



Trevor Keith
Director, Planning and Building, County of SLO
976 Osos Street, Room 200
San Luis Obispo, CA 93408
for Central California Rural Regional Energy Network

November 4, 2025

Advice Letter No. 3-E/3-G

(Central California Rural Regional Energy Network ID U-4002)

California Public Utilities Commission
Energy Division Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, CA 94102-3298

Subject: Central California Rural Regional Energy Network 2025 Mid-Cycle Advice Letter

I. Purpose

Central California Rural Regional Energy Network (“CCR REN”) hereby submits its Tier 2 2025 Mid-Cycle Advice Letter (“MCAL”) to the California Public Utilities Commission (“Commission” or “CPUC”) in compliance with Decision (“D.”) 21-05-031, D.23-06-055, D.25-08-034, Resolution E-5351, Resolution E-5400, and guidance from the Commission’s Energy Division (“ED”) staff. This MCAL follows the format provided by ED; required tables per ED guidance are included in Attachment A. On August 22, 2025, CCR REN and the other Portfolio Administrators (“PAs”) were granted an extension of time by the CPUC Executive Director pursuant to Rule 16.6 of the CPUC’s Rules of Practice and Procedure to submit their MCALs 60 days after the issuance date of D.25-08-034, which adopted energy efficiency goals for 2026-2037. As D.25-08-034 was issued on September 5, 2025, 60 days after its issuance is November 4, 2025. This MCAL is therefore timely submitted in accordance with the granted extension.

This MCAL provides program budget information, programmatic adjustments, community engagement indicators, an explanation of how CCR REN has addressed impact evaluation recommendations, and a monitoring plan for any unintentional overlap between CCR REN’s residential program and the Investor-Owned Utilities (“IOUs”)’ Energy Savings Assistance (“ESA”) programs. The MCAL also includes updated supporting documentation for energy efficiency (“EE”) programs that CCR REN offers during program years (“PY”) 2024-2027. CCR REN forecasts achieving \$8,183,805 in Total System Benefits (“TSB”) along with an energy savings forecast of 552,410 net therms, a net demand reduction of 77 kW, and negative 3.06 million first-year net kWh savings. The updated forecasted four-year portfolio Total Resource Cost (“TRC”) and Portfolio Administrator Cost (“PAC”) test ratios for the

Resource Acquisition segment of the EE portfolio, including portfolio support, are 1.00 and 1.01, respectively. The updated TRC and PAC test ratios for the entire EE portfolio are 0.29 and 0.29, respectively.

II. Background

a. Regulatory Filing Requirements

1. Mid-Cycle Advice Letter Requirements

In D.21-05-031, the Commission required that EE PAs submit a Tier 2 advice letter by September 1, 2025,¹ to provide a mid-cycle update to their technical inputs, forecasts, and portfolios to account for the CPUC-adopted changes in EE potential and goals.² D.21-05-031 establishes general criteria for ED staff reviewing the MCAL:

- The PA's EE portfolio must meet the TSB goal for the four years³, adjusted by the updated TSB for the remaining period of the portfolio.
- The portfolio must meet or exceed a forecasted TRC ratio of 1.0 for the resource acquisition segment of the portfolio (with the exception of RENs).
- The combined equity and market support segments of the portfolio must not exceed 30% of the total budget (with the exception of RENs).
- For IOUs: the statewide and third-party contribution percentage requirements must be met.
- The Advice Letters also must include a report on the progress against metrics relevant for each segment of the portfolio.⁴

2. Load Impact Study Recommendations and Community Engagement Indicators

In D.23-06-055, the Commission established two new requirements for PA MCALs. First, all PAs shall include specific descriptions of how they have incorporated or otherwise addressed impact

¹ On August 22, 2025, the submission deadline was extended to November 4, 2025, by the CPUC's Executive Director pursuant to CPUC Rules of Practice and Procedure Rule 16.6.

² Ordering Paragraph ("OP") 10 in D.21-05-031, *Assessment of Energy Efficiency Potential and Goals and Modification of Portfolio Approval and Oversight Process*, issued May 26, 2021.

³ The CPUC assigned TSB goals to the four IOUs only, per OP 1 in D.25-08-034, *Decision Adopting Energy Efficiency Goals for 2026-2037*, issued September 5, 2025.

⁴ *Id.* at pp. 42-43.

evaluation recommendations.⁵ The Commission delegates to ED staff the task of determining which impact studies should be addressed in MCALs.⁶ Second, PAs shall develop and include in their MCAL indicators measures of community engagement.⁷

3. IOU Updated TSB Goals

In D.25-08-034, the CPUC adopted the Total System Benefit and energy savings goals for 2026-2037 for Pacific Gas and Electric Company, San Diego Gas and Electric Company, Southern California Edison Company, and Southern California Gas Company.⁸ These new savings goals are expected to be incorporated into the present cycle of MCAL submissions.

4. Updates to Performance Indicators and Metrics

In Resolution E-5351, the Commission updated and clarified adopted Equity Segment Indicators, Market Support Indicators, and Common Metrics for use by all Portfolio Administrators.⁹ A Portfolio Administrator may use the MCAL as one avenue to request reinstatement of an indicator or metric.¹⁰

5. Updates to CCR REN Energy Efficiency Portfolio

In Resolution E-5400, the Commission approved Northern California Rural Regional Energy Network (“NREN”)’s and CCR REN’s revised business plans.¹¹ CCR REN and NREN are required to update and modify their portfolios in their respective MCALs if there are changes or modifications to programs related to findings of overlap with ESA.¹² Furthermore, CCR REN and NREN are required to include a monitoring plan for overlap with ESA in their MCALs.¹³

b. Contents of Filing

The contents of this MCAL are as follows:

⁵ OP 16 in D.23-06-055, *Decision Authorizing Energy Efficiency Portfolios for 2024-2027 and Business Plans for 2024-2031*, issued July 3, 2023.

⁶ *Id.* at p. 32.

⁷ *Id.*, OP 24.

⁸ OP 1 in D.25-08-034, *Decision Adopting Energy Efficiency Goals for 2026-2037*, issued September 5, 2025.

⁹ OPs 2-6, CPUC Resolution E-5351, issued June 12, 2025.

¹⁰ *Id.*, OP 10.

¹¹ OPs 1-2, CPUC Resolution E-5400, issued September 5, 2025.

¹² *Id.*, OP 3.

¹³ *Id.*

TABLE OF CONTENTS

I. Purpose	1
II. Background	2
a. Regulatory Filing Requirements	2
b. Contents of Filing	3
III. Discussion	5
a. Portfolio Overview	5
b. Summary of Forecasted Portfolio Impacts.....	8
IV. Energy Efficiency Portfolio Details	12
a. Segment Metrics	12
b. New Programs	16
c. Program Changes	16
d. Program Closures	17
e. EM&V (2024-2027).....	17
f. Cost Recovery.....	18
g. CEDARS Discrepancies (optional)	19

ATTACHMENT A - Appendices from Excel Template¹⁴

ATTACHMENT B - Community Engagement Indicators Results

ATTACHMENT C - CCR REN Response to Recommendations

ATTACHMENT D - CEDARS Filing Confirmations

ATTACHMENT E - CCR REN Residential Equity Program (“REP”) Monitoring Plan

¹⁴ Please see CEDARS for an Excel version of Attachment A.

III. Discussion

a. Portfolio Overview

1. Recent CPUC Decision or Guidance Impacting EE Portfolio

The CPUC, in D.24-09-031, split the formerly authorized Rural REN into two new rural RENs, Northern California REN and CCR REN.¹⁵ The Decision also directed CCR REN to submit a Tier 3 advice letter on or before December 31, 2024, updating its business and portfolio plans, program offerings, goals, and forecasts, for the period 2024 through 2027.¹⁶ In compliance, CCR REN submitted Advice 1-E/1-G on December 31, 2024. The CPUC approved CCR REN Advice 1-E/1-G through its approval of Resolution E-5400, issued September 5, 2025.¹⁷ Notably, the Resolution requires CCR REN to monitor for overlap with ESA, update and modify its portfolio in the MCAL if there are changes or modifications to its programs related to findings of overlap with ESA, and include a monitoring plan in its MCAL.¹⁸ Additional recent CPUC decisions and guidance expected to impact the CCR REN portfolio include:

- D.23-06-055: Community engagement indicator tracking requirements were adopted and will impact the EE portfolio.
- CPUC Resolution E-5350 which, among other items, adjusted hard-to-reach net-to-gross ratios downward for direct install residential and commercial programs and incorporated updated avoided cost calculation assumptions.
- CPUC Resolution E-5351, which clarified and revised adopted indicators and metrics related to EE portfolios in compliance with D.23-06-055.

CCR REN expects that Rulemaking 25-04-010 will introduce additional policies that may impact the EE portfolio, such as viable electric alternatives and fuel switching.

2. Forecast Approach

D.24-09-031 authorized funding for CCR REN for the period 2024-2027. Due to the timing of the Decision, which was not issued until October 2, 2024, CCR REN was only operational at the end of program year 2024. Additionally, this timing did not allow CCR REN to file a True-Up Advice Letter.

¹⁵ OP 4 in D.24-09-031, *Decision Modifying Rural Regional Energy Network Approved in Decision 23-06-055*, issued October 2, 2024.

¹⁶ *Id.*, OP 9.

¹⁷ OP 2, CPUC Resolution E-5400, issued September 5, 2025.

¹⁸ *Id.*, OP 3.

Accurate program year (“PY”)2026 and PY2027 forecasts are dependent on PY2025 expenditure expectations. As a result, CCR REN’s MCAL updates the PY2025 budget to reflect expected expenditures. PY2025 expenditure is based on the best available information at the time of the filing of this advice letter. PY2025 program budgets will be updated in CEDARS using negative budget adjustments in the carryover fields in the first monthly report (or annual report if no monthly reports are available) that is submitted after the approval of this advice letter.

CCR REN’s forecast approach is divided into two categories: program costs and measure-level forecasts for CCR-COM-001 and CCR-RES-001.

Program Costs

CCR REN’s forecast approach began with a budget evaluation for PY2025. The forecast was informed by the existing expenditure levels; the PY2024 carryover amount; and labor, consultant support, and material cost forecast expectations. The PY2025 budget updates were a necessary step to inform the budgets for PY2026 and 2027 and spending across the three years. Without addressing PY2025, the MCAL would present budgets for PY2026 and PY2027 that would be under-forecasted. As a result, CCR REN is updating its PY2025, PY2026, and PY2027 budgets in this Advice Letter.

CCR REN discussed the need to update PY2025 with ED staff on July 18, 2025, and as requested by ED, CCR REN identified each alteration to the PY2025 budget with an asterisk and a footnote. To forecast the program budgets, CCR REN took the following steps:

- A budget sub-committee for the MCAL was formed, consisting of representatives from CCR REN Partner Agencies, including the High Sierra Energy Foundation (“HSEF”), Association of Monterey Bay Area Governments (“AMBAG”), and the County of San Luis Obispo (“County”).
- The sub-committee requested that all CCR REN Partner Agencies reforecast their staff and material needs across all programs and activities for program years 2025 through 2027.
- Consultant costs were updated to reflect contracted amounts resulting from County-led competitive solicitations. Additionally, projections for portfolio support costs were revised.
- Staff costs, updated consultant costs, portfolio support, and other expected direct expenses were incorporated into program-level budgets with appropriate cost classifications.

- The County’s accounting representatives supported and reviewed all budgeting for reasonableness and compliance.
- Final program budgets were presented to the CCR REN leadership team for their review and approval as required by the adopted governance structure.

The program cost forecasts and budgeting are consistent with the County’s accounting standard practices. Additionally, the forecasting approach and methodology are aligned with the existing CCR REN governance structure. Aligning with both the County’s accounting practices and the CCR REN governance structure introduced important checkpoints throughout the budgeting process, which served as a mechanism for quality assurance and control.

Measure Cost and Benefit Forecasts

CCR-COM-001, the Commercial Energy Improvement Program (“CEIP”), is a CCR REN resource acquisition program that focuses on hard-to-reach businesses in HSEF, San Joaquin Valley Clean Energy Organization (“SJVCEO”), and AMBAG regions. CEIP's EE measure cost forecasts are represented in the updated and filed Cost Effectiveness Inputs. CCR REN followed these steps to forecast CEIP's measure costs and benefits:

- Evaluated new measure level opportunities based on current field observations.
- Reassessed the appropriateness of the climate zone and building type mapping.
- Updated the delivery timetable across claim quarters, as needed.
- Revised measure cost estimates considering current market costs and anticipated U.S. tariff impacts.
- Adjusted the volume of installations across different measure types.
- Utilized updated Electronic Technical Reference Manual (“eTRM”) permutation data for affected measure packages, where applicable.

AMBAG, the lead agency for the CEIP offering, reviewed the outputs and impacts and presented them to the CCR REN leadership team for discussion, feedback, and approval.

CCR-RES-001, the Residential Equity Program, is a CCR REN equity program that focuses on services for hard-to-reach and underserved populations in the SJVCEO, HSEF, and AMBAG regions. The Residential Equity Program offers both direct installation and do-it-yourself (“DIY”) options to

participants. Claimable measures already in use by the program have been added to the filings. This MCAL includes an ESA overlap monitoring plan and ESA referral process to address E-5400 requirements. Additional clarity on monitoring, referral process, and coordination will be resolved in CCR REN's Joint Cooperation Memos ("JCMs"). CCR REN followed these steps to forecast CEIP's measure costs and benefits:

- Assessed and identified claimable measures in current offerings.
- Forecasted volume installed expectations by permutation across served climate zones.
- Requested per unit installation cost estimates from the implementing consultant.

3. Portfolio Changes

CCR REN is forecasting approximately \$8.7 million in PY2025 expenditures compared to the original estimate of \$10.9 million. The expected change to PY2025 expenditures is driven by lower consultant and marketing costs compared to the original forecast and delays in staffing the new REN. As a result, CCR REN adjusts its PY2026 budget upward from approximately \$11.2 million to \$12.6 million and PY2027 from \$11.2 million to \$14.5 million. These adjustments reflect a combination of PY2024 carryover, forecasted unspent funds from PY2025, and expected continued operational ramp-up.

Additionally, CCR REN will redirect \$1.19 million from the 4-year residential program budget and \$1.6 million from the Workforce, Education, and Training (WET) program budget. These funds will be shifted to codes and standards, commercial, public, and financing program offerings. These fund shifts do not change CCR REN's CPUC-approved cumulative EE budget for 2024-2027.

b. Summary of Forecasted Portfolio Impacts

1. Portfolio Budget Summary

Table 1.1a below shows the EE portfolio budget by Sector and Segment. PY2024-2027 cumulative forecasts use the updated PY2025 forecast in addition to updated PY2026 and PY2027 forecasts.

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	\$-	\$-	\$11,172,362	\$-	\$11,172,362
2	Commercial Sector	\$7,221,188	\$-	\$-	\$-	\$7,221,188
3	Industrial Sector	\$-	\$-	\$-	\$-	\$-
4	Agricultural Sector	\$-	\$-	\$-	\$-	\$-
5	Public Sector	\$-	\$-	\$1,194,747	\$-	\$1,194,747
6	Cross-Cutting Sector					
7	Emerging Tech	\$-	\$-	\$-	\$-	\$-
8	WE&T	\$-	\$-	\$7,238,473	\$-	\$7,238,473
9	Finance	\$-	\$-	\$2,693,631	\$-	\$2,693,631
10	Codes & Standards	\$-	\$-	\$-	\$3,151,491	\$3,151,491
11	Portfolio Support	\$453,396	\$-	\$1,542,537	\$217,615	\$2,213,548
12	OBF Loan Pool					\$-
13	Portfolio Subtotal ^[2]	\$7,674,584	\$-	\$23,841,749	\$3,369,107	\$34,885,440

[1] 2024 Actuals are used in the updated forecast. *PY 2025 budgets were updated per ED approval, as CCR REN did not file a TUAL.

[2] Excludes EM&V and Portfolio Oversight.

Table 2.3a below presents the CCR REN updated annual and cumulative budget.¹⁹ The PY2025 TUAL column budget has been updated in this MCAL.* It was updated to reflect expenditures and to allow a reforecast of PY2026 and PY2027 that reflects current program ramp-up and spending expectations.

¹⁹2025 TUAL column values represent CCR REN's updated 2025 budget as no TUAL was filed due to the December 31, 2024, submission of an updated Business Plan.

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY2024-Actual	PY2025 TUAL*	PY2026	PY2027	Cumulative
1	Resource Acquisition	\$38,784	\$2,430,602	\$2,569,385	\$2,635,813	\$7,674,584
2	Market Support	\$-	\$-	\$-	\$-	\$-
3	Equity	\$216,376	\$5,171,353	\$8,406,407	\$10,047,614	\$23,841,749
4	Codes and Standards	\$75,255	\$780,794	\$1,203,890	\$1,309,168	\$3,369,107
5	EM&V (PA and ED)	\$1,375	\$361,673	\$507,487	\$583,025	\$1,453,560
6	Total Budget w/o OBF Loan Pool	\$331,789	\$8,744,422	\$12,687,169	\$14,575,619	\$36,339,000
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					66%
8	OBF Loan Pool Addition	\$-	\$-	\$-	\$-	\$-
9	Budget excluding Portfolio Oversight	\$331,789	\$8,744,422	\$12,687,169	\$14,575,619	\$36,339,000
10	ED Portfolio Oversight	\$-	\$-	\$-	\$-	\$-
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$331,789	\$8,744,422	\$12,687,169	\$14,575,619	\$36,339,000
12	Approved Budget Cap ^[4]					\$36,339,000

[4] D.24-09-031 and Authorized in Resolution E-5400.

* PY2025 budget was updated in this MCAL per ED staff guidance.

In Decision 24-09-031, the CPUC directed CCR REN to submit updated business and portfolio plans for the years 2024 to 2027 by December 31, 2024.²⁰ Table 1.5 presents the revised annual funding for 2024 through 2027 across the IOUs.

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

Line	Year	PG&E		SDG&E		SCE	SCG
		Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
1	2024 ^[1]	\$196,419	\$49,105	\$ -	\$ -	\$66,358	\$19,907
2	2025 ^[2]	\$5,176,698	\$1,294,175	\$ -	\$ -	\$1,778,031	\$533,409
3	2026	\$7,510,804	\$1,877,701	\$ -	\$ -	\$2,588,611	\$776,583
4	2027	\$8,628,767	\$2,157,192	\$ -	\$ -	\$2,834,800	\$850,440
5	Total	\$21,512,688	\$5,378,172	\$0	\$0	\$7,267,800	\$2,180,340

[1] 2024 Actuals are used.

[2] Uses updated PY2025 forecast values. CCR REN did not have a filed TUAL. This MCAL updates 2025 forecasts.

²⁰ OP 9, D.24-09-031.

2. Total System Benefit Forecast

Table 2.1a presents CCR REN's updated Total System Benefit Forecast for the 2024-2027 program cycle. CCR REN's forecasted TSB has increased by \$362,022 compared to what was initially filed with the updated CCR REN business plan.

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

Line	Segment	PY2024-Actual	PY2025 TUAL	PY2026	PY2027	Cumulative
1	Resource Acquisition	\$-	\$2,483,079	\$2,580,129	\$2,573,228	\$7,636,436
2	Market Support	\$-	\$-	\$-	\$-	\$-
3	Equity	\$-	\$-	\$212,619	\$334,750	\$547,369
4	Total TSB Forecast	\$-	\$2,483,079	\$2,792,748	\$2,907,978	\$8,183,805
5	CPUC TSB Goal ^[1]	\$533,964,188	\$562,933,481	\$588,847,859	\$660,083,248	\$2,345,828,776
6	TSB Forecast / TSB Goal ^[2]	0.00%	0.44%	0.47%	0.44%	0.35%

[1] TSB Goal set for IOUs in D.25-08-034. CPUC TSB Goal in line 5 is the sum of PG&E, SCE, and PG&E. It is not reflective of the proportionate value of each IOU.

*TSB for PY2025 was updated to reflect CCR REN's reforecast for the program year.

3. Portfolio Cost-Effectiveness Forecast

Table 3.a presents CCR REN's updated segment and portfolio cost-effectiveness ratios.

Table 3a – MCAL Updated Portfolio Cost Effectiveness Ratios (PY2024-2027) ^[1]

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	Resource Acquisition	1.00	1.01	1.25
2		Market Support	-	-	-
3		Equity	0.02	0.02	0.02
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	Including C&S	0.29	0.29	0.48
6		Excluding C&S	0.29	0.29	0.48

[1] 2024 actuals and the referenced and updated 2025 forecast were used.

Societal Cost Test values for 2026 and 2027 are presented in Table 3.d below.

Table 3.d – Societal Cost Test Ratios (PY2026-2027)

Line		2026		2027		2 Yr Total		
		Base	High	Base	High	Base	High	
1								
2	Segment	Resource Acquisition	1.40	1.39	1.37	1.37	1.39	1.37
3		Market Support	-	-	-	-	-	-
4		Equity	0.04	0.04	0.05	0.05	0.04	0.04
5		Codes and Standards	-	-	-	-	-	-
6	Portfolio	Including C&S	0.42	0.43	0.38	0.38	0.40	0.40
7		Excluding C&S	0.42	0.43	0.38	0.38	0.40	0.40

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

This section is not applicable to CCR REN.

5. Market Support and Equity Forecast

Table A outlines CCR REN's budget for market support and equity, including the total budget and the percentage allocated to each category. Table A reflects the PY2024 through PY2027 budget across programs.

Table A: Market Support & Equity Segment Budget 2024-2027

Line	Segment	Qualifying Budget	Total Budget ¹	% of Budget	Cap (IOU and ATA CCA only)
1	Market Support	\$ -	\$36,339,000	0%	N/A
2	Equity	\$23,841,750		65.6%	
3	Market Support + Equity	\$23,841,750		65.6%	

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

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

This section is not applicable to CCR REN.

7. Non-Advocacy C&S Budget Forecast

This section is not applicable to CCR REN.

IV. Energy Efficiency Portfolio Details

a. Segment Metrics

The following presents key metrics being tracked within each segment. All CCR REN programs operating within each segment have begun implementation activities. CCR REN issued and selected implementing consultants in Q4 of PY2024 in preparation for program launch in PY2025. Q1 and Q2 2025 focused on program ramp-up. In Q3 2025, all PY2025 programs achieved steady-state implementation. CCR-FIN-001 implementation will begin in PY2026. The metrics presented below reflect activity up to September 30, 2025.

Resource Acquisition

Commercial Energy Improvement Program (“CEIP”): CCR-COM-001

CEIP is a resource acquisition direct install program providing services to the HSEF, SJVCEO, and AMBAG regions. CEIP is CCR REN’s only resource acquisition program with a filed PY2025 goal of \$2,406,400 TSB and a forecasted TRC ratio of 1.03 excluding portfolio support costs. The table below presents CEIP’s production to the end of Q3 2025. At the end of Q3, CEIP pending installation and installed TSB exceeded \$1.8 million. The program is trending towards TSB and cost-effectiveness forecasts.

CEIP’s workforce integration strategy is delivering remarkable results. Thus far, four part-time, paid-in-community Clean Energy Advisors (“CEAs”) have been hired and trained. Two CEAs live and serve in the SJVCEO region, one in HSEF, and one in the AMBAG region.

CCR-COM-001 Metrics	2025 Progress to Date
Total System Benefit (TSB) Q3 Forecasted Claims	\$1,005,486
Percent of services delivered to hard-to-reach customers	100%
Completed energy efficiency projects in AMBAG territory	4
Completed energy efficiency projects in SJVCEO territory	5
Energy efficiency projects in HSEF territory	0
Clean Energy Advisors hired and trained per year	4
Clean Energy Advisors placed in full-time permanent jobs	0

Equity

CCR REN has three equity programs. Each is presented below.

Public Equity Program: CCR-PUB-001

The Public Equity Program supports hard-to-reach, disadvantaged, and underserved public agencies in the Monterey Bay area. The program is designed to help each agency access, understand, and address energy efficiency opportunities. Each served public agency may have multiple facility sites. The program has exceeded all original goals except for submitting external applications for funding.

CCR-PUB-001 Metrics	2025 Progress to Date
Hard-to-reach public agencies served	16
Equity facility sites participating	50
Referred equity projects to PG&E Public sector programs	42
External funding applications submitted	0
Percent of hard-to-reach served	69.4%

Rural California Pathway for Climate Adaptive Careers: CCR-WET-001

The Rural California Pathway for Climate-Adaptive Careers provides disadvantaged youth with training and paid career experience. The program will serve the SJVCEO, HSEF, and AMBAG regions and is designed to interact with CCR-RES-001. Hired disadvantaged youth are trained to conduct energy assessments and install simple energy and water-saving measures in the homes they serve. After completing the program, the youth are placed in externships to continue growing their careers. The program is trending toward hitting all goals in PY2025.

CCR-WET-001 Metrics	2025 Progress to Date
Disadvantaged youth energy specialists trained	36
Full-time seasonal hires	17
Percent of disadvantaged youth participation	100%
Externship host recruitments	13
Disadvantaged externship placements	10
Professional development training workshops	20
Permanent disadvantaged youth job placements	0
Participants	N/A

Residential Equity Program: CCR-RES-001

The Residential Equity Program connects rural residential communities to EE opportunities through targeted outreach, education, and technical assistance. The program serves the SJVCEO, HSEF, and AMGAG regions and interacts with CCR-WET-001. The trained disadvantaged youth provide in-person and virtual green house calls and direct installation of simple energy-saving measures. CPUC Resolution E-5400 requires CCR REN to include in its MCAL a monitoring plan for overlap with ESA. CCR

REN’s monitoring plan is included herein as Attachment E. Starting in PY2026, the Residential Equity Program will begin claiming energy savings for measure installations that are both approved by the CPUC and consistent under the terms of the Joint Cooperation Memos.

CCR-RES-001 Metrics	2025 Progress to Date
Virtual Green House Calls (V-GHC)	641
V-GHC energy saving kits sent (kits set to ship in Q4 PY2025)	0
Phone consultations (after kits are sent)	0
Participant follow-up calls (after kits are sent)	0
In-Person Green House Call signups	2,146
In-Person Green House Calls completed	760
Percent of equity customers	79%
Outreach events	150

Codes and Standards

Codes and Standards: CCR-CS-001

The Codes and Standards Program provides support services to code enforcement agencies, building design and construction professionals, and residents in regions of California that have traditionally lacked local and targeted support, helping them reduce energy usage and costs through improved building design and construction. This program is offered throughout the AMBAG, SJVCEO, and HSEF regions. The table on the following page presents Codes and Standards Metrics.

CCR-CS-001 Metrics	2025 Progress to Date
Training activities	7
Participants who completed training activities	172
Projects receiving enhanced code compliance support	9
Jurisdictions with staff participating in training activities	55
Jurisdictions receiving Energy Code Coach tech. assistance	4
Percent of jurisdictions with staff participating in Regional Energy Forums	30%
Jurisdictions receiving information about the program	441
Closed energy code cases	9
Percent of hard-to-reach participants	89%

b. New Programs

CCR REN is not currently proposing any new programs.

c. Program Changes

Table B below presents program changes.

Table B - Program Change Summary

Program	Change
CCR-RES-001	The budget has been reduced and shifted by \$1.19 million. The reduction in the budget accounts for the 2024 carryover, less 2025 expenditure forecasts, and is attributable to reduced consultant and CCR REN staff costs. In PY2026 and PY2027, energy-saving claims will be submitted for allowable measures. This is reflected in the updated filings. OP 3 of CPUC Resolution E-5400 requires a monitoring plan for ESA overlap to be included in this MCAL. CCR REN will report on its monitoring plan efforts in the 2025 annual report. OP 4 of CPUC Resolution E-5400 requires the Joint Cooperation Memos between CCR REN and IOUs to include a discussion of the agreed-upon referral process for ESA-eligible customers.
CCR-WET-001	The budget has been reduced and shifted by \$1.6 million. The reduction in the budget accounts for PY2024 carryover, less PY2025 expenditure forecasts. Cost savings were realized based on the competitive procurement of consultant services and updates to CCR REN staff cost forecasts. Consultant costs were updated to reflect contracted amounts resulting from County-led competitive solicitations.
CCR-COM-001	No programmatic changes have occurred since launch. The program budget increased by \$275k. Budget increases are associated with updated CCR REN staff cost forecasts. Measure costs and benefits were updated based on market conditions, avoided cost calculations, and new package values. Benefits have been updated to reflect the most current and applicable measure packages and associated permutation data. Some building type and climate zone alterations were made based on opportunities seen in the market and in served communities.
CCR-CS-001	The budget has been increased by \$386k. The increased budget reflects CCR REN's experience to date with the time and effort necessary to effectively implement. The

Program	Change
	budget increase is associated with additional CCR REN staff time expectations. No other changes have been made to this program.
CCR-PUB-001	The budget has been increased by \$25k. The updated budget accounts for the unspent funds in 2024, redistributes them in 2025 through 2027, and increases expected expenditure.
CCR-FIN-001	In PY2025 CCR REN began preparing for program launch in 2026. The MCAL updates the financing budget to \$2.6 million from \$607k. The updated budget includes additional funding for loans in 2026 and in 2027, \$800k and \$1.01 million respectfully.
Portfolio Support (“PS”)	PS Resource Acquisition costs were reduced. PS Equity and Codes & Standards costs were increased. PS costs in aggregate increased by \$33k. This is due to a greater level of administrative support needed for the equity and codes and standards market segments than originally planned.

d. Program Closures

CCR REN is not proposing any program closures during the program period through the end of 2027.

e. EM&V (2024-2027)

Table C below presents CCR REN’s annual breakdown of EM&V budget allocations. The 2024 figures reflect actuals. The MCAL adjusts EM&V budget allocations across years to maintain 4% across the program years 2024 through 2027.

Table C - Annual Breakdown of EM&V Budgets

Year	Portfolio Administrator (PA)	Total Budget w/o EM&V	EM&V Total (4% of Total Budget w/o EM&V)	EM&V ED	EM&V PA	Total Budget w/ EM&V
2024	PA, excluding ED Portfolio Oversight	\$330,414	\$13,767	\$0	\$1,375	\$331,789
2024	PA share of ED Portfolio Oversight	\$0	\$0	\$0	\$0	\$0
2024	ADD RENs (IOUs only)	\$0	\$0	\$0	\$0	\$0
2025	PA, excluding ED Portfolio Oversight	\$8,382,749	\$349,281	\$259,802	\$101,871	\$8,744,422
2025	PA share of ED Portfolio Oversight	\$0	\$0	\$0	\$0	\$0
2025	ADD RENs (IOUs only)	\$0	\$0	\$0	\$0	\$0
2026	PA, excluding ED Portfolio Oversight	\$12,179,682	\$507,487	\$367,928	\$139,559	\$12,687,169
2026	PA share of ED Portfolio Oversight	\$0	\$0	\$0	\$0	\$0
2026	ADD RENs (IOUs only)	\$0	\$0	\$0	\$0	\$0
2027	PA, excluding ED Portfolio Oversight	\$13,992,595	\$583,025	\$422,693	\$160,332	\$14,575,619
2027	PA share of ED Portfolio Oversight	\$0	\$0	\$0	\$0	\$0
2027	ADD RENs (IOUs only)	\$0	\$0	\$0	\$0	\$0
	Total	\$34,885,440	\$1,453,560	\$1,050,423	\$403,137	\$36,339,000

f. Cost Recovery

This section is not applicable to CCR REN.

Gas/Electric Split (applicable to PG&E & SDG&E)

This section is not applicable to CCR REN.

1. Unspent Funds

CCR REN has no unspent funds to report as of August 2024. This is because CCR REN was not authorized to spend until Decision 24-09-031, which was issued on October 2, 2024. Table 1.4 below presents no unspent funds as of August 2024.

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

Line		PY2017	PY2018	PY2019	PY2020	PY2021	PY2022	PY2023	PY2024	Total 2017-2024
1	Unspent & Uncommitted	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

*CCR REN was not authorized as of August 2024. Therefore, CCR REN has no unspent funds to report.

2. Integrated Demand-Side Management (“IDSM”) Budget

CCR REN does not have an IDSM budget.

g. CEDARS Discrepancies

1. Authorized Spending Limit

When CEDARS PY2024 total expenditures, 2025 Revised Operating Budget is summed with the PY2026 and PY2027 filings, CEDARS will appear to exceed the authorized expenditure cap. Upon approval, CCR REN will use the next available monthly report to revise the 2025 operating budget to reflect the updated budget as shown in Table 2.3a. This change will also be documented in CCR REN’s 2025 annual report.

2. Implementation Plans:

Posted implementation plans will not immediately reflect the budget changes made in this MCAL. Upon approval, CCR REN will update implementation plans to reflect modified budgets as filed.

3. Total System Benefit:

To calculate the 4-year TRC, PAC, and RIM values, a CET was generated and run for 2025 that reflects the updated budget and includes a reforecast of the CCR-COM-001 program production. This update led to an increase in TSB that is not reflected in PY2025 values in CEDARS.

Tier Designation

This AL has a Tier 2 designation pursuant to OP 10 of D.21-05-031.

Effective Date

Pursuant to General Order (“GO”) 96-B, CCR REN respectfully requests this Tier 2 AL become effective on December 4, 2025, which is 30 days after the date of submittal.

Protest

Anyone may protest this Advice Letter by filing a protest with California Public Utilities Commission. The protest must be submitted electronically and must be received 20 calendar days after the date this Advice Letter is filed, which is Monday, November 24, 2025.

The protest should be sent via e-mail to the attention of the CPUC Energy Division at EDTariffUnit@cpuc.ca.gov. A copy of the protest should also be sent via e-mail to the addresses shown below on the same date it is sent to the Commission:

Trevor Keith
County of San Luis Obispo
tkeith@co.slo.ca.us

Melissa Brandt
Brandt Energy Strategies – Consultant for County of San Luis Obispo
melissa@brandtenergystrategies.com

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

Notice

A copy of this submittal has been served on the official Commission service lists for R.25-04-010 and A.22-02-005.

Respectfully submitted,

/s/ Trevor Keith

Trevor Keith
Director, Planning and Building
County of San Luis Obispo
976 Osos Street, Room 200
San Luis Obispo, CA 93408
(805) 781-5708
tkeith@co.slo.ca.us
for the Central California Rural Regional Energy Network



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

ELC GAS WATER
 PLC HEAT

Contact Person:

Phone #:
E-mail:
E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type: Monthly Quarterly Annual One-Time Other:

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

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:

No. of tariff sheets:

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:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

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:
Title:
Utility/Entity Name:

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Contact Name:
Title:
Utility/Entity Name:

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

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

ATTACHMENT A –

Appendices from Excel Template

(Attachment A in excel format is posted to CEDARS within the PY2026 and PY2027 filings as the budget_filing_appendix)

General Instructions for Completing the Tables:

- All currency will be reported to the dollar, i.e., \$0.
- Refer to instructions for guidance on cell color to view details on entry instructions.
- Worksheet is locked to safeguard formulas - no password requirement to unlock as needed.
- Be mindful of green areas to ensure formulas are included when saved.
- Yellow cells are unlocked and intended for data entry values.
- Tables should include actual results for FY2024, TUAL submissions for FY2025 and Revised submissions, if necessary, for FY2026 & FY2027.

Advice Letter Narrative Table 2.1 - Portfolio Budget by Sector and Segment (Consultative for FY 2024-2027) (1.1a - MCA, 1.1b - TUAL, 1.1c - Change)

Line	Line Item Description	Instructions for Data
1	Residential Sector	Enter residential sector budget by portfolio segment to calculate the cumulative residential sector budget for FY 2024-2027.
2	Commercial Sector	Enter commercial sector budget by portfolio segment to calculate the cumulative commercial sector budget for FY 2024-2027.
3	Industrial Sector	Enter industrial sector budget by portfolio segment to calculate the cumulative industrial sector budget for FY 2024-2027.
4	Agricultural Sector	Enter agricultural sector budget by portfolio segment to calculate the cumulative agricultural sector budget for FY 2024-2027.
5	Public Sector	Enter public sector budget by portfolio segment to calculate the cumulative public sector budget for FY 2024-2027.
6	Other Critical Sector	DO NOT ENTER DATA. Header row.
7	Emerging Tech	Enter emerging technology budget by portfolio segment to calculate the cumulative emerging technology budget for FY 2024-2027.
8	WTR	Enter WTR budget by portfolio segment to calculate the cumulative WTR budget for FY 2024-2027.
9	Finance	Enter Finance budget by portfolio segment to calculate the cumulative Finance budget for FY 2024-2027.
10	Codes & Standards	Enter codes and standards budget in CEI column to calculate the cumulative Codes & Standards portfolio budget for FY 2024-2027.
11	Portfolio Support	Enter portfolio support budget by portfolio segment to calculate the cumulative portfolio support budget for FY 2024-2027.
12	OPF Loan Pool	Enter cumulative OPF loan pool addition for FY 2024-2027.
13	Portfolio Subtotal	DO NOT ENTER DATA. Formula summation lines 1-12.

Advice Letter Narrative Table 2.2 - Total Cost Recovery Request, Including REIN/CCA and Other Costs (1.2a-MCA, 1.2b - TUAL, 1.2c - Change)

Line	Line Item Description	Instructions for Data
1	AL Auditor Fee	In column "to PA Program", DO NOT ENTER DATA. Represents the Program Subtotal from Table 1.2.
2	REIN/CCA 1 (in applicable)	Enter budget for REIN/CCA through EMI/PA and NRE/PA.
3	REIN/CCA 2 (in applicable)	DO NOT enter budget from REIN/CCA.
4	REIN/CCA 3 (in applicable)	DO NOT enter budget from REIN/CCA.
5	REIN/CCA 4 (in applicable)	DO NOT enter budget from REIN/CCA.
6	REIN/CCA 5 (in applicable)	DO NOT enter budget from REIN/CCA.
7	Total	DO NOT ENTER DATA. Formula summation lines 1-6.
8	2024 Collection	In column (I) enter amount of revenue collected including from all relevant Program Administrators collected in 2024.
9	Forward 2025 Collection	In column (I) enter projected amount of revenue collected including from all relevant Program Administrators collected in 2025.
10	Reassess Cost Recovery	In column (I) enter projected amount of revenue collected including from all relevant Program Administrators collected in 2025.
Column: Column Description		
a	PA Program	Represents cost recovery by PA.
b	ED Portfolio Overight	Represents cost recovery for ED Portfolio Overight, as approved in D-21-06-055.
c	EMV PA	Represents cost recovery for EMV PA Budget, including cost recovery for Energy Delivery EMV.
d	EMV ED	DO NOT enter cost recovery for EMV PA and EMV ED as REIN/CCA do not have revenue in EMV from Energy Delivery.
e	Unsettled Unappropriated Funds for 2024-2022 Offset	Enter unspent & unappropriated funds that would offset 2024-2027 cost recovery from pre-2024. Enter a negative number.
f	Total	DO NOT ENTER DATA. Formula summation lines 1-10.

Advice Letter Narrative Table 2.3 - Annual and Cumulative Total System Benefit Forecast (2.1a - MCA, 2.1b - TUAL, 2.1c - Change)

Line	Line Item Description	Instructions for Data
1	Resource Acquisition	Enter annual Total System Benefit Forecast for Resource Acquisition segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
2	Market Support	Enter annual Total System Benefit Forecast for Market Support segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
3	Equity	Enter annual Total System Benefit Forecast for Equity segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
4	Total TSB Forecast	Cumulative TSB Forecast for 2024-2027 (Enter Actuals for 2024 - TUAL for 2025).
5	CPUC TSB Total (I)	Enter annual Total System Benefit Forecast, as adjusted in CPUC D-21-08-019.
6	TSB Forecast TSB Cost	DO NOT ENTER DATA. Formula summation lines 1-5.

Advice Letter Narrative Table 2.3 - Annual and Cumulative Codes and Standards Savings Forecast (2.3a - MCA, 2.3b - TUAL, 2.3c - Change)

Line	Line Item Description	Instructions for Data
1	OSW Forecast	Cumulative OSW Forecast for 2024-2027 (Enter Actuals for 2024 - TUAL for 2025).
2	OSW CPUC Cost	OSW CPUC Cost as adjusted in D-21-08-019.
3	OSW Forecast/OSW	Cumulative OSW Forecast/OSW for 2024-2027.
4	MW Forecast	Cumulative MW Forecast for 2024-2027 (Enter Actuals for 2024 - TUAL for 2025).
5	MW CPUC Cost	MW CPUC Cost as adjusted in D-21-08-019.
6	MW Forecast/OSW	Cumulative MW Forecast/OSW for 2024-2027.
7	MW/OSW Forecast	Cumulative MW/OSW Forecast for 2024-2027 (Enter Actuals for 2024 - TUAL for 2025).
8	MW/OSW CPUC Cost	MW/OSW CPUC Cost as adjusted in D-21-08-019.
9	Cumulative Forecast/OSW	Cumulative Forecast/OSW for 2024-2027.

Advice Letter Narrative Table 2.3 - Annual and Cumulative Budget (2.3a - MCA, 2.3b - TUAL, 2.3c - Change)

Line	Line Item Description	Instructions for Data
1	Resource Acquisition	Enter annual Resource Acquisition segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
2	Market Support	Enter annual budget for Market Support segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
3	Equity	Enter annual budget for Equity segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
4	Codes and Standards	Enter annual budget for Codes and Standards segment to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
5	EMV	Enter annual budget for EMV to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
6	Total Budget with OPF Loan Pool	DO NOT ENTER DATA. Formula summation lines 1-5.
7	Market Support and Equity, percent of Total Budget with OPF Loan Pool	DO NOT ENTER DATA. Formula calculating cumulative segment budget as a percent of total cumulative portfolio budget including OPF loan pool addition.
8	OPF Loan Pool Addition	Enter annual budget for OPF loan pool addition to calculate cumulative total (Enter Actuals for 2024 - TUAL for 2025).
9	Budget Inclusive Portfolio Overight	DO NOT ENTER DATA. Formula summation lines 1-8.
10	ED Portfolio Overight	DO NOT ENTER DATA. Formula summation lines 1-9.
11	Total Portfolio Budget, w/ ED Portfolio Overight	DO NOT ENTER DATA. Formula summation lines 1 and 10.
12	Revised Budget (2.1)	DO NOT ENTER DATA. Revised budget cap from LAR, D-21-08-055.

Advice Letter Narrative Table 2.3a - Portfolio Cost Effectiveness Ratios (FY 2024-2027) (2a - MCA, 2b - TUAL, 2c - Change)

Line	Line Item Description	Instructions for Data
1	Segment - Resource Acquisition	Enter TRC, PAC, and RRM benefit cost ratios for the Resource Acquisition segment on a cumulative 4-year basis.
2	Segment - Market Support	Enter TRC, PAC, and RRM benefit cost ratios for the Market Support segment on a cumulative 4-year basis.
3	Segment - Equity	Enter TRC, PAC, and RRM benefit cost ratios for the Equity segment on a cumulative 4-year basis.
4	Codes and Standards (S&S)	Enter TRC, PAC, and RRM benefit cost ratios for the Codes and Standards segment on a cumulative 4-year basis.
5	Portfolio - including S&S	Enter TRC, PAC, and RRM benefit cost ratios for the entire portfolio, including the Codes and Standards segment on a cumulative 4-year basis.
6	Portfolio - including CA	Enter TRC, PAC, and RRM benefit cost ratios for the entire portfolio, excluding the Codes and Standards segment on a cumulative 4-year basis.

Advice Letter Narrative Table 2.3b - Societal Cost Test (FY 2024-2027)

Line	Line Item Description	Instructions for Data
1	Segment - Resource Acquisition	Enter SCT benefit cost ratios for the Resource Acquisition segment for the year in the appropriate column and a cumulative total.
2	Segment - Market Support	Enter SCT benefit cost ratios for the Market Support segment for the year in the appropriate column and a cumulative total for 2024 & 2027.
3	Segment - Equity	Enter SCT benefit cost ratios for the Equity segment for the year in the appropriate column and a cumulative total for 2024 & 2027.
4	Codes and Standards (S&S)	Enter SCT benefit cost ratios for the Codes and Standards segment for the year in the appropriate column and a cumulative total for 2024 & 2027.
5	Portfolio - including S&S	Enter SCT benefit cost ratios for the entire portfolio, including the Codes and Standards segment for the year in the appropriate column and a cumulative total for 2024 & 2027.
6	Portfolio - including CA	Enter SCT benefit cost ratios for the entire portfolio, excluding the Codes and Standards segment for the year in the appropriate column and a cumulative total for 2024 & 2027.

Advice Letter Narrative Table 2.4 - Portfolio Statewide and Third-party Contributions Percentage Requirements (DOU only)

Line	Line Item Description	Instructions for Data
1	Statewide	Enter the cumulative statewide program budget, including program support PA costs.
2	Third-party	Enter the cumulative statewide program budget, including program support PA costs.

Appendix 1 - 2024 - 2027 Program Portfolio Budget and Targets

Column	Column Description	Instructions for Data
a	Program ID	Enter Program ID as listed in the CEI/PA Program Table.
b	Program Name	Enter Program Name as listed in the CEI/PA Program Table.
c	Target Exempt	Enter "Yes" for Non-Third Party Exempt Programs and "No" for Resource Programs, as defined in the EE Policy Manual Version 8.
d	Program Type	Enter "Local Third Party" for local third party qualifying programs.
e	Business Sector	Enter program sector as listed in the CEI/PA Program Table (OP Sector).
f	Portfolio Segment	Enter program segment as listed in the CEI/PA Program Table.
g	Budget - TUAL	Enter cumulative program budget.
h	TSL - TUAL	Enter cumulative program Total System Benefit Forecast.
i	WTR - TUAL	Enter cumulative program electric energy savings (WTR) forecast.
j	WTR - MCA	Enter cumulative program TSL peak demand savings (WTR) savings forecast.
k	Thru - TUAL	Enter cumulative program electric energy savings (Thru) forecast.
l	Budget - MCA	Enter cumulative program budget.
m	TSL - MCA	Enter cumulative program Total System Benefit Forecast.
n	WTR - MCA	Enter cumulative program electric energy savings (WTR) forecast.
o	Thru - MCA	Enter cumulative program electric energy savings (Thru) forecast.
p	Budget - Change	DO NOT ENTER DATA. Formula difference columns g-l.
q	TSL - Change	DO NOT ENTER DATA. Formula difference columns h-m.
r	WTR - Change	DO NOT ENTER DATA. Formula difference columns i-n.
s	Thru - Change	DO NOT ENTER DATA. Formula difference columns j-o.
t	Thru - Change	DO NOT ENTER DATA. Formula difference columns k-p.
w	Change Ratio	Enter variation on any significant changes to the program level.

Appendix 2 - Energy Efficiency Cap And Target Expenditure Projections (Consultative for FY 2024-2027)

Line	Line Item Description	Instructions for Data
1	Administrative Costs	DO NOT ENTER DATA. Header row.
2	PA	Enter non-third party qualifying and third party qualifying portions of the cumulative PA program administrative budget, per EE Policy Manual cost category definition, excluding target exempt programs and non-PA third party and partnership administrative costs. 30% cap requirement based on D-09-29-541 is set for EDU only.
3	Non-PA Third Party & Partnership	Enter non-third party qualifying and third party qualifying portions of cumulative third party program administrative budget, per EE Policy Manual cost category definition, including target exempt programs. Non-Third party program definition per D-10-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" category are costs for programs that met the 2014 Third Party definition as to the transition to the new third party definition.
4	PA & Non-PA Target Exempt Programs	Enter non-third party qualifying and third party qualifying portions of cumulative target exempt program administrative budget, per EE Policy Manual cost category definition. Target Exempt Programs include: Emerging Technology, Workforce Education & Training, Strategic Energy Reserve (SER) program, SP Placeholder for Public, OP, and Codes & Standards programs including Building Code Advisory, Appliance Standards Advisory and National Standards Advisory.
5	Marketing & Outreach Costs	DO NOT ENTER DATA. Header row.
6	Incentives and Rebates	Enter non-third party qualifying and third party qualifying portions of cumulative incentives and rebates budget, per EE Policy Manual cost category definition.
7	Direct Implementation Costs	Enter non-third party qualifying and third party qualifying portions of cumulative direct implementation non-incentive budget, per EE Policy Manual cost category definition, excluding target exempt programs.
8	Non-Incentives and Non-Rebates	Enter non-third party qualifying and third party qualifying portions of cumulative target exempt program direct implementation non-incentive budget, per EE Policy Manual cost category definition.
9	Target Exempt (Non-Incentives and Non-Rebates)	Enter non-third party qualifying and third party qualifying portions of cumulative target exempt program direct implementation non-incentive budget, per EE Policy Manual cost category definition.
10	EMVY Costs (PA and ED)	For EDU, EMVY costs only include EDU's Total EMVY budget (PA + ED) and does not include REIN or CCA EMVY budget. For RRM & CCA, include EMVY PA Budget and EMVY ED - 50. The EMVY percentage is based on PA's target portfolio budget from the RRM, EDU, and CCA.
11	EMVY - PA	Enter cumulative EMVY PA budget.
12	EMVY - ED	DO NOT ENTER DATA. Formula difference columns 10-11.
13	PA Spending Budget Required (including OPF Loan Pool Additions and excluding ED Portfolio Overight)	DO NOT ENTER DATA. Formula summation lines 1-12.
14	Total Third Party Qualifying Costs	DO NOT ENTER DATA. Formula summation lines 2-13.
15	OPF Loan Pool Addition	Enter cumulative OPF loan pool addition for FY 2024-2027.
16	PA Spending Budget Required (including ED Portfolio Overight)	DO NOT ENTER DATA. Formula summation lines 12 and 14.
17	ED - Portfolio Overight	DO NOT ENTER DATA. Formula summation lines 12 and 14. *Commission staff require additional consulting and technical support resources in order to perform adequate portfolio oversight. \$1 million annually in verifiable funding from EDU should be made available to Commission staff for this purpose.
18	EE Excluded EDU	Enter cumulative budget for EE Excluded EDU programs per D-23-08-055, OP 19.
19	PA Spending Budget Required	DO NOT ENTER DATA. Formula summation lines 15 and 16.

Column	Column Description	Instructions for Data
a	Non-Third Party Qualifying Costs	DO NOT ENTER DATA. Formula summation columns 2-13.
b	Third Party Qualifying Costs	DO NOT ENTER DATA. Formula summation columns 2-13.
c	Total Portfolio	DO NOT ENTER DATA. Formula summation columns a & b.
d	Percent of Budget	As defined in the Energy Efficiency Policy Manual Version 8 dated April 2020, Appendix C, this total is the denominator used to calculate the EDU PA Admin, Marketing, and Direct Implementation Non-incentives percentages.
e	Cost Percentage	
f	Target %	

Appendix 3 - ETR Implementation Plans

Completing existing ETR worksheets including study name in column A and implementation plan detail in column M.

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

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ -	\$ -	\$ 11,172,362	\$ -	\$ 11,172,362
2	Commercial Sector	\$ 7,221,188	\$ -	\$ -	\$ -	\$ 7,221,188
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ 1,194,747	\$ -	\$ 1,194,747
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 7,238,473	\$ -	\$ 7,238,473
9	Finance	\$ -	\$ -	\$ 2,693,631	\$ -	\$ 2,693,631
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 3,151,491	\$ 3,151,491
11	Portfolio Support	\$ 453,396	\$ -	\$ 1,542,537	\$ 217,615	\$ 2,213,548
12	OBFL Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal [2]	\$ 7,674,584	\$ -	\$ 23,841,749	\$ 3,369,107	\$ 34,885,440

[1] 2024 Actuals are used in the updated forecast. *PY 2025 budgets were updated per ED approval as CCR REN did not have a filed TUAL.

[2] Excludes EM&V and Portfolio Oversight

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

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ -	\$ -	\$ 12,363,750	\$ -	\$ 12,363,750
2	Commercial Sector	\$ 6,945,902	\$ -	\$ -	\$ -	\$ 6,945,902
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ 1,169,210	\$ -	\$ 1,169,210
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 8,854,169	\$ -	\$ 8,854,169
9	Finance	\$ -	\$ -	\$ 607,500	\$ -	\$ 607,500
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 2,764,559	\$ 2,764,559
11	Portfolio Support	\$ 463,066	\$ -	\$ 1,532,976	\$ 184,304	\$ 2,180,346
12	OBFL Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal [2]	\$ 7,408,968	\$ -	\$ 24,527,605	\$ 2,948,863	\$ 34,885,436

[1] Excludes EM&V and Portfolio Oversight. *CCR REN did not submit a TUAL due to filing on 12/31/2024. The values above reflect the 12/31/2024 filing.

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	\$ -	\$ -	\$ (1,191,388)	\$ -	\$ (1,191,388)
2	Commercial Sector	\$ 275,286	\$ -	\$ -	\$ -	\$ 275,286
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ -	\$ -	\$ -	\$ -
5	Public Sector	\$ -	\$ -	\$ 25,537	\$ -	\$ 25,537
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ (1,615,696)	\$ -	\$ (1,615,696)
9	Finance	\$ -	\$ -	\$ 2,086,131	\$ -	\$ 2,086,131
10	Codes & Standards	\$ -	\$ -	\$ -	\$ 386,932	\$ 386,932
11	Portfolio Support	\$ (9,670)	\$ -	\$ 9,561	\$ 33,311	\$ 33,202
12	OBFL Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal [2]	\$ 265,616	\$ -	\$ (685,856)	\$ 420,244	\$ 4

[2] excludes EM&V and Portfolio Oversight

Table 1.2a - MCAL Total Cost Recovery Request, Including REN/CCA and Other Costs (IOU Only)¹

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offset[2]	(f) Total
1	Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	Collected 2024 Recovery						\$ -
18	Expected 2025 Recovery						\$ -
19	Remaining Cost Recovery						\$ -

[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 1.2b - 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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	SoCal REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	3C-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	I-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	RREN Central ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	RREN North ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

4	Bay-REN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[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	2023 Unspent Funds	2024	2025	2026	2027	2024-2027
1	IOU (excluding fuel substitution budget)		\$ -	\$ -	\$ -	\$ -	\$ -
2	IOU Budget forecasted to support fuel sub		\$ -	\$ -	\$ -	\$ -	\$ -
3	Total cost recovery request for IOU portfolio (excluding offset)		\$ -	\$ -	\$ -	\$ -	\$ -
4	IOU Pre-2024 Estimated Unspent & Uncommitted Funds to Offset 2024-2027 Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	Total Cost Recovery Request for IOU Portfolio (including offset)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	Applicable electric split						
7	Applicable gas split	0%	0%	0%	0%	0%	
8	Electric portion for cost recovery (excluding fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	Fuel sub applicable electric split	0%	0%	0%	0%	0%	
10	Electric portion for cost recover (fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total electric portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Total Gas portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	Electric split (with fuel sub)	0%	0%	0%	0%	0%	
14	Gas split (with fuel sub)	0%	0%	0%	0%	0%	

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	TOTAL 2017-2024
1	Unspent & Uncommitted									\$ -
2	EM&V									\$ -
3	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2024-2027 Rate Offset									
5	EM&V - PA Funds									\$ -
6	EM&V - CPUC Funds									\$ -
7	IOU Program Funds									\$ -
8	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

*CCR REN was not authorized as of August 2024. Therefore, CCR REN has no unspent funds to report.

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

Line	Year	PG&E		SDG&E		SCE	SCG
		Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2	2024	\$196,419	\$49,105	0	0	\$66,357.86	\$19,907.36
3	2025	\$5,176,698	\$1,294,175	0	0	\$1,748,884.48	\$524,665.34
4	2026	\$7,510,804	\$1,877,701	0	0	\$2,537,433.76	\$761,230.13
5	2027	\$8,628,767	\$2,157,192			\$2,915,123.89	\$874,537.17
6	Total	\$21,512,688	\$5,378,172	\$0	\$0	\$7,267,800	\$2,180,340

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

Line	Year	2024 Reported Expenditures	2024 Carryover Funding ⁷	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offset	2024-2027 Funding Total
1	2024	\$ 331,789	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 331,789
2	2025	\$ -	\$ 2,598,211	\$ 6,146,211	\$ -	\$ -	\$ -	\$ 8,744,422
3	2026	\$ -	\$ -	\$ -	\$ 12,687,169	\$ -	\$ -	\$ 12,687,169
4	2027	\$ -	\$ -	\$ -	\$ -	\$ 14,575,619	\$ -	\$ 14,575,619

[7] 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*	\$ -	\$ 2,483,079	\$ 2,580,129	\$ 2,573,228	\$ 7,636,436
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ -	\$ -	\$ 212,619	\$ 334,750	\$ 547,369
4	Total TSB Forecast	\$ -	\$ 2,483,079	\$ 2,792,748	\$ 2,907,978	\$ 8,183,805
5	CPUC TSB Goal	\$ 533,964,188	\$ 562,933,481	\$ 588,847,859	\$ 660,083,248	\$ 2,345,828,776
6	<i>TSB Forecast / TSB Goal^[1]</i>	0.00%	0.44%	0.47%	0.44%	0.35%

[1] TSB Goal set for IOUs in D.25-08-034. CPUC TSB Goal in line 5 is the sum of PG&E, SCE, and PG&E. It is not reflective of the proportionate value of each IOU.

*TSB for PY 2025 was updated to reflect CCR REN's reforecast for the program year

Table 2.1b - TUAL Annual and Cumulative Total System Benefit Forecast

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ 2,406,400	\$ 2,417,418	\$ 2,445,836	\$ 7,269,654
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ -	\$ -	\$ -	\$ -	\$ -
4	Total TSB Forecast	\$ -	\$ 2,406,400	\$ 2,417,418	\$ 2,445,836	\$ 7,269,654
5	CPUC TSB Goal	\$ 533,964,188	\$ 562,933,481	\$ 544,470,414	\$ 574,561,521	\$ 2,215,929,604
6	<i>TSB Forecast / TSB Goal^[2]</i>	0.00%	0.43%	0.44%	0.43%	0.33%

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016. Line 5 is the sum of PG&E, SCE, and PG&E. It is not a proportionate value of each IOU.

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	\$ -	\$ 76,679	\$ 162,711	\$ 127,392	\$ 366,782
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ -	\$ -	\$ 212,619	\$ 334,750	\$ 547,369
4	Total TSB Forecast	\$ -	\$ 76,679	\$ 375,330	\$ 462,142	\$ 914,151
5	CPUC TSB Goal	\$ -	\$ -	\$ 44,377,445	\$ 85,521,727	\$ 129,899,172
6	<i>TSB Forecast / TSB Goal^[3]</i>	0.00%	0.01%	0.03%	0.01%	0.02%

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

[1] TSB Goal set in decion D.25-08-034. * Not applicable to CCR REN

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 ^[2]	-	-	-	-	-
2	GWh CPUC Target ^[2]	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	0%	0%	0%	0%	0%
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target ^[2]	187	172	-	-	359
6	<i>MW Forecast/Target</i>	0%	0%	0%	0%	0%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[2]	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	0%	0%	0%	0%	0%

[2] TSB Goal set in decions D.21-09-037 and corrected in D.22-05-016. * Not applicable to CCR REN

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 ^[3]	-	-	-	-	-
2	GWh CPUC Target ^[3]	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	0%	0%	0%	0%	0%
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target ^[3]	-	-	-	-	-
6	<i>MW Forecast/Target</i>	0%	0%	0%	0%	0%
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target ^[3]	-	-	-	-	-
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	\$ 38,784	\$ 2,430,602	\$ 2,569,385	\$ 2,635,813	\$ 7,674,584
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 216,376	\$ 5,171,353	\$ 8,406,407	\$ 10,047,613	\$ 23,841,749
4	Codes and Standards	\$ 75,255	\$ 780,794	\$ 1,203,890	\$ 1,309,168	\$ 3,369,107
5	EM&V (PA and ED)	\$ 1,375	\$ 361,673	\$ 507,487	\$ 583,025	\$ 1,453,560
6	Total Budget w/o OBF Loan Pool	\$ 331,789	\$ 8,744,422	\$ 12,687,169	\$ 14,575,619	\$ 36,339,000
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					66%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 331,789	\$ 8,744,422	\$ 12,687,169	\$ 14,575,619	\$ 36,339,000
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 331,789	\$ 8,744,422	\$ 12,687,169	\$ 14,575,619	\$ 36,339,000
12	Approved Budget Cap ^[4]*					\$ 36,339,000

[4] Decision 23-06-055 OP5. * D.24-09-031 set CCR REN's Approved Budget Cap in Table 5.

*PY2025 budget was updated in this MCAL per ED staff guidance to allow for increased forecast accuracy for PY 2026 and PY 2027

Table 2.3b - TUAL Annual and Cumulative Budget*

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 63,940	\$ 2,457,927	\$ 2,448,878	\$ 2,438,223	\$ 7,408,968
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 2,164,460	\$ 7,234,760	\$ 7,551,408	\$ 7,576,977	\$ 24,527,605
4	Codes and Standards	\$ 584,400	\$ 792,000	\$ 787,730	\$ 784,733	\$ 2,948,863
5	EM&V (PA and ED)	\$ 117,200	\$ 436,864	\$ 449,501	\$ 449,999	\$ 1,453,564
6	Total Budget w/o OBF Loan Pool	\$ 2,930,000	\$ 10,921,551	\$ 11,237,517	\$ 11,249,932	\$ 36,339,000
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					67%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 2,930,000	\$ 10,921,551	\$ 11,237,517	\$ 11,249,932	\$ 36,339,000
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 2,930,000	\$ 10,921,551	\$ 11,237,517	\$ 11,249,932	\$ 36,339,000

*CCR REN was authorized in D.24-09-031 and advice letter 1-E /1-G was approved in Resolution E-5400.

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ (25,156)	\$ (27,325)	\$ 120,507	\$ 197,590	\$ 265,616
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ (1,948,084)	\$ (2,063,407)	\$ 854,999	\$ 2,470,636	\$ (685,856)
4	Codes and Standards	\$ (509,145)	\$ (11,206)	\$ 416,160	\$ 524,435	\$ 420,244
5	EM&V (PA and ED)	\$ (115,825)	\$ (75,191)	\$ 57,986	\$ 133,026	\$ (4)
6	Total Budget w/o OBF Loan Pool	\$ (2,598,211)	\$ (2,177,129)	\$ 1,449,652	\$ 3,325,687	\$ (0)
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					-1.89%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (2,598,211)	\$ (2,177,129)	\$ 1,449,652	\$ 3,325,687	\$ (0)
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (2,598,211)	\$ (2,177,129)	\$ 1,449,652	\$ 3,325,687	\$ (0)

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

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	Resource Acquisition	1.00	1.01	1.23
2		Market Support	-	-	-
3		Equity	0.02	0.02	0.02
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.29	0.29	0.48
6		<i>Excluding</i> C&S	0.29	0.29	0.48

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

*CCR REN did not file a TUAL, 2025 forecasts were updated as a part of the MCAL

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

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	Resource Acquisition	0.98	0.99	1.56
2		Market Support	-	-	-
3		Equity	-	-	-
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.26	0.26	0.29
6		<i>Excluding</i> C&S	0.26	0.26	0.29

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

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	Resource Acquisition	0.02	0.02	(0.33)
2		Market Support	-	-	-
3		Equity	0.02	0.02	0.02
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including</i> C&S	0.03	0.03	0.19
6		<i>Excluding</i> C&S	0.03	0.03	0.19

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	1.40	1.39	1.37	1.37	1.39	1.37
3		Market Support	-	-	-	-	-	-
4		Equity	0.04	0.04	0.05	0.05	0.04	0.04
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	<i>Including</i> C&S	0.42	0.43	0.38	0.38	0.40	0.40
7		<i>Excluding</i> C&S	0.42	0.43	0.38	0.38	0.40	0.40

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]	\$ -	\$ 36,339,000	0%	20%
2	Third-party ^[2]	\$ -	\$ 36,339,000	0%	60%

[1] SW program definition per D.16-08-019, OP 24, OP 38, & OP 39.

[2] Third party program definition per D.16-08-019, OP 10, includes SW third-party budgets

[1] Updated Forecasts for 2024-2027 include 2024 Actuals, 2025 TUAL Forecast, and Updated forecasts for 2026 and 2027.
Please ensure that on Table A1, each IOU lists all of the SW program and the associated IOU specific budget.

Updated MZAL Forecasts ^(M)										TUAL FYing					Change						
(a) Program ID	(b) Program Name	(c) Target Exempt	(d) Program Type	(e) Business Sector	(f) Portfolio Segment	(g) Budget	(h) T5B	(i) GWh	(j) MW	(k) MMThm	(l) Budget	(m) T5B	(n) GWh	(o) MW	(p) MMThm	(q) Budget	(r) T5B	(s) GWh	(t) MW	(u) MMThm	(v) Change Notes
CCR-COM-001	Commercial Energy Improvement Program	No	REN/CCA	Commercial	Resource Acquisition	\$ 7,221,187.71	\$ 7,636,436	\$ (8.20)	0.07	0.51	\$ 6,945,902	\$ 7,269,654	(3.54)	0.04	0.565	\$ 275,286	\$ 366,782.35	\$ 0.34	0.03	(0.05)	Budget increased, T5B forecast increased.
CCR-RES-001	Residential Equity Program	No	REN/CCA	Residential	Equity	\$ 11,172,262.42	\$ 547,269	0.14	0.01	0.04	\$ 12,263,702	-	-	-	-	\$ (1,091,439)	\$ 547,269	0.14	0.01	0.04	Budget was reduced, two measures added for claims, low flow faucet aerators and showerheads.
CCR-WET-001	Rural California Pathway for Climate Adaptive Cal	No	REN/CCA	Cross-Cutting	Equity	\$ 7,238,472.65	\$ -	-	-	-	\$ 8,854,169	\$ -	-	-	-	\$ (1,615,696)	\$ -	-	-	-	Budget was reduced, no changes to program design.
CCR-ES-001	Codes and Standards	No	REN/CCA	Cross-Cutting	Codes and Standards	\$ 1,151,491.40	\$ -	-	-	-	\$ 2,768,519	\$ -	-	-	-	\$ 886,932	\$ -	-	-	-	Budget was increased, no changes to program design.
CCR-PUB-001	Public Equity Program	No	REN/CCA	Public	Equity	\$ 1,108,746.37	\$ -	-	-	-	\$ 1,169,219	\$ -	-	-	-	\$ 29,937	\$ -	-	-	-	Budget was increased, no changes to program design.
CCR-FIN-001	Finance Equity Program	No	REN/CCA	Cross-Cutting	Equity	\$ 2,693,830.79	\$ -	-	-	-	\$ 467,508	\$ -	-	-	-	\$ 2,086,131	\$ -	-	-	-	Budget was increased to add additional funding for implementation.
CCR-PS-0A	Portfolio Support-Resource Acquisition	No	Portfolio Support	Portfolio Support	Resource Acquisition	\$ 453,396.00	\$ -	-	-	-	\$ 483,068	\$ -	-	-	-	\$ (29,672)	\$ -	-	-	-	Minor budget reduction.
CCR-PS-Equity	Portfolio Support-Equity	Yes	Portfolio Support	Portfolio Support	Equity	\$ 1,542,536.98	\$ -	-	-	-	\$ 1,532,976	\$ -	-	-	-	\$ 9,561	\$ -	-	-	-	Minor budget increase.
CCR-PS-CS	Portfolio Support-Codes and Standards	Yes	Portfolio Support	Portfolio Support	Equity	\$ 217,615.45	\$ -	-	-	-	\$ 184,394	\$ -	-	-	-	\$ 33,111	\$ -	-	-	-	Budget increase to better support C&S.
CCR-EMV	Evaluation Measurement and verification	Yes	EMV	EMV	EMV	\$ 1,483,160.00	\$ -	-	-	-	\$ 1,453,564	\$ -	-	-	-	\$ (29,596)	\$ -	-	-	-	Minor change in funding, EM&V meets 4% threshold.
						\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	
						\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	
						\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	
						\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	\$ -	\$ -	-	-	-	
Total						\$ 36,339,000	\$ 8,183,805	\$ (8.06)	0	1	\$ 36,339,000	\$ 7,269,654	\$ (3.54)	0.04	0.565	\$ (0)	\$ 914,513	\$ 0.48	0	(0)	

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

Line	Budget Category	Expenditures			Performance		
		(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget ^[6]	(e) Cap Percentage	(f) Target %
1	Administrative Costs						
2	PA ^[1]	\$ 2,955,356		\$ 2,955,356	8.1%	10.0%	
3	Non-PA Third Party & Partnership ^[2]			\$ -	0.0%		10.0%
4	PA & Non-PA Target Exempt Programs ^[3]	\$ 668,943		\$ 668,943			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 1,018,025		\$ 1,018,025	2.8%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 2,739,084		\$ 2,739,084			
9	Non Incentives and Non Rebates	\$ 17,890,856		\$ 17,890,856	49.2%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)	\$ 9,613,176		\$ 9,613,176			
11	EM&V Costs (PA and ED) ^[4]	\$ 1,453,560	\$ -	\$ 1,453,560	4.0%	4.0%	
11a	EM&V - PA	\$ 403,137		\$ 403,137			
11b	EM&V - ED	\$ 1,050,423		\$ 1,050,423			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 36,339,000	\$ -	\$ 36,339,000			
13	Total Third-Party Qualifying Costs ^[5]		\$ -		0.0%		60.0%
14	OBF Loan Pool Addition	\$ -		\$ -			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[8]			\$ 36,339,000			
16	ED Portfolio Oversight ^[10]	\$ -		\$ -			
17	EE-Funded IDSM	\$ -				2.5%	
	Multi-DER IDSM ^[7]	\$ -					
18	PA Spending Budget Request			\$ 36,339,000			

[1] 10% cap requirement based on D. 09-09-047 for IOU only

[2] New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.

[3] Target Exempt Programs include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).

[4] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED = \$0. The EM&V percentage is based on PA's total portfolio budget (from line 13) RENs and CCAs

[5] IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets. Calculation of (d) Percent of Budget for Third-Party Implementer Contracts uses \$1,179,559,488 as its denominator.

[6] With the exception of Third Party Implementer Contracts as noted in footnote [5], calculation of (d) Percent of Budget uses \$1,143,059,488 as the denominator; equal to line 15 PA Budget Spending Request.

[7] D.23-06-055 OP 29: Portfolio administrators (PAs) may set aside up to 2.5 percent, or \$4 million, whichever is greater, up to a maximum of \$15 million, from within their total budgets during 2024-2027 approved in this decision to fund innovative integrated demand-side management projects, including ongoing load-shifting that is not event-based. Energy efficiency funding shall not be used for rebating capital costs of non-efficiency technologies, except as already provided for electric panel upgrades in Decisions 19-08-009 and 23-04-035.

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

[9] Includes actual expenditures for 2024, 2025 TUAL forecasts, and updated values for 2026-2027 forecasts.

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

[11] D.23-06-055, COL 1, COL 4, and table 1 (p.6), which set the SW funding allocations for IOUs and 10% for SoCalGas only.

[12] D.18-05-041 OP10: Each IOU PA should set aside a minimum annual amount of \$1 million for the residential sector and a load-share-proportional amount of \$20 million for the commercial sector from each IOU PA's IDSM budget to test and deploy integration strategies, which may test multiple program design and customer incentive approaches, as well as multiple technology types, with emphasis on demand-response-capable control technologies.

Appendix 3 - RTR Implementation Descriptions per D.23 06-055

ED staff request that PAs describe their progress on recommendations from PY2022 onwards evaluations that impact programs in the current budget cycle.

CALMAC ID	Study Name	Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	PA Response		Proposed RTR Implementation				
					Choose: Accepted, Rejected, or Other	PA Response Notes	Next Steps:	Timeline:	Status:	Notes:	Impacted Programs:
				If incorrect, please indicate and redirect in notes.	Accepted, Rejected, or Other	Examples:	For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.	Set deadlines for the completion of each action. Include a start date and end date when possible.	Track the status of each action item (e.g., Not Started, In Progress, Completed).	Add notes for any additional information or updates.	Identify which programs (program IDs) would be impacted by the action items.
Overall conclusions and recommendations							Proposed Next Steps				
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 "fleet" serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid		SCE							
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 coupons.		SCG							
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.		SCG							
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.		SCG							
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 IIOUS							
CPU0369.01	PY 2022 Local 3-Party Programs Impact	Track efforts to obtain input from HTR/DAC communities and track HTR/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.		All IIOUS							
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 IIOUS							
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 IIOUS							
CPU0372.01	PY 2022 Regional Energy Networks Impact	RENs are in the unique position of being able to support more effectively CPUC policies and California's larger decarbonization goals through innovative solutions and scalable activities. For this reason, RENs should consider increasing efforts to create a pathway to electrification such as higher incentives and rebates, varying levels of incentives, and equity-focused multipliers that target low-income participants, DACs, and environmental justice areas		All RENs	Accepted for CCR-COM-001; under further review for all other CCR programs	CCR-COM-001 is designed to accelerate electrification while balancing utility cost impacts and customer choice.		N/A	N/A	N/A	CCR-COM-001
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	Rejected	Rejected as CCR REN does not currently implement multifamily program	Rejected as CCR REN does not currently implement multifamily programs.	N/A	N/A	N/A	N/A
CPU0372.01	PY 2022 Regional Energy Networks Impact	We recommend that the RENs collaborate with the utilities and other stakeholders to share best practices and lessons learned from their experience and to identify opportunities for coordination and alignment of programs and incentives, particularly for programs that traditionally experience challenges serving the multifamily sector		All RENs	Accepted	No program changes required at this time. Program changes will be introduced as best practices and lessons learned are documented by CCR REN.	CCR REN agrees with the recommendation that RENs, utilities, and other stakeholders should build existing capacity to share best practices across Program Administrators that further align programs services and incentives in such a way as to add value to both non-participating and participating ratepayers.	Start Date: Immediately End Date: None, Ongoing	No action items identified to track.	N/A	All CCR REN programs
CPU0372.01	PY 2022 Regional Energy Networks Impact	DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the ICM 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 ICMs and PIPs that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the ICM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.		All RENs, MCE	Other	Under further review	CCR REN agrees with the recommendation's intent. CCR REN is sensitive to the cost to ratepayers when programs are not well coordinated. CCR REN is also sensitive to the cost to ratepayers when attendance is high and those attending do not add significant value. CCR REN needs additional time to determine the appropriate approach to coordinating meetings to ensure the value of participation is balanced against the costs of attending.	N/A	N/A	N/A	N/A
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			CCR REN welcomes RACI charts within the ICM and PIP documentation process, and if other impacted parties accept this recommendation.				
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 innovations 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 ES 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 2021 SoCalGas Residential EE Portfolio Impact	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.		SCG							
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered 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							

CALMAC ID	Study Name	PA
CPU0367.01	PY 2018 - 2021 Forward-looking Smart Thermostat Study	SCE
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	SCG SCG SCG
CPU0369.01	PY 2022 Local 3-Party Programs Impact	All IOUs All IOUs All IOUs All IOUs
		All RENs All RENs

CPU0372.01	PY 2022 Regional Energy Networks Impact	All RENs
		All RENs, MCE
		All RENs
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	SDG&E
		SDG&E
		SDG&E
		SDG&E
CPU0357.01	PY 2021 SoCalGas Residential EE Portfolio Impact	SCG
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	PG&E
		PG&E

Recommendation

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 “fleet” serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid

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 coupons.

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.

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.

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).

Track efforts to obtain input from HTR/DAC communities and track HTR/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.

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.

The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.

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 equityfocused multipliers that target low-income participants, DACs, and environmental justice areas

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

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

DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the JCMs even when third-party implementers manage the programs. The PAs should attend the coordination meetings and then direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the JCMs and PIPs that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the JCM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.

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.

Build more community input into all phases of program delivery.

Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery innovations in delivering deeper

PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESJ Goals 4.1, 6.1, 8, and 9.

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.

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.

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.

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.

ATTACHMENT B –

Community Engagement Indicators Results

Community Engagement Indicators Results

On August 1, 2025, final community engagement indicators were emailed to the Portfolio Administrators. These included the Community Engagement Indicators Findings and Recommendations Memo and an Excel workbook with consensus indicators.

The following presents the Community Engagement Indicators CCR REN will track:

Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform
Engagement Activities					
Participation	Description of types of engagement activities conducted relevant to the 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 the 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
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 by 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
Input	Feedback themes from engagement activities	Understand input from engagement activities related to the	List of key themes	List of key themes sentences from all equity segment engagement activities feedback	Annual Report Narrative

	relevant to the equity segment	equity segment to then help make program changes if needed.		in the Annual Report Key Themes Chart.	
Changes to Program					
Input	Changes to equity segment program design as needed, based on feedback	Ensure feedback for equity segment programs is informing equity segment programming.	Summary Narrative	Thematic summary of description of changes that were addressed and incorporated into equity segment programs in the Annual Report Program Changes Chart.	Annual Report Narrative

ATTACHMENT C –

CCR REN Response to Recommendations

CCR REN Response to Recommendations

Attachment C presents each recommendation applicable to CCR REN and CCR REN's response. Response to Recommendations can also be found in Attachment A which is made part of this MCAL and is posted to CEDARS within the PY2026 and PY2027 budget filings.

Recommendation

RENs are in the unique position of being able to support CPUC policies and California's larger decarbonization goals more effectively 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, disadvantaged communities (DACs), and environmental justice areas.

- **Accepted, Rejected, or Other.**

Accepted for CCR-COM-001; under further review for all other CCR REN programs.

- **Describe Specific Program Change, give reason for rejection, or indicate that it's under further review.**

CCR-COM-001 is designed to accelerate electrification while balancing the impacts on utility costs and customer choice.

- **For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.**

CCR-COM-001 creates a pathway to electrification for hard-to-reach commercial ratepayers and provides a variety of interventions to support the transition, including hiring trusted in-community Clean Energy Advisors to support each participant's energy journey. It is designed to focus on beneficial electrification while prioritizing customer cost impacts and allowing for continued customer choice. No additional steps are required at this time. Ongoing monitoring and review are in place to inform future program optimizations that support increasing pathways toward electrification.

- **Start Date / End Date**

N/A

- **Status Tracking**

N/A

- **Notes**

N/A

- **Program Identification**

CCR-COM-001

Recommendation

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.

- **Accepted, Rejected, or Other.**

Rejected

- **Describe Specific Program Change, give reason for rejection, or indicate that it's under further review.**

Rejected as CCR REN does not currently implement multifamily programs.

- **For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.**

Rejected as CCR REN does not currently implement multifamily programs.

- **Start Date / End Date**

N/A

- **Status Tracking**

N/A

- **Notes**

N/A

- **Program Identification**

N/A

Recommendation

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.

- **Accepted, Rejected, or Other.**

Accepted

- **Describe Specific Program Change, give reason for rejection, or indicate that it's under further review.**

No program changes required at this time. Program changes will be introduced as best practices and lessons learned are documented by CCR REN.

- **For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.**

CCR REN agrees with the recommendation that RENs, utilities, and other stakeholders should build existing capacity to share best practices across Portfolio Administrators that further align programs, services, and incentives in such a way as to add value to both non-participating and participating ratepayers.

CCR REN is incorporating program alignment and coordination into the JCM process. Through CalREN, CCR REN shares experiences and best practices with other RENs. Through CAEECC, CCR REN will share best practices with all PAs. CCR REN will seek additional opportunities to coordinate with all PAs in an ad hoc setting.

- **Start Date / End Date**

Start Date: Immediately

End Date: None, Ongoing

- **Status Tracking**

No action items identified to track.

- **Notes**

N/A

- **Program Identification**

All CCR REN programs

Recommendation

DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the JCMs, even when third-party implementers manage the programs. The PAs should attend the coordination meetings and then direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the JCMs and Program Implementation Plan (“PIP”) that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document, and an updated version of the RACI could be included with both the JCM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.

- **Accepted, Rejected, or Other.**

Other

- **Describe Specific Program Change, give reason for rejection, or indicate that it’s under further review.**

Under further review

- **For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.**

CCR REN agrees with the recommendation’s intent. CCR REN is sensitive to the cost to ratepayers when programs are not well coordinated. CCR REN is also sensitive to the cost to ratepayers when attendance is high and those attending do not add significant value. CCR REN needs additional time to determine the appropriate approach to coordinating meetings to ensure the value of participation is balanced against the costs of attending.

CCR REN welcomes RACI charts within the JCM and PIP documentation process, and if other impacted parties accept this recommendation.

- **Start Date / End Date**

N/A

- **Status Tracking**

N/A

- **Notes**

N/A

- **Program Identification**

N/A

Recommendation

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.

- **Accepted, Rejected, or Other.**

Other

- **Describe Specific Program Change, give reason for rejection, or indicate that it's under further review.**

Under further review

- **For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines.**

CCR REN does not currently implement a residential program that focuses on fuel substitution technologies. CCR REN sees an opportunity to provide additional support in making the CEC Equitable Building Decarbonization program more readily available to participating households that qualify. CCR REN will consider this recommendation for future programming.

- **Start Date / End Date**

N/A

- **Status Tracking**

N/A

- **Notes**

N/A

- **Program Identification**

N/A

ATTACHMENT D –
CEDARS Filing Confirmations

CEDARS FILING SUBMISSION RECEIPT

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

PA: Central California Rural REN (CCR)

Budget Filing Year: 2026

Submitted: 08:36 on 31 Oct 2025

By: Lou Jacobson

Advice Letter Number: AL_3-E/3-G

* Portfolio Budget Filing Summary *

- TRC: 0.28
- PAC: 0.28
- TRC (no admin): 1.94
- PAC (no admin): 1.98
- RIM: 0.47
- Budget: \$12,687,169.04
- TotalSystemBenefit: \$2,792,748.13
- ElecBen: \$109,755.48
- GasBen: \$3,772,068.23
- OtherBen: \$2,585.05
- TRCCost: \$13,784,283.26
- PACCost: \$13,738,700.64

* Programs Included in the Budget Filing *

- CCR-COM-001: Commercial Energy Improvement Program
- CCR-CS-001: Codes and Standards
- CCR-EMV: Evaluation Measurement and Verification
- CCR-FIN-001: CCR REN Finance Program
- CCR-PS-CS: Portfolio Support - Codes and Standards
- CCR-PS-Equity: Portfolio Support - Equity
- CCR-PS-RA: Portfolio Support - Resource Acquisition
- CCR-PUB-001: Public Equity Program
- CCR-RES-001: Residential Equity Program
- CCR-WET-001: Rural California Pathway for Climate Adaptive Careers

CEDARS FILING SUBMISSION RECEIPT

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

PA: Central California Rural REN (CCR)

Budget Filing Year: 2027

Submitted: 08:36 on 31 Oct 2025

By: Lou Jacobson

Advice Letter Number: AL_3-E/3-G

* Portfolio Budget Filing Summary *

- TRC: 0.26
- PAC: 0.26
- TRC (no admin): 1.99
- PAC (no admin): 2.03
- RIM: 0.41
- Budget: \$14,575,619.18
- TotalSystemBenefit: \$2,907,977.85
- ElecBen: \$125,032.79
- GasBen: \$3,862,810.88
- OtherBen: \$2,744.13
- TRCCost: \$15,668,276.71
- PACCost: \$15,622,583.21

* Programs Included in the Budget Filing *

- CCR-COM-001: Commercial Energy Improvement Program
- CCR-CS-001: Codes and Standards
- CCR-EMV: Evaluation Measurement and Verification
- CCR-FIN-001: CCR REN Finance Program
- CCR-PS-CS: Portfolio Support - Codes and Standards
- CCR-PS-Equity: Portfolio Support - Equity
- CCR-PS-RA: Portfolio Support - Resource Acquisition
- CCR-PUB-001: Public Equity Program
- CCR-RES-001: Residential Equity Program
- CCR-WET-001: Rural California Pathway for Climate Adaptive Careers

ATTACHMENT E –

CCR REN Residential Equity Program Monitoring Plan

CCR REN Residential Equity Program (“REP”) Monitoring Plan

October 31, 2025

Background

CCR REN’s Residential Equity Program (“REP” or “Program”) provides energy efficiency (“EE”) services to rural, hard-to-reach, underserved, and disadvantaged residential customers within CCR REN’s territory. REP serves a unique dual purpose, in conjunction with CCR REN’s Workforce Education and Training program, in providing local, disadvantaged youth with paid work experience while delivering meaningful energy savings opportunities to customers with a high energy cost burden and limited EE opportunities compared to residents in more urban areas of California. The program helps customers reduce household energy and water use through in-home and virtual energy surveys, energy education, do-it-yourself (“DIY”) EE kits, and direct installation of simple EE measures. The specific services offered are described in further detail in the program’s Implementation Plan.

The CPUC, in Resolution E-5400, states that “[i]f CCR REN’s and NREN’s programs overlap with ESA, each shall update and modify its portfolio in the mid-cycle advice letters due September 1, 2025, if there are changes or modifications to their programs related to findings of overlap with ESA. They shall include a monitoring plan for overlap with ESA in their mid-cycle advice letters and shall report on their monitoring efforts in their annual reports.¹” The monitoring plan described herein was developed by CCR REN to fulfill the CPUC’s requirement.

Customer Participation Summary in REP To Date:

Since program launch in April 2025 through July 2025, the number of customers REP has encountered who are or may be eligible for ESA² are as follows:

- 1,498 customers signed up for Green House Calls, and 964 of those customers were on the CARE FERA rate.
- 410 customers received a Green House Call, and 250 of those were on the CARE FERA rate.

This Monitoring Plan will continue to track and report participation statistics and referrals to the ESA program and services provided to the customer by ESA.

¹ Ordering Paragraph 3, CPUC Resolution E-5400, *Revised 2024-27 energy efficiency portfolio business plans for Northern California Rural Regional Energy Network and Central California Rural Regional Energy Network*, issued September 5, 2025.

² ESA eligibility was determined by checking the participating REP customer’s account information against data furnished by PG&E to the program implementer Rising Sun Center for Opportunity. If the customer data indicated the customer was enrolled in an income-qualified tariff (CARE or FERA) then REP counts the customer as ESA-eligible.

Scope of Monitoring Plan

As required by the CPUC, the Monitoring Plan tracks and reports information about customers served by the program, their potential eligibility for the Energy Savings Assistance (ESA) program, referrals made by CCR REN's REP to the IOU's income-qualified programs and rates, and measures installed in the customer household by REP. In sum, the monitoring plan will record:

- Number of total customers participating in CCR REN's REP
- Number of CARE and FERA customers served by CCR REN
- Number of Measures and Types installed by CCR REN
- Number of referrals by CCR REN
- Number of referrals served by IOU ESA programs (will require IOU to provide data)
- Participating customer information needed to support the above

Procedure

The basic procedure for the Monitoring Plan is described below. This procedure is also incorporated into the Joint Cooperation Memo ("JCM") Decision Tree diagram which is included here for reference as Figure 1. Some details of the coordination process are still being refined with the IOUs as stated in the JCM, however this procedure reflects the process CCR REN proposes for its Monitoring Plan.

Step 1: CCR REN conducts outreach to hard to reach, disadvantaged, and underserved customers and enrolls a customer in CCR REN's RES Equity Program (REP)

Step 2: CCR REN checks whether the customer is an IOU customer.

Step 2A: If customer is not an IOU customer, they are not eligible for CCR REN's REP program. CCR REN will provide information on statewide programs that customer may be eligible for.

Step 3: If the customer is an IOU customer, CCR REN then checks that the customer address is within CCR REN's service area.

Step 3A: If the customer is not within CCR REN's service area, the customer is provided information about IOU programs.

Step 4: CCR REN checks the IOU customer data to determine if customer is enrolled in CARE/FERA. If the customer is not enrolled in CARE/FERA, then proceed to Step 5.

Step 4.A: If customer is enrolled in CARE/FERA, CCR REN obtains customer's authorization to make a referral to IOU ESA program and enters this customer's information in the REP Monitoring Log and Referral Log and proceeds to Step 5.

Step 5: CCR REN schedules an appointment and provides REP services and measures in the customer home, including a walk-through energy survey and briefing with the customer, and installation of appropriate energy efficiency measures. All services are provided at no cost to the customer. To prevent any duplication of measure installation, existing measures in the home are verified by REP and if an efficient option is found to be already installed and operation, the equivalent REP measure is not

installed by REP. For example, a new LED lamp is only installed by REP if the existing lamp is incandescent or fluorescent. REP will not replace an energy efficient measure found to already exist in the home.

Step 6: CCR REN conducts an interview with the customer while at the customer home and based on customer-provided household size and income determines whether customer may be eligible for CARE/FERA/ESA. If yes, then proceed to Step 6.A. If no, proceed to Step 7.

Step 6.A: CCR REN obtains customer authorization for referral and enters customer's information in the REP Monitoring Log and Referral Log and proceeds to Step 7.

Step 7: CCR REN informs customer of ESA and other IOU and CCR REN programs for which customer may be eligible.

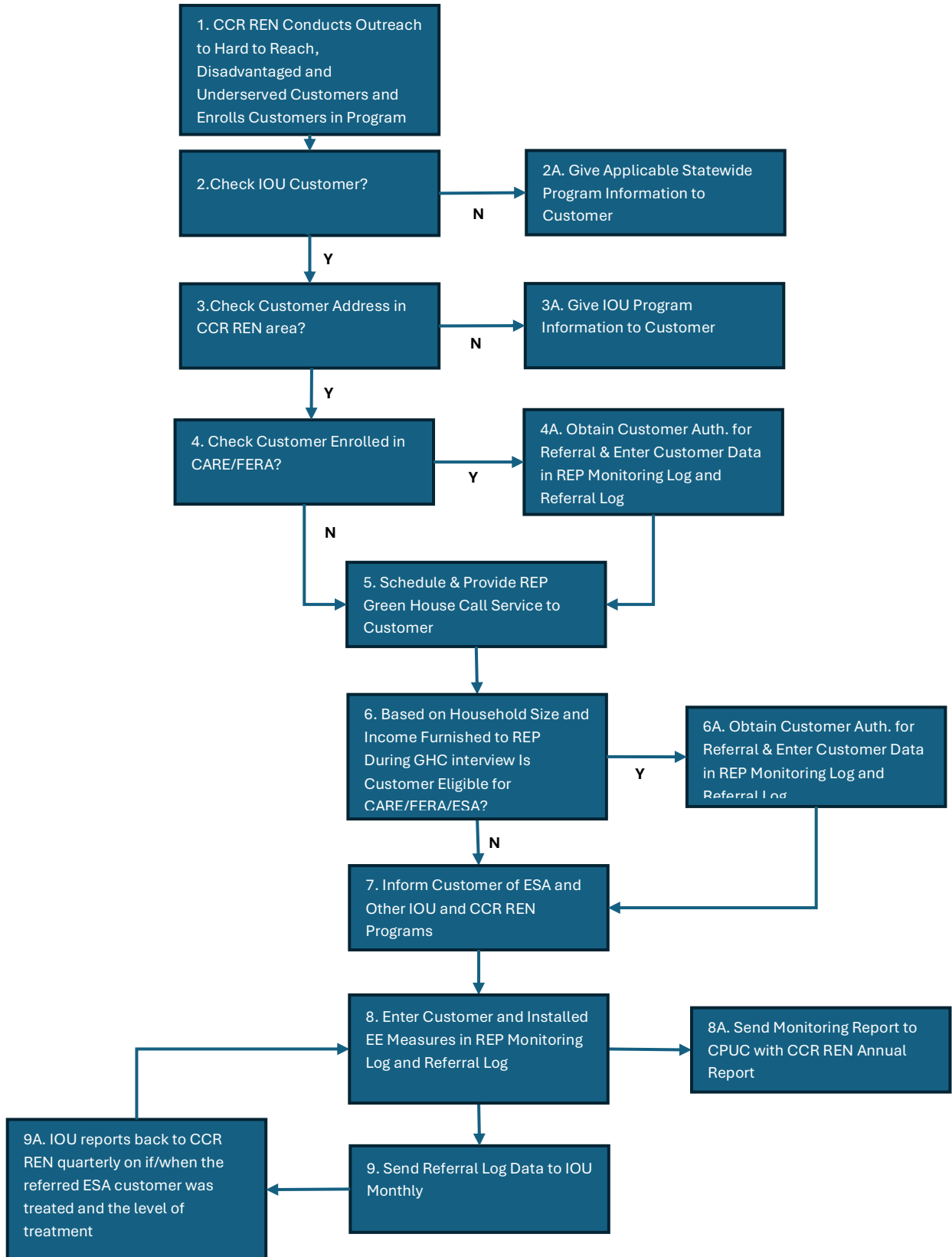
Step 8: CCR REN enters customer information and installed EE measures in REP Monitoring Log and Referral Log.

Step 8.A: CCR REN sends Monitoring Report to CPUC with CCR REN Annual Report.

Step 9: CCR REN sends Referral Log data to IOU monthly.

Step 9.A: IOU reports back to CCR REN quarterly with information about if/when the referred customer was treated and level of treatment. CCR REN incorporates this information in the Annual Monitoring Report to the CPUC.

Figure 1: CCR REN RES + IOU ESA Decision Tree



Implementation Schedule

CCR REN will submit this Monitoring Plan to the CPUC with its Mid-Cycle Advice Letter on or before the November 4, 2025 extended due date.

CCR REN will begin implementing the REP Monitoring Plan within 30 days of CPUC approval of CCR REN's Mid-Cycle Advice Letter.

Reporting Schedule

CCR REN will provide REP Monitoring Reports to the CPUC as part of its Program Year 2025 Annual EE Report, and with each subsequent Annual EE Report through Program Year 2027.