

# Program Administrator CAEECC Semi-Annual Report Out

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# Achievement and Forecast Summary



	2023 Confirmed Claim Summary Total System Benefit** (\$)	Q1 2024		Q2 2024		Q1 + Q2 2024	
		Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
		<b>Resource Acquisition</b>	\$36,763,335	\$9,305,838	\$8,005,932	\$5,806,841	\$5,556,705
<b>Market Support</b>	\$4,393	\$11,921	\$1,057,989	\$3,662	\$2,481,083	\$15,583	\$3,539,072
<b>Equity</b>	\$0	\$0	\$214,237	\$0	\$298,167	\$0	\$512,404
<b>EM&amp;V</b>	\$0	NA	\$80,386	NA	\$84,369	NA	\$164,755
<b>Codes and Standards</b>	\$624,873,949	\$61,797,625	\$879,781	\$61,248,365	\$852,274	\$123,128,262	\$1,732,055
<b>TOTAL Portfolio</b>	<b>\$661,641,677</b>	<b>\$71,115,385</b>	<b>\$10,238,325</b>	<b>\$67,058,868</b>	<b>\$9,272,598</b>	<b>\$138,174,253</b>	<b>\$19,510,923</b>

2024 Forecast Estimate	
	Total PA Portfolio
	Total System Benefit (\$)
<b>Q1 and Q2 Claims</b>	\$15,128,262
<b>Q3 and Q4 Forecast*</b>	\$35,761,180
<b>Total TSB Forecast Attainment</b>	<b>\$47,599,496</b>
<b>TSB Goal</b>	\$45,004,630
<b>TSB Percent of Goal</b>	<b>%106</b>
<b>Total Expenditure</b>	<b>\$57,801,295</b>

Data Pulled from CEDARS Quarterly Claims Segment Dashboard. Excludes ESA Data

Excludes ESA  
 Q1 and Q2 Claims from CEDARs Quarterly Claims Goal Attainment Dashboard; **w/o C&S\*\*\***  
 \*Q3 and Q4 from internal EOY forecast  
 \*\*TSB was not a PA goal in 2023 and used a different avoided cost calculator version than 2024.

# SDG&E Claims Summary by Sector



Claims Summary By Sector								
		Q1 + Q2					Q1+Q2 Total	
		Agricultural	Commercial	Cross-Cutting	Industrial	Public		Residential
TSB		140,585	8,563,858	123,045,991	0	18,903	6,404,916	<b>138,174,253</b>
GHG (w/ C&S)		94	2,841	48,471	0	6	9,718	<b>61,130</b>
kWh	Annual Gross	0	-2,107,701	424,020,509	0	24,719	12,069,588	<b>434,007,115</b>
	Annual Net	0	-2,597,523	124,995,136	0	19,406	12,698,530	<b>135,115,549</b>
	Lifecycle Net	0	-26,491,815	1,677,505,984	0	287,214	9,880,510	<b>1,661,181,894</b>
Therms	Annual Gross	28,550	930,358	2,408,752	0	0	1,188,622	<b>4,556,284</b>
	Annual Net	19,414	765,724	1,253,760	0	0	1,103,362	<b>3,142,260</b>
	Lifecycle Net	97,070	8,367,424	18,347,936	0	0	3,153,253	<b>29,965,684</b>
kW	Annual Gross	0	205.55	81,697.06	0	13.19	179.44	<b>82,095.24</b>
	Annual Net	0	135.53	25,534.31	0	12.03	161.41	<b>25,843.28</b>

# Third Party Vendor Support and Implementation



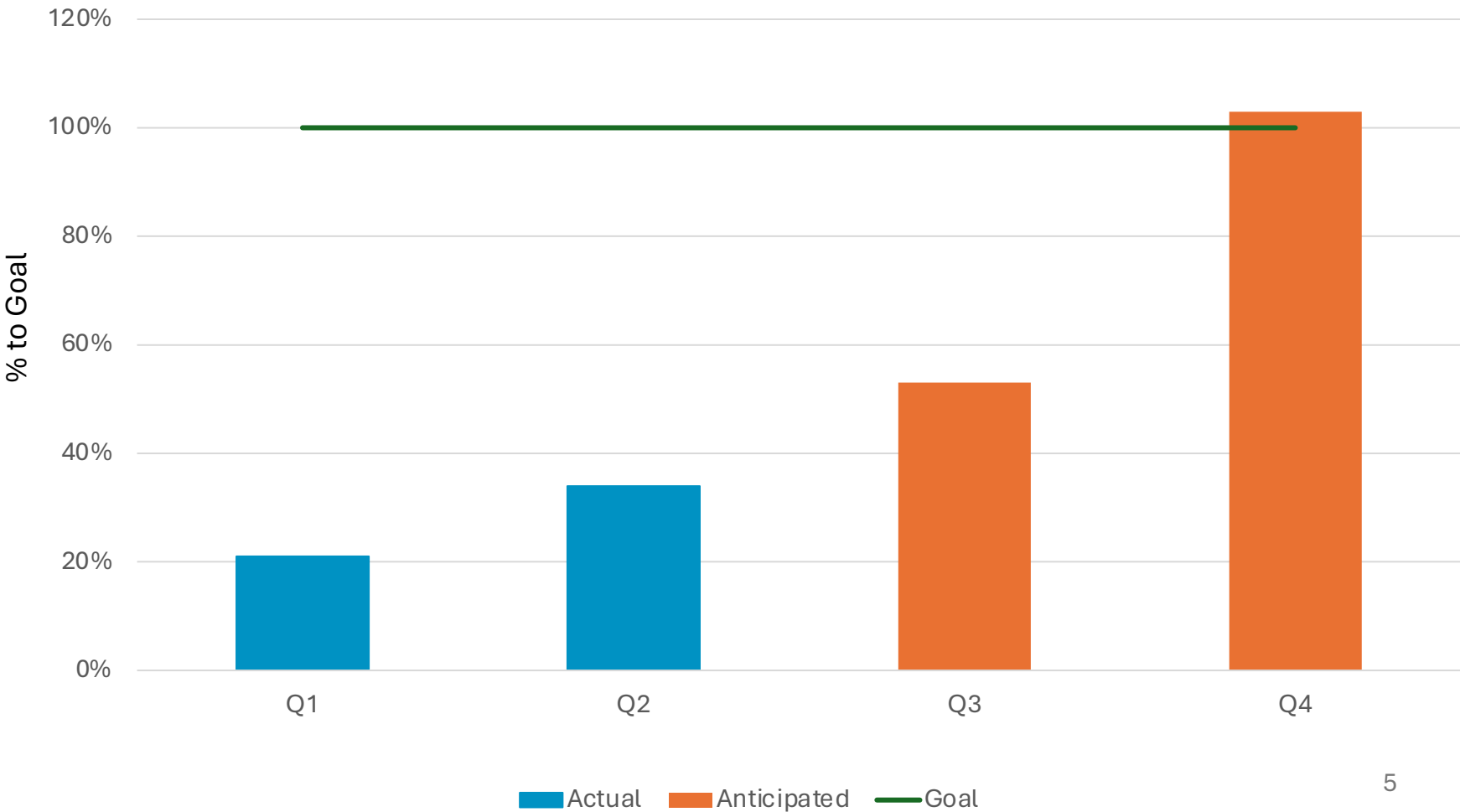
Vendor Support By Sector for New and Active Programs							
	Q1 + Q2						EM&V
	Agricultural	Commercial	Cross-Cutting	Industrial	Public	Residential	
PA Core Program Support Vendor(s)		Synergy					Demand Side Analytics
		Mendota				Mendota	KW Engineering
							Yinsight
IOU Third Party Prime Contractor(s)	Cascade Energy	CLEAResult Consulting, Inc.	Richard Heath & Associates	Cascade Energy	TRC Solutions	CLEAResult Consulting, Inc.	
		TRC Solutions				Synergy	
		Bidgely				Bidgely	
		Resource Innovations				Global Energy Solutions	
						Frontier Energy	

Includes: All REN Program related vendors, CCA Program Related Vendors, and IOU Core Program vendors.



- TSB forecasts primarily contributed to Commercial and Residential sector programs:
  - Large Commercial
  - Multi-Family
  - Res Behavior
- Industrial program forecasts trending late in the year
- Agricultural smallest sector
- SW vs. Regional Portfolio Make-up

Quarterly Progress towards TSB Goals - Resource Acquisition



### **SDG&E intends on filing an off-cycle Energy Efficiency Strategic & Business Plan Application in Q1 2025**

SDG&E's requested relief is expected to consist of the following:

- Request for partial withdrawal from Energy Efficiency Program Administration; specifically, relief from administering regional Energy Efficiency programs
- SDG&E continues to support San Diego Regional Energy Network and will continue to be a fiscal agent
- SDG&E will still pay its fair share of Statewide programs enabling SDG&E customers to have access to Statewide Energy Efficiency programs

Please respond to the following questions:

1. Was the recent Segmentation Justification exercise helpful to clarify any aspect of your portfolio and its operation? If so, please share relevant conclusions.

**The recent segmentation justification exercise was not helpful as much of this information is already included in either CEDARS or Annual Reports, where indicators and metrics are reported. This exercise unnecessarily constrained resources.**

2. Would you recommend any aspect of it be repeated? If so, with what regularity or with what trigger?

**SDG&E does not recommend that this exercise be repeated.**

Was the recent Program Overlap Advice Letter helpful to clarify any aspect of your portfolio and its operation? If so, please share relevant conclusions.

**SDG&E was a participant in the joint advice letter however, due to the timing of the approval of SDREN, SDG&E and SDREN programs were not compared as were the other PAs programs. However, with the approval of a REN in the SDG&E territory, SDG&E recognizes that effective coordination and communication among PAs is essential for identifying program overlap. SDG&E and SDREN have already initiated this collaborative effort.**

3. Would you recommend any aspect of it be repeated? If so, with what regularity or with what trigger?

**SDG&E does not recommend future joint Program Overlap advice letters. The Joint PAs plan to continue further analysis to comprehensively capture the scope of program overlap risk.**

# Current Pipeline By Sector



End of Year Projections for Projects Associated with 2024 Claims								
		Q3-Q4 Pipeline					Total Q3-Q4 Projections	
		Agricultural	Commercial	Cross-Cutting	Industrial	Public		Residential
TSB		555,942	12,169,132	0	3,521,662	2,538,626	13,685,873	32,471,235
GHG								
kWh	Annual Gross							
	Annual Net	0	5,520,774	0	4,264,997	615,636	24,219,763	34,621,170
	Lifecycle Net							
Therms	Annual Gross							
	Annual Net	71,369	544,569	0	347,133	0	1,051,398	2,014,469
	Lifecycle Net							
kW	Annual Gross							
	Annual Net	0	815	0	549	202	10,163	11,729
Expenditures		814,504	13,314,252	6,560,506	2,872,406	2,045,080	12,683,624	38,290,372