



Full CAEECC Quarterly Meeting #46

Hosted by the California Energy Efficiency Coordinating Committee (CAEECC)

Meeting Date: 5/8/25

Last updated May 2, 2025



Welcome & Background

Introductions + Agenda

How to Participate

Membership Updates

Welcome & Background

Introductions + Agenda

Welcome!

Virtual Crew:

Katie Abrams to read out
attendee list



San Francisco Crew:

Michelle Vigen Ralston to
read out attendee list



Welcome!

View Details in Agenda Document

11:30	Bring your own lunch & mingle for In-Person Attendees
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12:15	Welcome & Background
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12:30	Policy, Regulatory & Legislative Updates
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break

2:00	CAEECC Business Items
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3:00	Main Assembly Wrap Up
------	------------------------------

break

3:15	Optional Assembly
------	--------------------------

4:00	Gathering in honor of Nils
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Meeting Goals

1

Engage on policy and regulatory updates

2

Complete CAEECC Business items

Welcome & Background

How to Participate

We're joining from ONLINE and IN-PERSON



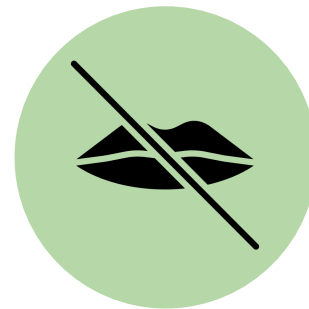
SF Emcee:
Michelle
Virtual Emcee:
Katie



Chat is only for
technical issues.
No substantive
comments.

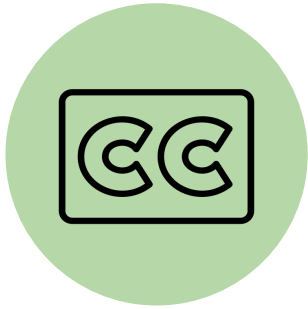


All Attendees:
Reactions +
Raise Hand



In-Person:
No side
conversations!

Virtual Participants



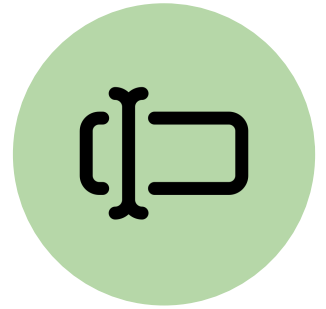
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captioning is
available



Share your **video**
if possible



Mute yourself
when you're not
speaking.



Rename yourself
with your
Representation &
Pronouns



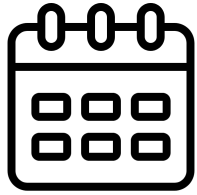
How the Public Can Participate

These are the dedicated Public discussion opportunities, as indicated on the agenda with “*”:

- * Policy, Regulatory & Legislative Updates: CPUC ED Staff Updates and EE Rulemaking Next Steps
- * Main Assembly Wrap up: Q3 Full CAEECC Meeting Proposed Topics
- * Optional Assembly

During the dedicated Public discussion times, the Public may participate by raising their hand to speak

Groundrules



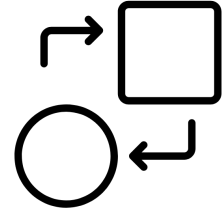
Attend all
meetings



Do your
homework



Materials are
posted 5 days
in advance



Propose
alternatives



Proposed Meeting Norms

1. Make space, take space (share the mic).
2. Stories shared here stay here; what is learned here leaves here.
3. Share your unique perspective: share your unpopular opinion!
4. Generative thinking: "yes, and" instead of "yes, but".
5. Listen from the "We", speak from the "I".
6. Offer what you can; ask for what you need.
7. Be inquisitive.
8. Assume best intent.
9. Be empowered to share impact.

Welcome & Background

Membership Update



Membership Update

- Ely Jacobsohn, a long-time CPUC Ex Officio CAEECC representative, is moving to Commissioner Houck's office as an advisor for next 7-24 months in total
- Pam Rittelmeyer and Coby Rudolph will continue as CPUC Ex-Officio representatives



Policy, Regulatory & Legislative Updates

CPUC Energy Division Staff Updates
(e.g., application templates,
Indicators and Common Metrics
Draft Resolution, state audit of EE,
evaluations out for comment)

EE Rulemaking Next Steps

Equity & Market Support Goals

CPUC Energy Division Updates

Pam Rittelmeyer, Senior Analyst

Coby Rudolph, Supervisor

Energy Efficiency Procurement and Portfolio Management

CAEECC Quarterly Meeting: May 2025



California Public
Utilities Commission

Agenda

- Energy Division Staff Update
- New EE Rulemaking

Energy Division Staff Update

1. Application templates for 2028-31 EE Business Plan Cycle
 - Current Status
 - Next steps
2. Indicators and Common Metrics Draft Resolution – status update
3. California State Audit – next steps from Energy Division
4. Evaluations currently out for comment:
 - SEM (by 5/9)
 - NMEC (by 5/11)

R.25-04-010 EE Rulemaking Next Steps

- Now that the OIR is voted and approved:
 - New proceedings are assigned to the CPUC President by default. The President may then reassign a proceeding to a different commissioner.
 - Parties may file comments (if any) to OIR (Rule 6.2). Any person may obtain party status by filing comments to the OIR (Rule 1.4(a)(2)).
 - The assigned commissioner and judge(s) will schedule the Pre-hearing conference (PHC).
- What happens at a Pre-hearing Conference?
 - Procedural matters (see Rule 7.2) including schedule, scope, and any other matters specified in the ruling setting the PHC.
 - Who will attend: Respondents, parties and interested people.
- Scoping Memo Issued after PHC
 - The Assigned Commissioner will issue a scoping memo in consultation with the assigned ALJ.

Questions?



Join the discussion, raise your hand (in Zoom or in person) to join the queue

1

Member-only Discussion

2

Public-invited Discussion

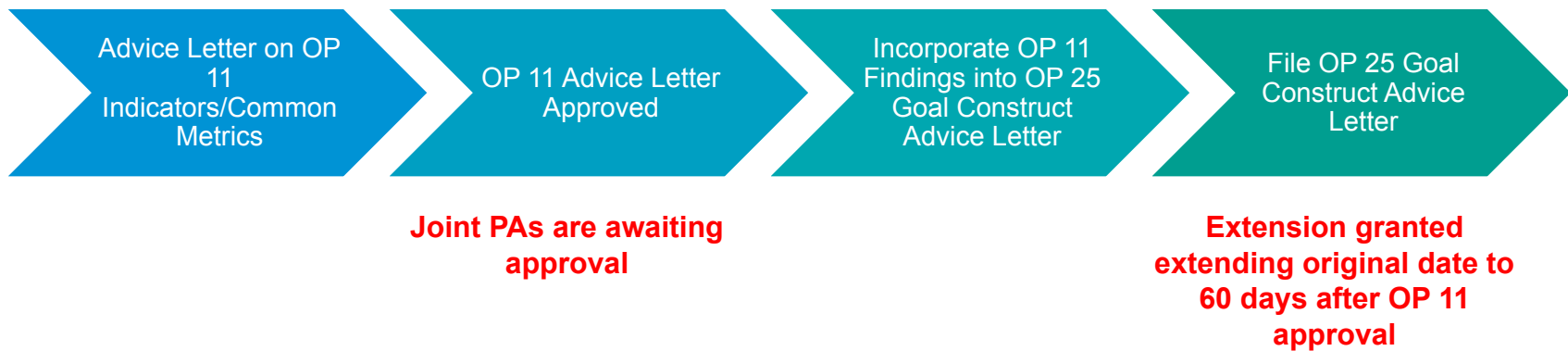
Procedural Updates: Market Support and Equity

Presenter: Stephanie Gutierrez

May 8, 2025

Tier 3 Advice Letter: OP 11 Clarifying Indicators, Common Metrics, and Identifying Baselines

D.23-06-055; OP 11 “The portfolio administrators shall jointly submit a Tier 2 advice letter by no later than May 1, 2024 clarifying all of the indicators adopted in this decision, including any modifications from metrics and indicators adopted in Decision 18-05-041, and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines”



Tier 3 Advice Letter: OP 25 Goal Constructs for the Market Support & Equity Segments

D.23-06-055; OP25 The decision requires the PAs to collaboratively propose goal constructs for the equity and market support segments of their energy efficiency portfolios.

Goal Construct

Options: Two or three clearly defined goal construct options for each the equity segment and market support segment that align with the objectives and indicators adopted in Decision 23-06-055.

Goal-Setting Process:

A recommended process for proposing, adopting, and tracking goals over a medium- to long-term timeframe (12–24 years, in four-year increments).

Study Requirements:

A description of the necessary studies, including scope, methods, and funding, to set targets for goals and ensure they are meaningful, measurable, and achievable.

Join the discussion, raise your hand (in Zoom or in person) to join the queue

1

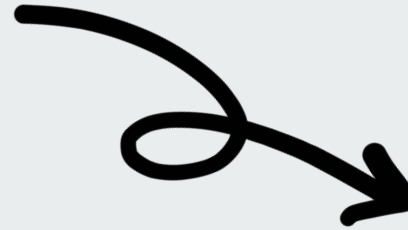
Member-only Discussion

2

Public-invited Discussion

Break (15 mins)

a view of what's next on the agenda



2:00

CAEECC Business Items

3:00

Main Assembly Wrap Up

break

3:15

Optional Assembly

4:00

Gathering in honor of Nils



CAEECC Business Items

Community Engagement Panel
Recap

Annual Performance Report
Review Preparation

Equity Advisory Committee
Scope of Work Overview

CAEECC Business Items

Recap of Community Engagement Panel Held on April 9, 2025

Community Engagement Panel Background

- Background

Member Survey results on CAEECC engagement for indicators was inconclusive → Facilitation Team proposed a Panel to share the Panel's experiences with equity segment program implementation

- Purpose

Hear perspectives of community engagement and outreach for energy (efficiency) programs. PAs can take these insights to develop outreach processes / indicators for Mid Cycle Advice Letters



2025 (Sep) - Deadline

D.23-06-055 requires PAs to develop the metrics for Community Engagement Indicators, but does not require PAs to file jointly.

PA coordination includes an externally facilitated process.

Community Engagement Panel Recap



Panelists

Julia Hatton, Rising Sun Center for Opportunity

Brooke Wright, Environmental Innovations

Sarah Sharpe, Central California Asthma Collaborative

Key Takeaways

- Relationship-building with customers and trusted community organizations is crucial
- Programs should be more accessible
- Indicators should account for the different types of community engagement



Community Engagement Panel Recap, cont'd

Digging Deeper

- There isn't a one size fits all, we need to meet communities where they are at
- The significant value of being on the ground, consistent, and persistent
- Be mindful that community engagement isn't about "making a sale" or extraction, it's really about building long-term relationships
- Potentially explore indicators that track the frequency *and quality* of outreach, and how these efforts lead to outcomes like sign-ups or enrollments

CAEECC Business Items

Prep for Annual Performance Portfolio Review, Scheduled for August 5, 2025



Annual Performance Portfolio Review

What

- Present key trends to watch (and note any issues that need attention)
- Present overall metrics of progress
- Identify any program closures
- Highlight any specific metrics identified by ED (i.e. Equity and Market Support Indicators)

Why

- Focus on the most useful data to inform the review of progress and focal points for improvements.

Annual Portfolio Performance Report Review Goals

1

Meeting Goal #1

Identify challenges & opportunities

2

Meeting Goal #2

Identify who might problem solve (CAEECC, Portfolio Administrator (PA), or other) in a timely fashion

3

Meeting Goal #3

Ensure transparent review, tracking, and dialogue of portfolios to maximize cost-effectiveness

Draft Agenda

*Virtual. Tentatively 9:30am-3:00pm. 12 Portfolio Administrators, 9 presenting**

Welcome and Intros

Agenda, Meeting Goals and Participation

Annual Performance Overview

Overview of the Annual Portfolio Performance Report Review Sessions

Central CA Performance Review

CCRREN and 3CREN

Southern CA Performance Review

SCE, SoCalGas, SDG&E, SDREN, I-REN, SoCalREN

Northern CA Performance Review

NRREN, PG&E, MCE, BayREN

Key Themes

Discussion and summary of key themes

Wrap Up

Overview of PPRR and next steps

**CCRREN, SDREN, and NRREN will not be presenting*



Presentations Include

Format of Past Presentations:

- A. Charts
- B. Tables
- C. Comparison to yearly projections
- D. Short description of significant challenges, issues, and successes
- E. Programs that are due for closure or extension

Next Steps: Co-Chairs revising template; they'll seek PA and ED feedback

CAEECC Business Items

Equity Advisory Committee Scope of Work

Equity Advisory Committee

Background

November 2024 (Q4 CAEECC): Members and Public discussed EAC concept at Q4 2024 CAEECC meeting

February 2025: CAEECC Members voted to implement an Equity Advisory Committee, with 76% in favor

April 2025: Co-Chairs, Energy Division and Facilitation team drafted proposed Scope of Work* (SOW)

April 24 - April 30, 2025: CAEECC Members reviewed draft SOW

Today's Goal

Discuss CAEECC Member input on draft Scope of Work: **Scope, Composition, & Deliverables**

Next Steps

Next step: Co-Chairs and Energy Division will finalize the SOW based on input gathered thus far

**Draft SOW posted to Q2 Full CAEECC meeting page:
<https://www.caeec.org/5-8-2025>*



Background: SOW Draft Scope

During the **2025-2026 pilot**, the EAC will focus on **advising Portfolio Administrators and Energy Division on Equity Best Practices**.

Additional future scope, to be determined by CAEECC and/or the CPUC, could include providing feedback to Portfolio Administrators on best practices and lessons learned on furthering equity objectives across programs with an equity focus; providing informal input to Energy Division on portfolio and policy changes to promote Energy Efficiency (EE) delivery to communities of concern/priority communities; collaborating with the CAEECC Facilitation Team for equity-centered meeting facilitation; serving as a liaison between CAEECC and DACAG, LIOB, and other similar entities; or other topics at the discretion of CAEECC.

Member-only Discussion on Scope

Given the new proceeding and the forthcoming guidance to PAs for the next EE portfolio, should we include a task to **advise on what should be included in that guidance** (assuming it would come out before the end of this pilot)?



Background: SOW Draft Composition

EAC members will have knowledge of CAEECC and experience in California's energy efficiency industry with a focus on programs that include an equity element. This might include, but is not limited to, folks with experience as California **energy efficiency equity program evaluators, implementers, program administrators, and community engagement representatives.**

Composition may include a mix of CAEECC Members and non-Members but will be **capped at approximately 3-5 people**

Member-only Discussion on Composition

Is 3-5 people the appropriate number of people for the EAC?



Background: SOW Draft Deliverables

Deliverable: **Meeting notes and a possible presentation at a full CAEECC quarterly meeting or Portfolio Performance Report Review.**

A formal report may not be needed, and it may be more valuable to provide feedback in real time. Additional deliverables could be proposed by EAC members and discussed at a CAEECC quarterly meeting.

Expected use of the recommendations: informal recommendations to the PAs and CPUC ED

Member-only Discussion on Deliverables

Should the EAC develop a **best practice checklist**
(assuming one doesn't already exist)?

Would that be helpful for CAEECC Members?



Main Assembly Wrap Up

Q3 Full CAEECC Meeting
Proposed Topics

Q2 Meeting Objectives & Goals



January 2025

CAEECC Member-only
Phase 3 DEI Training
Plan

Q1

February 11, 2025

Full CAEECC Quarterly
Meeting #45



April 9, 2025

Panel on Community
Engagement

Q2

May 8, 2025

Full CAEECC
Quarterly Meeting
SF + Virtual



August 5th, 2025

*Annual 2024 Portfolio
Performance Report
Review
Virtual*

Q3

August 13, 2025

Full CAEECC
Quarterly Meeting
*SoCal (location tbd) +
SF (tbd) + virtual*



November 6, 2025

*Semi Annual 2025
Portfolio Performance
Report Review
Virtual*

Q4

December 9, 2025

Full CAEECC
Quarterly Meeting
*SoCal (location tbd) +
SF (tbd) + virtual*

2025 Meeting Dates

Q3 (August 13, 2025) + Beyond Full CAEECC Meeting Proposed Topics

- Full Assembly
 - a. Equity Advisory Committee Update
 - b. Portfolio Performance Report Review key themes
 - c. Energy Division Updates (including AB3264)
 - d. Community Based Design Collaborative
 - e. MCAL formal consultation
- Optional Assembly
 - a. Possibly the PAs' Market Rate Non-Energy Benefits study (maybe SoCalGas or Illume)
 - b. Solicitations: new/closing programs for all PAs related to MCALs

Q4 Full CAEECC Mtg (December 9, 2025):

- a. PA Application formal consultation
- b. TBD fuel substitution and cost-effectiveness; new/closing programs

Join the discussion, raise your hand (in Zoom or in person) to join the queue

1

Member-only Discussion

2

Public-invited Discussion

2/11/25 Q1 Meeting Evaluation Scores

Evaluation Question Summaries	Avg.
Objectives of the meeting were accomplished.	4.9
Presentations and background documents were clear and helpful.	5.2
This meeting was an inclusive and trusting environment.	5.2
The facilitators were effective in running the meeting.	5.4
Overall, the meeting format was smooth and effective.	4.7
Overall, this Full CAEECC meeting was successful.	5

Scores are 1-6 scale, where 1 is "strongly disagree" and 6 is "strongly agree"; and 3.5 is mid-point of 1-6 scale

Scores based on responses from 19 members and 3 stakeholders

Facilitation Team and Co-Chairs reviewed and debriefed comments from respondents



Meeting Goals

1

Engage on policy and regulatory updates

2

Complete CAEECC Business items

This Meeting Evaluations

CAEECC Members are required by Groundrules to complete each Meeting Evaluation.

Members of the Public are encouraged to complete the evaluations.



Evaluations will be sent by
CAEECC Facilitator



Complete evaluations **today** and
latest by May 15, 2025 COB

Break (Back at 3:15)

a view of what's next on the agenda




3:15

Optional Assembly

4:00

Gathering in honor of Nils



Optional Assembly

CPUC NEBS AND CEC
Non-Energy Impacts

Community Based Design
Collaborative Update

Optional Assembly

CPUC Non-Energy Benefits & CEC Non-Energy Impacts



CPUC Update on Non-Energy Benefits (NEBs)

Pam Rittelmeyer, Energy Division



CEC Processes and Decision-Making: Non-Energy Impacts within the CEC

Jacqueline Gilyard Jones - NEI OIIP Lead
May 8, 2025
CAEECC Meeting



ACRONYMS

- AB – Assembly Bill
- CALSHAPE- California Schools Healthy Air, Plumbing and Efficiency Program
- CEC - California Energy Commission
- CERRI - Community Energy Reliability and Resilience Investment
- EDD – Employment Development Department
- EBD – Equitable Building Decarbonization Program
- EPIC – Electric Program Investment Charge
- EVID – EV Infrastructure Deployment
- IEPR – Integrated Energy Policy Report
- INDIGO - Industrial Decarbonization and Improvement of Grid Operations
- LI-DAC – Low Income – Disadvantaged Communities
- NEI – Non-Energy Impact
- S4A – Solar For All Program
- SB – Senate Bill
- V2G – Vehicle to Grid
- VPP – Virtual Power Plant



Presentation Overview

- Describe landscape of non-energy impacts (NEIs) in CEC's programs
 - What we do
 - How we currently use NEIs
 - Plan for NEIs



Three Main Functions of the CEC



Policy & Planning

Forecasts of

- Demand



- Supply
- Reliability



Regulatory Functions

- Codes & Standards



- Power Plant Permits



Program Implementation

- Research & Development



- Fueling Innovation & Market Transformation





Examples* of CEC Programs



Policy & Planning

- Demand Forecast
- IEPR
- SB 100
- Reliability Assessments & Reports
- SBX1-2 - Petroleum Industry data collection



Regulatory Functions

- Power Source Disclosure
- CalGreen – Green Building Standards



Program Implementation

- Decarbonization Incentive Programs
 - Zero Emission School Buses
 - Equitable Building Decarbonization
 - Solar for All
- EV Charging Infrastructure Incentives
- EPIC

*not a comprehensive list



Programs Currently using NEIs



Policy & Planning

- Demand Forecasting
 - Resilience
- IEPR
 - Equity
- SB 100
 - Air Quality



Regulatory Functions

- Building Efficiency Standards (Title 20 & 24)
 - Air Quality
 - Environmental
 - Affordability
- Appliance Standards
 - Resilience



Program Implementation

- Decarbonization Incentive Programs
 - Air Quality
- EV Charging Infrastructure Deployment
 - Air Quality
 - Resilience
- EPIC Programs



Current NEI Categories at CEC



Air Quality



Land Use



**Affordability &
Economics**



**Workforce &
Jobs**



Air Quality



Air Quality

Definition: Air quality related health impacts including the monetary and non-monetary evaluation of those impacts.

CEC Context

- Health impacts linked with emissions like PM_{2.5} and ozone
- **Sources:** fuel burn for electricity, transportation, buildings, and industry.
- **Impacts:** total premature mortalities, asthma emergency room visits, and the monetary costs incurred like medical bills and lost work.

CEC Activities

- CalSHAPE & INDIGO programs considers air pollutants in the benefits calculator
- Equitable Building Decarbonization program installs retrofits which benefits indoor air quality
- EV Infrastructure Deployment considers indirect impacts on air quality including a localized health impact report



Land Use



Land Use

- **Definition:** Environmental impacts of siting of energy infrastructure, and implications for lands that have alternative productive uses.

CEC Context

- Impacts that new energy facilities/infrastructure could have on communities
- Risks and benefits for land and the community if it were used for energy purposes or for alternative uses like farmland or housing

CEC Activities

- Land use screens development accounting for land use and environmental information for input into resource and transmission planning.



Affordability and Economics



Affordability & Economics

Definition: Household energy costs, including changes to the home and transportation costs, impacts on local supply chains, lifecycle costs and impacts on economic growth.

CEC Context

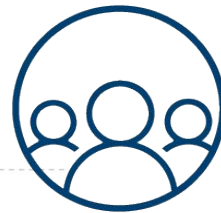
- Energy affordability, with an emphasis on households that pay a disproportionately high share of their household income on energy.

CEC Activities

- Solar for All: 20% reduction in energy bills for participants
- EBD Program: no cost retrofits for low-income households; priority invitations to homes most likely to experience beneficial bill impacts.
- EV Infrastructure Deployment considers indirect impacts on transportation costs, affordability of EV adoption



Workforce and Jobs



**Workforce
& Jobs**

Definition: The number, quality, and accessibility of jobs gained through the energy transition.

CEC Context

- Availability and accessibility of jobs that provide family-sustaining wages, health benefits, a pension, worker advancement opportunities, and collective worker input and are stable, predictable, safe and free of discrimination.

CEC Activities

- EV Charging Infrastructure Reports (AB2127) evaluating workforce changes due to charging infrastructure.
- EDD funding under S4A to assess workforce impacts
- Building Standards include estimates of impact on labor due to their measures



NEI Categories Under Consideration



Air Quality



Land Use



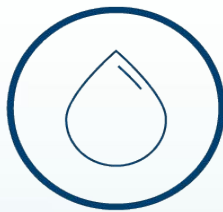
**Affordability
&
Economics**



**Workforce
& Jobs**



Resilience



**Water Supply
& Quality**



**Public Health
& Safety**



Crosscutting



Additional Categories for Study



Resilience

- **Resilience** - the capacity of any entity— an individual, a community, an organization, or a natural system—to prepare for disruptions, to recover from shocks and stresses, and adapt and grow from a disruptive experience.” (OPR, 2018)



Public Health & Safety

- **Public Health & Safety**
-Understanding health impacts that are not fully captured in other categories including: total lifecycle costs, and protection from injury.



Water Supply & Quality

- **Water Supply & Quality** - Developing estimates of changes in water supply by quantifying the amount of water consumed for energy production and use



Crosscutting

- **Cross Cutting** - Impacts that are not fully captured in specific factors including equity



Implement structure & consistency in assessing NEIs

Current Typical Methods

- Outdoor GHG Reductions
- Social Cost of Carbon
- Environmental Analysis
- Affordability (Bill impacts)
- Equity

Potential New Structure/Methods

- Align metrics across CEC divisions
- Assign monetary value where possible
 - Energy affordability gap
 - Resilient energy affordability gap
- Develop methods to "tell the whole story"
 - Outdoor & Indoor Air Quality
 - Increase regional granularity of data reporting



OIIP NEI Categories



Air Quality



Land Use



**Affordability
&
Economics**



**Workforce
& Jobs**



Resilience



**Water Supply
& Quality**



**Public Health
& Safety**

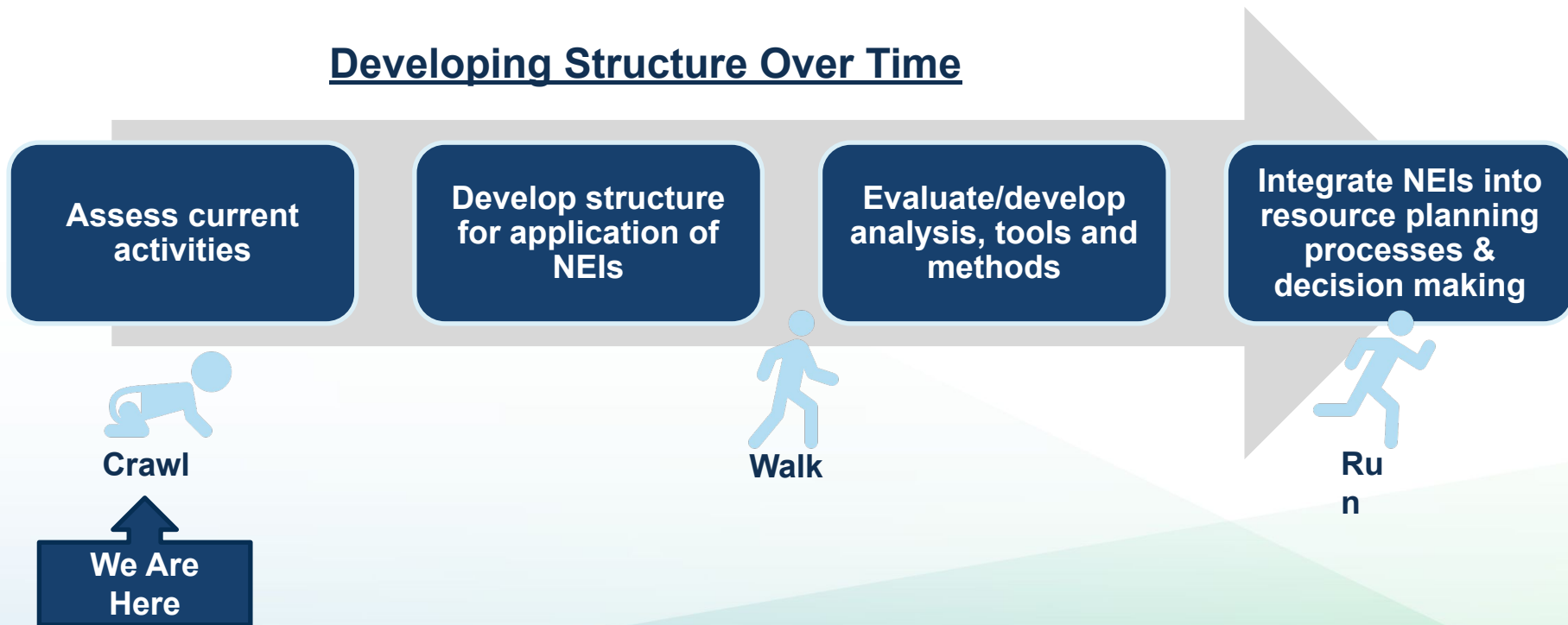


Crosscutting



To reach the OIIP goal, we will move forward in phases

Developing Structure Over Time





Thank You!

Jacqueline.Jones@energy.ca.gov

Optional Assembly

Community Based Design Collaborative Update

Community Based Design Collaborative

Q2 May 8th CAEECC meeting



Agenda

- What is CBDC
- Collaborative roles and responsibilities
- Regions represented and their environmental concerns
- Collaborative engagement & process
- Program milestones and timelines
- Collaborative to-date
- Up next

Building locally-focused energy programs



**Community-Based
Design Collaborative**



Mission

SoCalREN is developing an opportunity to make the transition to a clean energy future a more participatory process!

Through the collaborative, we are making energy programs more relevant and responsive to the needs of people.

Participating community-based organizations share the energy-related gaps in their communities and spur creative program development ideas based on the needs of their communities.

Program Start & Funding

The Community-based Design Collaborative was funded for SoCalREN to facilitate community involvement in energy efficiency program design in the advancement of the CPUC's [Environmental & Social Justice Action Plan](#).

Over the last 10 years, SoCalREN has supported communities across Southern and Central California become more energy efficient and drive deep GHG reductions that support community members sustainability needs.



Public Agencies



Residential



Financing



Workforce



Agriculture



Commercial



Codes & Standards



The SoCalREN Public Agency Programs are administered by the County of Los Angeles and funded by California utility ratepayers under the auspices of the California Public Utilities Commission. Learn more at [socalren.org](https://socialren.org).

Collaborative Roles

California Public Utilities Commission

Gillian Weaver

Pamela Rittelmeyer

Ely Jacobsohn



Los Angeles County

Lujuana Medina

Tessa Charnofsky

Shelley Osborn



The Energy Coalition

Ivana Dorin

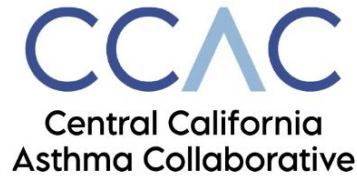
Natalie Espinoza

Elaina Lee



Greenlining Institute

Collaborative Partners

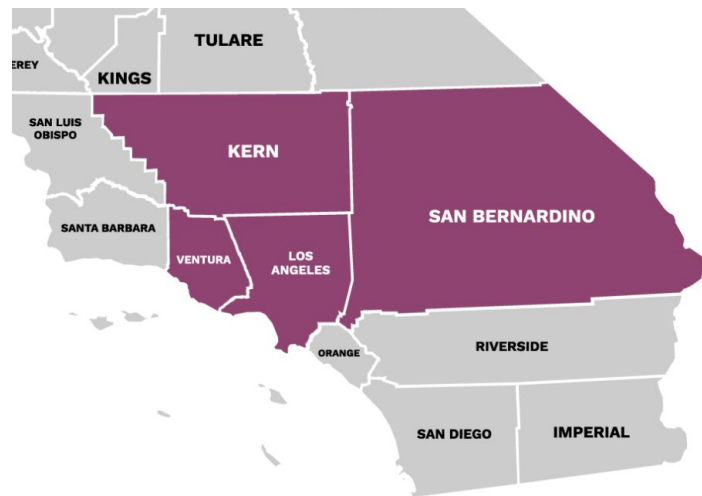


Regions Represented

SoCalREN engaged and brought in community-based organizations representing Los Angeles, San Bernardino, Kern, and Ventura Counties to join the Collaborative and help us build a more energy efficient future.

CBO focus areas include:

- Environmental justice
- Public health
- Clean transportation
- Climate action
- Other closely related sectors



Regional Environmental Concerns

Los Angeles County	San Bernardino County	Ventura County	Kern County
Environmental Concerns <ul style="list-style-type: none">● Air pollution● Asthma● Freeway surrounding● High-emission industries	Environmental Concerns <ul style="list-style-type: none">● Air pollution● Asthma● Food access● High-emission industries● Wildfire smoke	Environmental Concerns <ul style="list-style-type: none">● Heat waves● Air pollution● Wildfire smoke	Environmental Concerns <ul style="list-style-type: none">● Air pollution● High-emission industries● Wildfire smoke● Asthma

Collaborative Engagement & Process



Mission Alignment



Local Presence



Capacity



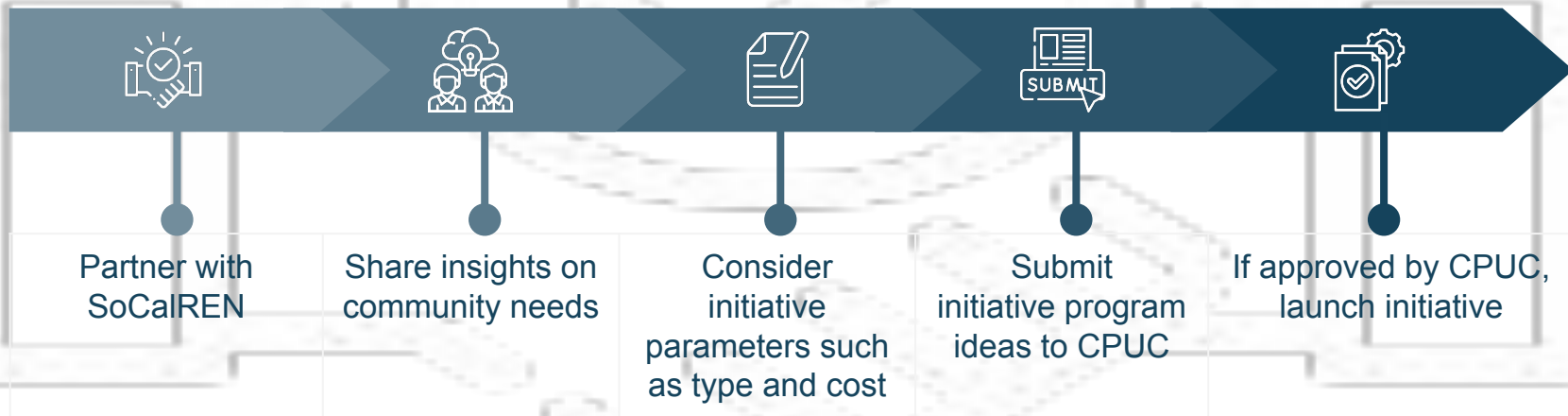
Collaborative Approach



References

Collaborative Process

CBO partners are helping to develop a framework for SoCalREN to work with CBOs to identify and fund locally-focused energy programs that can potentially be scaled across California.



Collaborative Member Functions

- Each organization designated one representative to attend monthly collaborative meetings
- Members are attending 5 meetings from January 2025 to June 2025, including pre- and post-meeting preparation as applicable
- Support in gathering community feedback through surveys or in-person sessions
- Collaborate to define clear, measurable goals through consensus-building and shared decision-making
- Provide insights and expertise to guide decision-making and strategy
- Uphold cultural competence and inclusivity

Collaborative to date: Meetings 1-4 Recap

Completed Meeting Recaps

Meeting 1 January	<ul style="list-style-type: none">• Alignment on goals and participation• Discuss conflict resolution strategies• Review energy fundamentals• Discuss how to educate/inform broader community about opportunity
Meeting 2 February	<ul style="list-style-type: none">• Discuss and determine budgets for programs• Discuss range/types of programs
Meeting 3 March	<ul style="list-style-type: none">• Develop outreach plans to prospective partners and what, if any, gaps remain before collecting ideas
Meeting 4 April	<ul style="list-style-type: none">• Develop and agree on draft criteria for evaluation of program proposals and progress for the initiatives, including reporting, metrics, and accountability• Establish evaluation process for program proposals, metrics, and accountability

Current Activities & Engagement



- **Initial Outreach to Communities (May –June)**
 - *CBDC partners will begin canvassing their communities, educating them about the opportunity*
 - *Materials have been prepared that will engage communities to participate*
- **Submission Period (June - July)**
 - *Thru CBDC partners we will seek proposals from communities and or community-based organizations to submit initial proposals through a templated form*
 - *The CBDC will then review and evaluate proposals to be recommended to be piloted**

*All proposals first review with SCR team; SCR team will work with communities to ensure all proposal comply with CPUC EE guidelines prior to their CBDC submittal;

Up Next

Remaining Meetings

Meeting 5 June	<ul style="list-style-type: none">• Two month between meetings to allow for outreach to collect program initiative ideas• Review proposed program initiatives• Consider best ways to support program initiatives• Agree on collaborative next steps
July - August	<ul style="list-style-type: none">• Collecting program initiative proposals• Reviewing and agreeing which are recommended for funding and inclusion in the CPUC advice letter
<i>Tier 2 Advice Letter submitted September 30, 2025</i>	

Timeline & Next Steps



Project Timeline

End of April 2025
Finalize evaluation
criteria for
program initiatives

End of April - End of
June 2025
CBOs conduct
outreach

July-August 2025

Draft Recommendations
submitted in CPUC Tier 2
advice letter

End of April 2025
Share outreach materials
with CBO collaborative
members

Proposals submitted by
end of June 2025
Initial proposals
reviewed/evaluated
by CBDC~SCR Team

September - December 2025
Await decision for
proposed initiatives in
advice letter

Thank You

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County of Los Angeles
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Join the discussion, raise your hand (in Zoom or in person) to join the queue

1

Member-only Discussion

2

Public-invited Discussion



Appendix

PA Solicitation Slides

Appendix A

PA Solicitation Slides

SCE Solicitation Timeline

Segment	Year		2024			2025												2026								
	Quarter		Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3		
	Month		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
RA	Local Customer Programs	Industrial - Large Customer, Comprehensive Projects	Contracting							AL		IP														
RA	Local Customer Programs	Comprehensive Commercial <i>Phase 2 Negotiations</i>		Contracting						AL		IP														
TBD	Statewide Programs	Residential - Plug Load Appliances	RFP Prep			RFI			RFP				Contracting				AL		IP							
TBD	Local Customer Programs	TBD: Rolling Gap-Filling Solicitation 1							RFP Prep	RFP						Contracting				AL		IP				
TBD	Local Customer Programs	TBD: Rolling Gap-Filling Solicitation 2											RFP Prep	RFP						Contracting					AL	

Today

Today

LEGEND:

RFA Prep

RFA/RFI

RFP Prep

RFP

Contract Negotiation

AL (if applicable) + Approval + IP

AL & IP Development:

- Industrial
- Comprehensive Commercial Phase 2

Upcoming Solicitations:

- Plug Load Appliances
- Rolling Gap-Filling

PG&E 2023 – 2025 Solicitation Schedule

Year		2023												2024												2025											
Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Local	2024 Summer Reliability Platform Administrator																																				
Local Res & Comm	Zonal Electrification – Pilot 1																																				
Local Res & Comm	Zonal Electrification – Pilot 2																																				
Local Res	Res. Electrification Equity																																				
Local Comm	Comm. Energy Mgmt. (SEM Expansion)																																				
Local Res	Res. Whole Home Load Management																																				
Statewide WE&T	SW WE&T Career & Workforce Readiness																																				
Statewide Comm	SW HVAC																																				

Legend:	
	RFA Prep
	RFA
	RFP Prep
	RFP
	Contract Negotiation
	AL (if applicable) + Approval + IP

Recently Launched Programs:

- Commercial Energy Management SEM Expansion

Advice Letters Under Review:

- Residential Whole Home Load Management

Contract Execution:

- None

Terminated Solicitations:

- None

Kicking-off Negotiations:

- None

In-flight Solicitations:

- None

Upcoming in 2025:

- SW WE&T Career & Workforce Readiness
- SW HVAC

2025 Solicitation Timeline & Solicitation Strategy

SDG&E contact: Stacie Risley srisley@sdge.com

Joint IOU Energy Efficiency Solicitation Schedule as of 1/21/2025 (Schedule may be subject to change at IOU's discretion)																														
IOU	Year		2024												2025															
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4						
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				
SDG&E	Local Commercial	Retail, Offices and Wholesale																												
SDG&E	Local Commercial	Groceries, Restaurants, Food Storage																												
SDG&E	Local Commercial	Private Institutions, Healthcare																												
SDG&E	Local Commercial	Lodging																												
SDG&E	Local Cross Cutting	Market Access Program																												

LEGEND:

RFA Prep

RFA

RFP Prep

RFP

Contract Negotiation

AL (if applicable) + Approval + IP

*Subject to change, pending any modifications and/or approvals from the Commission related to SDG&E's Energy Efficiency program administration.

2025 Solicitation Schedule

IOU	Year		2024												2025											
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 1)																								
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 2)																								
SoCalGas	Local - All Segments	Innovation Design for EE Activities (Round 3)																								
SoCalGas	Local - All Segments	Market Access Program (MAP)																								
SoCalGas	Local - Commercial	Large Commercial																								

- ☐ Market Access Program for commercial and residential, a one-stage solicitation, in negotiation phase.
- ☐ Large Commercial Program for large commercial customers, a one-stage solicitation, in the RFP Prep phase.
- ☐The IDEEA 365 is a recurring competitive procurement process. SoCalGas released the RFP for Round 3 in November of 2024.

Solicitation Contact: EMPonco@socalgas.com



LEGEND:

RFA Prep

RFA

RFP Prep

RFP

Contract Negotiation

AL (if applicable) + Approval + IP

Glad to be of service.®