RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	Bay-REN (SW Program)	\$ 4,900,000	\$ -	\$ -	\$ -	\$ -	\$ 4,900,000
8	Ava Community Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	CleanPowerSF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Peninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	SD REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	Total	\$ 1,407,808,927	\$ 1,990,400	\$ 16,056,235	\$ 42,373,326	\$ (196,873,376)	\$ 1,271,355,513

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

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

Table 1.2c - Change Total Cost Recovery Request, Including REN/CCA and Other Costs (IOU 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	\$ 28,875,478	\$ -	\$ 435,032	\$ 1,957,266	\$ (20,505,714)	\$ 10,762,062
2	SoCal REN	\$ 43,704	\$ -	\$ 504	\$ 1,311	\$ -	\$ 45,519
3	3C-REN	\$ 122,668	\$ -	\$ (33,733)	\$ (88,935)	\$ -	\$ (0)
4	I-REN	\$ 9,685,001	\$ -	\$ 51,268	\$ 135,162	\$ -	\$ 9,871,431
4	RREN Central ⁶	\$ (26,356,698)	\$ -	\$ (269,379)	\$ (828,817)	\$ -	\$ (27,454,894)
4	RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	Bay-REN (SW Program)	\$ (195,520)	\$ -	\$ 53,906	\$ 142,114	\$ -	\$ 500

8	Ava Community Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	CleanPowerSF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Peninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	SD REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	Total	12,174,633	\$ -	\$ 237,598	\$ 1,318,101	\$ (20,505,714)	\$ (6,775,382)

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

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

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

Line	Spending Budget & Cost Recovery Request	Unspent/Uncommitted Funds for Offset ^a	2024	2025	2026	2027	2024-2027
1	IOU (excluding fuel substitution budget)	(20,505,714)	158,612,682	321,486,815	279,917,735	248,593,814	988,105,331
2	IOU Budget forecasted to support fuel sub	-	66,942,590	6,088,058	18,521,470	112,015,337	203,567,455
3	Total cost recovery request for IOU portfolio (excluding offset)	(20,505,714)	225,555,272	327,574,873	298,439,205	360,609,150	1,191,672,786
4	IOU 2023 Estimated Unspent & Uncommitted Funds to Offset 2024 Cost Recovery	(187,223,889)	-	-	-	-	(187,223,889)
5	Total Cost Recovery Request for IOU Portfolio (including offset)	(207,729,603)	225,555,272	327,574,873	298,439,205	360,609,150	1,004,448,897
6	Applicable electric split	100%	100%	100%	100%	100%	100%
7	Applicable gas split	N/A	N/A	N/A	N/A	N/A	N/A
8	Electric portion for cost recovery (excluding fuel sub budget)	N/A	N/A	N/A	N/A	N/A	N/A
9	Fuel sub applicable electric split	N/A	N/A	N/A	N/A	N/A	N/A
10	Electric portion for cost recover (fuel sub budget)	N/A	N/A	N/A	N/A	N/A	N/A
11	Total electric portion for cost recovery for IOU portfolio	N/A	N/A	N/A	N/A	N/A	N/A
12	Total Gas portion for cost recovery for IOU portfolio	N/A	N/A	N/A	N/A	N/A	N/A
13	Electric split (with fuel sub)	N/A	N/A	N/A	N/A	N/A	N/A
14	Gas split (with fuel sub)	N/A	N/A	N/A	N/A	N/A	N/A

[8] Unspent/Uncommitted Funds for Offset were updated from TUAL to reflect actual 2023 & 2024 performance

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

Line		PY 2017	PY 2018	PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024
1	Unspent & Uncommitted			\$ (1,542,094)	\$ (1,247,609)	\$ (1,833,429)	\$ (3,347,968)	\$ (200,189,978)	\$ (9,090,968)
2	EM&V			\$ (33,600)	\$ (24,640)	\$ (33,893)	\$ (34,911)	-	-
3	Total			\$ (1,575,694)	\$ (1,272,249)	\$ (1,867,322)	\$ (3,382,879)	\$ (200,189,978)	\$ (9,090,968)
4	Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2025 Rate Offset								
5	EM&V - PA Funds								
6	EM&V - CPUC Funds								
7	IOU Program Funds								
8	Total								

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

Line	PG&E	SDG&E	SCE	SCG	Gas \$
1	Year	Gas \$	Electric \$	Gas \$	Electric \$
2	2024	N/A	N/A	N/A	N/A
3	2025	N/A	N/A	N/A	N/A
4	2026	N/A	N/A	N/A	N/A
5	2027	N/A	N/A	N/A	N/A
6	Total	-	-	-	-

Table 1.6 - Mid-Cycle Advice Letter Funding Breakdown (ALL PAs)

Line	Year	2024 Reported Expenditures	2024 Carryover Funding ^a	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset	2024-2027 Funding Total
1	2024	\$ 190,097,649	\$ 35,457,623				\$ (187,223,889)	38,331,383
2	2025			\$ 327,574,873				327,574,873
3	2026				\$ 298,439,205		\$ (20,505,714)	277,933,491
4	2027					\$ 360,609,150		360,609,150

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

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

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 148,123,946	\$ 241,296,159	\$ 218,960,416	\$ 287,828,043	\$ 896,208,565
2	Market Support	\$ 733,503	\$ 72,057,984	\$ 6,946,869	\$ 8,739,800	\$ 88,478,156
3	Equity	\$ 23,963	\$ 611,325	\$ 1,215,405	\$ 30,035	\$ 1,880,729
4	Total TSB Forecast	\$ 148,881,412	\$ 313,965,469	\$ 227,122,690	\$ 296,597,879	\$ 986,567,450
5	CPUC TSB Goal	\$ 112,534,778	\$ 117,062,964	\$ 145,208,902	\$ 177,437,507	\$ 552,244,151
6	<i>TSB Forecast / TSB Goal ^[1]</i>	132%	268%	156%	167%	179%

[1] TSB Goal set in decisions D.25-08-034

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	\$ 144,888,469	\$ 241,296,159	\$ 256,964,271	\$ 195,484,899	\$ 838,633,799
2	Market Support	\$ 44,104,273	\$ 72,057,984	\$ 79,667,090	\$ 83,113,849	\$ 278,943,196
3	Equity	\$ 574,530	\$ 611,325	\$ -	\$ -	\$ 1,185,855
4	Total TSB Forecast	\$ 189,567,272	\$ 313,965,469	\$ 336,631,361	\$ 278,598,748	\$ 1,118,762,850
5	CPUC TSB Goal	\$ 112,534,778	\$ 117,062,964	\$ 128,212,309	\$ 142,456,365	\$ 500,266,416
6	<i>TSB Forecast / TSB Goal ^[2]</i>	168%	268%	263%	196%	224%

[2] TSB Goal set in decisions D.21-09-037 and corrected in D.22-05-016

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	\$ 3,235,477	\$ 0	\$ (38,003,855)	\$ 92,343,144	\$ 57,574,766
2	Market Support	\$ (43,370,770)	\$ -	\$ (72,720,221)	\$ (74,374,049)	\$ (190,465,040)
3	Equity	\$ (550,567)	\$ -	\$ 1,215,405	\$ 30,035	\$ 1,880,729
4	Total TSB Forecast	\$ (40,685,860)	\$ 0	\$ (109,508,671)	\$ 17,999,131	\$ (132,195,400)
5	CPUC TSB Goal	\$ -	\$ -	\$ 16,996,593	\$ 34,981,142	\$ 51,977,735
6	<i>TSB Forecast / TSB Goal ^[3]</i>	-36%	0%	-106%	-28%	-45%

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

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

Line	Savings Unit	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[1]	1,225	1,046	848	763	3,882
2	GWh CPUC Target ^[1]	1,071	1,008	798	713	3,590
3	<i>GWh Forecast/Target</i>	114%	104%	106%	107%	108%
4	MW Forecast	250	211	171	156	788
5	MW CPUC Target ^[1]	187	172	138	121	618
6	<i>MW Forecast/Target</i>	134%	122%	124%	129%	128%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[1]	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	0%	0%	0%	0%	0%

[1] TSB Goal set in decisions D.25-08-034

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]	1,116	1,046	977	888	4,026
2	GWh CPUC Target ^[2]	1,071	1,008	987	910	3,977
3	<i>GWh Forecast/Target</i>	104%	104%	99%	98%	101%
4	MW Forecast	221	211	198	182	811
5	MW CPUC Target ^[2]	187	172	169	155	683
6	<i>MW Forecast/Target</i>	118%	122%	117%	117%	119%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[2]	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	0%	0%	0%	0%	0%

[2] TSB Goal set in decisions D.21-09-037 and corrected in D.22-05-016

Table 2.2c - Change Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[1]	109	-	(128)	(126)	(145)
2	GWh CPUC Target ^[1]	-	-	(190)	(197)	(386)
3	<i>GWh Forecast/Target</i>	10%	0%	7%	9%	7%
4	MW Forecast	29	-	(27)	(25)	(23)
5	MW CPUC Target ^[1]	29	-	(27)	(25)	(23)
6	<i>MW Forecast/Target</i>	16%	0%	7%	11%	9%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[1]	0	-	0	0	0
9	<i>MMThm Forecast/Target</i>	0%	0%	0%	0%	0%

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

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 128,884,759	\$ 192,711,992	\$ 176,737,470	\$ 241,232,767	\$ 739,566,987
2	Market Support	\$ 48,226,101	\$ 70,832,725	\$ 68,422,909	\$ 71,201,753	\$ 258,683,488
3	Equity	\$ 4,656,208	\$ 19,194,838	\$ 7,951,604	\$ 3,377,021	\$ 35,179,671
4	Codes and Standards	\$ 32,997,874	\$ 20,276,228	\$ 18,747,527	\$ 18,468,592	\$ 90,490,221
5	EM&V (PA and ED)	\$ 11,034,103	\$ 15,061,490	\$ 14,082,095	\$ 16,831,417	\$ 57,009,105
6	Total Budget w/o OBF Loan Pool	\$ 225,799,045	\$ 318,077,273	\$ 285,941,605	\$ 351,111,550	\$ 1,180,929,473
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					25%
8	OBF Loan Pool Addition	\$ (741,373)	\$ 9,000,000	\$ 12,000,000	\$ 9,000,000	\$ 29,258,627
9	Budget excluding Portfolio Oversight	\$ 225,057,672	\$ 327,077,273	\$ 297,941,605	\$ 360,111,550	\$ 1,210,188,100
10	ED Portfolio Oversight	\$ 497,600	\$ 497,600	\$ 497,600	\$ 497,600	\$ 1,990,400
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 225,555,272	\$ 327,574,873	\$ 298,439,205	\$ 360,609,150	\$ 1,212,178,500
12	Approved Budget Cap ^[4]					\$ 1,674,812,208

[4] Decision 23-06-095 OPS

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 113,921,070	\$ 192,711,992	\$ 216,168,034	\$ 169,476,793	\$ 692,277,889
2	Market Support	\$ 65,574,119	\$ 70,832,725	\$ 67,884,278	\$ 65,809,502	\$ 270,100,624
3	Equity	\$ 16,539,035	\$ 19,194,838	\$ 4,091,338	\$ 3,594,088	\$ 43,419,299
4	Codes and Standards	\$ 20,580,316	\$ 20,276,228	\$ 20,398,069	\$ 20,751,093	\$ 82,005,706
5	EM&V (PA and ED)	\$ 11,034,103	\$ 15,061,490	\$ 15,537,109	\$ 13,623,269	\$ 55,255,971
6	Total Budget w/o OBF Loan Pool	\$ 227,648,643	\$ 318,077,273	\$ 324,078,828	\$ 273,254,744	\$ 1,143,059,489
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					27%
8	OBF Loan Pool Addition	\$ 6,500,000	\$ 9,000,000	\$ 12,000,000	\$ 9,000,000	\$ 36,500,000
9	Budget excluding Portfolio Oversight	\$ 234,148,643	\$ 327,077,273	\$ 336,078,828	\$ 282,254,744	\$ 1,179,559,489
10	ED Portfolio Oversight	\$ 497,600	\$ 497,600	\$ 497,600	\$ 497,600	\$ 1,990,400
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 234,646,243	\$ 327,574,873	\$ 336,576,428	\$ 282,752,344	\$ 1,181,549,889

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 14,963,689	\$ 0	\$ (39,430,564)	\$ 71,755,974	\$ 47,289,099
2	Market Support	\$ (17,348,018)	\$ 0	\$ 538,631	\$ 5,392,251	\$ (11,417,136)
3	Equity	\$ (11,882,827)	\$ (0)	\$ 3,860,265	\$ (217,066)	\$ (8,239,628)
4	Codes and Standards	\$ 12,417,558	\$ (0)	\$ (1,650,542)	\$ (2,282,500)	\$ 8,484,515
5	EM&V (PA and ED)	\$ (0)	\$ 0	\$ (1,455,014)	\$ 3,208,148	\$ 1,753,133
6	Total Budget w/o OBF Loan Pool	\$ (1,849,598)	\$ 0	\$ (38,137,224)	\$ 77,856,806	\$ 37,869,984
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					-52%
8	OBF Loan Pool Addition	\$ (7,241,373)	\$ -	\$ -	\$ -	\$ (7,241,373)
9	Budget excluding Portfolio Oversight	\$ (9,090,971)	\$ 0	\$ (38,137,224)	\$ 77,856,806	\$ 30,628,611
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (9,090,971)	\$ 0	\$ (38,137,224)	\$ 77,856,806	\$ 30,628,611

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.08	1.18	0.65
2		Market Support	0.39	0.47	0.44
3		Equity	0.06	0.07	0.08
4		Codes and Standards (C&S)	1.77	46.50	0.96
5	Portfolio	Including C&S	1.44	3.96	0.83
6		Excluding C&S	0.88	0.96	0.60

[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	1.08	1.22	0.92
2		Market Support	0.91	1.29	1.14
3		Equity	0.03	0.03	0.03
4		Codes and Standards (C&S)	2.26	41.93	31.16
5	Portfolio	Including C&S	1.69	4.23	3.36
6		Excluding C&S	0.94	1.11	0.89

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	0.01	(0.03)	(0.27)
2		Market Support	(0.52)	(0.82)	(0.71)
3		Equity	0.03	0.03	0.05
4		Codes and Standards (C&S)	(0.49)	4.57	(30.19)
5	Portfolio	Including C&S	(0.25)	(0.27)	(2.53)
6		Excluding C&S	(0.07)	(0.15)	(0.29)

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	1.44	1.47	1.51	1.54	1.48	1.51
3		Market Support	0.17	0.17	0.17	0.17	0.17	0.17
4		Equity	0.28	0.28	0.01	0.01	0.21	0.21
5		Codes and Standards (C&S)	2.49	2.56	2.39	2.44	2.44	2.50
6	Portfolio	Including C&S	1.96	2.02	1.89	1.93	1.92	1.97
7		Excluding C&S	1.11	1.14	1.20	1.22	1.16	1.18

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]	\$ 271,404,008	\$ 1,182,919,873	23%	20%
2	Third-party ^[2]	\$ 813,104,206	\$ 1,182,919,873	69%	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

Appendix 1: 2024 - 2027 Program Portfolio Budget and Targets														Total Budget										Change		Notes		M-Notes																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
ID	Program Name	ID	Target External	Program Type	Business Sector	ID	Program Segment	ID	Budget	2024				2025				2026				2027																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																						
										Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est

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			Cap & Target		
		(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]	\$ 34,077,010		\$ 34,077,010	2.9%	10.0%	
3	Non-PA Third Party & Partnership ^[2]	\$ -	\$ 32,629,638	\$ 32,629,638	2.8%		10.0%
4	PA & Non-PA Target Exempt Programs ^[3]	\$ 21,326,940	\$ 4,358,753	\$ 25,685,693			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 9,120,014	\$ 24,589,751	\$ 33,709,766	2.9%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 33,369,064	\$ 413,016,523	\$ 446,385,586			
9	Non Incentives and Non Rebates	\$ 61,782,484	\$ 237,717,339	\$ 299,499,823	25.4%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)	\$ 151,140,650	\$ 100,792,201	\$ 251,932,851			
11	EM&V Costs (PA and ED) ^[4]	\$ 53,412,141	\$ -	\$ 57,009,105	4.8%	4.0%	
11a	EM&V - PA	\$ 13,317,677		\$ 13,317,677			
11b	EM&V - ED	\$ 43,691,428		\$ 43,691,428			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 364,172,290	\$ 813,104,206	\$ 1,180,929,473			
13	Total Third-Party Qualifying Costs ^[5]		\$ 813,104,206		68.9%		60.0%
14	OBF Loan Pool Addition	\$ 29,258,627		\$ 29,258,627			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[6]			\$ 1,210,188,100			
16	ED Portfolio Oversight ^[10]	\$ 1,990,400		\$ 1,990,400			
17	EE-Funded IDSM	\$ -				2.5%	
	Multi-DER IDSM ^[7]		\$ 15,000,000				
18	PA Spending Budget Request			\$ 1,212,178,500			

[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, Multi-DER IDSM and Codes & Standards programs

[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 \$1,109,266,909 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. The \$30,000,000 budget is included in the relevant lines 2 - 12.

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

[9] Includes actual expenditures and commitments 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.

Appendix 3: RTR Implementation Descriptions per 0.23-06-055
Do not insert text that describes your program or recommendations from FY2022 onwards evaluations that impact programs in the current budget cycle.

		Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	(PA Response)	PA Response Notes	Proposed RTR Implementation				
					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 ID) would be impacted by the action items.
CALMAC ID		Study Name	Recommendations			Accepted, Rejected, or Other					
Overall conclusions and recommendations											
CPU0367.01		PY 2018 - 2021 Forward-looking Smart Thermostat Study	There are program opportunities to increase smart thermostat penetration in households with air conditioning in hot climate zones. Programs should aim to expand the penetration of smart thermostats that can operate as part of a "heat" serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid	SCE	Accept	SCE accepts Commission's recommendation (CPU0367.01). Currently, the Residential Direct Install Program (SCE-13-SW-0055) and Comprehensive Manufactured Homes Program (SCE-13-TP-001) offer the Smart Thermostat measure. In Q3 2023, both programs will transition to the new Third-Party Residential Energy Solutions (SCE-TP-2023R_002) program and Multifamily Residential Direct Install (SCE-TP-2023R_MF_001) program, where smart thermostats will continue to be offered for the duration of the programs. Furthermore, the Integrated Demand Side Management (IDSM) activities previously implemented under Residential Direct Install will continue under the Residential Energy Solutions program where					
CPU0380.01		PY 2022 Midstream Commercial Water-Heating Impact	To increase the effectiveness and adoption of the online coupon tool, the Program implementer should enhance awareness and promotion of the tool among contractors. This could include targeted communication campaigns, training sessions on how to use the tool, and demonstrating the benefits and ease of purchasing equipment from big box stores using the coupon.	SGS							
CPU0380.01		PY 2022 Midstream Commercial Water-Heating Impact	The Program implementer should target outreach efforts and support to distributors and contractors in other parts of the state beyond southern California. This could include tailored marketing campaigns, incentives, and training programs to increase awareness and participation statewide.	SGS							
CPU0380.01		PY 2022 Midstream Commercial Water-Heating Impact	The Program administrator and implementer should formalize a process of verifying the eligibility of multifamily installations to ensure equipment is only installed on nonresidential/commercial rate meters.	SGS							
CPU0369.01		PY 2022 Local 3-Party Programs Impact	Other programs should consider emulating the strategies these programs have taken to achieve success, including offering measures that better align with customer preferences, such as electrification and deeper gas usage saving measures, and employing more effective outreach strategies, such as direct multi-language outreach and community engagement (e.g., events).	All IOUs	Accept	SCE accepts Commission's recommendations (CPU0369.01). SCE continually assesses our portfolio for potential gaps in market coverage and measure offerings to determine if a targeted solicitation may be needed to address portfolio needs. While third-party implementers are ultimately responsible for developing each program's strategy, SCE's EE portfolio includes third-party programs that support customer choice and more effective outreach strategies, including multiple offerings for residential, commercial, industrial, agricultural, and public customers. Regarding customer preferences, SCE's portfolio of third-party EE programs offer customers multiple avenues to pursue EE. SCE continues to incorporate Commission's recommendations (CPU0369.01). SCE's third-party implemented equity programs (Disadvantaged Community Marketing Outreach (DMCO) (SCE_Res_Equity_003) and Residential Energy Advisor Non-Resource (REAN) (SCE_Res_Equity_002)) currently incorporate two-way communication to measure and track sentiment within the target customer sector (e.g. through energy assessments, customer surveys, social marketing channels). However, SCE notes that in a third-party designed and delivered model, third-party implementers are responsible for engaging and tracking direct communication and outreach with customers.					
CPU0369.01		PY 2022 Local 3-Party Programs Impact	Track efforts to obtain input from HTN/DAC communities and track HTN/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.	All IOUs	Accept	SCE continues to incorporate Commission's recommendations (CPU0369.01). Third-party EE programs within SCE's portfolio are offering innovative approaches to marketing and outreach. The Simplified Savings (SCE_DMB_Equity_001) third-party implemented program has a step-by-step interactive website that offers customers benefits. The Comprehensive Manufactured Homes Program (SCE-13-TP-001), which is in the process of transitioning to Residential Energy Solutions (RES), collaborates with park managers/owners to host program presentations at park clubhouses for park residents.					
CPU0369.01		PY 2022 Local 3-Party Programs Impact	Existing and developing local 3PPs should take note of the marketing and outreach innovations that have continued to work for this pool of programs year-over-year: direct outreach and strategic partnerships.	All IOUs	Accept	SCE continues to incorporate Commission's recommendations (CPU0369.01). Since 2022, SCE included equity terms and framework by executing three equity contracts, which are the Residential Energy Advisor Non-Resource Equity Program (SCE_Res_Equity_001), Disadvantaged Community Marketing and Outreach Program (SCE_Res_Equity_003) and Simplified Savings Program (SCE_DMB_Equity_001). Since this impact evaluation came out, SCE has had no new solicitations for equity programs, and SCE is still exploring the resource solicitation avenue for equity framework.					
CPU0369.01		PY 2022 Local 3-Party Programs Impact	The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.	All IOUs	Accept	SCE continues to incorporate Commission's recommendations (CPU0369.01). Since 2022, SCE included equity terms and framework by executing three equity contracts, which are the Residential Energy Advisor Non-Resource Equity Program (SCE_Res_Equity_001), Disadvantaged Community Marketing and Outreach Program (SCE_Res_Equity_003) and Simplified Savings Program (SCE_DMB_Equity_001). Since this impact evaluation came out, SCE has had no new solicitations for equity programs, and SCE is still exploring the resource solicitation avenue for equity framework.					
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							
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							
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							
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 at official coordination meetings as defined in the ICNs 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 ICNs and PAs 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 ICN and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluations.	All RENs, MCE							
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							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Build more community input into all phases of program delivery.	SDGE							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery iterations in delivering deeper savings.	SDGE							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESG Goals 4, 1, 6, 1, and 8.	SDGE							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.	SDGE							
CPU0357.01		PY 2020-2022 Site-Level Normalized Measured Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	Recommendation 5a: A market study should be conducted to determine the share of tankless water heaters among recently installed water heaters for both the replacement and new construction market.	SGS							
CPU0377.01		PY 2020-2022 Site-Level Normalized Measured Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	Improve alignment between program implementers, PA staff, and evaluators on program evaluation and qualification requirements; increasing clarity on data requirements among all parties and streamlining the process of data sharing across parties can reduce duplicative work and confusion. Follow-on work led by ED can facilitate this process.	PG&E							

CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	To protect participants, the implementer should ensure that equipment is operational and meets the functional needs of the building and that the 12 months of pre-installation data is an actual representation of baseline energy usage with functional equipment. A simple functional check by the implementer on the existing equipment during the investigation phase could eliminate this risk without adding additional burden on the participants.	PG&E								
------------	--	---	------	--	--	--	--	--	--	--	--

Attachment B

Community Engagement Indicators

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	

Agreed Upon Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total
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	
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	
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	
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 Narrative Annual Report Program Changes Chart.		12	
Additional Potential Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total
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	
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	
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	
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	
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	
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	
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	

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

Attachment C

PA Response to Recommendations

Appendix 3: RTR Implementation Descriptions per 0.23-06-055
Do not insert text that describes your program or recommendations from FY2022 onwards evaluations that impact programs in the current budget cycle.

		Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	(PA Response)	PA Response Notes	Proposed RTR Implementation				
					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 ID) would be impacted by the action items.
CALMAC ID		Study Name	Recommendations	If incorrect, please indicate and redirect to notes.	Accepted, Rejected, or Other	Describe specific program change, give reason for rejection or indicate that it's under further review.					
Overall conclusions and recommendations											
CPU0367.01		PY 2018 - 2021 Forward-looking Smart Thermostat Study	There are program opportunities to increase smart thermostat penetration in households with air conditioning in hot climate zones. Programs should aim to expand the penetration of smart thermostats that can operate as part of a "heat" serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid	SCE	Accept	SCE accepts Commission's recommendation (CPU0367.01). Currently, the Residential Direct Install Program (SCE-13-SW-0055) and Comprehensive Manufactured Homes Program (SCE-13-TP-001) offer the Smart Thermostat measure. In Q3 2023, both programs will transition to the new Third-Party Residential Energy Solutions (SCE-TP-2023R_002) program and Multifamily Residential Direct Install (SCE-TP-2023R_MF_001) program, where smart thermostats will continue to be offered for the duration of the programs. Furthermore, the Integrated Demand Side Management (IDSM) activities previously implemented under Residential Direct Install will continue under the Residential Energy Solutions program where					
CPU0380.01		PY 2022 Midstream Commercial Water-Heating Impact	To increase the effectiveness and adoption of the online coupon tool, the Program implementer should enhance awareness and promotion of the tool among contractors. This could include targeted communication campaigns, training sessions on how to use the tool, and demonstrating the benefits and ease of purchasing equipment from big box stores using the coupon.	SGS							
CPU0380.01		PY 2022 Midstream Commercial Water-Heating Impact	The Program implementer should target outreach efforts and support to distributors and contractors in other parts of the state beyond southern California. This could include tailored marketing campaigns, incentives, and training programs to increase awareness and participation statewide.	SGS							
CPU0380.01		PY 2022 Midstream Commercial Water-Heating Impact	The Program administrator and implementer should formalize a process of verifying the eligibility of multifamily installations to ensure equipment is only installed on nonresidential/commercial rate meters.	SGS							
CPU0369.01		PY 2022 Local 3-Party Programs Impact	Other programs should consider emulating the strategies these programs have taken to achieve success, including offering measures that better align with customer preferences, such as electrification and deeper gas usage saving measures, and employing more effective outreach strategies, such as direct multi-language outreach and community engagement (e.g., events).	All IOUs	Accept	SCE accepts Commission's recommendations (CPU0369.01). SCE continually assesses our portfolio for potential gaps in market coverage and measure offerings to determine if a targeted solicitation may be needed to address portfolio needs. While third-party implementers are ultimately responsible for developing each program's strategy, SCE's EE portfolio includes third-party programs that support customer choice and more effective outreach strategies, including multiple offerings for residential, commercial, industrial, agricultural, and public customers. Regarding customer preferences, SCE's portfolio of third-party EE programs offer customers multiple avenues to pursue EE. SCE continues to incorporate Commission's recommendations (CPU0369.01). SCE's third-party implemented equity programs (Disadvantaged Community Marketing Outreach (DMCO) (SCE_Res_Equity_003) and Residential Energy Advisor Non-Resource (REAN) (SCE_Res_Equity_002)) currently incorporate two-way communication to measure and track sentiment within the target customer sector (e.g. through energy assessments, customer surveys, social marketing channels). However, SCE notes that in a third-party designed and delivered model, third-party implementers are responsible for engaging and tracking direct communication and outreach with customers.					
CPU0369.01		PY 2022 Local 3-Party Programs Impact	Track efforts to obtain input from HTN/DAC communities and track HTN/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.	All IOUs	Accept	SCE continues to incorporate Commission's recommendations (CPU0369.01). Third-party EE programs within SCE's portfolio are offering innovative approaches to marketing and outreach. The Simplified Savings (SCE_DMB_Equity_001) third-party implemented program has a step-by-step interactive website that offers customers benefits. The Comprehensive Manufactured Homes Program (SCE-13-TP-001), which is in the process of transitioning to Residential Energy Solutions (RES), collaborates with park managers/owners to host program presentations at park clubhouses for park residents.					
CPU0369.01		PY 2022 Local 3-Party Programs Impact	Existing and developing local 3PPs should take note of the marketing and outreach innovations that have continued to work for this pool of programs year-over-year: direct outreach and strategic partnerships.	All IOUs	Accept	SCE continues to incorporate Commission's recommendations (CPU0369.01). Since 2022, SCE included equity terms and framework by executing three equity contracts, which are the Residential Energy Advisor Non-Resource Equity Program (SCE_Res_Equity_001), Disadvantaged Community Marketing and Outreach Program (SCE_Res_Equity_003) and Simplified Savings Program (SCE_DMB_Equity_001). Since this impact evaluation came out, SCE has had no new solicitations for equity programs, and SCE is still exploring the resource solicitation avenue for equity framework.					
CPU0369.01		PY 2022 Local 3-Party Programs Impact	The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.	All IOUs	Accept	SCE continues to incorporate Commission's recommendations (CPU0369.01). Since 2022, SCE included equity terms and framework by executing three equity contracts, which are the Residential Energy Advisor Non-Resource Equity Program (SCE_Res_Equity_001), Disadvantaged Community Marketing and Outreach Program (SCE_Res_Equity_003) and Simplified Savings Program (SCE_DMB_Equity_001). Since this impact evaluation came out, SCE has had no new solicitations for equity programs, and SCE is still exploring the resource solicitation avenue for equity framework.					
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							
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							
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							
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 at official coordination meetings as defined in the ICNs 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 ICNs and PAs 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 ICN and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluations.	All RENs, MCE							
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							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Build more community input into all phases of program delivery.	SDGE							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery iterations in delivering deeper savings.	SDGE							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESG Goals 4, 1, 6, 1, 8, and 9.	SDGE							
CPU0352.01		PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.	SDGE							
CPU0357.01		PY 2020-2022 Site-Level Normalized Measured Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	Recommendation 5a: A market study should be conducted to determine the share of tankless water heaters among recently installed water heaters for both the replacement and new construction market.	SGS							
CPU0377.01		PY 2020-2022 Site-Level Normalized Measured Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	Improve alignment between program implementers, PA staff, and evaluators on program evaluation and qualification requirements; increasing clarity on data requirements among all parties and streamlining the process of data sharing across parties can reduce duplicative work and confusion. Follow-on work led by ED can facilitate this process.	PG&E							

CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	To protect participants, the implementer should ensure that equipment is operational and meets the functional needs of the building and that the 12 months of pre-installation data is an actual representation of baseline energy usage with functional equipment. A simple functional check by the implementer on the existing equipment during the investigation phase could eliminate this risk without adding additional burden on the participants.	PG&E								
------------	---	---	------	--	--	--	--	--	--	--	--

Attachment D

CEDARS Filing Confirmation

CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Edison (SCE)

Budget Filing Year: 2026

Submitted: 11:49 on 30 Oct 2025

By: Gary Golden

Advice Letter Number: 5670-E

* Portfolio Budget Filing Summary *

- TRC: 1.39
- PAC: 3.82
- TRC (no admin): 1.82
- PAC (no admin): 11.14
- RIM: 0.46
- SCB: 1.96
- SCH: 2.02
- Budget: \$285,941,605.01
- TotalSystemBenefit: \$1,132,137,144.52
- ElecBen: \$675,722,336.10
- GasBen: \$506,891,739.24
- WaterEnergyBen: \$52,009.06
- OtherBen: \$14,892,575.66
- TRCCost: \$837,741,503.08
- PACCost: \$304,005,887.64
- RIMCost: \$2,679,033,654.20
- SCBCost: \$855,305,668.96
- SCHCost: \$856,670,066.35

* Programs Included in the Budget Filing *

- SCE-13-ESA: Energy Savings Assistance Program
- SCE-13-L-003I: Public Sector Performance-Based Retrofit High Opportunity Program
- SCE-13-RENAAdmin: IOU REN Administrative Costs
- SCE-13-SW-002A: Commercial Energy Advisor Program

- SCE-13-SW-003D: Strategic Energy Management Program
- SCE-13-SW-007A: On-Bill Financing
- SCE-13-SW-007A1: On-Bill Financing Loan Pool
- SCE-13-SW-007C: New Finance Offerings
- SCE-13-SW-007C1: New Finance Offerings Credit Enhancements
- SCE-13-SW-008C: Compliance Improvement
- SCE-13-SW-008D: Reach Codes
- SCE-13-SW-008E: Planning and Coordination
- SCE-13-SW-010A: WE&T; Integrated Energy Education and Training
- SCE-13-TP-026: Residential 3P Solicitation
- SCE-13-TP-027: Commercial 3P Solicitation
- SCE-13-TP-028: Industrial 3P Solicitation
- SCE-24-Non-3P-001-Com: Comprehensive Energy Efficiency Resource (Commercial) - Com
- SCE-3OV0100: SCE EM&V;
- SCE-3OV0200: CPUC EM&V;
- SCE_3P_2020RCI_005: Comprehensive Commercial Program
- SCE_3P_2021AGPUB_001: Agriculture Energy Efficiency Program
- SCE_3P_2021AGPUB_002: Public Energy Performance Program
- SCE_3P_2024R_MF_001: Multifamily Residential Direct Install Program
- SCE_3P_2025C_001: Commercial Energy Reduction Initiative
- SCE_3P_2025C_002: Comprehensive Refrigeration Energy Savings and Training
- SCE_3P_2025C_003: Refrigeration Efficiency and Leak Mitigation
- SCE_3P_2025MAP_001C: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) - Commercial Sector
- SCE_3P_2025MAP_001P: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) - Public Sector
- SCE_3P_2025MAP_001R: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) - Residential Sector
- SCE_3P_2025MAP_002C: Measured Savings Program - Commercial Sector
- SCE_3P_2025MAP_002P: Measured Savings Program- Public Sector
- SCE_3P_2025R_001: Customer Home Engagement for Energy Reduction
- SCE_3P_2025R_002: Residential Energy Solutions
- SCE-3P-MULTI-DER-IDSM: Multi-DER IDSM Program Placeholder
- SCE_3P_SEM_001: Commercial Energy Manager Program
- SCE_3P_SEM_002: Industrial and Agriculture Energy Manager Program (Ind)
- SCE_3P_SEM_002A: Industrial and Agriculture Energy Manager Program (Ag)
- SCE_3P_SEM_003: SPARKe Commercial SEM Program
- SCE_3P_SEM_004: SPARKe Industrial and Agricultural SEM Program (Ind)
- SCE_3P_SEM_004A: SPARKe Industrial and Agricultural SEM Program (Ag)
- SCE_CS_PortfolioSupport: Codes & Standards Portfolio Support Costs
- SCE_Equity_PortfolioSupport: Equity Portfolio Support Costs
- SCE_MarketSupport_001: EE New Program Design Pilots

- SCE_MarketSupport_002: EE Contractor Demand Building Program
- SCE_MS_PortfolioSupport: Market Support Portfolio Support Costs
- SCE_PB_CS: Codes and Standards P&B;
- SCE_PB_EMV: EM&V; P&B;
- SCE_PB_Equity: Equity P&B;
- SCE_PB_MS: Market Support P&B;
- SCE_PB_RA: Resource Acquisition P&B;
- SCE_Portfolio_Oversight: ED Portfolio Oversight
- SCE_RA_PortfolioSupport: Resource Acquisition Portfolio Support Costs
- SCE_Res_Equity_001: Residential Energy Advisor (Resource)
- SCE_Res_Equity_002: Residential Energy Advisor (Non-Resource)
- SCE_Res_Equity_003: Disadvantaged Communities Marketing and Outreach
- SCE_SMB_Equity_001: Simplified Savings
- SCE_SW_CSA_Appl: Codes & Standards Advocacy - State Appliance Standards Advocacy
- SCE_SW_CSA_Appl_PA: Codes & Standards Advocacy - State Appliance Standards Advocacy - SCE Costs
- SCE_SW_CSA_Bldg: Codes & Standards Advocacy - State Building Codes Advocacy
- SCE_SW_CSA_Bldg_PA: Codes & Standards Advocacy - State Building Codes Advocacy - SCE Costs
- SCE_SW_CSA_Natl: Codes & Standards Advocacy - National Codes & Standards Advocacy
- SCE_SW_CSA_Natl_PA: Codes & Standards Advocacy - National Codes & Standards Advocacy - SCE Costs
- SCE_SW_ETP_Elec: Emerging Technologies Program, Electric
- SCE_SW_ETP_Elec_PA: Emerging Technologies Program, Electric - SCE Costs
- SCE_SW_FS: Food Service POS
- SCE_SW_FS_PA: Food Service POS - SCE Costs
- SCE_SW_HVAC_AE_NonRes: SW HVAC All Electric Non-Residential
- SCE_SW_HVAC_AE_NonRes_PA: SW HVAC All Electric Non-Residential SCE Costs
- SCE_SW_HVAC_QIQM: SW HVAC QI/QM Program
- SCE_SW_HVAC_QIQM_PA: SW HVAC QI/QM Program - SCE Costs
- SCE_SW_HVAC_Up_Com: SW HVAC Upstream Commercial
- SCE_SW_HVAC_Up_Com_PA: SW HVAC Upstream Commercial - SCE Costs
- SCE_SW_HVAC_Up_Res: SW HVAC Upstream Residential
- SCE_SW_HVAC_Up_Res_PA: SW HVAC Upstream Residential - SCE Costs
- SCE_SW_IP_Colleges: Institutional Partnerships, UC/CSU/CCC
- SCE_SW_IP_Colleges_PA: Institutional Partnerships, UC/CSU/CCC - SCE Costs
- SCE_SW_IP_Gov: Institutional Partnerships: DGS & DoC
- SCE_SW_IP_Gov_PA: Institutional Partnerships: DGS & DoC - SCE Costs
- SCE_SW_MCWH: Midstream Comm Water Heating
- SCE_SW_MCWH_PA: Midstream Comm Water Heating - SCE Costs
- SCE_SW_NC_NonRes_Ag_electric: SW New Construction NonRes Ag - All Electric
- SCE_SW_NC_NonRes_Ag_electric_PA: SW New Construction NonRes Ag - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ag_mixed: SW New Construction NonRes Ag - Mixed Fuel
- SCE_SW_NC_NonRes_Ag_mixed_PA: SW New Construction NonRes Ag - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Com_electric: SW New Construction NonRes Com - All Electric

- SCE_SW_NC_NonRes_Com_electric_PA: SW New Construction NonRes Com - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Com_mixed: SW New Construction NonRes Com - Mixed Fuel
- SCE_SW_NC_NonRes_Com_mixed_PA: SW New Construction NonRes Com - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Ind_electric: SW New Construction NonRes Ind - All Electric
- SCE_SW_NC_NonRes_Ind_electric_PA: SW New Construction NonRes Ind - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ind_mixed: SW New Construction NonRes Ind - Mixed Fuel
- SCE_SW_NC_NonRes_Ind_mixed_PA: SW New Construction NonRes Ind - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Pub_electric: SW New Construction NonRes Public - All Electric
- SCE_SW_NC_NonRes_Pub_electric_PA: SW New Construction NonRes Public - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Pub_mixed: SW New Construction NonRes Public - Mixed Fuel
- SCE_SW_NC_NonRes_Pub_mixed_PA: SW New Construction NonRes Public - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Res_electric: SW New Construction NonRes Res - All Electric
- SCE_SW_NC_NonRes_Res_electric_PA: SW New Construction NonRes Res - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Res_mixed: SW New Construction NonRes Res - Mixed Fuel
- SCE_SW_NC_NonRes_Res_mixed_PA: SW New Construction NonRes Res - Mixed Fuel - SCE Costs
- SCE_SW_NC_Res_electric: SW New Construction Res - All Electric
- SCE_SW_NC_Res_electric_PA: SW New Construction Res - All Electric - SCE Costs
- SCE_SW_PLA: Plug Load and Appliance
- SCE_SW_PLA_AE: SW PLA All Electric
- SCE_SW_PLA_AE_PA: SW PLA All Electric SCE Costs
- SCE_SW_PLA_PA: Plug Load and Appliance - SCE Costs
- SCE_SW_WET_CC: WET Career Connections
- SCE_SW_WET_CC_PA: WET Career Connections - SCE Costs
- SCE_SW_WET_Work: WE&T; Career and Workforce Readiness
- SCE_SW_WET_Work_PA: WE&T; Career and Workforce Readiness - SCE Costs
- SCE_SW_WP: Water/wastewater Pumping
- SCE_SW_WP_PA: Water/wastewater Pumping - SCE Costs

CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Edison (SCE)

Budget Filing Year: 2027

Submitted: 11:50 on 30 Oct 2025

By: Gary Golden

Advice Letter Number: 5670-E

* Portfolio Budget Filing Summary *

- TRC: 1.34
- PAC: 3.29
- TRC (no admin): 1.74
- PAC (no admin): 7.56
- RIM: 0.48
- SCB: 1.89
- SCH: 1.93
- Budget: \$351,111,550.03
- TotalSystemBenefit: \$1,185,590,291.75
- ElecBen: \$686,019,286.70
- GasBen: \$556,239,786.27
- WaterEnergyBen: \$59,088.61
- OtherBen: \$13,899,126.69
- TRCCost: \$911,555,047.15
- PACCost: \$370,937,260.04
- RIMCost: \$2,736,198,356.55
- SCBCost: \$931,887,177.09
- SCHCost: \$933,603,053.47

* Programs Included in the Budget Filing *

- SCE-13-ESA: Energy Savings Assistance Program
- SCE-13-L-003I: Public Sector Performance-Based Retrofit High Opportunity Program
- SCE-13-RENAdmin: IOU REN Administrative Costs
- SCE-13-SW-002A: Commercial Energy Advisor Program

- SCE-13-SW-003D: Strategic Energy Management Program
- SCE-13-SW-007A: On-Bill Financing
- SCE-13-SW-007A1: On-Bill Financing Loan Pool
- SCE-13-SW-007C: New Finance Offerings
- SCE-13-SW-007C1: New Finance Offerings Credit Enhancements
- SCE-13-SW-008C: Compliance Improvement
- SCE-13-SW-008D: Reach Codes
- SCE-13-SW-008E: Planning and Coordination
- SCE-13-SW-010A: WE&T; Integrated Energy Education and Training
- SCE-13-TP-026: Residential 3P Solicitation
- SCE-13-TP-027: Commercial 3P Solicitation
- SCE-13-TP-028: Industrial 3P Solicitation
- SCE-24-Non-3P-001-Com: Comprehensive Energy Efficiency Resource (Commercial) - Com
- SCE-3OV0100: SCE EM&V;
- SCE-3OV0200: CPUC EM&V;
- SCE_3P_2020RCI_005: Comprehensive Commercial Program
- SCE_3P_2021AGPUB_001: Agriculture Energy Efficiency Program
- SCE_3P_2021AGPUB_002: Public Energy Performance Program
- SCE_3P_2024R_MF_001: Multifamily Residential Direct Install Program
- SCE_3P_2025C_001: Commercial Energy Reduction Initiative
- SCE_3P_2025C_002: Comprehensive Refrigeration Energy Savings and Training
- SCE_3P_2025C_003: Refrigeration Efficiency and Leak Mitigation
- SCE_3P_2025MAP_001C: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) - Commercial Sector
- SCE_3P_2025MAP_001P: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) - Public Sector
- SCE_3P_2025MAP_001R: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) - Residential Sector
- SCE_3P_2025MAP_002C: Measured Savings Program - Commercial Sector
- SCE_3P_2025MAP_002P: Measured Savings Program- Public Sector
- SCE_3P_2025R_001: Customer Home Engagement for Energy Reduction
- SCE_3P_2025R_002: Residential Energy Solutions
- SCE-3P-MULTI-DER-IDSM: Multi-DER IDSM Program Placeholder
- SCE_3P_SEM_001: Commercial Energy Manager Program
- SCE_3P_SEM_002: Industrial and Agriculture Energy Manager Program (Ind)
- SCE_3P_SEM_002A: Industrial and Agriculture Energy Manager Program (Ag)
- SCE_3P_SEM_003: SPARKe Commercial SEM Program
- SCE_3P_SEM_004: SPARKe Industrial and Agricultural SEM Program (Ind)
- SCE_3P_SEM_004A: SPARKe Industrial and Agricultural SEM Program (Ag)
- SCE_CS_PortfolioSupport: Codes & Standards Portfolio Support Costs
- SCE_Equity_PortfolioSupport: Equity Portfolio Support Costs
- SCE_MarketSupport_001: EE New Program Design Pilots

- SCE_MarketSupport_002: EE Contractor Demand Building Program
- SCE_MS_PortfolioSupport: Market Support Portfolio Support Costs
- SCE_PB_CS: Codes and Standards P&B;
- SCE_PB_EMV: EM&V; P&B;
- SCE_PB_Equity: Equity P&B;
- SCE_PB_MS: Market Support P&B;
- SCE_PB_RA: Resource Acquisition P&B;
- SCE_Portfolio_Oversight: ED Portfolio Oversight
- SCE_RA_PortfolioSupport: Resource Acquisition Portfolio Support Costs
- SCE_Res_Equity_001: Residential Energy Advisor (Resource)
- SCE_Res_Equity_002: Residential Energy Advisor (Non-Resource)
- SCE_Res_Equity_003: Disadvantaged Communities Marketing and Outreach
- SCE_SMB_Equity_001: Simplified Savings
- SCE_SW_CSA_Appl: Codes & Standards Advocacy - State Appliance Standards Advocacy
- SCE_SW_CSA_Appl_PA: Codes & Standards Advocacy - State Appliance Standards Advocacy - SCE Costs
- SCE_SW_CSA_Bldg: Codes & Standards Advocacy - State Building Codes Advocacy
- SCE_SW_CSA_Bldg_PA: Codes & Standards Advocacy - State Building Codes Advocacy - SCE Costs
- SCE_SW_CSA_Natl: Codes & Standards Advocacy - National Codes & Standards Advocacy
- SCE_SW_CSA_Natl_PA: Codes & Standards Advocacy - National Codes & Standards Advocacy - SCE Costs
- SCE_SW_ETP_Elec: Emerging Technologies Program, Electric
- SCE_SW_ETP_Elec_PA: Emerging Technologies Program, Electric - SCE Costs
- SCE_SW_FS: Food Service POS
- SCE_SW_FS_PA: Food Service POS - SCE Costs
- SCE_SW_HVAC_AE_NonRes: SW HVAC All Electric Non-Residential
- SCE_SW_HVAC_AE_NonRes_PA: SW HVAC All Electric Non-Residential SCE Costs
- SCE_SW_HVAC_QIQM: SW HVAC QI/QM Program
- SCE_SW_HVAC_QIQM_PA: SW HVAC QI/QM Program - SCE Costs
- SCE_SW_HVAC_Up_Com_PA: SW HVAC Upstream Commercial - SCE Costs
- SCE_SW_HVAC_Up_Res_PA: SW HVAC Upstream Residential - SCE Costs
- SCE_SW_IP_Colleges: Institutional Partnerships, UC/CSU/CCC
- SCE_SW_IP_Colleges_PA: Institutional Partnerships, UC/CSU/CCC - SCE Costs
- SCE_SW_IP_Gov: Institutional Partnerships: DGS & DoC
- SCE_SW_IP_Gov_PA: Institutional Partnerships: DGS & DoC - SCE Costs
- SCE_SW_MCWH: Midstream Comm Water Heating
- SCE_SW_MCWH_PA: Midstream Comm Water Heating - SCE Costs
- SCE_SW_NC_NonRes_Ag_electric: SW New Construction NonRes Ag - All Electric
- SCE_SW_NC_NonRes_Ag_electric_PA: SW New Construction NonRes Ag - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ag_mixed: SW New Construction NonRes Ag - Mixed Fuel
- SCE_SW_NC_NonRes_Ag_mixed_PA: SW New Construction NonRes Ag - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Com_electric: SW New Construction NonRes Com - All Electric
- SCE_SW_NC_NonRes_Com_electric_PA: SW New Construction NonRes Com - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Com_mixed: SW New Construction NonRes Com - Mixed Fuel

- SCE_SW_NC_NonRes_Com_mixed_PA: SW New Construction NonRes Com - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Ind_electric: SW New Construction NonRes Ind - All Electric
- SCE_SW_NC_NonRes_Ind_electric_PA: SW New Construction NonRes Ind - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ind_mixed: SW New Construction NonRes Ind - Mixed Fuel
- SCE_SW_NC_NonRes_Ind_mixed_PA: SW New Construction NonRes Ind - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Pub_electric: SW New Construction NonRes Public - All Electric
- SCE_SW_NC_NonRes_Pub_electric_PA: SW New Construction NonRes Public - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Pub_mixed: SW New Construction NonRes Public - Mixed Fuel
- SCE_SW_NC_NonRes_Pub_mixed_PA: SW New Construction NonRes Public - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Res_electric: SW New Construction NonRes Res - All Electric
- SCE_SW_NC_NonRes_Res_electric_PA: SW New Construction NonRes Res - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Res_mixed: SW New Construction NonRes Res - Mixed Fuel
- SCE_SW_NC_NonRes_Res_mixed_PA: SW New Construction NonRes Res - Mixed Fuel - SCE Costs
- SCE_SW_NC_Res_electric: SW New Construction Res - All Electric
- SCE_SW_NC_Res_electric_PA: SW New Construction Res - All Electric - SCE Costs
- SCE_SW_PLA_AE: SW PLA All Electric
- SCE_SW_PLA_AE_PA: SW PLA All Electric SCE Costs
- SCE_SW_WET_CC: WET Career Connections
- SCE_SW_WET_CC_PA: WET Career Connections - SCE Costs
- SCE_SW_WET_Work: WE&T; Career and Workforce Readiness
- SCE_SW_WET_Work_PA: WE&T; Career and Workforce Readiness - SCE Costs
- SCE_SW_WP: Water/wastewater Pumping
- SCE_SW_WP_PA: Water/wastewater Pumping - SCE Costs

Attachment E

Revised Preliminary Statement Part FF (PPPAM)

PRELIMINARY STATEMENT FF

Sheet 6

FF. PUBLIC PURPOSE PROGRAMS ADJUSTMENT MECHANISM (Continued)

2. Definitions (Continued)

c. Authorized Procurement Energy Efficiency Annual Funding Levels: (Continued)

D.23-08-005 D.24-09-031	2024*	2025
Authorized EE Budget Funding	\$483,178,339	\$477,466,701
LESS: Unspent/Uncommitted Carryover Funds	<u>\$196,873,376</u>	<u>0</u>
Total Authorized EE Budget Funding	\$286,304,963	\$477,466,701
LESS: Budgeted SWEEBA Amount Included		
Within Authorized EE Budget Funding (transfer	\$13,809,226	\$14,608,753
from PEEBA to the SWEEBA		
LESS: Budgeted EE Financing Funding (transfer		
From PEEBA to the EEPBA)	<u>\$2,000,000</u>	<u>\$2,827,279</u>
Total Authorized Procurement EE Funding	\$270,495,737	\$460,030,699

(T)
|
|
|
|
(T)

*See Advice 5123-E-A for 2024-2027 authorized funding amounts.

These authorized annual amounts will include FF&U when implemented in rate levels each year.

(Continued)

(To be inserted by utility)

Advice 5670-E
Decision 21-05-031, D.23-06-055

Issued By
Michael Backstrom
Sr. Vice President

(To be inserted by Cal. PUC)

Date Submitted Nov 4, 2025
Effective _____
Resolution _____



Southern California Edison
Rosemead, California (U 338-E)

Revised
Cancelling Revised

Cal. P.U.C. Sheet No. 90740-E
Cal. P.U.C. Sheet No. 90280-E

TABLE OF CONTENTS

Sheet 1

Cal. P.U.C.
Sheet No.

TITLE PAGE	11431-E	
TABLE OF CONTENTS - RATE SCHEDULES	90740-90741-90073-90074-89511-90075-90076-E	(T)
.....	89428-89706-90077-E	
TABLE OF CONTENTS - LIST OF CONTRACTS AND DEVIATIONS	69230-E	
TABLE OF CONTENTS - RULES	73106-64043-E	
TABLE OF CONTENTS-INDEX OF COMMUNITIES, MAPS, BOUNDARY DESCRIPTIONS.....	62213-E	
TABLE OF CONTENTS - SAMPLE FORMS..	62213-86023-61576-70211-67879-61631-E	
.....	90194-67881-63296-E	

PRELIMINARY STATEMENT:

A. Territory Served	22909-E
B. Description of Service	22909-E
C. Procedure to Obtain Service	22909-E
D. Establishment of Credit and Deposits	22909-E
E. General	45178-45179-45180-53818-45182-E
F. Symbols	45182-E
G. Gross Revenue Sharing Mechanism.....	26584-26585-26586-26587-27195-27196-54092-E
.....	51717-53819-27200-27201-E
H. Baseline Service	52027-74486-74487-57170-52031-E
I. Charge Ready Program Balancing Account	68156-68157-68158-E
J. Pole Loading and Deteriorated Pole Program Balancing Account.....	72502-71931-71932-E
.....	72503-71934-E
K. Nuclear Decommissioning Adjustment Mechanism	36582-57779-E
L. Not Used	69296-69297-96298-69299-E
M. Income Tax Component of Contributions	58419-58420-E
N. Memorandum Accounts	69682-72911-85049-88603-73907-73908-85262-73910-85263-E
.....	73912-61165-63127-63128-86852-71939-42841-89441-67652-67653-44953-42851-E
.....	87349-87350-88014-88015-59413-71940-71941-72912-72913-72914-65112-89098-E
.....	69724-71943-86853-42863-42864-88447-71945-87351-67639-67640-59459-50421-E
.....	89254-60657-57958-57959-68887-70722-69304-69305-69306-89042-60601-85050-E
.....	86855-52551-52552-49928-58556-62521-62522-86076-44029-71948-71949-71950-E
.....	65203-86856-73067-72565-57964-60769-69864-60771-58886-60772-60773-71952-E
.....	71953-59918-71954-86857-71956-86556-71490-84845-88122-88123-88124-72080-E
.....	74303-71425-87352-73015-73100-74445-74474-87353-87354-86382-86049-86310-E
.....	86311-86783-87233-87751-87752-88429-88604-88605-88606-90278-90279-E
O. California Alternate Rates for Energy (CARE) Adjustment Clause	34705-41902-E
.....	36472-38847-56788-68625-89957-E
P. Tree Mortality Non-Bypassable Charge Balancing Account.....	65929-65930-65931-E

(Continued)

(To be inserted by utility)

Advice 5670-E
Decision 21-05-031, D.23-06-055

Issued By
Michael Backstrom
Sr. Vice President

(To be inserted by Cal. PUC)

Date Submitted Nov 4, 2025
Effective
Resolution

TABLE OF CONTENTS

Sheet 2

Cal. P.U.C.
Sheet No.

PRELIMINARY STATEMENT: (Continued)

Q.	Power Charge Indifference Adjustment Undercollection Balancing Account (PUBA)	.68068-E	
	.....	60869-68070-68071-E	
R.	Historical Procurement Charge Balancing Account	63262-63263-63264-E	
S.	Procurement Energy Efficiency Balancing Account	85102-73118-E	
T.	Electric and Magnetic Fields Measurement Program	64853-18320-18321-E	
U.	California Solar Initiative Program Balancing Account	56677-49280-56678-56679-E	
V.	Hazardous Substance Cleanup Cost Recovery Mechanism	18853-22174-E	
	.....	27264-49536-31527-31528-18857-22175-18859-27681-27682-27683-18863-E	
W.	Departing Load and Customer Generation Departing Load Cost Responsibility	33558-67964-E	
	.....	33560-39863-33562-58676-33564-33565-53824-53825-33568-33569-33570-33571-E	
	.....	33572-33573-33574-33575-E	
X.	Rule 20 Balancing Account (Rule 20-BA)	90549-71959-E	
Y.	Demand Response Program Balancing Account	85497-62827-85498-85499-85500-89256-E	
	.....	85502-85503-85504-71041-73069-71043-71044-E	
	.Rule 21 Balancing Account (R21BA)	67625-E	
AA.	California Alternate Rates for Energy (CARE) Balancing Account	44454-71960-58226-71961-E	
BB.	Greenhouse Gas Revenue Balancing Account	54108-63265-64150-56255-E	
CC.	Statewide Marketing, Education & Outreach Balancing Account (SME&OBA)	73070-65083-E	
	.....	68498-E	
DD.	Cost Of Capital Trigger Mechanism	31356-35497-31358-35498-31360-E	
EE.	Electric Deferred Refund Account	21212-26600-E	
FF.	Public Purpose Programs Adjustment Mechanism	49319-72853-51593-68453-89257-E	
	.....	90739-86932-86933-86934-86935-86936-E	(T)
GG.	Green Tariff Shared Renewables Balancing Account	60774-60775-60776-60777-E	
HH.	Low Income Energy Efficiency Program Adjustment Mechanism	89259-62840-55766-E	
II.	Bond Charge Balancing Account	32855-32234-32235-E	
JJ.	Building Decarbonization Pilot Program Administrative Cost Balancing Account		
	.....(BDPPACBA)-	89504-89505-89506-E	
KK.	Not In Use	-E	
LL.	Reliability Investment Incentive Mechanism	90493-90494-90495-E	
	.....	90496-90497-90498-90499-E	
MM.	Mobilehome Park Master Meter Balancing Account (MMMBA)	90190-69271-E	
NN.	Not In Use	-E	
OO.	Pension Costs Balancing Account	90527-90528-90529-E	
PP.	Post Employment Benefits Other Than Pensions Costs Balancing Account	90530-90531-E	
	.....	90532-90533-E	
QQ.	Building Decarbonization Pilot Program Balancing Account (BDPPBA)	89507-89509-E	
	.....	89510-E	

(Continued)

(To be inserted by utility)

Advice 5670-E
Decision 21-05-031, D.23-06-055

Issued By
Michael Backstrom
Sr. Vice President

(To be inserted by Cal. PUC)

Date Submitted Nov 4, 2025
Effective _____
Resolution _____