Agenda: Semi-Annual Portfolio Performance Report Review

For the 2026 Program Year

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

Register for the Meeting

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

Overview

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

Objectives

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

Agenda

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

Time	Topic + Description	Presenter
9:00am	**Meeting Welcome & Housekeeping & Background**	Facilitator
9:10	**Energy Division Presentation: Quantitative Overview Across All PAs + Q&A**	Pamela Rittelmeyer (CPUC)
9:25	**Challenge of Reduced and Changing Deemed Measures** Decreasing eligibility and savings values of deemed measures may impact sectors that certain PAs rely on most, whereas other PAs have the balance and flexibility to rely on other sectors. The impact of changes to gas appliance measures may impact	Panelists: • SCE (Zhong Li) on portfolio-wide effects • SDG&E (Kelvin Valenzuela) on statewide HVAC • SoCalGas (Anders

Time	Topic + Description	Presenter
	2027-2028 outcomes, meaning there are more limited measures available to balance TSB and TRC. Approximately 5min presentation/speaker followed by Q&A, which will include discussion of all PAs slides on this topic	Danryd) on water heating • SoCalREN (Alfredo Gutierrez, ICF) on lighting & water heating • Energy Solutions (Paul Kuck) on statewide foodservice
10:25	Break	
10:35	**Continuous Portfolio Improvement** • Lightning presentations by all PAs (3-4min each) • Member + Public Input & Discussion	• PG&E: Lisa Hunter and Lindsey Tillisch • SCE: Zhong Li & Ashley Hall • SDG&E: Kelvin Valenzuela • SoCalGas: Mori Farid • MCE: Alice Havenar-Daughton • 3C-REN: Erica Helson • BayREN: Jane Elias & Tim Olsen • CCR REN: Trevor Keith • I-REN: Benjamin Druyon • NREN: Lexie Perez • SDREN: Sheena Tran • SoCalREN: Sulma Hernandez
11:45	**Key Themes & Wrap Up** Summarize trends in PA portfolios; brainstorm possible course corrections (including possible PA proposals and/or use of Working Groups or Task Forces)	Facilitator and All
12:00	**Meeting Adjourned**	