



# ADVICE LETTER SUMMARY

## ENERGY UTILITY



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

Company name/CPUC Utility No.: Tri-County Regional Energy Network (3C-REN) ID # 220

Utility type:

- ELC       GAS       WATER  
 PLC       HEAT

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EXPLANATION OF UTILITY TYPE  
 ELC = Electric      GAS = Gas      WATER = Water  
 PLC = Pipeline      HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

11/4/25

Advice Letter (AL) #: 14-E/13-G

Tier Designation: 2

Subject of AL: 3C-REN 2024-2027 Energy Efficiency Portfolio Mid-Cycle Advice Letter

Keywords (choose from CPUC listing):

AL Type:  Monthly  Quarterly  Annual  One-Time  Other: Mid-cycle in a four-year portfolio

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.25-08-034, D. 21-05-031 OP 10, D.23-06-055, Resolution E-5387, Resolution E-5351

Does AL replace a withdrawn or rejected AL?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

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested?  Yes  No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required?  Yes  No

Requested effective date: 12/4/25

No. of tariff sheets:

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

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: None

Service affected and changes proposed<sup>1</sup>: N/A

Pending advice letters that revise the same tariff sheets: N/A

<sup>1</sup>Discuss 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:**

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Clear Form

## ENERGY Advice Letter Keywords

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



**November 4, 2025**

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**3C-REN Advice Letter 14-E/13-G**  
(Tri-County Regional Energy Network ID #220)

**Tier Designation**

This Advice Letter has a Tier 2 designation pursuant to Decision (D.) 21-05-031, Ordering Paragraph (OP) 10.

**Subject**

3C-REN 2024-2027 Energy Efficiency Portfolio Mid-Cycle Advice Letter

**I. Purpose**

The purpose of this Tier 2 advice letter is to provide a mid-cycle review of the technical inputs and forecasts of the portfolio of the Tri-County Regional Energy Network (3C-REN) portfolio approved in Decision D.23-06-055. Ordering Paragraph (OP) 10 of D.21-05-031 directs portfolio administrators (PAs) to submit their mid-cycle advice letters (MCAL) on September 1, 2025. On August 22, 2025, the Executive Director of the Commission granted an extension for all PAs to submit their Tier 2 advice letters 60 days after the issuance date of the decision adopting energy efficiency goals for 2026-2037, to be issued in R.25-04-010. On September 5, 2025, the Commission issued D.25-08-034, Decision Adopting Energy Efficiency Goals for 2026-2037, making the deadline for MCAL submittal November 4, 2025. This advice letter is filed in compliance with the Commission’s deadline extension.

This Advice Letter has a Tier 2 designation pursuant to Decision (D.) 21-05-031, OP 10.

**II. Background**

3C-REN is a collaboration of three counties, Ventura, Santa Barbara, and San Luis Obispo, in the California Central Coast region. Together, the three counties, home to roughly 1.5 million residents, represent a diverse service area that is geographically isolated from utility hubs and includes pockets of rural and disadvantaged communities as well as large, underserved Spanish-

speaking populations. After several years' experience and cooperative administration of energy and sustainability programs, the three counties formed the 3C-REN, led by the County of Ventura, to better leverage resources in the delivery of effective programs on a regional level. The region's high proportion of low-income and renter households and pockets of disadvantaged communities underscore the importance of 3C-REN's focus on equitable access to energy efficiency opportunities.

In D.14-10-046, the Commission authorized funding for EE programs until 2025. In 2015, the Commission issued D.15-10-028 approving the mechanics for EE rolling portfolio and outlining the business plan application process. In D.16-08-019, the California Public Utilities Commission (CPUC or Commission) provided guidance for Energy Efficiency (EE) Rolling Portfolio Business Plan (BP) filings and included consideration of the formation of new Regional Energy Networks (RENs). On January 23, 2017, 3C-REN filed a motion for approval of its rolling portfolio business plan and budget proposal.

In March 2022 3C-REN filed a new business plan application to continue already approved and performing programs and seek approval for three additional programs. 3C-REN's application was approved in full in D.23-06-055.

In October 2023 3C-REN filed Advice Letter 9-E/8-G 3C-REN 2024-2027 Energy Efficiency Portfolio True-Up Advice Letter to true up its portfolio prior to the beginning of the 2024-2027 portfolio period. In preparation for the TUAL, 3C-REN followed direction given by the Commission, as well as stakeholder guidance and best practices to inform updates made to its budget and forecasted savings. 3C-REN's TUAL budget updates included allocating funding for integrated demand side management (IDSM) and distinguishing between program implementation costs and portfolio administration PA costs. Savings forecasts were updated in accordance with the results of its programs to better align with program trends and run with the 2024 Cost-Effectiveness Tool (CET) Avoided Cost Version (2022/E-5228). 3C-REN did not open or close any programs that were not already included in the application at that time. The TUAL also provided an update on 3C-REN's progress related to metrics for each segment of its portfolio.

Consistent with Commission direction, 3C-REN prepared this MCAL in close alignment with stakeholder guidance and industry best practices to inform updates to its 2026–2027 budget and savings forecasts. Savings and Total System Benefit forecasts have been adjusted and run against 2024 Cost-Effectiveness Tool (CET) Avoided Cost Version (2024/E-5228), informed by updated inputs from 3C-REN's implementers contracted for its equity programs. At this time, 3C-REN is not opening or closing any programs. This MCAL also provides an update on 3C-REN's progress related to metrics for each segment of its portfolio, 3C-REN's response to evaluator recommendations, and community engagement indicators as developed by the Joint PAs.

Since filing 3C-REN's original business plan to serve public agencies and their constituencies within Southern California Edison's (SCE's), Southern California Gas's (SoCalGas's), and Pacific Gas and Electric's (PG&E's) service territories, 3C-REN has continued participation in the California Energy Efficiency Coordinating Committee (CAEECC) stakeholder engagement process, presenting program performance metrics and plans for the future, and welcoming questions and input from CPUC Energy Division, other PAs, industry stakeholders, and the general public. This MCAL is informed by that feedback, along with 3C-REN's analysis of program performance to date, and assessment of overall market potential and other externalities. 3C-REN remains intent on delivering programs that meet CPUC criteria as indicated by D.12-11-015 in the formation and implementation of programs including: filling gaps that the investor-owned utilities (IOUs) are not serving; developing programs targeting hard-to-reach (HTR) markets; and piloting new approaches to programs that have the potential to scale and offer innovative avenues to energy savings.

## **A. Regulatory Filing Requirements**

### ***1. D.21-05-031***

The Mid-Cycle Advice Letter (MCAL) requirement was adopted in D.21-05-031 which requires that each year on September 1, in the odd years when the energy efficiency (EE) potential and goals have been adopted by the Commission, each EE PA shall file either a portfolio true-up (prior to the start of a four-year portfolio) or a mid-cycle review (in year two of a four-year portfolio) Tier 2 advice letter adjusting technical inputs, forecasts, and portfolio to account for the changes in energy efficiency potential and goals.

D.21-05-031 requires that each PA's MCAL must meet the criteria listed below. 3C-REN's MCAL meets the criteria relevant to REN PAs and provides a report on the progress against metrics relevant for each segment of the portfolio.

- The program administrator's portfolio must meet the TSB for the four years, 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 equity and market support segments of the portfolio, combined, 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.

## **2. D.23-06-055**

Additional requirements for the MCAL were adopted in D.23-06-055, including the following:

- OP 16. Beginning with the mid-cycle budget advice letter submissions due in 2025, all portfolio administrators shall include specific descriptions of how they have incorporated or otherwise addressed impact evaluation recommendations for specific Commission studies released after 2022.
- OP 24. Portfolio administrators shall develop indicators to measure community engagement and should include them in their Mid-Cycle advice letters in 2025.

3C-REN's MCAL complies with these requirements. For details on how 3C-REN is addressing impact evaluation recommendations, please see Attachment C – Response to Recommendations. For details regarding indicators developed by the Joint PAs for measuring community engagement, please see Attachment B – Community Engagement Indicators Results.

## **3. D.25-08-034**

The Commission approved D.25-08-034 on August 28, 2025, adopting total system benefit and energy savings goals for the four large investor-owned utilities in the state.<sup>1</sup> The Commission's policy objective is to adopt "realistic and aggressive, yet achievable" energy efficiency goals. While the Commission's Potential & Goals Study and accompanying decision does not currently set goals for REN PAs, 3C-REN looks to the study and decision for the data and findings included, and for important insights regarding the state's potential for energy efficiency and market conditions affecting PA's ability to deliver on that potential.

In the decision, the Commission acknowledges the "considerable uncertainty with respect to the continued availability of IRA tax credits and to federal tariffs' impacts on supply chains, as well as timing and adoption of the ZEAS," saying "[w]e agree with parties that recommend adopting the most conservative estimates in light of these unusually uncertain circumstances, which can negatively impact cost-effectiveness of energy efficiency measures."<sup>2</sup> The Commission adopts the more conservative Scenario 2, which anticipates a statewide decrease in TSB in the near term for 2026. The Commission declines to adopt Scenario 3 that assumes increased fuel substitution adoption, acknowledging that the Commission has not yet considered or adopted policy recommendations that would be required to pursue the more aggressive pathway. The Commission also offers a reminder that the goals adopted in the decision are a floor rather than a ceiling, and that PAs should strive to exceed their goals.<sup>3</sup>

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<sup>1</sup> D.25-08-034 OP 1, FOF 3.

<sup>2</sup> D.25-08-034 at 12-13.

<sup>3</sup> D.25-08-034 at 12-14.

**4. D.21-09-037**

D.21-09-037 established that non-IOU PAs may propose revisions to their goals and savings forecast in the true-up or mid-cycle advice letters, and any such proposal must specifically identify the factor(s) impacting the proposed revision. 3C-REN has revised its goals and savings forecast in this MCAL and has specifically identified the factors impacting the proposed revision as detailed in this narrative document.

**5. D.25-xx-xxx (natural gas phase out #2)**

At the time of this MCAL submittal, the decision on Phase 2 of the natural gas energy efficiency incentives phaseout has not yet been issued by CPUC.

**B. Contents of this Filing**

The contents of this MCAL are shown below.

- I. Purpose..... 1
- II. Background ..... 1
  - A. Regulatory Filing Requirements ..... 3
    - 1. D.21-05-031..... 3
    - 2. D.23-06-055..... 4
    - 3. D.25-08-034..... 4
    - 4. D.21-09-037..... 5
    - 5. D.25-xx-xxx (natural gas phase out #2) ..... 5
  - B. Contents of this Filing..... 5
- III. Discussion..... 7
  - A. Portfolio Overview..... 7
    - 1. Recent CPUC Decision or Guidance Impacting EE Portfolio..... 7
    - 2. Forecast Approach..... 8
    - 3. Portfolio Changes ..... 9
  - B. Summary of Forecasted Portfolio Impacts..... 13
    - 1. Portfolio Budget Summary (copy table from excel file) ..... 13
    - 2. Total System Benefit Forecast..... 15
    - 3. Portfolio Cost Effectiveness Forecast..... 15
    - 4. Statewide and Third-Party Compliance (IOU only)..... 17
    - 5. Market Support and Equity Forecast ..... 17



6.	Codes & Standards Savings Forecast (ALL PA, as applicable).....	18
7.	Non-Advocacy C&S Budget Forecast.....	18
IV.	Energy Efficiency Portfolio Details.....	18
A.	Segment Metrics .....	18
1.	Community Engagement Indicators for the Equity Segment.....	24
B.	Program Changes.....	24
C.	Program Closures.....	24
1.	Programs Closed between TUAL and MCAL.....	24
2.	Programs to be Closed in 2026-2027 .....	24
3.	Programs to be Closed Upon Completion of Commitments .....	25
D.	EM&V (2024-2027).....	25
E.	Cost Recovery.....	26
1.	Unspent Funds .....	26
2.	Integrated Demand-Side Management (IDSM) Budget .....	26
F.	CEDARS Discrepancies (optional).....	27
V.	List of Attachments .....	27
VI.	Protest .....	28
VII.	Effective Date .....	28
VIII.	Notice.....	28

Attachment A – Appendices from Excel Template in PDF<sup>4</sup>

Attachment B – Community Engagement Indicators Results

Attachment C – PA Response to Recommendations

Attachment D – CEDARS Filing Confirmation

Attachment E – PY2023-24 CEDARS Correction Memo

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<sup>4</sup> Please see CEDARS for excel version of Attachment A.

### **III. Discussion**

#### **A. Portfolio Overview**

3C-REN's four-year portfolio consists of four existing, successful programs launched prior to 2024, and three newer programs approved in D.23-06-055 that have launched over the past year to fill gaps in energy efficiency services, pilot innovative programs, and serve HTR, disadvantaged, and underserved communities. These seven programs span four customer market sectors: Agricultural, Commercial, Cross-Cutting, and Residential. Among 3C-REN's seven programs are three equity-segment resource programs that deliver energy savings: the Single-Family Home Energy Savings Program, the Multifamily Home Energy Savings Program, and the Commercial Marketplace Program. All 3C-REN's programs that deliver energy savings are in the equity segment of the portfolio.

As of the time of this MCAL submittal, 3C-REN has not made any changes to its program segmentation. As mentioned above, 3C-REN's residential and commercial programs are categorized within the equity segment, and its workforce education and training (WE&T), Energy Assurance Services, and Agriculture programs are categorized as market support. The codes and standards (C&S) program remain separate as previously defined in D.12-05-015. 3C-REN's portfolio does not include resource acquisition segment programs and therefore is not subject to the direction in D.23-06-055 that programs meeting certain criteria should transition to use normalized metered energy consumption (NMEC); however, 3C-REN offers two NMEC program currently (Single Family and Commercial Marketplace).

#### ***1. Recent CPUC Decision or Guidance Impacting EE Portfolio***

Recent CPUC guidance that impacts or may impact 3C-REN's portfolio is described below.

- Resolution E-5351: As described in Section IV Energy Efficiency Portfolio Details, 3C-REN has reviewed the recent resolution on metrics and indicators and is preparing to track and report portfolio performance in alignment with the Resolution's orders. 3C-REN also participates in the Reporting Peer Coordination Group that has been tasked with operationalizing elements of the Resolution that need further development, e.g., calculating bill impacts, and is closely tracking these efforts as they progress.
- Resolution E-5387: 3C-REN, along with other PAs, submitted an advice letter (3C-REN 10-E/9-G, filed on March 15, 2024) proposing to incorporate Integrated Demand Side Management (IDSMS) program activities in its portfolio. On September 18, 2025, the Commission voted to approve Resolution E-5387 addressing 3C-REN and the other PA's IDSMS advice letters from March 2024. The adopted resolution approves 3C-REN's IDSMS activities to begin immediately. 3C-REN looks forward to the opportunity to launch these activities as a complement to its energy efficiency portfolio. As the IDSMS funding was originally budgeted across the four-year portfolio period, due to the timing

of the Resolution the budget forecast for these activities has been adjusted to focus those efforts in 2026-2027.

- D.25-08-034: On September 5, 2025, the Commission issued D.25-08-034 Decision Adopting Energy Efficiency Goals for 2026-2037. While the CPUC Potential & Goals Study and accompanying decisions have not historically set goals for RENs, the study and decision provide important insights into the state’s energy efficiency market. Because the study relies on the best available information and recent program data, it provides important indicators of measure adoption. D.25-08-034 acknowledges the considerable uncertainty surrounding tax credits, federal tariffs, and other factors, saying “[w]e agree with parties that recommend adopting the most conservative estimates in light of these unusually uncertain circumstances, which can negatively impact cost-effectiveness of energy efficiency measures.” 3C-REN has taken these insights into consideration in updating its forecast for the MCAL.

## ***2. Forecast Approach***

3C-REN’s forecast approach varies by program due to differences in data baselines and program maturity. More established programs with a consistent history of participation and savings use trend-based forecasting, while newer programs rely on early performance indicators to build projections.

For the single-family program, energy savings forecasts are based on historical uptake data and project volume trends from 2024 and 2025, particularly the sustained momentum in electrification and HTR project categories seen since 2024. The forecasts assume continued electrification-heavy portfolio with even project distribution across the territory's climate zone and consider the past realization rate achieved in the program.

For the commercial program, energy savings forecasts are based on project growth rates in 2025, as the program did not have projects until 2025, with an assumption of future reduction in HTR multiplier and continued composition of measure type mix.

For the multifamily program, energy savings forecasts are based on 2024-2025 actual and forecasted measure savings, an increase in incentive budget due to carryover, an updated measure mix forecast, and incentive totals projected to be co-leveraged from other programs.

This MCAL also includes an updated budget forecast for program years 2026-2027. The forecast reallocates unspent funds from the 2024 portfolio to programs where costs have been higher than expected, and programs where program staff have projected the highest impact. Funds were split across the 2026 and 2027 program years according to anticipated activity levels. 2025 budget amounts were maintained according to approved TUAL amounts per CPUC guidance regarding the MCAL template. The budget forecast also reflects carryover of unspent IDSM

dollars that were allocated for 2024 in the TUAL, given the timing of IDSM advice letter approval. For additional details please see the Portfolio Changes section that follows.

### **3. *Portfolio Changes***

The following sections describe 3C-REN programs, including any changes since 3C-REN's True Up Advice Letter was filed in October 2023.

#### **a. TCR-Res-003: Single Family NMEC Program**

Home Energy Savings is an existing single family residential equity program targeted towards HTR single-family households that delivers measurable energy savings. Savings are claimed using a population NMEC Measurement and Verification (M&V) platform. The program implementer, Recurve, delivers energy upgrades utilizing a network of energy efficiency installers (aggregators) who are paid incentives based on the metered savings achieved with their installations. Performance based incentives push aggregators to maximize both participant savings and grid benefits. Electrification projects led program uptake in both 2024 and 2025 program years, accounting for 67% and 99% of all completed projects respectively. By allocating the majority of the PY 2025 budget to HTR projects, the program reached a new high in HTR participation and project volume. Looking ahead, it will be important to define clearer program goals, leveraging the now-established base of committed participants (aggregators).

The program will continue to operate as in 2025 and will recruit and support more aggregators and identify and educate participants (with a focus on HTR customers) in order to reach energy savings goals. One change is that energy and TSB goals have been updated for the program since the filing of the TUAL, with previous goals were less accurate due to reliance on aggregated data from other programs, which did not fully capture the nuances of the NMEC program. By integrating actual program data, we have significantly improved the precision of our projections, ensuring more reliable and actionable insights moving forward. 3C-REN will continue to explore ways to expand reporting around programs such as through unique value metrics. For this program, 3C-REN is considering including the percentage of Ventura County participants considered priority Ventura County customers (3C-REN defined customers that are only able to meet two HTR criteria as Ventura County is within the Greater Los Angeles area to expand equity reach). There are no changes to the program related to D.23-04-035.

#### **b. TCR-Res-002: Multifamily Program**

Multifamily Home Energy Savings is an existing multifamily residential equity program that will continue to deliver energy savings targeting HTR multifamily properties. The Multifamily program is a multi-measure, whole-building energy efficiency rebate program targeted to multifamily property owners and managers. The program requires three or more upgrades in the project scope, a percentage of which must directly benefit tenants, that achieve a minimum

average greenhouse gas (GHG) savings per unit. The program includes no cost site assessments, technical assistance, and rebates paid directly to property owners/managers.

The program will continue to operate as in 2025. With the new IDSM funds available, approved in Resolution E-5387, the program's no-cost technical assistance will expand to provide education and information on distributed energy resources that may complement a 3C-REN energy efficiency or electrification project. In this MCAL, energy savings forecasts have been adjusted based on several factors: 1) 2024-2025 actual and forecasted measure savings; 2) an increase in incentive budget due to carry over; 3) an updated measure mix forecast; and 4) incentive totals projected to be co-leveraged from other programs.

Co-leveraging of incentives from other programs and funding sources are crucial for enabling comprehensive energy efficiency and electrification projects for HTR, disadvantaged, and underserved communities. Key rebates that can be layered with 3C-REN for heat pump water heating and heat pump HVAC retrofits include the Low-Income Weatherization Program (LIWP), Central Coast Community Energy's Electrify Your Home (EYH) program, and the next round of TECH Multifamily.

In alignment with CPUC's observations in the recent potential and goals decision, the Multifamily program has adjusted its forecast to account for uncertainty in the market, such as availability of co-leveraged funding sources, as well as increasing prices for equipment and labor. For the MCAL, the program conservatively estimates a decrease in kWh, kW, and therm forecasts based on currently observed annual savings within the program and consideration of increased electrification projects that require adequate incentives to offset costs for equity customers.

To ensure customers in the 3C-REN region have equitable access to multifamily decarbonization opportunities, the Multifamily program will monitor status of co-leveraged funding sources and be responsive to these challenges. 3C-REN will continue to explore ways to expand reporting of this program's outcomes and benefits, such as through unique value metrics (UVMs). For this program, 3C-REN is considering adopting a UVM to highlight the program's work with smaller "mom and pop" multifamily properties and small businesses, e.g., the percentage of properties served that have 20 or less Units, and/or have a single-property owner. There are no changes to the program related to D.23-04-035.

### **c. TCR-Com-001: Commercial Marketplace**

Commercial Marketplace Program is an existing equity program launched in October 2024, targeting HTR participants by providing energy efficiency services for small- and medium-sized businesses. Savings are claimed using a population NMEC M&V methodology. The program implementer, Recurve, delivers energy upgrades utilizing a network of energy efficiency installers (aggregators) who are paid incentives based on the metered savings achieved with their installations. Performance-based incentives push aggregators to maximize both participant

savings and grid benefits. The program achieved notable success this year in generating SMB/HTR volume. By allocating the majority of the PY 2025 budget to HTR projects, the program effectively reached the SMB/HTR projects it intended to serve.

The program will operate as in 2025 and will recruit and support more aggregators and identify and educate participants (with a focus on HTR participants) in order to reach energy savings goals. One significant change is that goals have been updated for the program; initial forecasts were less accurate due to reliance on aggregated data from other programs, which did not capture the distinction of a local NMEC program. With the integration of actual program data, our projections' precision has greatly increased, providing more dependable and actionable insights moving forward. The new forecasts included in the MCAL are now aligned with actual expected results. 3C-REN will continue to explore ways to expand reporting around programs such as through unique value metrics. For this program, 3C-REN is considering including the percent of participating businesses reporting a primary language other than English. There are no changes to the program related to D.23-04-035.

#### **d. TCR-WET-001: Workforce Education & Training**

Building Performance Training is one of 3C-REN's longest running programs, a workforce education and training (WE&T) cross-cutting program that acts as the Tri-County Region's market support, training, and resource hub. It provides the latest building science practices and energy efficiency trainings. In 2024, the program hosted 155 training events for 2,091 workers and students with courses covering topics ranging from high-performance enclosures and electrification to industry certifications.

The program will continue to operate as in 2025, and additional priorities will be engagement of HTR workers, contractor and union engagement, hands-on learning, education of young people through the guest speaker program, and evaluation of training and program effectiveness. WE&T will continue to broaden its network through targeted outreach, new partnership development, and new course offerings.

3C-REN will continue to explore ways to expand collecting and reporting through unique value metrics. For this program, 3C-REN is considering including the percentage of returning participants who have taken two or more trainings to understand long-term engagement, retention, or lack thereof and how to approach outreach. Also, due to WE&T common metrics being removed through Resolution E-5351, 3C-REN will continue to report all previously reported metrics through market support indicators and unique value metrics as applicable. There are no changes to the program related to D.23-04-035.

#### **e. TCR-CS-001: Codes & Standards**

Along with BPT, 3C-REN's Energy Code Connect (ECC) is one of the longest-running programs in 3C-REN's portfolio. ECC is a code and standards cross-cutting program that

provides technical assistance. The program has established the Tri-County Region as a leader in California Energy Code and Green Building Standards compliance, enforcement, and comprehension.

The program will continue to offer four main services to both public and private building professionals in the form of the following: the Energy Code Coach, Education Courses and Events, Regional Forums, and Reach Code Technical/Outreach/Educational Support for jurisdictions. 3C-REN plans to expand its Spanish language material, as well as add new collateral on locally relevant courses and checklists, information on decarbonization, fire recovery updates, and local standards that adhere to Title 24 updates to its website. These anticipated program changes, along with 3C-REN's current efforts listed above, will help 3C-REN target disadvantaged communities for its services, facilitate agency collaboration and improve regional cooperation that will result in more consistency among jurisdictions and avoid confusion for building professional, and support an increase in the number of completed permits in the replacement and retrofit market, as well as more effective and durable savings in the construction market. There are no changes to the program related to D.23-04-035.

**f. TCR-Ag-001: Agriculture Technical Assistance**

Agriculture Technical Assistance is a new market support segment program approved in D.23-06-055 and recently launched in late 2024. The program is designed to serve agricultural customers in reducing energy consumption through expansion of existing relationships, delivery of technical assistance to identify energy upgrades and complementary programs, addressing specialized energy and compliance needs of indoor agriculture/cannabis in technical assessments, and targeting of smaller and socially disadvantaged agricultural customers for program services.

As a new program that is currently ramping up, the program will continue to conduct outreach and enroll participants to grow the program in 2026 and 2027. There are no significant changes to this program at this time. There are no changes to the program related to D.23-04-035.

**g. TCR-CC-001: Energy Assurance Services (EAS)**

Energy Assurance Services (EAS) is a new market support segment program approved in D.23-06-055 and launched in 2024. The program supports commercial and public sector customers with energy management and technical support for comprehensive load management, including energy efficiency and resiliency projects. The program aligns with 3C-REN's organizational goals to serve HTR and vulnerable populations, through assistance to small and under-resourced jurisdictions, critical facilities, and community-serving locations. The comprehensive load management approach provides the ability to take a holistic view of customer needs and opportunities for energy efficiency, decarbonization, as well as addressing regional and local challenges with climate change impacts and extreme heat, grid reliability, and water conservation.

As a new program EAS will continue to conduct outreach and enroll participants to grow the program in 2026 and 2027. There are no changes to the program related to D.23-04-035.

**B. Summary of Forecasted Portfolio Impacts**

**4. Portfolio Budget Summary**

Please see below for 3C-REN’s portfolio budget summary tables.

**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			\$39,583,535		\$39,583,535
2	Commercial Sector		\$1,097,817	\$8,636,893		\$9,734,710
3	Industrial Sector					\$-
4	Agricultural Sector		\$1,356,965			\$1,356,965
5	Public Sector		\$1,097,817			\$1,097,817
6	Cross Cutting Sector					
7	Emerging Tech					\$-
8	WE&T		\$8,285,005			\$8,285,005
9	Finance					\$-
10	Codes & Standards				\$6,393,321	\$6,393,321
11	Portfolio Support		\$461,841	\$1,347,853	\$251,743	\$2,061,437
12	OBF Loan Pool					\$-
13	<b>Portfolio Subtotal [2]</b>	\$-	<b>\$12,299,445</b>	<b>\$49,568,281</b>	<b>\$6,645,064</b>	<b>\$68,512,790</b>

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

[2] Excludes EM&V and Portfolio Oversight



**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					\$-
2	Market Support	\$1,816,148	\$3,414,860	\$3,357,522	\$3,710,916	\$12,299,445
3	Equity	\$5,832,670	\$11,400,000	\$15,832,485	\$16,503,126	\$49,568,281
4	Codes and Standards	\$879,261	\$1,846,412	\$1,941,170	\$1,978,222	\$6,645,064
5	EM&V (PA and ED) <sup>[5]</sup>	\$355,337	\$694,219	\$880,465	\$924,678	\$2,854,699
6	<b>Total Budget w/o OBF Loan Pool</b>	<b>\$8,883,414</b>	<b>\$17,355,492</b>	<b>\$22,011,641</b>	<b>\$23,116,941</b>	<b>\$71,367,489</b>
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					86.7%
8	OBF Loan Pool Addition					\$-
9	<b>Budget excluding Portfolio Oversight</b>	<b>\$8,883,414</b>	<b>\$17,355,492</b>	<b>\$22,011,641</b>	<b>\$23,116,941</b>	<b>\$71,367,489</b>
10	ED Portfolio Oversight					\$-
11	<b>Total Portfolio Budget w/ ED Portfolio Oversight</b>	<b>\$8,883,414</b>	<b>\$17,355,492</b>	<b>\$22,011,641</b>	<b>\$23,116,941</b>	<b>\$71,367,489</b>
12	<b>Approved Budget Cap <sup>[4]</sup></b>					<b>\$71,367,489</b>

[4] Decision 23-06-055 OP5

[5] Reported program expenditures from 2024 Approved budget are \$8,527,077.87. The amount entered also includes PA EM&V Budget of 97,717.56 and CPUC EM&V budget of 257,619.02, for a total of \$8,883,414. This amount excludes expenditures of \$ 1,918,501.61 from Pre-2024 approved budget.

**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	\$2,389,994	\$1,660,843	0	0	\$3,055,894	\$1,776,683
3	2025	\$4,669,322	\$3,244,783	0	0	\$5,970,289	\$3,471,099
4	2026	\$5,922,012	\$4,115,297	0	0	\$7,572,005	\$4,402,328
5	2027	\$6,219,382	\$4,321,943	0	0	\$7,952,228	\$4,623,388
6	<b>Total</b>	<b>\$19,200,709</b>	<b>\$13,342,866</b>	<b>0</b>	<b>0</b>	<b>\$24,550,416</b>	<b>\$14,273,498</b>

## 5. Total System Benefit Forecast

3C-REN’s updated Total System Benefit (TSB) forecast is presented below.

<b>Table 2.1a - MCAL Updated Annual and Cumulative Total System Benefit Forecast</b>						
<b>Line</b>	<b>Segment</b>	<b>PY 2024- Actual</b>	<b>PY 2025 TUAL</b>	<b>PY 2026</b>	<b>PY 2027</b>	<b>Cumulative</b>
1	Resource Acquisition	\$-	\$-	\$-	\$-	\$-
2	Market Support	\$-	\$-	\$-	\$-	\$-
3	Equity	\$1,295,914	\$7,992,426	\$5,012,047	\$5,525,460	<b>\$19,825,847</b>
4	<b>Total TSB Forecast</b>	<b>\$1,295,914</b>	<b>\$7,992,426</b>	<b>\$5,012,047</b>	<b>\$5,525,460</b>	<b>\$19,825,847</b>
5	CPUC TSB Goal					\$-
6	<i>TSB Forecast / TSB Goal<sup>[1]</sup></i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>	<i>#DIV/0!</i>

[1] TSB Goal set in decision D.25-08-034. NOTE: the Potential & Goals decision does not set goals for REN PAs.

## 6. Portfolio Cost Effectiveness Forecast

3C-REN is committed to long-term cost efficiency in managing its portfolio. This dedication is seamlessly integrated with our commitment to ensuring equitable access and benefits throughout our service territory. It is important to note that, while the Commission has consistently affirmed that REN PAs are not bound by a cost-effectiveness threshold, cost efficiency remains a core principle guiding our operations.

As the Commission established in D.19-12-021, REN PAs—as local governments—have a unique and appropriate role in energy efficiency program administration, and this role is distinct from other types of PAs. The Commission describes that “[t]he particular areas of unique capacities local governments may bring in the delivery of energy efficiency include, but may not be limited to, public sector buildings, issues surrounding building code compliance, and treating or delivering energy efficiency services to hard-to-reach customers.” Later, in D.21-05-031, the Commission also highlighted that RENs’ portfolios may focus heavily on equity and market support due to RENs’ unique role within the overall energy efficiency portfolio of the state.

In alignment with Commission direction, 3C-REN’s portfolio comprises interconnected equity and market support programs across the agricultural, commercial, public, and residential sectors,

as well as codes and standards and workforce initiatives designed to build regional capacity in support of California’s transition to an equitable and sustainable clean energy economy. The portfolio consists of seven programs, three of which deliver direct energy savings within the equity segment: TCR-Res-002: Multifamily Program, TCR-Res-003: Single-Family NMEC Program, and TCR-Com-001: Commercial Marketplace. These efforts are supported by 3C-REN’s market support programs, TCR-WET-001: Workforce Education & Training and TCR-CS-001: Codes & Standards, which strengthen the local workforce’s ability to participate in and lead energy efficiency projects in equity-focused markets.

Recognizing additional regional needs, 3C-REN has also expanded its portfolio to address the Central Coast’s large agricultural industry and the capacity constraints of small and under-resourced jurisdictions, critical facilities, and community-serving organizations through two newer market support programs: TCR-Ag-001: Agriculture Technical Assistance and TCR-CC-001: Energy Assurance Services (EAS).

The tables in this section present 3C-REN’s updated cost-effectiveness forecast which aligns with the overall approach described earlier in the Forecast Approach and Portfolio Changes section of the MCAL.

<b>Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)<sup>[1]</sup></b>					
<b>Line</b>			<b>TRC ratio</b>	<b>PAC ratio</b>	<b>RIM ratio</b>
1	Segment	<b>Resource Acquisition</b>	-	-	-
2		Market Support	-	-	-
3		Equity	0.24	0.47	0.33
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including C&amp;S</i>	0.21	0.35	0.26
6		<i>Excluding C&amp;S</i>	0.22	0.38	0.28

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

<b>Table 3d - Societal Cost Test for 2026-2027</b>								
<b>Line</b>			<b>2026</b>		<b>2027</b>		<b>2 Yr Total</b>	
1			<b>Base</b>	<b>High</b>	<b>Base</b>	<b>High</b>	<b>Base</b>	<b>High</b>
2	Segment	<b>Resource Acquisition</b>	-	-	-	-	-	-
3		Market Support	-	-	-	-	-	-
4		Equity	<b>0.34</b>	<b>0.35</b>	<b>0.34</b>	<b>0.35</b>	<b>0.34</b>	<b>0.34</b>
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	<i>Including C&amp;S</i>	<b>0.29</b>	<b>0.29</b>	<b>0.30</b>	<b>0.30</b>	<b>0.29</b>	<b>0.30</b>
7		<i>Excluding C&amp;S</i>	<b>0.30</b>	<b>0.30</b>	<b>0.31</b>	<b>0.31</b>	<b>0.31</b>	<b>0.31</b>

### **7. Statewide and Third-Party Compliance (IOU only)**

Not applicable. 3C-REN does not currently offer any statewide programs. Until recently, statewide programs have been offered by IOUs; however, the statewide energy efficiency program landscape is changing. Fellow REN PA the Bay Area Regional Energy Network (BayREN) is now authorized for a statewide program. As San Diego Gas and Electric Company (SDG&E) transfers its statewide programs to other PAs, that also provides an opportunity for non-IOU PAs such as RENs to take on a leadership role with the statewide portfolio. 3C-REN welcomes this evolution and appreciates the opportunity for RENs to bring their equity-centered program approaches to a larger audience.

As a non-utility PA, 3C-REN is not subject to third-party program compliance requirements, as established in D.16-08-019, Ordering Paragraphs 10, 11, and 12. As a local government 3C-REN follows the Department of General Services Procurement Division procurement policies and guidelines.

### **8. Market Support and Equity Forecast**

3C-REN’s market support and equity segment budget forecast is shown in the table that follows. Note that REN PA expenditures are not limited to a certain percentage of the portfolio budget, as are IOU and CCA PAs per D.21-05-031 Conclusion of Law 8 and Ordering Paragraph 4. “The RENs are exempted from this requirement because of the nature of their portfolios, which is already different from the other program administrators. RENs, by their nature and primary purposes, are more likely to have a greater share of their portfolio devoted to market support and/or equity programs. Therefore, those portions of their budgets will not be subjected to an up-front limitation.”<sup>5</sup>

<sup>5</sup> D.21-05-031 at 23.

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

Line	Segment	Qualifying Budget	Total Budget <sup>1</sup>	% of Budget	Cap (IOU and ATA CCA only)
1	Market Support	\$12,299,445	\$71,367,489	17%	30%
2	Equity	\$49,568,281		69%	
3	Market Support + Equity	\$61,867,726		87%	

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

Note: 30% cap does not apply to REN PAs.

**9. Codes & Standards Savings Forecast (ALL PA, as applicable)**

3C-REN’s Codes & Standards programs contribute to increased code compliance through education and outreach efforts to improve code knowledge. Energy savings achieved through those efforts are currently claimed by the IOU PAs.

**10. Non-Advocacy C&S Budget Forecast**

3C-REN’s Codes & Standards programs contribute to increased code compliance through education and outreach efforts to improve code knowledge. Non-IOUs are not subject to the cumulative cap. 3C-REN’s entire C&S Budget is considered fully non-advocacy. Please see the Portfolio Budget Summary section for 3C-REN’s C&S budget.

**IV. Energy Efficiency Portfolio Details**

**C. Segment Metrics**

D.23-06-055 adopted objectives and indicators for the Equity and Market Support segments and specified the required reporting frequency (quarterly or annual) and level (segment or portfolio). 3C-REN actively participated in the Equity and Market Support Working Group convened by CAEECC to clarify these indicators through a stakeholder process. As directed by Ordering Paragraph (OP) 11 of D.23-06-055, 3C-REN joined with other PAs and stakeholders to prepare the joint PA Tier 2 advice letter submitted on May 1, 2024 (3C-REN Advice Letter 11-E/10-G). That filing clarified the equity and market support indicators; recommended modifications to the common metrics adopted in D.18-05-041; proposed a methodology for establishing baselines; and outlined a suggested schedule for tracking and reporting equity and market support indicators, as well as updated common metrics.

Throughout 2024, 3C-REN worked proactively to establish the framework necessary to track these indicators in anticipation of the forthcoming CPUC resolution and reporting requirements. Resolution E-5351 was approved on June 12, 2025, in which the Commission approved all equity indicators and market support indicators (with certain market support indicators paused pending further methodological clarification). Following approval, 3C-REN reviewed the resolution in detail and updated its tracking processes and indicators to ensure compliance.

3C-REN is well situated to fulfill its obligations to track progress toward the equity and market support indicators with tracking set to begin in Q4 2025 and reporting to occur with the Q4 claims filing, as directed in the resolution. Relatedly, 3C-REN has also been an active participant in the joint PA effort to develop Equity and Market Support goal constructs, as required by D.23-06-055 OP 25. This effort began in 2024 and culminated in the joint Tier 2 advice letter submitted on August 1, 2025 (3C-REN Advice Letter 13-E/12-G), proposing three equity goal constructs and two market support goal constructs.

3C-REN anticipates reporting on equity and market support indicators including but not necessarily limited to those shown below. 3C-REN may also continue to track select metrics and indicators that were paused or discontinued in the resolution, if helpful for internal purposes, e.g., number of collaborations to jointly develop or share training materials or resources.

**Table 1: 3C-REN Equity Segment Indicators**

Equity Indicator Description	Codes & Standards (C&S)	Single Family NMEC (Equity)	Multifamily (Equity)	Commercial (Equity)	Workforce, Education, and Training (Market Support)	Agriculture Technical Assistance (Market Support)	Energy Assurance Services (Market Support)
Count of equity target participants in equity segment, by sector		✓	✓	✓			
Sum of equity target participants' expected first-year bill savings in equity segment, by sector		✓	✓	✓			
Count of equity target participants in market support segment, by sector					✓	✓	✓
Count of equity target participants in resource acquisition segment, by sector							
Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment		✓	✓	✓			
Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment		✓	✓	✓			

Equity Indicator Description	Codes & Standards (C&S)	Single Family NMEC (Equity)	Multifamily (Equity)	Commercial (Equity)	Workforce, Education, and Training (Market Support)	Agriculture Technical Assistance (Market Support)	Energy Assurance Services (Market Support)
Sum of all equity segment participants' kW savings in equity segment		✓	✓	✓			
Sum of all equity segment participants' therm savings in equity segment		✓	✓	✓			
Sum of all equity segment participants' TSB in equity segment		✓	✓	✓			
Median of equity target participants' expected first-year bill savings in equity segment, by sector		✓	✓	✓			
Percent of equity target participants in equity segment, by sector		✓	✓	✓			



*Table 2: 3C-REN Market Support Segment Indicators*

Market Support Indicator Description	Codes & Standards (C&S)	Single Family NMEC (Equity)	Multifamily (Equity)	Commercial (Equity)	Workforce, Education, and Training (Market Support)	Agriculture Technical Assistance (Market Support)	Energy Assurance Services (Market Support)
Number of partners by type and purposes	✓				✓	✓	✓
Number of unique participants by sector that complete training	✓				✓		
Percentage of partners that have taken action supporting energy efficiency by type	✓				✓	✓	✓
Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency	✓				✓		
Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships	✓				✓	✓	✓
Assessed value of the partnership by partners					✓	✓	✓
Percent of participation relative to eligible target population for curriculum	✓				✓	✓	✓

Market Support Indicator Description	Codes & Standards (C&S)	Single Family NMEC (Equity)	Multifamily (Equity)	Commercial (Equity)	Workforce, Education, and Training (Market Support)	Agriculture Technical Assistance (Market Support)	Energy Assurance Services (Market Support)
Percent of total WE&T program participants that meet the definition of disadvantaged worker					✓		

### ***11. Community Engagement Indicators for the Equity Segment***

3C-REN served as the lead PA for a Joint PA process to develop community engagement indicators for equity programs, pursuant to D.23-06-055, Ordering Paragraph 24. This process took place over four meetings, facilitated by BluePoint Planning, where PAs developed 11 potential indicators and reached consensus on four of those indicators. These indicators were designed, as much as possible, to utilize information that is already being gathered, though not always formally collated, by PAs. Reporting of Community Engagement Indicators (CEIs) will occur annually in two places: (1) quantitative indicators will be reported in the BP Metrics Table of the Annual Report Spreadsheet; and (2) qualitative indicators will be reported in the Annual Report Narrative. The following four indicators received support from all PAs.

- Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context for PAs to add about their engagement activities
- Number of people who provided feedback relevant to the equity segment
- Feedback themes from engagement activities relevant to the equity segment
- Changes to equity segment program design as needed, based on feedback

Currently, there is still discussion on the timing and protocols for CEIs reporting in the Annual Report. There was a survey distributed to all PAs to refine the logistics for implementing the consensus indicators where the majority of PAs agreed community engagement indicators should be used only prospectively for new equity programs and the earliest program year these new reporting standards should apply is PY2027. The majority of PAs also agreed that there should be a phase-in period (with potential involvement of the Reporting PCG) following the decision.

See Attachment B for additional information on community engagement indicators and the Joint PA process led by 3C-REN.

#### **D. Program Changes**

3C-REN has updated its budget and savings forecast as outlined in the Portfolio Overview section and is not introducing new programs or making changes to its existing portfolio at this time.

#### **E. Program Closures**

##### ***12. Programs Closed between TUAL and MCAL***

3C-REN has not closed any programs between TUAL and MCAL.

##### ***13. Programs to be Closed in 2026-2027***

3C-REN has no current plans to close any programs.

**14. Programs to be Closed Upon Completion of Commitments**

3C-REN has no current plans to close any programs.

**F. EM&V (2024-2027)**

3C-REN has not made any revisions to its EM&V plans since submitting its Business Plan application.

Looking ahead, 3C-REN anticipates developing multiple EM&V studies covering a range of topics, including process evaluations of Workforce Education & Training (WE&T) and Codes & Standards (C&S) programs, as well as a market study focused on moderate-income participation and demand. Currently, one study is underway, a process evaluation of the Single-Family Home Energy Savings Program. This study seeks to identify process improvements that enhance customer experience and program effectiveness by strengthening customer engagement, streamlining participation, and improving overall satisfaction. The timing of this research is intended to provide actionable insights that will inform strategic updates to the program in advance of future Business Plan filings.

Key research questions guiding this study include:

- What challenges do customers encounter when navigating the program from start to finish?
- How satisfied are customers with the current energy efficiency measures offered?
- What pain points prevent customer leads from converting into completed projects?

Additional information on EM&V studies is available through the Energy Division’s Project Status Reporting System.

The table below includes zeroes, per instructions in the Joint PA and Energy Division MCAL template. 3C-REN’s EM&V budget is shown in the accompanying MCAL spreadsheet.

**Table C: Annual Breakdown of EM&V Budgets (Instructions: RENs and CCAs input 0)**

Year	PA	Total Budget w/o EM&V	EM&V Total	EM&V CPUC	EM&V PA	Total Budget w/ EM&V
2024	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2024	IOU 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	0	0	0	0	0
2025	IOU share of ED Portfolio Oversight	0	0	0	0	0
2025	ADD RENs (IOUs only)	0	0	0	0	0

Year	PA	Total Budget w/o EM&V	EM&V Total	EM&V CPUC	EM&V PA	Total Budget w/ EM&V
2026	PA, excluding ED Portfolio Oversight	0	0	0	0	0
2026	IOU 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	0	0	0	0	0
2027	IOU share of ED Portfolio Oversight	0	0	0	0	0
2027	ADD RENs (IOUs only)	0	0	0	0	0
	<b>Total</b>	0	0	0	0	0

**G. Cost Recovery**

Not applicable to REN PAs.

**1. Unspent Funds**

Not applicable. All 3C-REN funds were committed as of August 2024.

**2. Integrated Demand-Side Management (IDSM) Budget**

D.23-06-055 created an option for PAs to allocate up to 2.5 percent or \$4 million of their energy efficiency budgets to provide an operational complement for integrated demand side management (IDSM) in 2024-2027, for programs proposed via Tier 2 advice letter in March 2024.

In response, 3C-REN prepared a Tier 3 advice letter submitted on March 15, 2024 (3C-REN Advice Letter 10-E/9-G),<sup>6</sup> proposing to incorporate Integrated Demand Side Management (IDSM) program activities in its portfolio.

On September 18, 2025, the Commission voted to approve Resolution E-5387 addressing 3C-REN's IDSM advice letter. The adopted resolution approves 3C-REN's IDSM activities to begin immediately. As noted in the advice letter and the TUAL, 3C-REN has allocated IDSM funds across its programs within the direct implementation non-incentive cost category. 3C-REN's IDSM activities are described below. IDSM funding was originally budgeted across the four-year portfolio period. However, due to the timing of the Resolution and approval to begin IDSM activities occurring in September 2025, the budget forecast for these activities has been adjusted to focus those efforts in 2026-2027.

<sup>6</sup> 3C-REN Integrated Demand Side Management (IDSM) Advice Letter 2024, submitted March 15, 2024.

The following IDSM services are planned be offered using the operational framework of the programs listed below.

- WE&T and C&S
  - WE&T: Trainings on topics like electric vehicle infrastructure, vehicle-to-grid technology, solar, energy storage, or smart controls for load shifting.
  - C&S: Streamlined permitting and code requirements for IDSM technologies.
- Residential Single Family and Commercial
  - Customer and business education on technologies that complement energy efficiency such as electric vehicle infrastructure, vehicle-to-grid technology, solar, energy storage, or smart controls for load shifting.
  - Referrals to programs that offer support or incentives for adoption of IDSM technologies, and application support.
- Residential Multifamily, Agriculture and Energy Assurance Services
  - Customer education and technical assistance on technologies that complement energy efficiency such as electric vehicle infrastructure, vehicle-to-grid technology, solar, energy storage, or smart controls for load shifting.
  - Referrals to programs that offer support or incentives for adoption of IDSM technologies, and application support.

For 3C-REN's IDSM budget information, please see A1 Program Table within Attachment 1 and the Excel Template submittal.

#### **H. CEDARS Discrepancies (optional)**

An accounting error in the TCR-Res-002: Multifamily program that impacts program costs will be corrected in Q1 2026 for TCR 2023 and 2024 Annual Report submissions. This will result in a discrepancy in TCR's 2023 and 2024 annual reports until the correction is made. The error was identified on October 3, 2025, by TCR staff. Energy Division and CEDARS development were informed about the error on October 17, 2025, and agreed to correcting it in Q1 2026.

#### **V. List of Attachments**

Attached hereto are the following:

- Attachment A – Appendices from Excel Template in PDF
- Attachment B – Community Engagement Indicators Results
- Attachment C – PA Response to Recommendations

- Attachment D – CEDARS Filing Confirmation
- Attachment E – PY2023-24 CEDARS Correction Memo

## **VI. Protest**

Anyone may protest this Advice Letter. The Protest must state the grounds upon which it is based. The Protest must be made in writing and received by the Commission within 20 days of the date this Advice Letter was filed with the Commission, or November 24, 2025. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

California Public Utilities Commission  
CPUC Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of the Energy Division at [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov). It is also requested that a copy of the protest be sent by email to the address shown below on the same date it is mailed or delivered to the Commission.

Alejandra Tellez  
Deputy Executive Officer,  
Ventura County  
800 S. Victoria Avenue  
Ventura, CA 93009  
Telephone: 805-654-3835  
Facsimile: 805-654-5106  
E-mail: [Alejandra.Tellez@venturacounty.gov](mailto:Alejandra.Tellez@venturacounty.gov)

## **VII. Effective Date**

3C-REN requests that this Tier 2 advice filing become effective on regular notice December 4, 2025, which is 30 calendar days from the date of this filing.

## **VIII. Notice**

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically to service lists for R.13-11-005, A.22-02-005, and R.25-04-010 and uploaded to the CPUC Energy Division Advice Letter database ([cpucadviceletters.org](http://cpucadviceletters.org)). Address changes to the General Order 96-B service list should be directed to Alejandra Tellez at

Alejandra.tellez@venturacounty.gov or by calling 805-654-3835. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or by electronic mail at Process\_Office@cpuc.ca.gov.

Respectfully submitted,

/s/ Alejandra Tellez .

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For the 3C-REN, Tri-County Regional Energy Network



**Tri-County Regional Energy Network (3C-REN)**

**Advice Letter 14-E/13-G**

**2024-2027 Mid-Cycle Advice Letter**

**Attachment A – Appendices from Excel Template in PDF**

**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	\$ -	\$ -	\$ 39,583,535	\$ -	\$ 39,583,535
2	Commercial Sector	\$ -	\$ 1,097,817	\$ 8,636,893	\$ -	\$ 9,734,710
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ 1,356,965	\$ -	\$ -	\$ 1,356,965
5	Public Sector	\$ -	\$ 1,097,817	\$ -	\$ -	\$ 1,097,817
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ 8,285,005			\$ 8,285,005
9	Finance	\$ -				\$ -
10	Codes & Standards	\$ -			\$ 6,393,321	\$ 6,393,321
11	Portfolio Support	\$ -	\$ 461,841	\$ 1,347,853	\$ 251,743	\$ 2,061,437
12	OBF Loan Pool					\$ -
13	<b>Portfolio Subtotal [2]</b>	<b>\$ -</b>	<b>\$ 12,299,445</b>	<b>\$ 49,568,281</b>	<b>\$ 6,645,064</b>	<b>\$ 68,512,790</b>

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

[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			\$ 35,888,938		\$ 35,888,938
2	Commercial Sector		\$ 1,573,333	\$ 9,026,397		\$ 10,599,730
3	Industrial Sector					\$ -
4	Agricultural Sector		\$ 1,928,204			\$ 1,928,204
5	Public Sector		\$ 1,573,333			\$ 1,573,333
6	Cross Cutting Sector					
7	Emerging Tech					\$ -
8	WE&T		\$ 8,944,105			\$ 8,944,105
9	Finance					\$ -
10	Codes & Standards				\$ 7,312,237	\$ 7,312,237
11	Portfolio Support		\$ 471,367	\$ 1,536,161	\$ 258,715	\$ 2,266,242
12	OBF Loan Pool					\$ -
13	<b>Portfolio Subtotal [2]</b>	<b>\$ -</b>	<b>\$ 14,490,343</b>	<b>\$ 46,451,496</b>	<b>\$ 7,570,951</b>	<b>\$ 68,512,790</b>

[2] excludes EM&V and Portfolio Oversight

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

Line	Budget Category	Change-Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ -	\$ -	\$ 3,694,597	\$ -	\$ 3,694,597
2	Commercial Sector	\$ -	\$ (475,516)	\$ (389,504)	\$ -	\$ (865,020)
3	Industrial Sector	\$ -	\$ -	\$ -	\$ -	\$ -
4	Agricultural Sector	\$ -	\$ (571,239)	\$ -	\$ -	\$ (571,239)
5	Public Sector	\$ -	\$ (475,516)	\$ -	\$ -	\$ (475,516)
6	Cross Cutting Sector					
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ (659,101)	\$ -	\$ -	\$ (659,101)
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ (918,916)	\$ (918,916)
11	Portfolio Support	\$ -	\$ (9,525)	\$ (188,308)	\$ (6,972)	\$ (204,805)
12	OBF Loan Pool					\$ -
13	<b>Portfolio Subtotal [2]</b>	<b>\$ -</b>	<b>\$ (2,190,898)</b>	<b>\$ 3,116,785</b>	<b>\$ (925,887)</b>	<b>\$ (0)</b>

[2] excludes EM&V and Portfolio Oversight

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

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 <sup>6</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	RREN North <sup>6</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	<b>Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	<b>Collected 2024 Recovery</b>						\$ -
18	<b>Expected 2025 Recovery</b>						\$ -
19	<b>Remaining Cost Recovery</b>						\$ -

[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 <sup>6</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	RREN North <sup>6</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	<b>Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	RREN Central <sup>6</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	RREN North <sup>6</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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	<b>Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

[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	<b>Total cost recovery request for IOU portfolio (excluding offset)</b>		\$ -	\$ -	\$ -	\$ -	\$ -
4	<b>IOU Pre-2024 Estimated Unspent &amp; Uncommitted Funds to Offset 2024-2027 Cost Recovery</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	<b>Total Cost Recovery Request for IOU Portfolio (including offset)</b>	\$ -	\$ -	\$ -	\$ -	\$ -	
6	Applicable electric split						
7	Applicable gas split	100%	100%	100%	100%	100%	
8	Electric portion for cost recovery (excluding fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	Fuel sub applicable electric split	100%	100%	100%	100%	100%	
10	Electric portion for cost recover (fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	<b>Total electric portion for cost recovery for IOU portfolio</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	<b>Total Gas portion for cost recovery for IOU portfolio</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	Electric split (with fuel sub)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
14	Gas split (with fuel sub)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	

**Table 1.4 Prior Years Unspent 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	<b>Unspent &amp; Uncommitted</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
2	EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
3	<b>Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
4	<b>Unspent &amp; Uncommitted Pre-2023 EM&amp;V, and IOU Program Funds for 2024-2027 Rate Offset</b>										
5	EM&V - PA Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
6	EM&V - CPUC Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
7	IOU Program Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
8	<b>Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

**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	\$2,389,994	\$1,660,843	0	0	\$3,055,894	\$1,776,683		
3	2025	\$4,669,322	\$3,244,783	0	0	\$5,970,289	\$3,471,099		
4	2026	\$5,922,012	\$4,115,297	0	0	\$7,572,005	\$4,402,328		
5	2027	\$6,219,382	\$4,321,943	0	0	\$7,952,228	\$4,623,388		
6	<b>Total</b>	<b>\$19,200,709</b>	<b>\$13,342,866</b>	<b>0</b>	<b>0</b>	<b>\$24,550,416</b>	<b>\$14,273,498</b>		

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

Line	Year	2024 Reported Ex	2024 Carryover Fu	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncom mitted Funds for	2024-2027 Funding Total
1	2024	\$8,883,414	\$7,660,621					\$8,883,414
2	2025			\$17,355,492				\$17,355,492
3	2026		\$3,830,310		\$22,011,642			\$22,011,642
4	2027		\$3,861,738			\$23,116,941		\$23,116,941

[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.

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

[9] An accounting error in the TCR-Res-002: Multifamily program that impacts programs costs will be corrected in Q1 2026 for TCR 2023 and 2024 Annual Report submissions. This will result in a discrepancy in TCR's 2023 and 2024 annual reports until the correction is made. The error was identified on October 3, 2025 by TCR staff. Energy Division and CEDARS development were informed about the error on 10/17/2025 and agreed to correcting this error in Q1 2026.

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

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 1,295,914	\$ 7,992,426	\$ 5,012,047	\$ 5,525,460
4	<b>Total TSB Forecast</b>	<b>\$ 1,295,914</b>	<b>\$ 7,992,426</b>	<b>\$ 5,012,047</b>	<b>\$ 5,525,460</b>
5	CPUC TSB Goal				
6	<i>TSB Forecast / TSB Goal</i> <sup>[1]</sup>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[1] TSB Goal set in decisions D.XX-XX-XXX (update with latest P&G decision). NOTE: the Potential & Goals decision does not set goals for REN PAs.

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

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027
1	Resource Acquisition				
2	Market Support				
3	Equity	\$ 7,073,894	\$ 7,992,426	\$ 8,441,906	\$ 8,889,663
4	<b>Total TSB Forecast</b>	<b>\$ 7,073,894</b>	<b>\$ 7,992,426</b>	<b>\$ 8,441,906</b>	<b>\$ 8,889,663</b>
5	CPUC TSB Goal	\$ -	\$ -		
6	<i>TSB Forecast / TSB Goal</i> <sup>[2]</sup>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

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

**Table 2.1c - Change Annual and Cumulative Total System Benefit Forecast**

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ (5,777,980)	\$ -	\$ (3,429,860)	\$ (3,364,204)
4	<b>Total TSB Forecast</b>	<b>\$ (5,777,980)</b>	<b>\$ -</b>	<b>\$ (3,429,860)</b>	<b>\$ (3,364,204)</b>
5	CPUC TSB Goal	\$ -	\$ -	\$ -	\$ -
6	<i>TSB Forecast / TSB Goal</i> <sup>[3]</sup>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[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 <sup>[1]</sup>					-
2	GWh CPUC Target <sup>[1]</sup>					-
3	<i>GWh Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
4	MW Forecast					-
5	MW CPUC Target <sup>[1]</sup>					-
6	<i>MW Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target <sup>[1]</sup>	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[1] TSB Goal set in decisions D.XX-XX-XXX (update with latest P&G decision)

**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 <sup>[2]</sup>	-	-	-	-	-
2	GWh CPUC Target <sup>[2]</sup>	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target <sup>[2]</sup>			-	-	-
6	<i>MW Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target <sup>[2]</sup>	-	-	-	-	-
9	<i>MMThm Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

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

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

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC <sup>[3]</sup>	-	-	-	-	-
2	GWh CPUC Target <sup>[3]</sup>	-	-	-	-	-
3	<i>GWh Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
4	MW Forecast	-	-	-	-	-
5	MW CPUC Target <sup>[3]</sup>	-	-	-	-	-
6	<i>MW Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
7	MMThm Forecast	-	-	-	-	-
8	MMThm CPUC Target <sup>[3]</sup>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
9	<i>MMThm Forecast/Target</i>	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/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	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ 1,816,148	\$ 3,414,860	\$ 3,357,522	\$ 3,710,916	\$ 12,299,445
3	Equity	\$ 5,832,670	\$ 11,400,000	\$ 15,832,485	\$ 16,503,126	\$ 49,568,281
4	Codes and Standards	\$ 879,261	\$ 1,846,412	\$ 1,941,170	\$ 1,978,222	\$ 6,645,064
5	EM&V (PA and ED) <sup>[5]</sup>	\$ 355,337	\$ 694,219	\$ 880,465	\$ 924,678	\$ 2,854,699
6	<b>Total Budget w/o OBF Loan Pool</b>	<b>\$ 8,883,414</b>	<b>\$ 17,355,492</b>	<b>\$ 22,011,641</b>	<b>\$ 23,116,941</b>	<b>\$ 71,367,489</b>
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					86.7%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	<b>Budget excluding Portfolio Oversight</b>	<b>\$ 8,883,414</b>	<b>\$ 17,355,492</b>	<b>\$ 22,011,641</b>	<b>\$ 23,116,941</b>	<b>\$ 71,367,489</b>
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	<b>Total Portfolio Budget w/ ED Portfolio Oversight</b>	<b>\$ 8,883,414</b>	<b>\$ 17,355,492</b>	<b>\$ 22,011,641</b>	<b>\$ 23,116,941</b>	<b>\$ 71,367,489</b>
12	<b>Approved Budget Cap<sup>[4]</sup></b>					<b>\$ 71,367,489</b>

[4] Decision 23-06-055 OP5

[5] Reported program expenditures from 2024 Approved budget are \$8,527,077.87. The amount entered also includes PA EM&V Budget of 97,717.56 and CPUC EM&V budget of 257,619.02, for a total of \$8,883,414. This amount excludes expenditures of \$ 1,918,501.61 from Pre-2024 approved budget.

**Table 2.3b - TUAL Annual and Cumulative Budget**

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ 3,257,045	\$ 3,414,860	\$ 3,732,522	\$ 4,085,916	\$ 14,490,343
3	Equity	\$ 10,850,250	\$ 11,400,000	\$ 11,780,387	\$ 12,420,858	\$ 46,451,495
4	Codes and Standards	\$ 1,805,148	\$ 1,846,413	\$ 1,941,170	\$ 1,978,221	\$ 7,570,952
5	EM&V (PA and ED)	\$ 663,018	\$ 694,220	\$ 727,253	\$ 770,208	\$ 2,854,699
6	<b>Total Budget w/o OBF Loan Pool</b>	<b>\$ 16,575,461</b>	<b>\$ 17,355,493</b>	<b>\$ 18,181,332</b>	<b>\$ 19,255,203</b>	<b>\$ 71,367,489</b>
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					85.4%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	<b>Budget excluding Portfolio Oversight</b>	<b>\$ 16,575,461</b>	<b>\$ 17,355,493</b>	<b>\$ 18,181,332</b>	<b>\$ 19,255,203</b>	<b>\$ 71,367,489</b>
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	<b>Total Portfolio Budget w/ ED Portfolio Oversight</b>	<b>\$ 16,575,461</b>	<b>\$ 17,355,493</b>	<b>\$ 18,181,332</b>	<b>\$ 19,255,203</b>	<b>\$ 71,367,489</b>

**Table 2.3c - Change Annual and Cumulative Budget**

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -
2	Market Support	\$ (1,440,897)	\$ 0	\$ (375,000)	\$ (375,000)	\$ (2,190,898)
3	Equity	\$ (5,017,580)	\$ 0	\$ 4,052,098	\$ 4,082,268	\$ 3,116,786
4	Codes and Standards	\$ (925,887)	\$ (1)	\$ (0)	\$ 1	\$ (925,888)
5	EM&V (PA and ED)	\$ (307,681)	\$ (1)	\$ 153,212	\$ 154,470	\$ (0)
6	<b>Total Budget w/o OBF Loan Pool</b>	<b>\$ (7,692,047)</b>	<b>\$ (1)</b>	<b>\$ 3,830,309</b>	<b>\$ 3,861,738</b>	<b>\$ (0)</b>
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					1.3%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	<b>Budget excluding Portfolio Oversight</b>	<b>\$ (7,692,047)</b>	<b>\$ (1)</b>	<b>\$ 3,830,309</b>	<b>\$ 3,861,738</b>	<b>\$ (0)</b>
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	<b>Total Portfolio Budget w/ ED Portfolio Oversight</b>	<b>\$ (7,692,047)</b>	<b>\$ (1)</b>	<b>\$ 3,830,309</b>	<b>\$ 3,861,738</b>	<b>\$ (0)</b>



**Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)<sup>[1]</sup>**

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	<b>Resource Acquisition</b>	-	-	-
2		Market Support	-	-	-
3		Equity	0.24	0.47	0.33
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including C&amp;S</i>	0.21	0.35	0.26
6		<i>Excluding C&amp;S</i>	0.22	0.38	0.28

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

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

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	<b>Resource Acquisition</b>	-	-	-
2		Market Support	-	-	-
3		Equity	0.41	0.66	0.45
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including C&amp;S</i>	0.30	0.43	0.33
6		<i>Excluding C&amp;S</i>	0.33	0.48	0.36

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

Line		TRC ratio	PAC ratio	RIM ratio	
1	Segment	<b>Resource Acquisition</b>	-	-	-
2		Market Support	-	-	-
3		Equity	(0.17)	(0.19)	(0.12)
4		Codes and Standards (C&S)	-	-	-
5	Portfolio	<i>Including C&amp;S</i>	(0.09)	(0.08)	(0.07)
6		<i>Excluding C&amp;S</i>	(0.11)	(0.10)	(0.08)

**Table 3d - Societal Cost Test for 2026-2027**

Line			2026		2027		2 Yr Total	
			Base	High	Base	High	Base	High
1								
2	Segment	<b>Resource Acquisition</b>	-	-	-	-	-	-
3		Market Support	-	-	-	-	-	-
4		Equity	<b>0.34</b>	<b>0.35</b>	<b>0.34</b>	<b>0.35</b>	<b>0.34</b>	<b>0.34</b>
5		Codes and Standards (C&S)	-	-	-	-	-	-
6	Portfolio	<i>Including C&amp;S</i>	<b>0.29</b>	<b>0.29</b>	<b>0.30</b>	<b>0.30</b>	<b>0.29</b>	<b>0.30</b>
7		<i>Excluding C&amp;S</i>	<b>0.30</b>	<b>0.30</b>	<b>0.31</b>	<b>0.31</b>	<b>0.31</b>	<b>0.31</b>

**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 <sup>[1]</sup>				
2	Third-party <sup>[2]</sup>				

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

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

Appendix 1 - 2024 - 2027 Program Portfolio Budget and Targets

Updated MCAL Forecasts <sup>(1)</sup>										TJUAL Filing					Change					(l) Change Notes	
(a) Program ID	(b) Program Name	(c) Target Earmark	(d) Program Type	(e) Business Sector	(f) Portfolio Segment	(i) Budget	(m) TSB	(n) GWh	(o) MW	(p) MMThm	(q) Budget	(r) TSB	(s) GWh	(t) MW	(u) MMThm	(v) Budget	(w) TSB	(x) GWh	(y) MW		(z) MMThm
TCR-Ag-001	Agriculture: Technical Assistance	Yes	Core PA	Agricultural	Market Support	1,190,298	-	-	-	-	1,721,537	-	-	-	-	(531,239)	-	-	-	-	-
TCR-CC-001	Energy Assurance Services	Yes	Core PA	Cross-Cutting	Market Support	2,028,967	-	-	-	-	2,940,000	-	-	-	-	(911,033)	-	0	-	-	-
TCR-Com-001	Commercial Marketplace	No	Core PA	Commercial	Equity	8,024,393	7,487,137	5.55	0.70	0.14	8,276,397	21,261,254.20	20.45	2.61	0.10	(252,004)	(13,774,117)	-14.90	(1.91)	0.04	Energy savings (kW and kWh) and TSB goals have been updated for the program since the TJUAL to reflect lessons learned from recent program implementation. Namely, the program is expecting to see less kWh saved as a result of a focus on electrification projects, in alignment with state goals.
TCR-CS-001	Codes & Standards	Yes	Core PA	Cross-Cutting	Codes and Standards	6,258,321	-	-	-	-	7,152,237	-	-	-	-	(893,916)	-	0	-	-	-
TCR-Res-002	Multifamily	No	Core PA	Residential	Equity	16,207,097	4,975,828	(1.48)	0.03	0.31	15,983,929	3,024,984.00	(0.35)	0.03	0.17	223,168	1,950,844	-1.13	(0.00)	0.14	TSB and energy savings forecasts have been adjusted based on actual program performance in recent years. This included a decrease in kWh forecasts based on currently observed annual savings within the program and consideration of increased electrification projects.
TCR-Res-003	Single Family NMEC	No	Core PA	Residential	Equity	22,763,938	7,362,881	(4.68)	(0.34)	0.62	19,155,009	8,111,651.00	1.44	0.66	0.29	3,608,929	(748,770)	-6.12	(1.00)	0.32	TSB and energy savings forecasts have been adjusted based on actual program performance in recent years. This included a decrease in kWh and therm forecasts based on currently observed annual savings within the program and consideration of increased electrification projects.
TCR-WET-001	Workforce Education & Training	Yes	Core PA	Cross-Cutting	Market Support	8,118,338	-	-	-	-	8,737,438	-	-	-	-	(619,101)	-	0	-	-	-
TCR-EMV-002	EM&V: CPUC	Yes	Core PA	Cross-Cutting	Evaluation, Measurement	2,069,657	-	-	-	-	2,069,658	-	-	-	-	(1)	-	0	-	-	-
TCR-EMV-001	EM&V: 3C-REN	Yes	Core PA	Cross-Cutting	Evaluation, Measurement	785,042	-	-	-	-	785,041	-	-	-	-	1	-	0	-	-	-
TCR-IDSM-Equity-001	IDSM - Equity	Yes	Core PA	Cross-Cutting	Equity	1,225,000	-	-	-	-	1,500,000	-	-	-	-	(275,000)	-	0	-	-	-
TCR-IDSM-MarketSupport-002	IDSM - Market Support	Yes	Core PA	Cross-Cutting	Market Support	500,000	-	-	-	-	620,000	-	-	-	-	(120,000)	-	0	-	-	-
TCR-IDSM-CS-003	IDSM - Codes & Standards	Yes	Core PA	Cross-Cutting	Codes and Standards	135,000	-	-	-	-	160,000	-	-	-	-	(25,000)	-	0	-	-	-
TCR-CS-Portfolio Support	Portfolio Admin - CS	Yes	Core PA	Cross-Cutting	Codes and Standards	251,743	-	-	-	-	258,725	-	-	-	-	(6,972)	-	0	-	-	-
TCR-Equity-Portfolio Support	Portfolio Admin - Equity	Yes	Core PA	Cross-Cutting	Equity	1,347,853	-	-	-	-	1,536,161	-	-	-	-	(188,308)	-	0	-	-	-
TCR-MS-Portfolio Support	Portfolio Admin - Market Support	Yes	Core PA	Cross-Cutting	Market Support	461,841	-	-	-	-	471,367	-	-	-	-	(9,525)	-	0	-	-	-
<b>Total</b>						<b>71,367,489</b>	<b>19,825,847</b>	<b>(6.61)</b>	<b>0.38</b>	<b>1.06</b>	<b>71,367,489</b>	<b>32,397,889.20</b>	<b>21.54</b>	<b>3.29</b>	<b>0.56</b>	<b>(9)</b>	<b>(12,572,043)</b>	<b>(22.15)</b>	<b>(2.91)</b>	<b>0.50</b>	

**Appendix 2 - Energy Efficiency Cap And Target Expenditure Projections (Cumulative for PY 2024-2027)**

Program level budgets can be found on tab A1 - Program Table

Line	Budget Category	Expenditures			Cap & Target Performance		
		(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget <sup>[6]</sup>	(e) Cap Percentage	(f) Target %
1	<b>Administrative Costs</b>						
2	PA <sup>[1]</sup>	\$ 3,194,953		\$ 3,194,953	4.6%		
3	Non-PA Third Party & Partnership <sup>[2]</sup>	\$ -		\$ -	0.0%		
4	PA & Non-PA Target Exempt Programs <sup>[3]</sup>			\$ -			
5	<b>Marketing and Outreach Costs</b>						
6	Marketing & Outreach	\$ 1,512,978		\$ 1,512,978	2.2%		
7	<b>Direct Implementation Costs</b>						
8	Incentives and Rebates	\$ 28,670,846		\$ 28,670,846			
9	Non Incentives and Non Rebates	\$ 33,274,013		\$ 33,274,013	47.9%		
10	Target Exempt (Non Incentives and Non Rebates)			\$ -			
11	<b>EM&amp;V Costs (PA and ED) <sup>[4]</sup></b>	\$ 2,854,699	\$ -	\$ 2,854,699	4.1%		
11a	EM&V - PA	\$ 785,042		\$ 785,042			
11b	EM&V - ED	\$ 2,069,656		\$ 2,069,656			
12	<b>PA Spending Budget Request</b> (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 69,507,489	\$ -	\$ 69,507,489			
13	<b>Total Third-Party Qualifying Costs <sup>[5]</sup></b>				0.0%		
14	<b>OBF Loan Pool Addition</b>			\$ -			
15	<b>PA Spending Budget Request</b> (excluding ED Portfolio Oversight) <sup>[6]</sup>			\$ 69,507,489			
16	<b>ED Portfolio Oversight <sup>[10]</sup></b>			\$ -			
17	<b>EE-Funded IDSM</b>			\$ -			
18	<b>Multi-DER IDSM<sup>[7]</sup></b>	\$ 1,860,000					
19	<b>PA Spending Budget Request</b>			\$ 69,507,489			

[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.

CALMAC ID	Study Name	PA	Recommendation
CPU0372.01	PY 2022 Regional Energy Networks Impact	All RENS	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	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	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, MCE	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.
		All RENS	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.

**Tri-County Regional Energy Network (3C-REN)**  
**Advice Letter 14-E/13-G**  
**2024-2027 Mid-Cycle Advice Letter**  
**Attachment B – Community Engagement Indicators Results**

# Community Engagement Indicators Findings and Recommendations Memo

An Energy Efficiency Portfolio Administrator report in compliance with California Public Utilities  
Commission Decision 23-06-055, Ordering Paragraph 24

July 31, 2025

Prepared by BluePoint Planning



## Background

California Public Utilities Commission (CPUC or Commission) Decision (D.) 23-06-055 requires California's Energy Efficiency (EE) Portfolio Administrators (PAs) to collaboratively develop qualitative and quantitative indicators for tracking and reporting counts and types of community engagement activities targeted at equity communities.<sup>1</sup>

Ordering Paragraph (OP) 24 of the decision states the following:

OP 24. Portfolio administrators shall develop indicators to measure community engagement, and should include them in their Mid-Cycle advice letters in 2025. After the advice letters are addressed by the Commission, the portfolio administrators shall report on the adopted community engagement indicators in their annual reports.

To begin this effort, the California Energy Efficiency Coordinating Committee (CAEECC) hosted a CAEECC Community Engagement Panel in April 2025. Key takeaways from the panel included:

- 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.

Following the panel, Tri-County Regional Energy Network (3C-REN) engaged BluePoint Planning as a facilitator for collaboration among the PAs. BluePoint facilitated the process among the PAs of developing potential indicators and reaching consensus on a set of agreed-upon indicators.

The PAs will include the indicators in their Mid-Cycle Advice Letters to be filed in Fall 2025, with annual reporting to follow.

## Introduction

This memo describes the purpose and desired outcomes of community engagement indicators for equity segment programs. These indicators are focused on measuring engagement particularly with disadvantaged communities (DACs), Hard-to-Reach (HTR) customers, and other environmental and social justice (ESJ) populations, though they consider all populations in the equity segment. The indicators provide a baseline common set of metrics that PAs will report on, and each PA may add additional indicators to track within their organization. Suggested Common Indicators (as well as Additional Potential Indicators) are included in the accompanying Community Engagement Indicators (CEIs) List.

Combined, the set of indicators were developed to paint a full picture of engagement; no one indicator will provide a full story. While there are only four agreed upon suggested common

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<sup>1</sup> D.23-06-055 at 67-69.

## Equity Segment | Community Engagement Indicators

indicators, PAs are also welcome to utilize any number of the additional non-consensus potential indicators. Below is more context on how CEIs were developed, the purpose of CEIs, and how to report and use the accompanying CEIs.

## Purpose for Indicators

To help frame and focus the development of community engagement indicators, per CPUC OP 24, PAs met and discussed the overarching purpose and need for community engagement for equity programs. The following key themes reflect their input: to better understand community needs, build trust with different equity customers and communities, and ensure that equity programs are relevant and impactful.

### Long-Term Outcomes

The ideal engagement outcomes are as follows. Each outcome is associated with different audiences, as described further below in this memo:

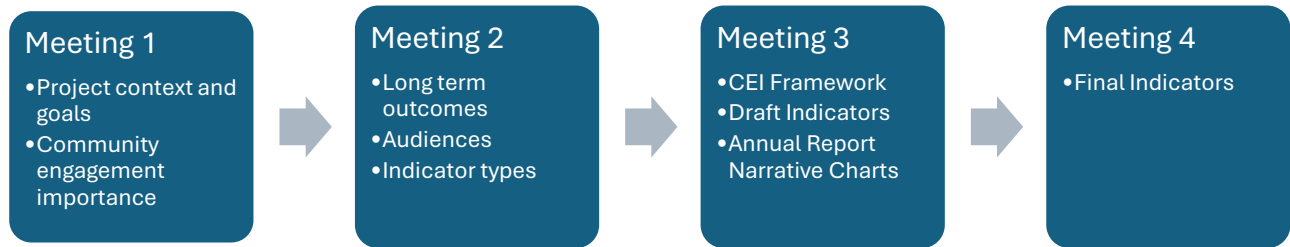
- **Relevance** – Programs are designed to address community needs while being accessible to participants.
- **Trust** – A continued relationship and sense of trust is fostered between engagement audiences (including program participants) and the PA / third party (3P) implementers.
- **Impact** – Equity engagement audiences participate and benefit from program and effectively utilize program offerings.

## Overarching PA Considerations and Concerns

Throughout the Engagement Process (detailed below), there were a few main themes that emerged around considerations for developing the PA indicators. Overarching concerns and considerations in developing the indicators included the following:

- Each type of engagement does not necessarily occur in distinct phases; rather they span multiple phases and so phases may not be a good way to categorize when each indicator would be used.
- The scope of engagement may vary across PAs, some of which are rural and expressed that they may face lower participation in engagement activities. Thus, using percentages instead of counts for indicators as possible will make engagement more comparable across PAs.
- There is a desire for qualitative indicators that allow PAs to provide further context on engagement.

## Portfolio Administrators Engagement Process



The Project Team led a series of four meetings to develop and hone a set of CEIs. The purpose of the first PA meeting was to reach a shared understanding of existing information and concerns, discuss the Community Engagement Indicators development process, and establish a work plan. The following themes emerged from this meeting:

- PAs believe that community engagement for equity programs is important because it helps them better understand a community's needs, builds trust with equity customers and communities, and ensures that equity programs are relevant and impactful.
- Creating community engagement indicators will be challenging for many reasons. Specifically, the value or impacts of engagement is hard to quantify. Indicators also need to be flexible, so engagement efforts can adapt to changes in community needs.
- Qualitative indicators may be more useful, as they can tell a story about engagement. However, there are still questions and concerns around designing, gathering, and reporting data on qualitative indicators.
- The role of CBO partners is important for engagement for equity programs. Community engagement indicators should assess the strength of relationships with CBO partners.
- Trust and awareness in different target audiences are also important outcomes of engagement that should be measured with indicators.

From there, the Project Team developed a straw person Community Engagement Indicators Framework and set of Indicator types. The purpose of the second PA meeting was to present and gather feedback on these documents. The following themes emerged from the second meeting:

- The PAs agree with all three long term outcomes of community engagement for equity programs developed after the first meeting: relevance, trust, and impact.
- The PAs generally agree with audiences listed (CBOs, contractors, and tenants/homeowners), and note that there may be direct communication with community members, public agencies, and business owners as well.
- The PAs generally agree with the proposed indicator types: awareness, input, participation, and satisfaction.
- Within the Community Engagement Indicators Framework, there needs to be better definitions and delineations between each of the three engagement phases: program design, implementation, and assessment.

## Equity Segment | Community Engagement Indicators

- The Project Team should clarify the meaning of a “count” measurement for the indicators and more specificity may be needed here. In some cases, there may also be benefit of using percentages instead of counts.
- The Project Team needs to continue to develop and refine the methodology for gathering feedback for indicators.

The Project Team then developed and sent out a first draft of Community Engagement Indicators for PAs to review, and PAs provided their support of each indicator on a scale of 1-5, with 1 being low support and 5 being high support, as well as written feedback. Based on this, the Project Team developed and presented a second draft of CEIs for feedback at the third PA meeting (Framework included below). The following themes emerged from the third meeting:

- The PAs generally support the updated CEI Framework. They recommend revising the title of the third element, “Program Changes” to note that program changes should only occur when needed.
- The scope of engagement may vary across PAs, some of which are rural and expressed that they may face lower participation in engagement activities. Thus, using percentages instead of counts for indicators will make engagement more comparable across PAs.
- Some PAs have concerns regarding the level of detail for the indicators. Specifically, whether the indicators should be more prescriptive/specific about engagement or allow for more flexibility.
- The PAs generally support the Key Themes Chart and Program Changes Chart that will accompany the indicators spreadsheet. Some PAs have different ideas for the best way to report this information.
- Most PAs think that some tweaks are needed before the community engagement indicators are finalized.

Based on feedback from the second draft of Community Engagement Indicators and the third meeting, the Project Team updated and honed the CEIs and send out a third draft of CEIs to PAs for review. PAs indicated whether they would support the inclusion of each indicator by answering “Yes,” “No,” and “Yes, with minor edits.” For any instances that PAs answered “Yes, with minor edits,” PAs were asked to provide edits. Based on these responses, the Project Team compiled all PA responses, made minor edits to indicators, and organized these indicators into those that received all yeses (consensus), all but one yes (near consensus), general support, and mixed support. Consensus and near consensus indicators were organized into a set of Suggested Common Indicators, and the remaining indicators were organized into a list of Additional Potential Indicators.

The Project Team then held the final fourth PA meeting. The purpose of this meeting was to present PA votes and feedback on the third draft of the CEIs and reach agreement on the suggested common indicators to move forward with. Project Team proposed that Suggested Common Indicators list be presented to the CPUC. The following themes emerged from the fourth meeting:

- Some PAs think the suggested common indicators list should be condensed to fewer indicators.
- The PAs do not think that any of the additional indicators (original indicators 1, 3, 4, 5, and 6) should be added to the suggested common indicators list.
- The PAs that responded are all comfortable with the suggested common indicators list (original indicators 2, 7, 8, 9, 10, and 11).
- After discussion about whether some indicators could be condensed or reduce, a majority (77%) of PA representatives that responded think that satisfaction indicators 9 and 10 should be eliminated from the Suggested Common Indicators list.

Based on this feedback the Project Team removed indicators 9 and 10 from the Suggested Common Indicators list and moved them to the Additional Potential Indicators list. The attached spreadsheet is the Final Community Engagement Indicators Spreadsheet that PAs will do a final vote on.

## Engagement Audiences

Different audiences will have different engagements and relationships with the PAs and therefore outcomes will vary – and so should the indicators. Contractors and CBOs may develop long-term relationships with PAs/Programs, which are important to build trust. Homeowners, tenants, and renters will likely have shorter involvement with PAs and programs and so trust may be a less relevant outcome (though utilities may aim to build trust via customers’ gas and electric accounts). Understanding these nuances can help ensure indicators are measuring something that is possible. Audiences include the following, along with the outcomes that correspond to each.

<b>Audience</b>	<b>Role</b>	<b>Outcome</b>
<b>CBO</b>	Direct engagement with community members, help to relay and gather feedback.	Trust
<b>Contractors</b>	May be helping to deliver a program, may also be the focus of a program (WE&T). In both cases will be important to engage for all phases.	Relevance, Trust, Impact
<b>Tenants/ homeowners/ renters</b>	Recipients of program services (tenants also include business owners)	Relevance, Impact
<b>Public Agencies</b>	May be recipient of program services or may help disseminate information about services	Relevance, Trust, Impact

## Indicator Types

To help improve communications, align and coordinate measures of success, the following indicator types are used to aggregate sets of indicators that can be reported in annual reports, and from CBOs, partners and others.

**Awareness** (quantitative) – The number of community members, especially DACs, HTR customers, and other ESJ populations, who know about a program through engagement and education activities and communication.

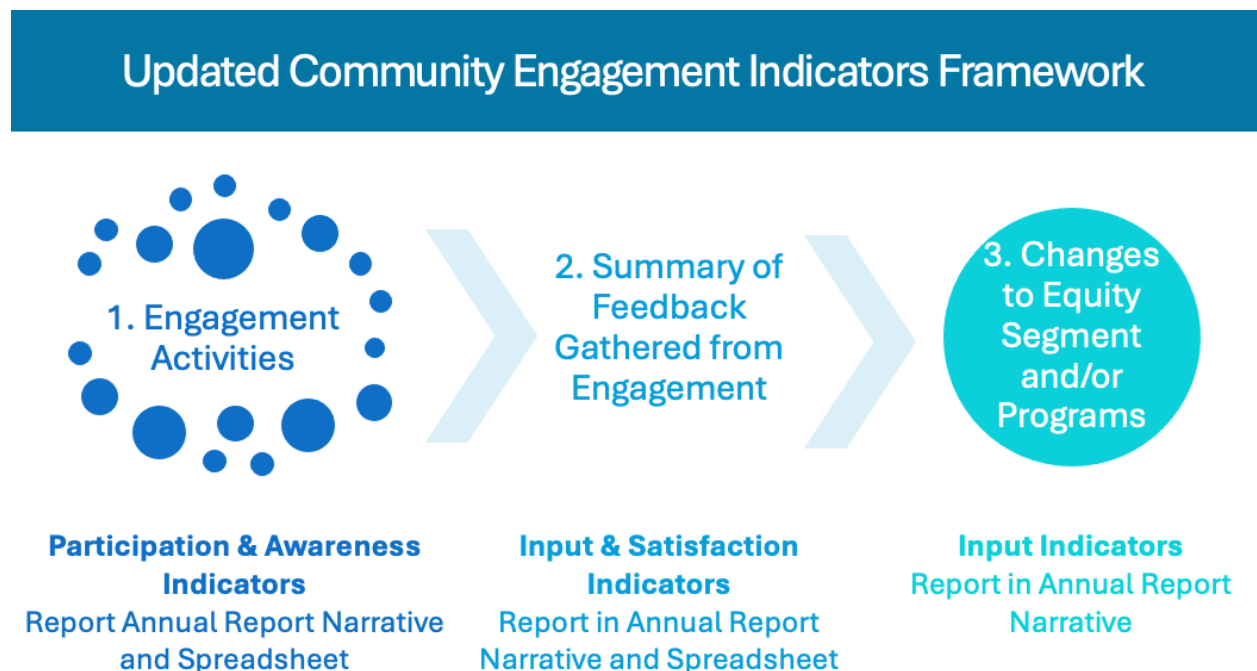
**Input** (qualitative and quantitative) – The amount and quality of feedback from program audience members, including changes to program design based on that feedback.

**Participation** (quantitative) – Participation in engagement activities and program offerings.

**Satisfaction** (qualitative) – Reports of satisfaction of program participation.

## Indicator Framework

Below is the Community Engagement Indicators Framework, which describes different “buckets” of community engagement indicators, and how indicators within each of these buckets may be reported. These include both quantitative and qualitative indicators. Generally, quantitative indicators are reported in the Annual Report Spreadsheet while qualitative indicators will be included in the Annual Report Narrative.



Below is more detail on the three different buckets that an indicator can fall into. These indicators measure engagement as a whole and progress towards identifying specific segment or program feedback, and, finally, measure any changes to programs that result from that qualitative input. Each bucket has a different purpose and indicator types associated with it. Indicators in each bucket may be reported either through the Annual Report Spreadsheet or in the Annual Report Narrative.

1. **Engagement Activities** – Indicators in this bucket measure overall participation in all engagement activities, as well as program awareness. These indicators are largely quantitative and are to be reported in the Annual Report Spreadsheet. The summary narrative is to be filled out in the Engagement Activities Summary of the Annual Report.
2. **Summary of Feedback** – Indicators in this bucket illustrate engagement in program input and program satisfaction surveys. These indicators include a qualitative summary narrative that PAs have received from engagement activities, as well as quantitative feedback about satisfaction and supporting metrics that illustrate the quantity of that input. Quantitative indicators are to be reported in the Annual Report Spreadsheet and the summary narrative is to be filled out in an Annual Report Key Themes sheet and to be submitted in the Annual Report.
3. **Program Changes (as needed)** – This indicator qualitatively measures any program changes that are made from feedback received. The summary narrative is to be filled out in an Annual Report Program Changes sheet and to be submitted in the Annual Report.



## Indicator List

Below is the list of Suggested Common Indicators, in green, and Additional Potential Indicators in yellow. PAs were asked to do a final yes or no vote on these indicators.

Suggested Common Indicators	Indicator	Unit of Measurement
<b>Engagement Activities</b>		
2	Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context PAs want to add about their engagement activities	Summary Narrative
<b>Summary of Feedback</b>		
7	People who provided feedback relevant to equity segment	Count
8	Feedback themes from engagement activities relevant to equity segment	List of key themes
<b>Changes to Program</b>		
11	Changes to equity segment program design as needed, based on feedback	Summary Narrative
Additional Potential Indicators	Indicator	Unit of Measurement
<b>Engagement Activities</b>		
1	People in all engagement activities relevant to the equity segment	Count
3	People in partners' engagement activities relevant to equity segment	Percent
4	Funding for partners' engagement activities related to equity segment	Dollars
5	People reached through online, telephone, or other outreach for the equity segment.	Percent
6	Equity segment inquiries	Count
<b>Summary of Feedback</b>		
9	Equity segment participant satisfaction survey responses	Count
10	Rating from equity segment participant satisfaction surveys	Numerical Rating

## Consensus Indicators

The following four indicators received support from all PAs.

Indicator	Yes	No
Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context PAs want to add about their engagement activities	12	0
Number of people who provided feedback relevant to equity segment	12	0
Feedback themes from engagement activities relevant to equity segment	12	0
Feedback themes from engagement activities relevant to equity segment	12	0

## Non-Consensus Indicators

The following indicators received mixed support from PAs.

Indicator	Yes	No
Number of people in all engagement activities relevant to the equity segment	7	5
People in partners' engagement activities relevant to equity segment	6	6
Funding for partners' engagement activities related to equity segment	6	6
People reached through online, telephone, or other outreach for the equity segment.	6	6
Equity segment inquiries	7	5
Equity segment participant satisfaction survey responses	6	6
Rating from equity segment participant satisfaction surveys	6	6

## Best Practices

Below are best practices for measuring community engagement that PAs are encouraged to follow.

- Include a feedback mechanism at every engagement activity to measure outreach touches.
- Compile all feedback from different engagement activities and pull out most common themes (for summary narratives).
- Vet program changes with partners to ensure changes reflect input and continue to build trust with partners.
- Engagement activities should include efforts to reach community members where they are and provide support and accommodations (e.g. food, childcare) during activities such as focus groups and community meetings.

## Reporting

Indicators are designed, as much as possible, to utilize information that is already being gathered, but perhaps not formally collated, by PAs. Reporting of CEIs will occur annually in two places: quantitative indicators will be reported in the BP metrics table of the Annual Report Spreadsheet and qualitative indicators will be reported in the Annual Report Narrative.

The accompanying Community Engagement Indicators Spreadsheet includes a list of indicators included in the BP metrics table as well as separate worksheets of summary tables to be included in the Annual Report Narrative (Engagement Activities Summary Table, Key Themes Table, and Program Changes Table).

For indicators reported in the Annual Report Spreadsheet, the “purpose” field will be repurposed to the Annual Report Spreadsheet’s “description” field. For indicators reported in the Annual Report Narrative, each cell in the qualitative indicators table should be brief and include 1-3 sentence descriptions.

At the time of this Memo, there is still discussion on the timing and protocols for CEIs reporting in the Annual Report. Appendix A of this Memo includes survey results from the PAs on these preferences, which can be used as reference in determining reporting timelines and processes.

## Key Definitions

The definitions below are meant to provide additional context for and accompany the revised Community Engagement Indicator spreadsheet.

**Indicator Type** – The type of engagement that each indicator is designed to measure (participation, awareness, etc.).

**Unit of Measurement** – How each indicator is counted, which may include measurements such as count, dollars, or percent.

**Methodology** – Methods to conduct and collect information on indicator engagement activities.

**Engagement Activity** – Engagement activities include workshops, focus groups, door-to-door canvassing, surveys, etc. that are designed to solicit feedback from program participants or potential program participants on equity segment programs.

**Equity Segment Participant** (definition from CPUC Resolution E-5351) – Must be a participant in an Equity segment program but does NOT have to be hard-to-reach, located in a disadvantaged community, or underserved.

**Partner** (definition from CPUC Resolution E-5351) – An entity that has agreed to engage in a mutually beneficial relationship to serve at least one primary purpose of the EE portfolio: resource acquisition, equity, or market support with regard to supply or delivery of products, services, education, and/or training. These include but are not limited to educational institutions/organizations, governments, community-based organizations, trade associations, suppliers, manufacturers, contractors, etc.

**Social Media Click Rate** – The total number of clicks, likes, and/or shares on a social media post link divided by the total number of impressions of that post.

**Feedback** – Feedback on programs refers to oral and/or written comments from workshops, pop-up activities, document review, or other engagement activities.

**Satisfaction Rating** – This rating is for satisfaction surveys and utilizes a rating system on a scale of 1 (poor) to 5 (excellent).

**Qualitative** – A unit that captures descriptive data. Contributes to a more complete story of the indicator. Contains insights into the progress that is being made toward outcomes. Often requires more capacity and time to track. Qualitative measurements can include feedback summaries.

**Quantitative** – A unit counted or measured in numerical values. Relatively easy to measure (if data is available). Only provides a snapshot in time of the indicator.

## Appendix – OP24 Implementation Survey Results

Separate from BluePoint Planning’s CEI facilitation process, the PAs need to further refine the logistics for implementing the indicators. To assess PAs’ current thoughts on implementation, Sebastien Csapo (PG&E) sent out a survey to all PAs with questions regarding CEI reporting.

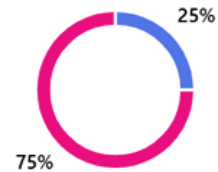
### Summary of Survey Results

- Majority of PA respondents think the CEI should only apply to prospective new equity programs.
- Majority of PA respondents think the 2027 program year is the earliest program year the new standards should apply.
- PA respondents’ opinions varied on whether the Reporting PCG should be involved for clarifying reporting issues or not.
- Strong majority of PA respondents think that there should be a phase-in period for the CEI.
- All PA respondents support optional reporting, rather than required reporting, on the non-consensus CEI.

### Survey Results

2. Should CEI indicators be used retroactively for existing equity programs or only prospectively for new equity programs?

● Retroactive	3
● Prospective	9



## Equity Segment | Community Engagement Indicators

3. What is the earliest program year these new reporting standards should apply?



4. Do you think the "Reporting PCG" would need to be involved for clarifying reporting issues?



5. Should there be a phase-in period (e.g., a period of time after adoption of the MCAL and potential involvement of the Reporting PCG.)?



6. Treatment of non-consensus indicators?



Agreed Upon Indicators								
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No	
Engagement Activities	Participation	Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context for PAs to add about their engagement activities	Provide context to the overall annual engagement for the equity segment each year.	Summary Narrative	Description of engagement activities relevant to equity segment, including types of activities conducted, number of activities, audiences targeted, number of people reached, outreach methods, and any additional context, such as using trusted messengers, using appropriate language, or providing supports to participants, like gift cards and food.	Annual Report Narrative	12	0
Summary of Feedback								
Input	Number of people who provided feedback relevant to the equity segment	Track the number of people who provided equity segment feedback. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people who provided feedback relevant to the equity segment during engagement activities.	Annual Report Spreadsheet	12	0	
Input	Feedback themes from engagement activities relevant to the equity segment	Understand input from engagement activities related to the equity segment to then help make program changes if needed.	List of key themes	List of key themes sentences from all equity segment engagement activities feedback in the Annual Report Key Themes Chart.	Annual Report Narrative	12	0	
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	12	0	
Additional Potential Indicators								
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No	
Engagement Activities	Participation	Number of people in all engagement activities relevant to the equity segment	Track equity segment engagement. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people in all engagement activities relevant to the equity segment annually.	Annual Report Spreadsheet	7	5
Participation	People in partners' engagement activities relevant to the equity segment	Understand how effective partners are in engaging and building trust with equity segment populations.	Percent	Percentage determined by the number of participants in partners' engagement activities divided by the number of participants in all engagement activities. Partners would be required to track their engagement numbers.	Annual Report Spreadsheet	6	6	
Input	Funding for partners' engagement activities related to the equity segment	Assess how funding correlates with how effective partners are in engaging and building trust with equity segment population.	Dollars	Amount of money spent to fund partners' engagement activities related to equity segment. Funding includes stipends, grants, contracts, etc. to support partners' engagement for equity segment.	Annual Report Spreadsheet	6	6	
Awareness	People reached through online, telephone, or other outreach for the equity segment	Assess awareness of equity programs from equity segment population.	Percent	Percentage of emails opened from email campaign, rate of social media clicks, likes and shares, or percentage of text campaigns clicked in equity segment outreach.	Annual Report Spreadsheet	6	6	
Awareness	Equity segment inquiries	Assess awareness of equity programs from equity segment population.	Count	Total number of unique submissions of interest forms on websites, number of calls, number of emails, or forms for more information across all equity segment programs. Note: Using unique QR codes on materials and webpages to track inquiries is recommended.	Annual Report Spreadsheet	7	5	
Summary of Feedback								
Satisfaction	Equity segment participant satisfaction survey responses	Provides the count of surveys.	Count	Total number of completed surveys.	Annual Report Spreadsheet	6	6	
Satisfaction	Rating from equity segment participant satisfaction surveys	Understand participant satisfaction with equity segment programs.	Numerical Rating	Average post-participation satisfaction rating for equity segment and/or programs using standard rating system of 1 (poor) to 5 (excellent).	Annual Report Spreadsheet	6	6	

Type of Activity	Number of Activities	Audiences Targeted	Number of Participants	Outreach Methods	Additional Considerations and Context (Optional)
Type of activity such as workshops, focus groups, surveys, stakeholder interviews, etc.	Total number of any specific activities.	Audiences can be defined as contractors, participants, CBOs, public agencies, public members, etc.	Total number of participants in engagement activities. (Total of all participants in this column are reported as a separate indicator in CEDARS.)	Method(s) of promoting activity (e.g. social media, website, poster, phone calls).	List any additional context issues around scale of activities and outreach, and any other context related to quality and success of outreach. You may leave this blank.
Focus Groups	3	CBOs	35	Social media, email	Focus groups were publicized through CBO networks. Focus group members were compensated for their time and childcare was provided.
Community pop-up event	1	General public	15	Publicized in community newsletter	Poor weather led to low attendance at event
Survey	1	Program participants	800	Social media, email blast, website	



List of Key Themes	Equity Segment Program Name
List out key theme by feedback	Equity Segment Program Name or Sector Level
Need to add Mandarin language access in all outreach materials	Across Portfolio
Moderate income homeowners do not have access to incentives	Low-Income SF Homeowner Program
Low-income participants have difficulty and confusion around filling out incentive requests	Low-Income MF Renter Program, Low-Income SF Homeowner Program
Small Business participants indicate they are very happy with the program	Small Business Equipment Replacement Program

Equity Segment Program Name	Engagement Feedback Themes	Equity Segment Program Changes	Reason for Change
Equity Segment Program Name	List out key theme by feedback	List out any changes made to the program. If no changes were made, list "none."	Provide a brief description of why changes were made. If no changes were made, describe why no changes were made.
Overall Equity Segment	Need to add Mandarin language access in all outreach materials	All print outreach materials will include Mandarin translations	Need for increased language accessibility to meet Mandarin-speaking populations of equity program
Low-Income Single Family Program	Moderate income homeowners do not have access to incentives	Increase eligibility for homeowners with moderate incomes;	Need to reach underserved moderate income population who has difficulty making home upgrades with existing low-income single family incentives
Low-Income Single Family Program	Low-income participants have a difficulty and confusion around filling out incentive requests	Increase technical assistance	Need for additional support for program participation and uptake of incentives
Low-Income MF Renter Program	Low-income participants have a difficulty and confusion around filling out incentive requests	Increase technical assistance	Need for additional support for program participation and uptake of incentives
Small Business Equipment Replacement Program	Program participants are interested in program	None	No changes, as high participation and satisfaction indicate program is successful
Small Business Equipment Replacement Program	Program is easy to participate in	None	No changes, as high participation and satisfaction indicate program is successful

**Tri-County Regional Energy Network (3C-REN)**  
**Advice Letter 14-E/13-G**  
**2024-2027 Mid-Cycle Advice Letter**  
**Attachment C – PA Response to Recommendations**

CALMAC ID	Study	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	PA Response		Proposed RTR Implementation				
				Choose:	Examples:	Next Steps:	Timeline:	Status:	Notes:	Impacted Programs:
			If incorrect, please indicate and redirect in notes.	Accepted, Rejected, or Other	Describe specific program change, give reason for rejection, or indicate that it's under further review.	Next Steps: For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines. For each rejected recommendation, document the reason provided for rejection. Outline any potential follow-up actions or considerations for the future.	Timeline: Set deadlines for the completion of each action. Include a start date and end date when possible.	Status: Track the status of each action item (e.g., Not Started, In Progress, Completed).	Notes: Add notes for any additional information or updates.	Impacted Programs: Identify which programs (program IDs) would be impacted by the action items.
<b>Overall conclusions and recommendations</b>						<b>Proposed Next Steps</b>				
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	3C-REN's programs are designed to advance CPUC policies and California's broader decarbonization goals by creating equitable pathways to energy savings and electrification. The Multifamily Program includes incentive adders that encourage deeper savings measures, such as electrification. The Single-Family and Commercial Programs offer NMEC pathways that apply incentive multipliers for hard-to-reach participants and electrification projects. All three programs are designed as equity programs, prioritizing underserved and hard-to-reach customers to ensure that benefits extend to low-income households, disadvantaged communities, and environmental justice areas. 3C-REN continues to explore enhancements to its incentive structures, including equity-focused multipliers beyond the existing hard-to-reach framework, to further support electrification pathways. To strengthen equitable access, 3C-REN has cultivated partnerships with trusted community-based organizations and local messengers, such as the Santa Barbara Promotora Network, Green Business Programs, and United Domestic Workers, to ensure offerings reach those who need them most. 3C-REN also sponsors and participates in regional events that engage vulnerable communities, including those organized by the Central Coast Alliance United for a Sustainable Economy (CAUSE), a key local partner serving workers, immigrants, and communities of color.	Continue implementing current program offerings while exploring additional opportunities to strengthen electrification pathways for low-income participants, disadvantaged communities (DACs), and environmental justice areas.	The timeline aligns with the MCAL, and any additional opportunities to strengthen the electrification pathway will be incorporated into the Business Plan, as appropriate.	In Progress		TCR-Com-001; TCR-Res-002; TCR-Res-003
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	Accepted	3C-REN leads quarterly multifamily calls with all IOUs in our region with a standing agenda item to share successes and best practices during coordination meetings.	Continue to lead quarterly multifamily calls, including have standing agenda items to share successes and best practices during coordination meetings.	Timeline aligns with MCAL as coordination meetings have already been implemented and will continue on a bimonthly basis.	Completed		TCR-Res-002
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	3C-REN maintains close coordination with utilities and other stakeholders implementing programs within the same sectors. This includes leading recurring Portfolio Administrator Sector Coordination (PASC) meetings; participating in quarterly coordination calls with the IOUs, SCE, and JCE; convening regular coordination meetings with CC-LEAP (funded by PG&E). A standing agenda item for these meetings is the exchange of best practices and lessons learned, as well as the identification of opportunities for program and incentive alignment. 3C-REN will continue to explore ways to strengthen and expand these collaborative practices going forward.	Ongoing coordination meetings with IOUs and other stakeholders are well established and will continue at their regular cadence. While standing agenda items already exist to facilitate the sharing of best practices and lessons learned, 3C-REN will reinforce the importance of exchanging experiences and perspectives during these discussions in upcoming meetings, emphasizing alignment with recommendations from the PY 2022 Regional Energy Networks Impact Study.	Ongoing bimonthly, quarterly meetings.	Completed		TCR-Com-001; TCR-Res-002; TCR-Res-003; TCR-WET-001; TCR-CS-001; TCR-AG-001; TCR-CC-001
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 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.	All RENs, MCE	Accepted	3C-REN will continue to attend all coordination meetings as defined in JCMs, even when third-party implementers manage the programs. 3C-REN has been an active participant in coordination activities including sector-specific meetings as outlined in SoCalREN's JCM, quarterly IOU calls as outlined in 3C-REN's JCM, and additional coordination efforts such as quarterly multifamily calls. These meetings have been valuable for improving coordination with other PAs. Action items identified through these meetings are documented in meeting minutes and tracked to ensure that the responsible PA follows through, with records made available to future evaluators. 3C-REN will consider adding a RACI table, where applicable, to its program implementation plans.	Where appropriate, update PIP documentation with RACI tables of coordination meetings needed to be attended by each program.	Update PIP documentation by Business Plan Application	In Progress		TCR-Com-001; TCR-Res-002; TCR-Res-003; TCR-WET-001; TCR-CS-001; TCR-AG-001; TCR-CC-001
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	Accepted	A central objective of 3C-REN's residential programs is to direct the majority of incentives toward hard-to-reach (HTR) customers. To achieve this, 3C-REN offers enhanced incentives for HTR participants and provides additional support for fuel-substitution technologies that often face higher upfront costs. Dedicated HTR budget allocations and incentive multipliers help ensure that underserved households can access energy upgrades that might otherwise remain unaffordable. 3C-REN continually monitors participation trends and will adjust program design and incentive structures as needed to improve accessibility and reach. Additionally, 3C-REN coordinates and stacks incentives with complementary funding sources, such as JCE, SOMAH, and TECH, to expand the impact of its offerings and maximize benefits for priority communities.	Continue implementing current program offerings while exploring additional opportunities to reach low-income participants, disadvantaged communities (DACs), and environmental justice areas.	The timeline aligns with the MCAL, and any additional opportunities to reach low-income participants, disadvantaged communities (DACs), and environmental justice areas will be incorporated into the Business Plan, as appropriate.	In Progress		TCR-Res-003

**Tri-County Regional Energy Network (3C-REN)**  
**Advice Letter 14-E/13-G**  
**2024-2027 Mid-Cycle Advice Letter**  
**Attachment D – CEDARS Filing Confirmation**

## CEDARS FILING SUBMISSION RECEIPT

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

PA: Tri-county Regional Energy Network (TCR)

Budget Filing Year: 2026

Submitted: 10:07 on 04 Nov 2025

By: Casey Connorton

Advice Letter Number: 14-E/13-G

### \* Portfolio Budget Filing Summary \*

- TRC: 0.2
- PAC: 0.33
- TRC (no admin): 0.41
- PAC (no admin): 2.52
- RIM: 0.5
- SCB: 0.29
- SCH: 0.29
- Budget: \$22,011,641.56
- TotalSystemBenefit: \$5,012,046.51
- ElecBen: \$468,668.08
- GasBen: \$7,831,183.26
- WaterEnergyBen: \$1,001.46
- OtherBen: \$0.00
- TRCCost: \$42,344,336.01
- PACCost: \$25,300,447.85
- RIMCost: \$34,861,606.22
- SCBCost: \$43,906,065.25
- SCHCost: \$44,062,187.98

### \* Programs Included in the Budget Filing \*

- TCR-Ag-001: Agriculture Technical Assistance
- TCR-CC-001: Energy Assurance Services (EAS)
- TCR-Com-001: Commercial Marketplace
- TCR-CS-001: Codes & Standards

- TCR-CS-PortfolioSupport: Portfolio Admin - CS
- TCR-EMV-001: TCR EM&V;
- TCR-Equity-PortfolioSupport: Portfolio Admin - Equity
- TCR-IDSM-CS-003: IDSM - Codes & Standards
- TCR-IDSM-Equity-001: IDSM - Equity
- TCR-IDSM-MarketSupport-002: IDSM - Market Support
- TCR-MS-PortfolioSupport: Portfolio Admin - Market Support
- TCR-Res-002: Multifamily
- TCR-Res-003: Single Family NMEC
- TCR-WET-001: Workforce Education & Training

## CEDARS FILING SUBMISSION RECEIPT

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

PA: Tri-county Regional Energy Network (TCR)

Budget Filing Year: 2027

Submitted: 10:07 on 04 Nov 2025

By: Casey Connorton

Advice Letter Number: 14-E/13-G

### \* Portfolio Budget Filing Summary \*

- TRC: 0.2
- PAC: 0.34
- TRC (no admin): 0.41
- PAC (no admin): 2.53
- RIM: 0.51
- SCB: 0.3
- SCH: 0.3
- Budget: \$23,116,940.93
- TotalSystemBenefit: \$5,525,459.53
- ElecBen: \$493,363.23
- GasBen: \$8,636,400.87
- WaterEnergyBen: \$986.87
- OtherBen: \$0.00
- TRCCost: \$45,249,804.14
- PACCost: \$26,722,232.37
- RIMCost: \$36,916,163.54
- SCBCost: \$46,954,724.85
- SCHCost: \$47,100,401.82

### \* Programs Included in the Budget Filing \*

- TCR-Ag-001: Agriculture Technical Assistance
- TCR-CC-001: Energy Assurance Services (EAS)
- TCR-Com-001: Commercial Marketplace
- TCR-CS-001: Codes & Standards



- TCR-CS-PortfolioSupport: Portfolio Admin - CS
- TCR-EMV-001: TCR EM&V;
- TCR-Equity-PortfolioSupport: Portfolio Admin - Equity
- TCR-IDSM-CS-003: IDSM - Codes & Standards
- TCR-IDSM-Equity-001: IDSM - Equity
- TCR-IDSM-MarketSupport-002: IDSM - Market Support
- TCR-MS-PortfolioSupport: Portfolio Admin - Market Support
- TCR-Res-002: Multifamily
- TCR-Res-003: Single Family NMEC
- TCR-WET-001: Workforce Education & Training

**Tri-County Regional Energy Network (3C-REN)**  
**Advice Letter 14-E –/13-G**  
**2024-2027 Mid-Cycle Advice Letter**  
**Attachment E – PY2023-2024 CEDARS Correction Memo**



California Public Utilities Commission  
Energy Division  
505 Van Ness Avenue  
San Francisco, CA 94102

November 4, 2025  
Mid Cycle Advice Letter (MCAL) Submittal Attachment  
Re: Tri-County Regional Energy Network (3C-REN) Annual Report Correction Memorandum

To Amy Reardon and CEDARS development:

On October 3, 2025, an accounting error was identified impacting Tri-County Regional Energy Network's (3C-REN's) Annual Report submissions for Program Years (PY) 2023 and 2024. The error was in the program cost reporting for the **TCR-Res-002: Multifamily program** and impacts program costs submitted and related cost effectiveness outputs. A second error was identified in the 2024 Annual Report in the budget year from which **TCR-EMV-001: EM&V - PA** expenditures were reported. The plan for corrections is detailed in this memorandum.

Energy Division (ED) and CEDARS development were informed about errors present on October 17, 2025, and agreed on a plan to correct in Q1 2026 with the following steps.

- Schedule time with CEDARS development to complete the corrections. – **Completed 10/17/25**
- Send CEDARS development text to display on the 3C-REN CEDARS dashboard with the correction completed timeline of Q1 2026. – **Completed 10/24/2025**
- Share the description of the corrections with the Investor Owned Utilities (IOUs) PG&E, SCE and SCG for them to include in their respective MCALs in alignment with 3C-REN's MCAL. – **Completed 10/29/2025**
- Update the memo first sent to ED and CEDARS development on October 14, 2025, to reflect impact on IOU portfolios when corrections are made. – **Completed 11/4/2025**
- Update MCAL template and narrative discrepancy section to align with corrections and attach updated memo to MCAL submission. – **Completed 11/4/2025**

- Update Annual Report narrative and spreadsheet to align with corrections in coordination with the CEDARS updates in Q1 2026. – **To be Completed in Q1 2026**

**2023 Annual Report: Error and Corrections**

The error discovered in 3C-REN's *TCR-Res-002: Multifamily* program resulted in an underreporting of program cost. Full details of the corrections to be made are in Tables 1-4. Table 1 shows the 2023 reported rebate and incentive (UserInputIncentive in CEDARS program costs table) value before and after the correction, from \$280,850 to \$411,887.

**Table 1. TCR-Res-002: Multifamily PY 2023  
Reported Incentives vs. Correct Values**

Reported UserInputIncentive	Difference UserInputIncentive	Correct UserInputIncentive
<del>\$280,850.00</del>	+\$131,037.00	<b>\$411,887.00</b>

Table 2 details the reported and correct program costs table details in CEDARS for PY 2023, including the new UserInputIncentive value.

**Table 2. TCR-Res-002: Multifamily PY 2023  
Reported Program Cost Input vs. Correct Values**

Program Cost Input	Reported	Correct
PrgID	TCR-Res-002	TCR-Res-002
PrgYear	2023	2023
Claim Year Quarter	2023Q4	2023Q4
AdminCostsOverheadAndGA	\$29,281.84	\$29,281.84
AdminCostsOther	\$0.00	\$0.00
MarketingOutreach	\$22,014.05	\$22,014.05
DIActivity	\$1,140,644.60	\$1,140,644.60
DIInstallation	\$0.00	\$0.00
DIHardwareAndMaterials	\$0.00	\$0.00
DIRebateAndInspection	\$0.00	\$0.00
EMV	\$0.00	\$0.00
UserInputIncentive	<del>\$280,850.00</del>	<b>\$411,887.00</b>
OnBillFinancing	\$0.00	\$0.00
CostsRecoveredFromOtherSources	\$0.00	\$0.00

**2024 Annual Report: Error and Corrections**

Two errors were made in the 2024 Annual Report, the first is in 3C-REN's *TCR-Res-002: Multifamily* program resulting in an underreporting of program cost and related cost effectiveness outputs, and the second was in the reporting of *TCR-EMV-001: EM&V – PA* expenditures.

Table 3 details the 2024 reported and correct rebate and incentive value from \$834,702.15 to \$1,507,958.15.

**Table 3. TCR-Res-002: Multifamily PY 2024  
Reported Incentives vs. Correct Values**

Reported UserInputIncentive	Difference UserInputIncentive	Correct UserInputIncentive
<del>\$834,702.15</del>	+\$673,256.00	\$1,507,958.15

Table 4 details the reported and correct program costs table in CEDARS for PY 2024, including the new UserInputIncentive value.

**Table 4. TCR-Res-002: Multifamily PY 2024  
Program Cost Input Reported vs. Correct Values**

Program Cost Input	Reported	Correct
PrgID	TCR-Res-002	TCR-Res-002
PrgYear	2024	2024
Claim Year Quarter	2024Q4	2024Q4
AdminCostsOverheadAndGA	\$10,738.16	\$10,738.16
AdminCostsOther	\$0.00	\$0.00
MarketingOutreach	\$29,887.79	\$29,887.79
DIActivity	\$1,304,271.26	\$1,304,271.26
DIInstallation	\$0.00	\$0.00
DIHardwareAndMaterials	\$0.00	\$0.00
DIRebateAndInspection	\$0.00	\$0.00
EMV	\$0.00	\$0.00
UserInputIncentive	<del>\$834,702.15</del>	<b>\$1,507,958.15</b>
OnBillFinancing	\$0.00	\$0.00
CostsRecoveredFromOtherSources	\$0.00	\$0.00

3C-REN incorrectly reported the *TCR-EMV-001: EM&V – PA* expenditures for 2024 in *T-3 Programs & Expenditures* table of the Annual Report spreadsheet template by including it under the “2024 Expenditures from pre-2024 budgets” rather than the “2024 Expenditures from 2024 Budget” column. Table 5 details the reported and correct *TCR-EMV-001: EM&V – PA* expenditures.

**Table 5. TCR-EMV-001 EM&V – PA Expenditures Reported Budget Year vs. Correct**

PA / SW	Lead PA	Program ID	Program Name	EM&V	
				2024 Expenditures from pre-2024 budgets	2024 Expenditures from 2024 Budget
TCR	3C-REN	TCR-EMV-001	EM&V - PA	<del>\$50,707.01</del>	+\$50,707.01

3C-REN will complete changes to the annual report spreadsheet to reflect the correction to EM&V budget year. However, as the total expenditure remains correct in claim filings, no changes will be made to CEDARS reporting. The edits will be made simultaneously with the updates for the TCR-RES-002 program cost correction.

**Impact to IOU Portfolios After Corrections**

Table 6 summarizes the additional reported expenditures to 3C-REN’s Portfolio after the corrections.

**Table 6. Additional 3C-REN Portfolio Expenditures Per Year**

Year	Additional Reported Expenditures After Corrections
2023	+\$131,037.00
2024	+\$673,256.00

Table 7 details the additional expenditures by IOU after 3C-REN completes corrections by year and combined for the two years.

**Table 7. Impact to IOU Portfolios After Corrections**

	Program Year 2023			Program Year 2024		
	PG&E	SCE	SoCalGas	PG&E	SCE	SoCalGas
	45.6%	34.4%	20.0%	45.6%	34.4%	20.0%
Total Impact Per IOU Per Year	\$59,753	\$45,077	\$26,207	\$307,005	\$231,600	\$134,651
<b>Cumulative Impact By IOU</b>				<b>\$366,758</b>	<b>\$276,677</b>	<b>\$160,859</b>

If there are additional details required for this correction request, please do not hesitate to contact me at [alejandra.tellez@venturacounty.gov](mailto:alejandra.tellez@venturacounty.gov).

Sincerely,

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 Director -Ventura County  
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