EE Business Plan Application Template

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**Instructions for Completion:**

Unless explicitly stated otherwise, all Portfolio Administrators (PAs) are expected to respond to each chapter and section of this template. Any chapter or section that is limited to specific PAs (e.g., IOUs only) is clearly labeled.

# **Exhibit 1:** 2028-2031 Portfolio Plan and 2032-2035 Business Plan

## Chapter 1: Executive Summary (5 Page Limit)

1. Provide a brief description of the application’s intent. Describe how was the intent determined, what type of community engagement informed the intent, whether and how ratepayers in different classes/sectors would be impacted; whether and how ratepayers will have easier access to information and participation in programs; etc.
2. Describe the regulatory context of this filing (including legislative, CPUC requirements, and ESJ Action Plan, etc.).

## Chapter 2: Portfolio Summary

### Service territory and service territory-related factors

1. Describe the service territory and how the service territory impacts EE program delivery (i.e. what service territory-related factors could make achieving EE goals easier or harder). Discuss climate impacts, socioeconomic factors, PAs in the same service area, and other service territory-specific characteristics.

### Application summary tables of expected performance metrics covering the 4-year and 8-year budget request

1. Use the tables below to summarize the annual budget request, forecasted cost-effectiveness, and other expected performance metrics over the 4-year and 8-year duration.

**Table 1: 4-year Portfolio Budget Forecast Summary (2028-2031)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **4-year Portfolio Budget Forecast Summary (2028-2031) ($000)** | | | | | |
|  | 2028 | 2029 | 2030 | 2031 | Total (4 years) |
| Total Budget |  |  |  |  |  |
| Resource Acquisition Segment Budget |  |  |  |  |  |
| Market Support Segment Budget |  |  |  |  |  |
| Equity Segment Budget |  |  |  |  |  |
| Codes and Standards Budget |  |  |  |  |  |
| EM&V |  |  |  |  |  |
| Administration |  |  |  |  |  |
| ED Portfolio Oversight |  |  |  |  |  |

**Table 2: 4-year Portfolio Forecast Summary (2028-2031)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **4-year Portfolio Forecast Summary (2028-2031)** | | | | | | |
|  | 2028 | 2029 | 2030 | 2031 | Resource Acquisition Segment Only  (Total 4-year) | Entire Portfolio (Total 4-year) |
| Total System Benefit (TSB) |  |  |  |  |  |  |
| Total Resource Cost (TRC) Ratio |  |  |  |  |  |  |
| Program Administrator Cost (PAC) Ratio |  |  |  |  |  |  |
| Societal Cost Test (SCT) |  |  |  |  |  |  |
| Ratepayer Impact Measure Test Ratio (RIM) |  |  |  |  |  |  |
| Lifecycle MWh/GWh |  |  |  |  |  |  |
| First Year MW |  |  |  |  |  |  |
| Lifecycle MMTHERMS |  |  |  |  |  |  |
| Lifecycle CO2 Metric Tons |  |  |  |  |  |  |

**Table 3: 4-year Portfolio Budget Forecast Summary (2032-2035)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **4-year Portfolio Budget Forecast Summary (2032-2035) ($000)** | | | | | |
|  | 2032 | 2033 | 2034 | 2035 | Total (4-year) |
| Total Budget |  |  |  |  |  |
| Resource Acquisition Segment Budget |  |  |  |  |  |
| Market Support Segment Budget |  |  |  |  |  |
| Equity Segment Budget |  |  |  |  |  |
| Codes and Standards Budget |  |  |  |  |  |
| EM&V |  |  |  |  |  |
| Administration |  |  |  |  |  |
| ED Portfolio Oversight |  |  |  |  |  |

**Table 4: 4-year Portfolio Forecast Summary (2032-2035)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **4-year Portfolio Forecast Summary (2032-2035)** | | | | | | |
|  | 2032 | 2033 | 2034 | 2035 | Resource Acquisition Segment Only  (Total 4-year) | Entire Portfolio  (Total 4-year) |
| Total System Benefit (TSB) |  |  |  |  |  |  |
| Total Resource Cost (TRC) Ratio |  |  |  |  |  |  |
| Program Administrator Cost (PAC) Ratio |  |  |  |  |  |  |
| Societal Cost Test (SCT) |  |  |  |  |  |  |
| Ratepayer Impact Measure Test Ratio (RIM) |  |  |  |  |  |  |
| Lifecycle MWh/GWh |  |  |  |  |  |  |
| First YearMW |  |  |  |  |  |  |
| Lifecycle MMTHERMS |  |  |  |  |  |  |
| Lifecycle CO2 Metric Tons |  |  |  |  |  |  |

**Table 5: 4-year and 8-year IOUs Total System Benefit Forecast (w/out C&S) vs. Goals (IOUs and other PAs, as applicable[[1]](#footnote-2)[[2]](#footnote-3))**

|  |  |  |  |
| --- | --- | --- | --- |
| **4-Year and 8-Year Total System Benefit Forecast vs. Goals ($000)** | | | |
| Year | Total System Benefit  Forecast | Total System Benefit Goals | Percent of TSB Goal |
| 2028 |  |  |  |
| 2029 |  |  |  |
| 2030 |  |  |  |
| 2031 |  |  |  |
| Total (4 years) |  |  |  |
| 2032 |  |  |  |
| 2033 |  |  |  |
| 2034 |  |  |  |
| 2035 |  |  |  |
| Total (4 years) |  |  |  |
| Cumulative  (8 years) |  |  |  |

**Table 6: 4-Year and 8-Year Codes and Standards Forecast vs. Goals (IOUs only)**

|  |  |  |  |
| --- | --- | --- | --- |
| **4-Year and 8-Year Codes and Standards Forecast vs. Goals** | | | |
| Year | Energy Savings  (MWh, MW, MMtherms) | Goals  (MWh, MW, MMtherms) | Percent of Goal |
| 2028 |  |  |  |
| 2029 |  |  |  |
| 2030 |  |  |  |
| 2031 |  |  |  |
| Total (4 years) |  |  |  |
| 2032 |  |  |  |
| 2033 |  |  |  |
| 2034 |  |  |  |
| 2035 |  |  |  |
| Total (4 years) |  |  |  |
| Cumulative  (8 years) |  |  |  |

**Table 7: Portfolio Statewide and Third-Party Contribution Percentage Requirements (As Applicable)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Portfolio Statewide and Third-Party Contribution Percentage Requirements** | | | | | |
| **Time Period** | **Budget Component** | **Qualifying Budget** | **Cumulative Total Budget w/o OBF Loan Pool** | **Contribution Percentage** | **Minimum Threshold** |
| 2028-2031 (4-years) | Statewide [1] |  |  |  | 20% |
| 2028-2035 (8-years) | Statewide [1] |  |  |  | 20% |
| 2028-2035 (4-years) | Third-party [2] |  |  |  | 60% |
| 2028-2035 (8-years) | Third-party [2] |  |  |  | 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 budget.

## Chapter 3: Portfolio Strategies

### Describe portfolio strategies for 4-year plan and 8-year plan

All PAs are expected to address each of the strategy areas listed below, except where explicitly noted as PA-specific (e.g., items pertaining only to SoCalREN). These strategies should reflect planned approaches over the 4-year and 8-year time horizons.

1. If your strategy depends on new or updated policy, clearly state the rationale and your recommended policy change.
2. If applicable, identify if an approach requires or would be complimented by activity authorized in a different proceeding, and identify the rules in that proceeding that they must adhere to in delivering this approach using both EE and the other funding.

#### Strategies:

1. Advance affordability and mitigate overall rate impacts, consistent with Executive Order N-5-24
2. Optimize TSB achievement and cost effectiveness, as well as TSB achieved per ratepayer dollar spent
3. Focus electric savings at peak times with high avoided cost and TSB
4. Advancement of building decarbonization activities in your EE portfolios
5. Use of meter-based savings measurement
6. Increase progress on CPUC’s ESJ Action Plan goals[[3]](#footnote-4). Reference the specific ESJ Action Plan Goals and the EE portfolio strategy. Describe your approaches to advancing these goals.
7. Promote responsible management and disposal of removed refrigerant and incorporate low-GWP refrigerants/ultra-low GWP refrigerants
8. Incorporate community-based program design in relevant existing and planned EE programs
   1. Describe how your relevant programs align with SoCalREN’s Community Based Collaborative’s recommended process, ensures meaningful community involvement, and advances equity and ESJ Action Plan goals (D.21-06-055, OP 31)
   2. **SoCalREN only:** Describe how SoCalREN has coordinated with the administrators to structure a process for community-based programs for all areas covered by the Commission’s EE programs (D.23-06-055, OP 31). Describe the process developed. Recommend whether a community-based approach should be administered statewide or regionally, and by which PAs. The proposal should reflect experience between now and then in the SoCalREN area (D. 23-06-055, p. 84).
9. If you would like to pursue integrated demand-side management (IDSM) activities within your portfolio, propose your strategy including technologies, target customer engagement tools, etc..
10. Increase workforce education and training to better deliver quality EE installations
11. Develop joint demographic data reporting, as required by D.23-06-055 (COL 38)
12. Overcome sector and segment specific challenges (e.g., market support, equity, residential, multifamily, industrial, etc.)
13. Spur innovation to advance a technology, marketing strategy, or delivery approach in a manner different from previous efforts in your EE portfolios

## Chapter 4: Forecast Methodology and Zero-Based Budgeting

### Demonstration of the reasonableness of request

1. Describe the reasonableness of the application request. Also include the following and note how delivery type and measurement methods are being incorporated into each:
   * 1. Methodologies to forecast and allocate Resource Acquisition, Equity, Market Support, and Codes and Standards program budget and benefits
     2. Methodologies to forecast and allocate program budget and benefits by sector
     3. Methodologies and calculations used to derive a zero-based budget (D.21-05-031, COL 22, OP 8)

### Program Modifications from 2024-2027 portfolio cycle

1. Describe the significant program modifications (e.g., portfolio segmentation changes or significant budget shifts) from the 2024-2027 portfolio cycle.
2. List all closed programs[[4]](#footnote-5) in Table 9 below.
3. List all new programs/program placeholders in Table 10 below.

**Table 8: Closed Programs from the 2024-2027 Cycle**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Closed Programs from the 2024-2027 Cycle** | | | | | | |
| Name of Closed Program | Segment | Sector | Unspent Budget of the Closed Program | Total EE budget from the 2024-2027 cycle | Rationale for Program Closure | Underperformance and Remediation  (If applicable, elaborate on what led to underperformance and why. Describe remediation efforts that were undertaken, results of those efforts, and over which timeframe.) |
|  |  |  |  |  |  |  |

**Table 9: New Programs in 2028-2032 Application Cycle**

|  |  |  |  |
| --- | --- | --- | --- |
| **New Programs in 2028-2032 4-Year Application Cycle** | | | |
| Name of New Program/Placeholder Program | Segment | Sector | High Level Program Description/Purpose |
|  |  |  |  |

## Chapter 5: Portfolio Management

### Overview for 4-year plan and 8-year plan: Key metrics and outcomes

* 1. Discuss how the proposed business plan outcomes align with and support your 4- and 8-year goals (e.g., TSB achievement, advancing EE in equity communities, etc.).
     1. Use this space to introduce and orient the reader to your logic model, as described in #2.
     2. **RENS only:** RENs should discuss how their Unique Value Metrics (described below in narrative and listed in Table 10) complement the logic model.
  2. Insert a portfolio-level logic model illustrating the inputs, activities by sector, outputs, and outcomes, for both your 4-year and 8-year portfolio and business plans.
     1. The logic model should clearly align with the strategies identified in Chapter 3.
     2. The following may be useful examples of logic models which include pertinent information for Commission review:

Timeline

AI-generated content may be incorrect.

Diagram

AI-generated content may be incorrect.

* 1. For RENs only: Unique Value Metrics (UVMs)
     1. Complete the table below to clearly identify the UVMs the REN will use in the upcoming portfolio cycle, including:
        1. What the metric is measuring;
        2. How the REN will track and report on it;
        3. Why this metric reflects a unique value or contribution.
     2. In addition to completing the table, provide a brief narrative (1-2 paragraphs) summarizing how your UVMs collectively reflect the RENs unique role in California’s EE landscape. This description should highlight overarching themes or strategies not captured in the individual metric descriptions.

**Table 10: UVM Overview and Reporting Approaches**

|  |  |  |  |
| --- | --- | --- | --- |
| **UVM Overview and Reporting Approaches** | | | |
| Unique Value Metric (UVM) | Description of What It Measures | Tracking & Reporting Approach including targets where applicable | Strategic Importance to REN Portfolio |
|  |  |  |  |

### Strategies to optimize portfolio and manage risk

1. Describe how the PA uses TSB goals and cost-effectiveness metrics to maximize overall portfolio performance. Include the PA’s approach to setting and tracking goals, the use of metrics and procedures in place to stay “on-target” to meet TSB and cost-effectiveness requirements, as applicable.
2. Describe the PA’s overall approach and flexibility in identifying and managing the risk of underperformance at the portfolio level. Include how performance is monitored, how underperformance is identified in a timely manner, and how the PA intervenes to support success across programs, including making adjustments or closing programs when warranted.
   * + - 1. Outline a corrective action plan for programs, sectors and/or segments that are underperforming.
         2. If applicable, describe the flexibility that should be retained for this cycle.
         3. Program specific closures and remediation strategies should be detailed in the list of closed programs in Table 8 above.
3. Describe how and the extent to which the PA’s procurement practices both create and mitigate risk related to forecasting, expenditures, program implementation, and regulatory compliance.

### Third-Party Programs (IOUs only)

1. What is the responsibility of the IOU to the third-party implementers? Describe your plan to support third party performance, including the requirements prescribed by D.23-02-002.
2. How is the risk of underperformance distributed between IOUs and the third-party implementers?
   * + - 1. In cases of third-party underperformance, how is it managed differently from overall portfolio underperformance as detailed above?
3. Solicitation Strategy:
   * + - 1. Describe strategies for designing the scope and schedule of solicitations that support both 4-year and 8-year plans.
         2. Discuss planned improvements to solicitation practices based on Procurement Review Group (PRG) and Independent Evaluator (IE) input, including IE Semi-Annual Reports, etc. Include recommendations for policy changes needed to support improvements.
         3. Discuss plans to seek stakeholder input on solicitation practices.
         4. Discuss the strategy for engaging a diverse range of businesses in solicitations, with a focus on new, small, and/or DBE firms, as well as businesses and organizations from markets that have historically been underrepresented in EE programs.
4. Provide timeline with the third-party solicitation schedule from 2028 to 2035. Use the solicitation schedule posted to CAEECC for reference.

### Statewide Programs (IOU and BayREN)

1. Each lead PA: provide a summary of the current portfolio of statewide programs, including how the program incorporates results and recommendations from evaluation studies. Reference the studies and relevant recommendations, as applicable.
   * + - 1. Describe how future statewide programs will support the objectives of both 4-year and 8-year plans.
2. Identify and provide supporting rationale for any proposed changes to the PA statewide funding allocation and proposed changes to any statewide program funding levels. (Reference Tab 6 for Statewide Programs in the Business Plan Workbook.)
3. Identify and provide rationale for any proposed changes in the designated lead PA for the statewide administration of programs.
4. If applicable, describe coordination needs or conflicts where statewide midstream programs may overlap with statewide or locally administered downstream programs, and propose a process to clarify program precedence or coordination responsibilities across PAs.

### Statewide Assessment

* + - 1. Based on D.23-06-055 (COL 7), PAs propose your assessment process for statewide programs.

## Chapter 6: Segmentation and Sector Strategy

### Portfolio Segment Goals

The description below may be dependent on the content of the PA tier 3 advice letters proposing equity and market support goal constructs (D.23-06-055, OP 25) and the content and timing of the subsequent CPUC resolution.

Describe the PA’s approach to setting and achieving goals for the Market Support and Equity segments, including:

1. The goal constructs themselves
2. How these goal constructs align with the segment objectives established in D.21-05-031, and
3. How do the PA’s approaches to Equity and Market Support segments align with the adopted goal constructs?
4. The strategies and plans in place to achieve these goal constructs

### Portfolio Sector Strategy

1. For each sector (e.g., residential, commercial, industrial, agricultural, public, and cross-cutting, etc.), provide:
   1. A brief narrative (1-2 paragraphs) describing the high-level strategy, including key target populations and end-uses (e.g., in residential: single family, multifamily, farmworker housing).

**Table 11: Budget Distribution by Sector**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Budget Distribution by Sector ($000)** | | | | | | | | |
|  | **Sector** | | | | | | | | |
| **Budget** | Residential | Commercial | Industrial | Agricultural | Public | Cross-Cutting | EM&V | Portfolio Support | Total Budget |
| 2028 |  |  |  |  |  |  |  |  |  |
| 2029 |  |  |  |  |  |  |  |  |  |
| 2030 |  |  |  |  |  |  |  |  |  |
| 2031 |  |  |  |  |  |  |  |  |  |
| **Total**  **(4-Year)** |  |  |  |  |  |  |  |  |  |
| 2032 |  |  |  |  |  |  |  |  |  |
| 2033 |  |  |  |  |  |  |  |  |  |
| 2034 |  |  |  |  |  |  |  |  |  |
| 2035 |  |  |  |  |  |  |  |  |  |
| **Total**  **(4-Year)** |  |  |  |  |  |  |  |  |  |
| **Cumulative Total**  **(8-Year)** |  |  |  |  |  |  |  |  |  |

### Portfolio Segmentation Strategy (RA, MS, E, C&S)

1. Describe the rationale and criteria for the proposed distribution of budget among the portfolio segments and alignment with broader portfolio objectives for 4-year plan.
2. Provide a high-level discussion of 8-year segmentation plan strategies.

#### Resource Acquisition

1. Describe the PA’s strategy for the Resource Acquisition segment.
2. Describe the sector(s) the PA proposes to service within the Resource Acquisition segment (noting expansion into new sectors or withdrawal from a sector). Include forecasts of single family and manufactured home customers served.
3. Describe which sectors are targeted for Strategic Energy Management (SEM), site and population Normalized Metered Energy Consumption (NMEC), deemed, custom measurement, direct install, etc. and why.

#### Market Support

1. Describe the PA’s strategy for the Market Support segment, including how strategies and activities for each of the five MS Sub-objectives make it more likely to achieve Market Support and Resource Acquisition goals consistent with the Commission’s objectives.
2. Describe the sector(s) the PA proposes to serve in the Market Support segment (noting PA expansion into new sectors or withdrawal from sector). Include forecasts of single family and manufactured customers served in each sector.

#### Equity

1. Describe the PA’s strategy for the Equity segment, including how strategies and activities make it more likely to achieve overall Equity and Resource Acquisition goals consistent with the Commission’s objectives.
2. Discuss whether the current definitions of the three Equity subcategories (hard to reach, underserved, and disadvantaged communities) require further refinement or clarification to better support program design and delivery.
3. Describe the sector(s) the PA proposes to serve within the Equity segment (noting PA expansion into new sectors or withdrawal from sector). Include forecasts of single family and manufactured home customers served.

#### Codes & Standards

1. Describe the PA’s strategy for the Codes & Standards segment consistent with the Commission’s objectives.
2. Describe the sector(s) that the PA proposes to serve within the Codes and Standards segment.

## Chapter 7: Portfolio Coordination

### Segment and Sector Specific Coordination

#### Coordination within the Same PA

Describe all coordination between EE programs, sectors, and segments run by the same PA. Include:

1. Sector/segment specific coordination
2. Program-specific coordination
   * + - 1. Sector/segment specific coordination
         2. Program-specific coordination

#### Coordination with Other PAs

Provide a high-level description of how the PA coordinates with other PAs, on statewide and regional programs, to support portfolio alignment and reduce customer confusion. This section should focus on coordination processes, including participants, structure, and frequency, rather than program-level details or prospective program overlap. In your response, address the following:

1. Coordination Participants
   1. Identify every PA you coordinate with (e.g., specific IOUs, RENs, CCAs) and briefly describe any shared geographic territory or customer segments in which overlap is possible
2. Coordination Structure and Frequency
   1. List every formal venue used for coordination (e.g., JCM process, PASC meetings, ad-hoc working groups, bilateral meetings)
   2. Specify how often each coordination venue convenes (e.g., monthly, quarterly, annual, or other)
   3. Name the typical staff roles involved in coordination (e.g., portfolio managers, sector leads, evaluation staff), and the counterpart roles at other PAs
3. Coordination Practices (Overlap Identification and Mitigation Workflow)
   1. Describe the steps or criteria used to flag potential “substantially similar” or “duplicative” programs (as these terms are defined by SoCalREN 20-E Advice Letter (D.23-06-055, OP 32))
   2. Explain how overlap findings are brought to the coordination venue and the timeline for reaching resolution
   3. List options / specific levers to resolve or prevent overlap

#### Coordination with Market Transformation

1. Describe how the PA portfolio proposes to coordinate with Market Transformation activities (i.e., CalMTA and TECH Clean California). Specify if there are any programs or market transformation initiatives in particular that are relevant.

#### Coordination with Energy Savings Assistance (ESA) Programs

1. Describe coordination, procedures for referring customers, and avoiding overlap with ESA program(s) available in the same geographic region. Specify the ESA programs, as relevant, and the planned coordination.

#### Coordination with Other Demand Side Programs

Unless addressed in the ESA or Market Transformation sections above, describe how the PA proposes to coordinate its energy efficiency efforts with CPUC-regulated DSM programs and other efficiency/DSM programs administered by other state and local agencies (e.g., water), and municipalities:

* 1. Other demand-side programs (demand response~~,~~ etc.), including EE/demand response technology integration efforts
  2. This should include coordination plans with building decarbonization programs.

## Chapter 8: Stakeholder Engagement

1. Provide a summary of feedback received through the stakeholder engagement process, in developing the application, highlighting areas of support and/or proposed changes by stakeholders. Include the number of opportunities or events where engagement was sought.
2. Explain how the PA addressed the feedback, including any changes to their draft Application.

## Chapter 9: Evaluation, Measurement & Verification

1. Provide a summary of planned EM&V Studies and Activities for the 4-year plan and 8-year plan.
   * + - 1. Include portfolio-wide studies that evaluate whether specific program outcomes are sufficiently meeting objectives as listed in 4- and 8-year plans (such as but not limited to: TSB, TRC, PAC, RIM, measure adoption, participation among priority customer groups, engagement metrics, etc.).
2. Provide PA/ED budget allocation and justification.

## Chapter 10: Cost & Cost Recovery (IOUs only)

1. Describe Cost Recovery and Funding Mechanisms, including:
   * + - 1. Revenue requirement forecasts and cost recovery strategies
         2. Funding sources and administration of unspent funds

For dual-fuel IOUs: Provide a description of methodology for determining from gas and electric rates, respectively, including how unspent funds from each set of ratepayers are dealt with and trued-up.

## Chapter 11: Recommendations for New or Modified EE Policy



# **Exhibit 2**: Program Cards

**Program Cards (1 card per program) - SAMPLE**

*\*In italics are example program details.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Program Name: Sample Residential Program** | | | |
| **Program ID:** *SCE-XX-RES-001A*  **New / Existing:** *New*  **Expected Program Duration:** *2028 - onwards* | | | |
| **Portfolio Segment:** (Resource Acquisition, Market Support, Equity, Codes and Standards)  *Resource Acquisition* | **Program Implementer Type:** (IOU Core, Third-Party Solicited, REN, CCA)  *Third-Party Implementer* | | **Third-Party Program Implementer (applicable to IOUs only):**  *Example Implementer Company* |
| **Applicable Sector:** (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered) *Residential* | | **Customer Group(s):**  *Single Family Residential* | |
| **Sector Challenges:**  *Existing single-family homes remain inefficient and costly to implement* | | **Sector Opportunities (Expected Outcome(s)):**  *Increased participation in EE program and adoption of EE measures* | |
| **Brief Program Description: (Including customer target, program strategies employed, expected program outcome):**  *The Sample Residential Program focuses on implementing behavior intervention strategies designed to help customers understand and manage their household energy use. The single family frogram also offers single family residential customers incentives or direct installation of HVAC, lighting, water heating, etc. measures.* | | | |
| **Known Equity Concerns in the Selected Markets (if applicable):**  *High population of HTR customers spread over a broad geographic region* | | **Proposed Solutions to Equity Concerns (if applicable):**  *Explore remote, virtual options to engage with customers; select appropriate vendors ready to serve this region* | |
| **Intervention Strategy:** (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)  *Marketing & Outreach, Audit, and Rebate* | | **Delivery Type:** (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)  *Downstream, Downstream – Direct Install* | |
| **Measurement and Verification Methods**: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)  *Deemed, NMEC - Population* | | **Program Total System Benefit (TSB) for 2028-2031:**  *$4,500,000* | |
| **Annual Budgets for 2028-2031:**  *2028:*  *2029:*  *2030:*  *2031:* | | **Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:**  *TRC: 1.5*  *PAC: 1.8* | |
| **Anticipated directional and scale changes in budget for years 2032-2035:**  *Anticipate an increase in budget for this program for the 2032-2035 period, dependent on program performance.* | | **Market Actors necessary for success:**  *Home Depot* | |
| **High-level description of delivery workforce including necessary scale and its risks:**  *Workforce requirements include cashiers, delivery drivers, etc. There are high quantities of these workers in place. A closure or suspension of regular services of one or more major retailers could pose a risk to program effectiveness.* | | | |
| **Near-term Program Output(s) (1-4 years):**  *Install EE equipment in XXX single family homes during program implementation period.* | | | |
| **Long Term Outcome (5-10 years):**  *Move 50% of the single-family market to high efficiency equipment.* | | | |
| **Does this program interact with other programs in this PA portfolio? If so, describe:**  *Yes, this PA offers two programs in the residential sector. This example residential program is complemented by a third-party multifamily program. Both programs are coordinating and sharing best practices on monthly program management calls.* | | | |
| **Program Metrics and Indicators (KPIs):** (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) | | | |
| **Does this program utilize Integrated Demand Side Management (IDSM)?**  *EE/DR, Multi-DER IDSM, other or none* | | **Link to Existing Implementation Plan, if existing:**  *Link to CEDARS IP* | |

# **EXHIBIT 3:** CEDARS Filing Links and Receipts

1. Required: IOUs should insert the results CPUC Potential and Goals Decision [D.25-xx-xx]. [↑](#footnote-ref-2)
2. Optional: Non-IOUs may provide goals based on PA specific forecasts. [↑](#footnote-ref-3)
3. https://www.cpuc.ca.gov/ESJactionplan/ [↑](#footnote-ref-4)
4. Not required where a program is closed due to a program ending according to its original contract term length or upon completion of commitments. [↑](#footnote-ref-5)