



Full CAEECC Quarterly Meeting #42 Part II

Hosted by the California Energy Efficiency Coordinating Committee (CAEECC)
Virtually on Zoom

Meeting Date: 5/15/24

Last updated May 15, 2024

Welcome!

● *Portfolio Performance Report Review Agenda*

● *CAEECC Agenda*

30 min
lunch

1:50
break

3:25
break

| | | | |
|----|-------|-------------------------------------|---|
| 00 | 9:00 | Welcome and Introduction | <i>Agenda, Meeting Goals and Participation</i> |
| 01 | 9:05 | SoCal Performance Review I | <i>SCE + SoCalGas</i> |
| 02 | 11:45 | SoCal Performance Review II | <i>SDG&E + SoCalREN</i> |
| 03 | 1:30 | Wrap Up Performance Review | <i>Discussion and next steps</i> |
| 04 | 2:00 | CAEECC Meeting Commences | <i>Housekeeping and Agenda</i> |
| 05 | 2:05 | Evolving CAEECC WG Shareouts | <i>ECWG Members present overviews of their Reflection Submissions + Q&A</i> |
| 06 | 3:35 | CAEECC Business Items | <i>Membership Survey Results + Co-Chair Proposal for Next Steps on CAEECC Scope/Purpose</i> |
| 07 | 4:50 | CAEECC Agenda Wrap Up | <i>Evaluations and Next Steps</i> |

5:00pm - Meeting Adjourns

00



Introductions

Objectives + Meeting Goals

How to Participate



Welcome!

As folks filter in, please
drop your **Name**,
Pronouns, and
Organization /
Representation in the
chat.



Opening Remarks from Energy Division



Annual 2023 Portfolio Performance Report Review Goals

1

Meeting Goal #1

Identify challenges & opportunities

2

Meeting Goal #2

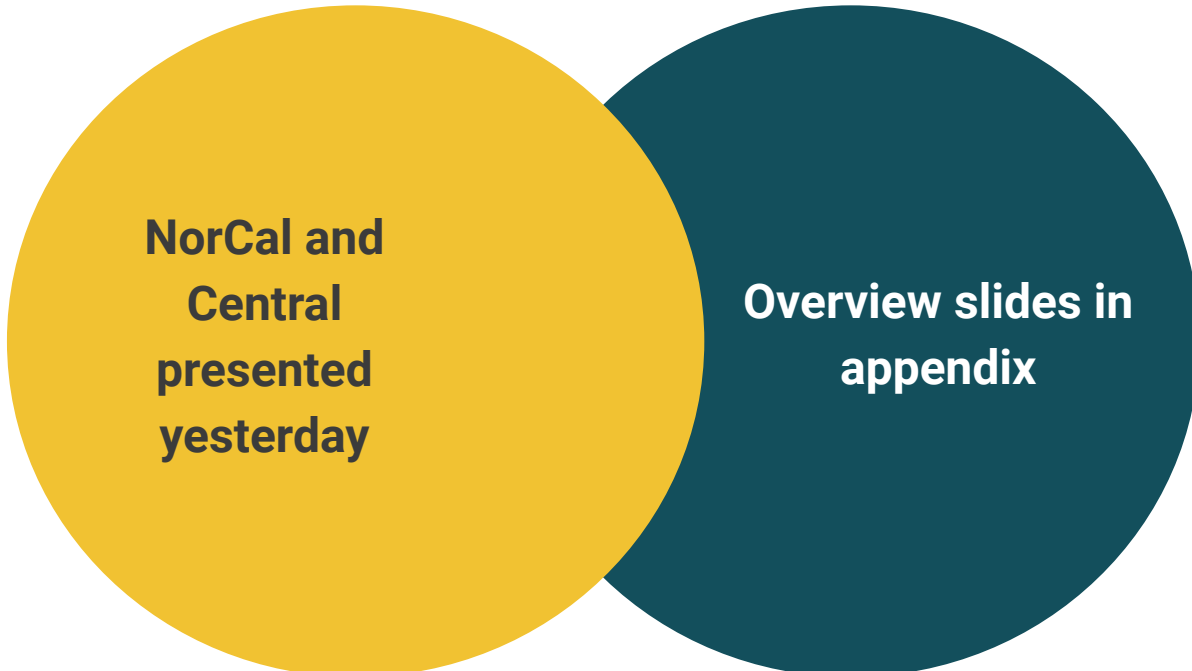
Identify who might problem solve (CAEECC, Portfolio Administrator (PA), or other) in a timely fashion

3

Meeting Goal #3

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

Quick Recap



**NorCal and
Central
presented
yesterday**

**Overview slides in
appendix**

CAEECC Agenda Goals

1

Meeting Goal #1

Participate in shareouts by Evolving CAEECC Working Group Members on their reflections and engage in clarifying questions for Full CAEECC Members

2

Meeting Goal #2

Discuss and seek agreement on co-chair next steps proposal for CAEECC 4.0

3

Meeting Goal #3

Present CAEECC Membership Process survey results and next steps

00: Introductions

How to Participate in Portfolio Performance Report Review Sessions



Format for each Program Administrator

- 1) Program Administrator (PA) Presentation
- 2) Questions & Input
 - a) First by CAEECC Members (verbally)
 - b) Then by the Public (via Slido)

Questions & Input submitted via Slido but not answered will be included in the meeting summary, and PAs will be asked to respond to as many as possible (due to time limitations we may not get to all questions & input during the meeting)



Everyone:

- **Closed captioning** is available
- Share your **video** if possible
- **Rename** your Participant Name to include your Representation & Pronouns
- **Mute** yourself when you're not speaking.

CAEECC Members Participation:

- **Rename** to “CAEECC - [Name], [Organization]”
- As usual, please **raise your hand** to enter the queue.
- If there are many folks with raised hands, please limit yourself to 1-2 questions. We'll then pass on the mic and if there's time, we'll return to your remaining questions.
- *If CAEECC Members have more questions than time allows, please use the Public Slido Link to uplift your remaining questions (see next slide). Please enter your name when using Slido.*



Non-CAEECC Member Participation:

- **Participate in Questions & Input via [Slido](#):**

- Go to [Slido.com](#) and enter code #7738434, Select “May 15”
- Use Q&A for Questions (character limit is 300)
- *Use Zoom Chat for Input beyond the character limit*

- Questions & Input can be added **at any point** during the PA presentation.

- Please **tag** your Questions according to the PA Presenter (i.e. PG&E or SoCalREN), so we can address your questions accordingly.

- Questions can be **upvoted** to uplift common questions.

- **Due to limited time, only a few questions may be addressed during the meeting.** The Facilitator will use upvotes and facilitator discretion in selecting questions. All Slido questions that weren't answered in the Questions & Input segments will be included in the Meeting Summary. PAs will be asked to respond in the Meeting Summary.

Zoom Webinar & Attendee Participation

Non-CAEECC Members are *Attendees* in this Zoom Webinar except *Presenters*

Messaging:

- Cannot Direct Message other Attendees
- Can chat Everyone
- Can Direct Message a Host/Panelist

Member Transparency

- Lead CAEECC Members renamed with “C - [Name], [Organization]”

Voter Transparency:

- Facilitators will go one-by-one through CAEECC Roster for “Yays” and “Nays”

Due to time limitations, we may not be able to answer all questions.

Unanswered questions will be noted in the Meeting Summary and will be answered offline by 5/23.

Illustrative Questions

From *CAEECC 2020 Consensus EE Filing Process Proposal Motion* (available on [Meeting Webpage](#))

1. Given all the technical and policy aspects, what is the strategic vision of the PA moving forward?
2. How can we solve for upcoming major technical changes? What are viable options to make up savings in a cost-effective manner? What additional items are related that need to be resolved?
3. What are the new state or CPUC directions that will modify how programs are designed and/or implemented?
4. If there are technical issues, how could we bring in the [California Technical Forum](#)?



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01

SoCal Performance Review I

Session Goal:

SCE

SoCalGas

01: SoCal Performance Review I

SCE

Portfolio Performance Report Review

California Energy Efficiency Coordinating Committee (CAEECC)

Southern California Edison

Presenter: Nicole Di Jerlando, Energy Efficiency-Performance and Resource Management

May 15, 2024

Summary of Core Metrics (\$ in millions)

| Includes Codes & Standard | 2023 |
|---------------------------|---------|
| Budget | \$369 |
| TSB | \$1,512 |
| % of kWh Goal | 98% |
| % of kW Goal | 94% |

| Excludes Codes & Standard | 2023 |
|---------------------------|-------|
| Budget | \$352 |
| TSB | \$68 |
| % of kWh Goal | 47% |
| % of kW Goal | 28% |

| Segment | 2023 | | |
|-----------------------------|-------------------------|----------------|------------------------|
| | Budget Authorized (\$M) | % Budget Spent | TSB (\$M) ¹ |
| Resource Acquisition | \$292 | 33% | \$68 |
| Equity | \$13 | 9% | \$0 |
| Market Support ² | \$31 | 81% | \$0 |
| EM&V | \$16 | 44% | \$0 |
| C&S | \$17 | 119% | \$1,444 |
| TOTAL Portfolio | \$369 | 40% | \$1,512 |
| (Administration) | \$35 | N/A | N/A |

1 Pursuant to D.21-05-031 Ordering Paragraph 1, beginning in program year 2022 TSB will be reported by each program administrator and will replace energy and peak demand savings goals starting in program year 2024.

2 Market Support TSB totaled \$10,830. Zeroed out due to rounding.

| 2023 Cost Effectiveness | | | |
|-------------------------|------|-------|------|
| Portfolio (w/ C&S) | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 2.90 | 2.61 | 5.75 | 9.29 |
| Portfolio (w/o C&S) | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 1.03 | 0.52 | 1.13 | 0.63 |
| Resource Acquisition | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 1.16 | 0.61 | 1.28 | 0.78 |

Filed = 2022-2023 Biennial Budget Advice Letter

EOY = End of Year 2023 Annual Report

Total Portfolio Impacts (\$ in Millions)

| Includes Codes & Standards | 2023 |
|-------------------------------|--------|
| \$/kWh | \$0.20 |
| \$/therm | \$0.00 |

| Excludes Codes & Standard | 2023 |
|------------------------------|--------|
| \$/kWh | \$0.22 |
| \$/therm | \$0.00 |

| 2023 | |
|------------------------|------------|
| Net GWh Savings | 209 |
| Agricultural | 1 |
| Commercial | 82 |
| Public | 1 |
| Residential | 100 |
| Industrial | 25 |
| Cross-Cutting | 0.43 |
| Net MW Savings | 19 |
| Agricultural | 0 |
| Commercial | 2 |
| Public | 1 |
| Residential | 13 |
| Industrial | 3 |
| Cros-Cutting | 0.05 |

| 2023 | |
|--------------------------|---------------|
| Net Therm Savings | 0 |
| Agricultural | 0 |
| Commercial | 0 |
| Public | 0 |
| Residential | 0 |
| Industrial | 0 |
| Cross-Cutting | 0 |
| TSB (\$) | \$67.8 |
| Agricultural | \$0.8 |
| Commercial | \$37.4 |
| Public | \$0.8 |
| Residential | \$17.3 |
| Industrial | \$11.2 |
| Cross-Cutting | \$0.3 |

| 2023 | |
|-------------------------------------|----------------|
| GHG (MT CO₂e) | 378,140 |
| Agricultural | 208 |
| Commercial | 341,344 |
| Public | 0 |
| Residential | 30,243 |
| Industrial | 6,345 |
| Cross-Cutting | 0 |

Sector by Sector Highlights, Challenges, and Lessons Learned

Agricultural Sector

SCE's Agriculture Sector Energy Efficiency (EE) program (ICF Agriculture Energy Efficiency Program (AgEE)) provides ways to help agricultural customers reduce their energy costs and usage, including technical support (facility audits, calculation and design assistance, and pump tests), and financial support through calculated and deemed incentives and rebates.

Highlights

- AgEE delivered approximately 800,000 (kWh)
 - Installations include variable frequency drives (VFDs) on agricultural well pumps and booster pumps, in addition to several larger, more efficient agricultural ventilation fan projects that utilize VSDs to further increase efficiency.

2024 Outlook

- AgEE is building relationships in the local agricultural community through partnership with several key trade allies.
- The program is expected to provide additional impactful projects upon approval and roll-out of the Indoor Horticulture deemed measure package.

Commercial Sector

SCE's Commercial sector EE programs offer technical support (e.g., facility audits, calculations, and design assistance) along with rebates and incentives to provide Demand Side Management (DSM) solutions, enabling commercial customers to save both energy and money.

Highlights

- Willdan Commercial EE program represents over 80% of the commercial sector and delivered approximately 67 GWh or 160% of the programs 2023 energy savings delivery goals.
 - Success is attributed to over 800 projects, 95% of which were Deemed measures for Refrigeration (14%), Lighting (5%), and Heat Pump Water Heaters (82%).
- Market Access Program (MAP) successfully completed over 140 installations in the commercial sector, including lighting retrofits and Energy Management Systems.

2024 Outlook

- SCE received approvals and commenced with activities to launch two programs in the commercial sector with planned savings for 2024.
 - Commercial Behavioral Program delivered by ICF to promote adoption of behavioral changes for small and midsize commercial customers.
 - Simplified Savings Program delivered by Resource Innovations offering energy education, bill analysis, free direct install measures and incentives for higher impact energy savings for small to medium commercial customers in Disadvantage Communities and/or who are considered Hard to Reach Customers.

Public Sector

SCE statewide and local public sector programs focus on public, government, state, water agencies, districts and school facilities with a whole facility Strategic Energy Management (SEM), and Behavioral, Retrocommissioning and Operational (BRO) approaches to energy savings and demand reduction.

Highlights

- Statewide Higher Education Efficiency Performance (HEEP) Program made progress in 2023 by enrolling several Community College Districts and UC/CSU campuses.
- Public Energy Performance (PEP) program successfully submitted 57 project applications in 2023 and continued to improve their processes to improve the quality of submissions.
- Statewide Water Infrastructure and System Efficiency Program (SW WISE) offers both custom and deemed measures delivering 3,790 (net kWh) in 2023.

2024 Outlook

- In 2024, the SW HEEP program plans to amplify its efforts on the SEM delivery channel.
- After a year of building relationships, improving internal processes, and conducting treasure hunts, the PEP program is poised to for significant growth when compared to 2023.
- Both SW HEEP and PEP have shifted towards an SEM model that will deliver greater savings and TSB.

Residential Sector

SCE's residential sector programs cater to homeowners, renters, multifamily property owners, and new construction builders. SCE collaborated with industry stakeholders, such as manufacturers, distributors, contractors, and governmental, educational, and housing organizations, to raise awareness of available offerings for residential customers.

Highlights

- Home Energy Advisor Program (HEA) delivered 90 GWh of SCE's residential sector energy savings.
- Residential Direct Install (DI) program completed over 7,000 installations of energy-efficient measures, such as Smart Thermostats, Brushless Fan Motors, Fan Controllers, and Duct Sealing, in the Single-Family and Multifamily sectors.
- Disadvantage Communities Marketing and Outreach Non-Resource Program developed plans to distribute 8,000 door hangers, conduct 30 outreach events, 204 media and radio advertisements and 400 energy advisements beginning in Q4 2023.
- Market Access Program (MAP) successfully completed over 6,000 residential installations consisting of Whole House Fans, LED Parabolic Aluminized Reflector (PAR) Lamps, and Electronically Commutated Motors (ECMs) for Central HVAC Condensers
- Enervee Marketplace delivered over 250 projects, all of which were deemed measures, in 2023, resulting in over 21,000 net kWh in savings.

2024 Outlook

- In 2024, the Residential DI and Comprehensive Manufactured Homes programs added new measures to promote additional customer enrollments.
- SCE received approvals and commenced with activities to launch new programs in the Residential sector with planned savings for 2024.

Industrial Sector

SCE's Industrial sector EE programs work with stakeholders to promote integrated energy management solutions to industrial end-use customers. The programs are designed to overcome the traditional market barriers to energy efficiency while also advancing distributed generation (DG) and demand response (DR) opportunities.

Highlights

- Strategic Energy Management program surpassed expectations in 2023, achieving net energy savings of approximately 23 GWh and demand reduction of 2.7 MW with a TRC of 1.91.
 - Industrial SEM program retained over 80% participation program wide compared to 2022 participant total including customers in a variety of industries.

2024 Outlook

- As program and sector exceeded expectations, in 2024 SCE plans to offer similarly structured SEM type programs in the third party industrial, commercial, and agricultural sectors.

Cross-Cutting Sector Highlights

Finance

- On-Bill Financing program (OBF) funded loans totaling over \$1.6 million, and SCE received over \$6 million in loan repayments.
- California Public Utilities Commission (CPUC) issued D.23-08-026 53 authorizing the expansion of OBF to finance clean energy technologies beyond energy efficiency.
- New Finance Offerings (NFO) provided credit enhancements for more than 285 GoGreen Home loans and three GoGreen Business loans totaling over \$6.3 million.

Emerging Technology (Statewide Electric Emerging Technologies Program – SWEETP)

- SWEETP supported progress toward the state's climate goals through housing characterization studies of single- and multifamily and manufactured housing in Hard to Reach (HTR) and Disadvantaged Communities (DACs) to identify gaps and opportunities toward electrification and assessing the viability of heat pumps using low-GWP refrigerant, including CO₂, and challenges against adoption of air-to-water heat pumps.

Emerging Technology

- legacy Emerging Technology Program (ETP), the IOU-led emerging technologies program, conducted laboratory evaluation of small wall-mounted heat pump water heaters (HPWH) suitable for low-demand, point-of-use needs in small residential occupancies

Cross-Cutting Sector Highlights

WE&T

- WE&T's collaborations with organizations such as Strategic Energy Innovations, Proteus Inc., and the California Restaurant Foundation expanded the reach and impact of energy education and workforce development programs.
 - Collaborations supported Climate Corps Fellowships, academic projects integrating energy concepts into curriculum, and hands-on training with commercial kitchen equipment, ultimately promoting clean energy adoption and sustainability.
- The comprehensive Fuel Substitution and Building Electrification curriculum, launched by WE&T in 2023, equipped participants with the knowledge and skills necessary to navigate the transition toward sustainable and decarbonized building operation.
 - 54 unique classes, covering topics such as building electrification fundamentals, agricultural electrification, heat pump water heating, and residential electrification for homeowners and contractors, empowering a wide range of professionals to effectively promote and implement clean energy solutions.

Code and Standards

- SCE administers three C&S subprograms (Compliance Improvement, Reach Codes, and Planning and Coordination) focused on efforts to increase compliance with existing C&S regulations to ensure energy savings are realized from new codes and standards, and support local governments that include reach codes as a climate strategy

Challenges and Lessons Learned

- SCE challenges in 2023 include but are not limited to:
 - Competing portfolio objectives of meeting cost effectiveness versus savings goal attainment
 - Changes to measure savings and eligibility
 - Limited control over how third party programs are designed, implemented and achieve savings delivery
- SCE is committed to learning from 2023 experiences and making the following adjustments
 - Establishing closer partnerships with contracted and future third parties
 - Modifying solicitations to lead to a broader more diversified base of contracted suppliers
 - Rapid release of solicitations in 2023 through future years

Program Updates and Collaboration

Energy for What's Ahead[®]



Program Openings & Closures

| Programs (Implementer) | Sector | Status |
|---|---------------|-----------------------|
| Disadvantaged Communities Marketing and Outreach (Global Energy Solutions) | Residential | Open - May 2023 |
| Non-Resource and Resource EE Residential Energy Advisor (CLEAResult Consulting, Inc.) | Residential | Open - July 2023 |
| Local Small/Medium Business Equity, Simplified Savings Program (Resource Innovations, Inc.) | Commercial | Open - September 2023 |
| Statewide Water Infrastructure & System Efficiency Program (Lincus) | Public | Open - January 2023 |
| Statewide Lighting Program (TRC Solutions) | Commercial | Closed - July 2023 |

Questions

Nicole Di Jerlando
Principal Manager
Southern California Edison
Nicole.DiJerlando@sce.com

Appendix

Energy for What's Ahead[®]



Budget Details

(\$ in Millions)

| 2023 Budget by Sector | Budget Authorized | Expenditure | % of Budget Spent | TRC Ratio | PAC Ratio | TSB | Net GWh** | Net MW |
|------------------------|-------------------|----------------|-------------------|-------------|-------------|----------------|--------------|------------|
| Residential | \$89.0 | \$25.7 | 29% | 0.68 | 0.69 | \$17.2 | 99.46 | 13.29 |
| Commercial | \$151.9 | \$65.3 | 43% | 0.56 | 0.68 | \$37.4 | 82.31 | 2.20 |
| Public | \$12.7 | \$2.9 | 23% | 0.07 | 0.31 | \$0.8 | 1.23 | 0.56 |
| Agriculture | \$7.1 | \$1.2 | 17% | 0.63 | 0.72 | \$0.8 | 0.81 | 0.19 |
| Industrial | \$54.2 | \$5.8 | 11% | 1.48 | 1.94 | \$11.2 | 24.80 | 2.93 |
| WE&T | \$9.8 | 6.2 | 63% | 0 | 0 | 0 | 0 | 0 |
| Finance | \$1.4 | \$2.9 | 207% | 0 | 0 | 0 | 0 | 0 |
| Emerging Technology | \$8.9 | \$9.5 | 107% | 0 | 0 | 0 | 0 | 0 |
| Other* | \$16.8 | \$8.4 | 50% | 0.16 | 0.28 | \$0.4 | 0 | 0 |
| C&S | \$17.1 | \$20.3 | 119% | 3.50 | 71.03 | \$1,444.2 | 1,223 | 234.6 |
| TOTAL Portfolio | \$368.8 | \$148.2 | 40% | 2.61 | 9.29 | \$1,512 | 1,432 | 254 |

* Other includes EM&V

** Total Portfolio GWh Regional Energy Network (REN) = 8.2 GWh

Questions & Input

*First from CAEECC Members
then from the Public*

Public Members are able to participate using Slido. To access Slido:

- 1. Use your smartphone and scan the QR code*
- 2. Visit slido.com and enter code #7738434*



01: SoCal Performance Review I

SoCalGAS



SOCALGAS 2023 ENERGY EFFICIENCY PORTFOLIO UPDATE

Darren Hanway

Manager of Energy Programs & Strategy

5-15-2024

2023 Overview

SoCalGas' offers the largest portfolio of gas energy efficiency programs in the United States. Over the last five years, they have helped save SoCalGas customers nearly \$487 million in utility bill costs and delivered more than 236 million therms in energy savings. That's enough natural gas usage for approximately 592,000 households a year and reduced greenhouse gas emissions (GHGs) by over 1,252,000 metric tons, the equivalent of removing over 298,000 cars from the road annually.



PHCC Energy Efficiency Partner of the Year



Summary of Core Metrics

| w/ Codes & Standard | Year |
|---------------------|---------------|
| Budget | \$132,703,182 |
| TSB (Actual) | \$563,677,810 |

| w/out Codes & Standard | Year |
|------------------------|---------------|
| Budget | \$131,268,467 |
| TSB (Actual) | \$161,651,559 |

| | 2023 | | | |
|-----------------------------|----------------------|------------------------------------|--------------|-------------|
| | Authorized Budget | % of Spend (Including Commitments) | MMTherms | % of Goal |
| Resource Acquisition | \$97,558,590 | 85.91% | | |
| Equity | \$9,538,991 | 70.54% | | |
| Market Support | \$18,602,671 | 85.15% | | |
| EM&V | \$5,568,216 | 99.77% | | |
| TOTAL Portfolio | \$132,703,182 | 85.41% | 47.3M | 110% |

| Year Cost-Effectiveness | | | |
|-------------------------|------|-------|------|
| Portfolio | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 0.99 | 1.48 | 1.31 | 1.66 |

| Resource Acquisition | | | |
|----------------------|------|-------|------|
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 1.26 | 1.78 | 1.81 | 2.02 |

- Does not include Codes & Standards savings.

Total Portfolio Impact

w/ C&S 2023

| | |
|----------|---------|
| \$/kWh | N/A |
| \$/therm | \$21.26 |

w/out C&S 2023

| | |
|----------|---------|
| \$/kWh | N/A |
| \$/therm | \$39.40 |

2023

Net GWh Savings

5.11

| | |
|---------------|--------|
| Residential | 5.30 |
| Commercial | (0.20) |
| Industrial | - |
| Agricultural | - |
| Public | - |
| Cross Cutting | 0.01 |

Net kW Savings

1.37

| | |
|---------------|--------|
| Residential | 1.39 |
| Commercial | (0.02) |
| Industrial | - |
| Agricultural | - |
| Public | - |
| Cross Cutting | - |

2023

Net Therm Savings (MMth)

47.30

| | |
|---------------|-------|
| Residential | 16.50 |
| Commercial | 5.93 |
| Industrial | 1.26 |
| Agricultural | 0.54 |
| Public | 0.22 |
| Cross Cutting | 0.70 |

TSB (\$)

\$563,677,810

| | |
|---------------|-----------------|
| Residential | \$65,643,254.46 |
| Commercial | \$76,586,919.50 |
| Industrial | \$6,967,109.49 |
| Agricultural | \$4,259,225.69 |
| Public | \$1,589,056.11 |
| Cross Cutting | \$6,605,993.49 |

2023

GHG (MT CO₂e)

250,001

| | |
|---------------|--------|
| Residential | 87,302 |
| Commercial | 31,376 |
| Industrial | 6,667 |
| Agricultural | 2,857 |
| Public | 1,164 |
| Cross Cutting | 3,704 |

Sector Highlights, Challenges, and Lessons Learned

Residential Highlights

SoCalGas Offers 15 Residential EE Programs for Customers.

Highlights include:

01

Online Marketplace Solutions

Expanded marketplace to include A to Z customer solutions at the point of click which has increased participation, particularly with underserved communities.

02

Residential Behavioral Program

Engaged with over 1.7 million customers from Fall 2022 through Spring 2023. Methodology included 16 treatment cohorts that received Home Energy Reports. Nearly 11.4 million therms were saved, representing a substantial 14% savings increase over 2022.

03

Digital Payment Solutions

Worked towards providing digital payment solutions for customers in lieu of a physical check delivered in the mail. This provides customers the flexibility of more choices, shortens delivery times, and reduces costs.



Residential Challenges & Lessons Learned

Outreach

- Cross Promotion of Income Qualified Programs to increase exposure.
- To drive technology innovation, SoCalGas has board seats with trade organizations and meets with manufacturers.
- To drive technology adoption, SoCalGas are members of local contractor trade associations.

Marketing

- Increase the exposure and awareness of market support programs such as Marketplace
- Increase outreach efforts of local direct implementation programs including in-language support.
- Targeted marketing through community-based organizations helped market to broader audiences.

Customer Experience

- Utilized Single Points of Contact with step-by-step processes for participation and program benefits
- Tailored and customized energy reports and program information deepened savings
- Partnering with qualified trade professionals to deliver local, direct implementation programs.

Residential Takeaways & 2024 Outlook

Technology Advancement

- Gas Absorption Heat Pump
- Carbon Capture Technology
- Solar Thermal Water Heating
- Wall Heaters

Innovation

- Digital Rebates to scale across programs,
- Leveraging behavioral insights to target outreach efforts.
- Expand the use of On Bill Financing to the residential customer.

Expanding Access

- Increase focus on Equity customers including DAC, HTR and Underserved communities.
- Increase access to capital through financing and promotion of IRA funds.
- Increase access through partnership program funding with various municipalities.

Commercial, Industrial Agricultural Highlights

SoCalGas Offers 10 Commercial, 6 Industrial, and 1 Agricultural EE Programs for Customers.

Highlights include:

01

Commercial: Launched an innovative Commercial Fryer Campaign to best serve DAC and HTR customers. The program exceeded its annual energy-savings performance goal for 2023.

02

Industrial: Included 17 of SoCalGas' largest industrial customers across 4 cohorts and completed the first-of- its-kind gas-only cohort.

03

Agricultural: Enrollment increased substantially in 2023, with a total of 35 project installations, a 45% increase over 2022.



Challenges & Lessons Learned

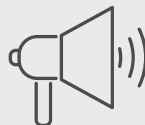
(Industrial, Commercial, Agriculture)

Accessibility



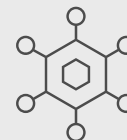
- Leverage technology to streamline program intake processes.
- Facilitating access to energy efficiency equipment through targeted campaigns.
- Strategic event participation to enhance program presence in the community and gain participants.

Comprehensive Support



- Customer support to secure program influence and prevent free-ridership.
- Implement and grow a trade ally network to expand program awareness and participation.
- Concierge type service for customers navigating NMEC or Custom opportunities.

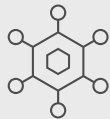
Unforeseen Process Barriers



- Fluctuations in project stakeholders and decision makers within customer network.
- Continued education for customers' maintenance staff typically supporting project development.
- Securing commitments while overcoming sudden changes in supply chain.

Takeaways & 2024 Outlook

Business Partner Support



- Connect the expertise of Business partners with relationships from Account Executives.
- Engaging new vendors through competitive solicitation process.
- New program concepts (i.e., commercial SEM, small breweries, etc.)

Grow Connections



- Supporting Business Partners to expand their trade ally network.
- Establishing partnerships with community organizations.
- Fostering connections with Agricultural stakeholders to pursue Custom projects.

Expand Access



- Targeting underserved, DAC and HTR customers.
- Identifying customers with potential for Custom/NMEC participation.
- Developing program materials in multiple languages.

Public Highlights

SoCalGas Offers 3 Public EE Programs for Customers.

Highlights include:

01

Public Sector Regional Energy Pathways

Facilitated engagement between program implementers and public sector which contributed to EE projects in K-12 schools and local governments. Expanded outreach by enrolling region ambassadors and hosted third annual K-12 EE Webinar.

02

Large Public Sector Program (LPS)

Offers energy efficiency solutions tailored to large public sector customers, including those serving HTR and DAC communities. Launch activities included outreach to all twelve counties in territory and contacting cities and municipal governments exceeding 100,000 people. The program includes a pathway for NMEC projects.



Takeaways & Lessons Learned

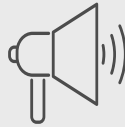
(Public)

Collaborations



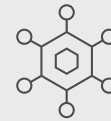
- Share best practices with Business Partners Custom processes to maintain momentum of project pipeline.
- Foster conversations with Business Partners to overcome timelines of the customer approval process.

Stakeholder Awareness



- Enhance Business Partner subcontractor network
- Integrate existing community outreach efforts with Business Partner staff to maintain positive customer relationships.

Innovation



- Brainstorming with Business Partners to deliver new participation strategies.
- Engaged new Business Partner through solicitation to specifically target underserved communities.

Comprehensive Opportunities



- Actively seeking opportunities to cater comprehensive solutions for customers.
- Support Business Partners to explore NMEC opportunities.

Portfolio Updates & Key Collaborations

Key Collaborations

Program Partnering

SoCalGas partners with the following organizations that contribute funding for the delivery of electricity- and water-saving measures and services through SoCalGas' energy efficiency portfolio. Partnered activities include joint direct installation, customer rebates, outreach and marketing.

- Metropolitan Water District
- Los Angeles Department of Water and Power
- Pasadena Water and Power
- Burbank Water and Power
- Riverside Public Utilities
- West Basin Municipal Water Utilities
- City of Glendora





QUESTIONS?

Darren Hanway
Manager of Energy Programs &
Strategy

SoCalGas

dhanway@socalgas.com

(213) 244-3419

Questions & Input

*First from CAEECC Members
then from the Public*

Public Members are able to participate using Slido. To access Slido:

- 1. Use your smartphone and scan the QR code*
- 2. Visit slido.com and enter code #7738434*



| | | |
|----|------|--------------------------|
| 00 | 9:00 | Welcome and Introduction |
|----|------|--------------------------|

| | | |
|----|------|----------------------------|
| 01 | 9:05 | SoCal Performance Review I |
|----|------|----------------------------|

| | | |
|----|-------|------------------------------------|
| 02 | 11:45 | SoCal Performance Review II |
|----|-------|------------------------------------|

| | | |
|----|------|-----------------------------------|
| 03 | 1:50 | Wrap Up Performance Review |
|----|------|-----------------------------------|

break

| | | |
|----|------|---------------------------------|
| 04 | 2:00 | CAEECC Meeting Commences |
|----|------|---------------------------------|

| | | |
|----|------|-------------------------------------|
| 05 | 2:10 | Evolving CAEECC WG Shareouts |
|----|------|-------------------------------------|

break

| | | |
|----|------|------------------------------|
| 06 | 3:55 | CAEECC Business Items |
|----|------|------------------------------|

| | | |
|----|------|--|
| 07 | 4:50 | CAEECC Agenda Wrap Up + Adjournment |
|----|------|--|

**Lunch
until
11:45am**

02

SoCal Performance Review II

Session Goal:

SDG&E

SoCalREN

02: SoCal Performance Review II

SDG&E



SDG&E 2023 Energy Efficiency Program Results

May 15, 2024

Kelvin Valenzuela, Manager



Summary of Core Metrics

| w/Codes & Standards | 2023 |
|---------------------|---------------|
| Budget | \$57,504,531 |
| TSB | \$661,641,677 |
| % of kWh Goal | 164% |
| % of kW Goal | 151% |
| % of Therm Goal | 158% |

| w/o Codes & Standards | 2023 |
|-----------------------|--------------|
| Budget | \$50,889,803 |
| TSB | \$36,763,335 |
| % of kWh Goal | 46% |
| % of kW Goal | 39% |
| % of Therm Goal | 132% |

| | 2023 | | |
|----------------------|------------------------|------------------|---------------|
| | Budget Authorized (\$) | Budget Spent (%) | TSB (\$)¹ |
| Resource Acquisition | \$71,703,434.64 | 57% | \$36,763,335 |
| Equity | \$267,286.15 | 105% | \$0 |
| Market Support | \$14,884,248.96 | 67% | \$4,393 |
| EM&V | \$3,769,335.18 | 64% | N/A |
| TOTAL Portfolio | \$94,233,376 | 61% | \$661,641,677 |
| (Administration) | \$9,423,338 | 4% | N/A |

¹ Pursuant to D.21-05-031 Ordering Paragraph 1, beginning in program year 2022 TSB will be reported by each program administrator and will replace energy and peak demand savings goals starting in program year 2024.

| 2023 Cost Effectiveness | | | |
|-------------------------|------|-------|-------|
| Portfolio (w/ C&S) | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 2.82 | 2.79 | 9.06 | 10.56 |
| Resource Acquisition | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 1.34 | 0.81 | 1.82 | 0.93 |

Total Portfolio Impact

| w/ C&S | 2023 |
|----------|--------|
| \$/kWh | \$0.11 |
| \$/therm | \$9.11 |

| w/o C&S | 2023 |
|----------|---------|
| \$/kWh | \$1.10 |
| \$/therm | \$21.07 |

| 2023 | |
|------------------------|-------------------|
| Net kWh Savings | 50,630,575 |
| Agricultural | 1,192 |
| Commercial | 28,408,476 |
| Public | 1,472,097 |
| Residential | 20,748,810 |
| Net kW Savings | 8,916 |
| Agricultural | 1.0 |
| Commercial | 1,110 |
| Public | 476 |
| Residential | 7,329 |

| 2023 | |
|--------------------------|---------------------|
| Net Therm Savings | 2,632,175 |
| Agricultural | 50,866 |
| Commercial | 835,806 |
| Public | 0 |
| Residential | 1,745,502 |
| TSB (\$) | \$36,767,728 |
| Agricultural | \$267,622 |
| Commercial | \$22,668,895 |
| Public | \$720,849 |
| Residential | \$13,110,362 |



Sector by Sector Highlights | Challenges | Lessons Learned

Residential

Commercial

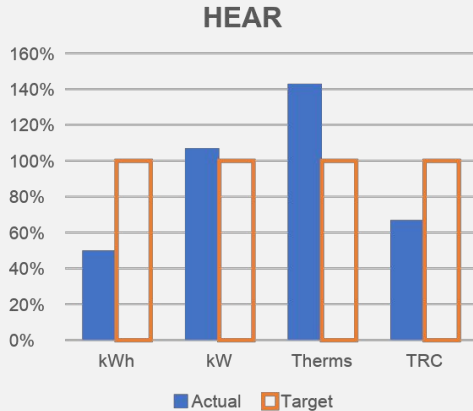
Industrial

Agriculture

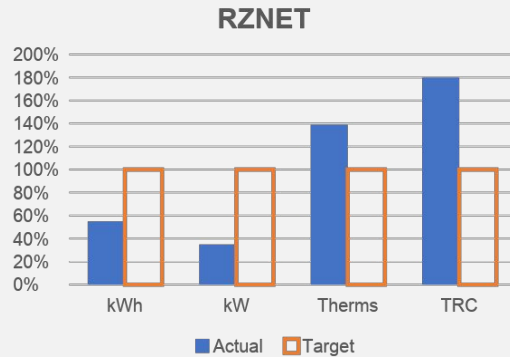
Public

Residential Sector Highlights

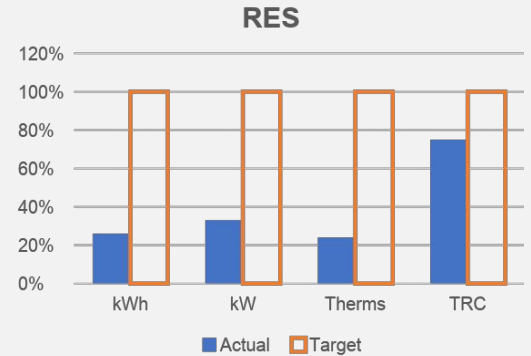
Behavioral Program: Home Energy Audits & Reports (HEAR)



Multi-Family Program: Residential Zero Net Energy Transformation (RZNET)



Single-Family Program: Residential Energy Solutions (RES)



Residential Sector Lessons Learned

Behavioral Program: Home Energy Audits & Reports (HEAR)

Data challenges from predecessor to successor implementer



Multi-Family Program: Residential Zero Net Energy Transformation (RZNET)

Geotagged timestamped photos continues to be an integral part of RZNET's Quality Assurance Plan



Single-Family Program: Residential Energy Solutions (RES)

Technical review meetings with implementer



Residential Sector Takeaways & 2024 Outlook

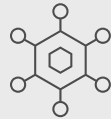


Cost-Effectiveness



Average
cost-effectiveness of
sector was below 1.0

Full-Year for Behavioral Program



The HEAR program
will have a full-year to
implement

Total System Benefit



New goal metric
starting in 2024

Balancing TSB & TRC

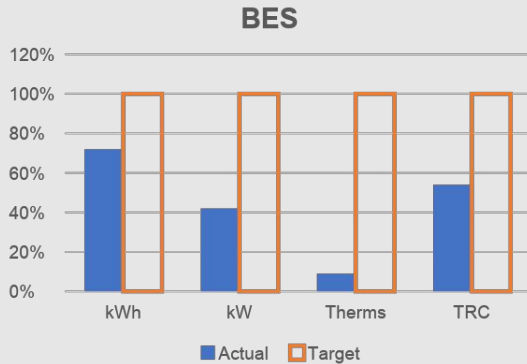


Monitor measure
offerings that are
costly while still
contributing to overall
TSB

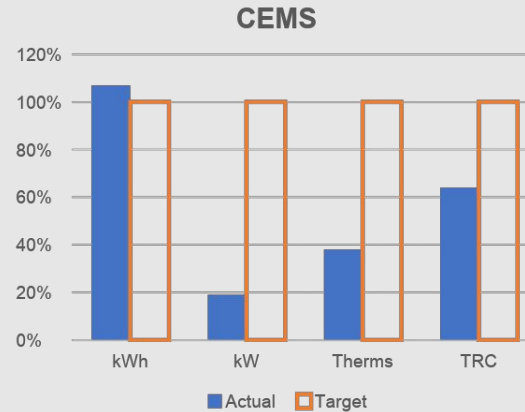
Commercial Sector Highlights



Small Commercial Program: Business Energy Solutions (BES)



Large Commercial Program: Comprehensive Energy Management Solutions (CEMS)



Commercial Sector Lessons Learned



Focused Offerings

Hot Water Pipe, Tank Insulation,
and Heat Pump Water Heaters
(HPWHs)

Deemed Pathway

Shift from custom to more
deemed offerings

Forecasting vs. Actuals

With shift comes different
results

Commercial Takeaways & 2024 Outlook

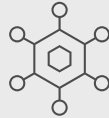


HPWH Popularity



HPWHs growth continues into 2024

Cost-Effectiveness



Average cost-effectiveness between programs was below 1.0

Total System Benefit



New goal metric starting in 2024

Commercial Solicitations



Ongoing Solicitations for Commercial sector

Industrial Sector Highlights



**Industrial Program: Industrial
Savings Measurement
Assistance Rebate & Training
(SMART) Program**



**CPUC approved
January 2023**

Industrial Sector Lessons Learned

Late Launch Date

Delays to launching the program resulted in delays to claim savings in 2023

SEM Focused

Customers have gravitated to SEM approach

Outreach to Vendors

Strategic outreach to vendors is an additional channel for other project types, however, due to challenges with a lengthy sales process, those opportunities were limited

Industrial Sector Takeaways & 2024 Outlook

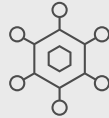


No further delays



No-ramp up period for 2024. Anticipate claims for 2024.

Inclusion of other offerings



Continue to find participants interested in deemed, custom, NMEC offerings

Total System Benefit



New goal metric starting in 2024

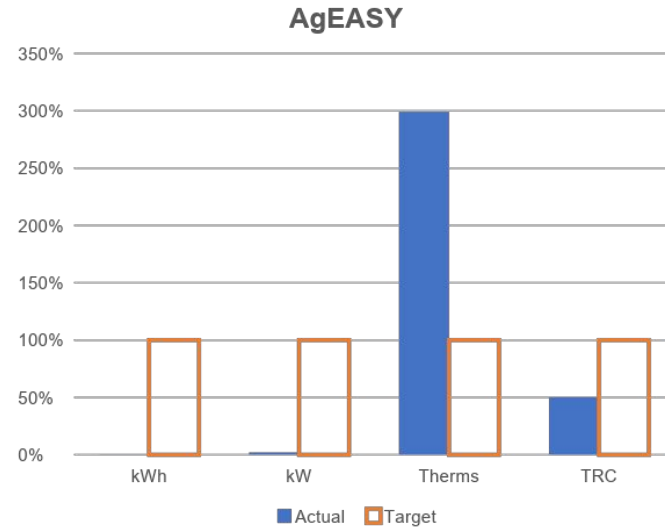
Balancing TSB & TRC



As claims start to come in, monitor TSB vs. TRC

Agricultural Sector Highlights

Agriculture Program: Agricultural Growers Services (AgEASY) Program



Agricultural Sector Lessons Learned

Hosted Training Initiated Engagement (TIE)

Implementer hosted TIE
Workshops to build customer
knowledge of EE opportunities

Increased Enrollments

Outreach efforts resulted in
enrolling more than a
dozen sites

Participation for Other Offerings

Only a few selected measure
offerings were enrolled and
claimed

Agriculture Takeaways & 2024 Outlook

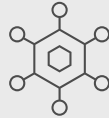


Cost-Effectiveness



**Cost-effectiveness
improvement**

Inclusion of other offerings



**Continue to find
participants
interested other
deemed and custom
offerings**

Total System Benefit



**New goal metric
starting in 2024**

Balancing TSB & TRC

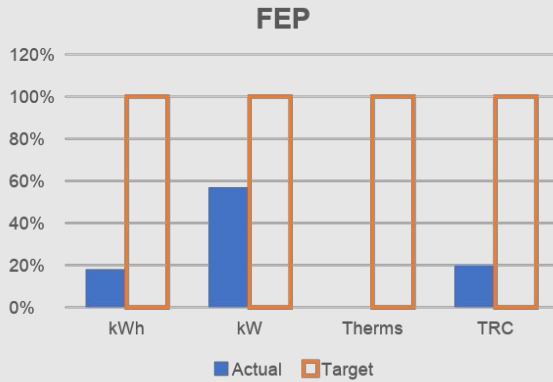


**As additional
offerings start to
come in, monitor
TSB vs. TRC**

Public Sector Highlights



Federal Program: SD Energy Link/Federal Energy Program (FEP)



Local Government Program: Climate Action Plan for Zero Net Energy (CAP4ZNE)



Public Sector Lessons Learned



Procurement Misalignment

Both Public project timelines and contracting takes a long time and vary by jurisdiction

Supporting Data

Supporting data and documents were not collected or not sufficient

Cross Cutting Sector Highlights

01

**Workforce, Education, and Training (WE&T):
Integrated Energy Education Training (IEET)**

02

On-Bill Finance (OBF)

03

Codes & Standards

SW C&S: Compliance Enhancement

SW C&S: Reach Codes (RC)

SW C&S: Planning and Coordination (PC)



Cross Cutting Sector Lessons Learned

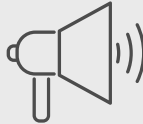


Added offerings



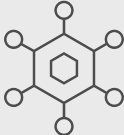
Real Estate had one-on-one mentoring sessions to advance the value of energy efficiency in the market

New Collaborations



Energize Colleges, had moderate success, there were issues with schedules, planned activities and competing priorities

Payback & Eligibility



For comprehensive, multi-measure projects, the payback tends to be much longer than the 15-year maximum required for business projects to qualify

Statewide Highlights

01

Statewide HVAC Quality Installation/Quality Maintenance (Qi/QM) Program: Quality Residential HVAC Services

02

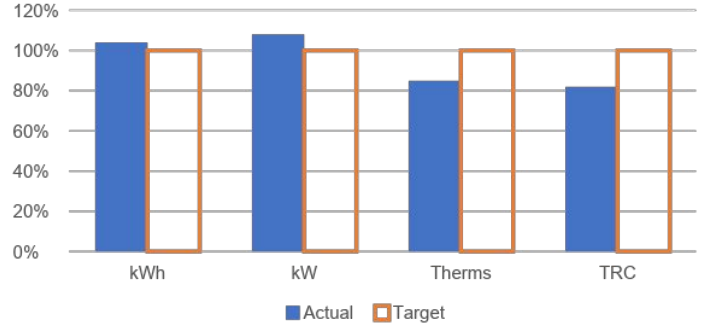
Statewide Heating, Ventilation, and Air Conditioning (HVAC) Program: Comfortably California

03

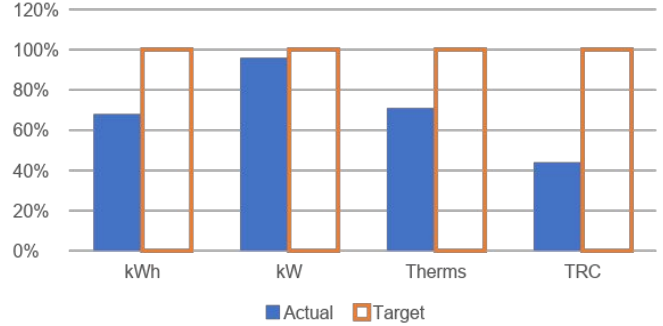
Statewide Plug-Load & Appliance (PLA) Program: Golden State Rebates



SW-HVAC



SW-PLA



Statewide Lessons Learned

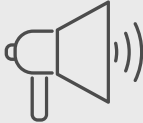


Data Collection



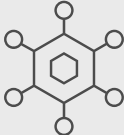
Downstream data collection requirements for this midstream program had reduced participation and lowered TRC

Increased Fuel Substitution Participation



2023 saw large increase for fuel sub participation, helped energy savings, while returning adding to low TRC

Limited offerings



PLA has a limited variety of available measures

Statewide Takeaways & 2024 Outlook

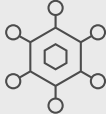


Growth for QI/QM



The program will have a full year to implement increasing enrollment

Cost-Effectiveness



Average cost-effectiveness between SW RA programs were below 1.0

Total System Benefit



New goal metric starting in 2024

Balancing TSB & TRC



Fuel sub measures continue to increase, helping TSB, but lowers TRC



Program Updates and Collaboration

Program Openings & Closures

The following list includes those programs that have been closed via SDG&E's September 2023 True Up AL 4302-E.

- **3201 - HERs Home Energy Audit**
- **3222 – Savings By Design**
- **4011 - K-12 - EE Program**
- **3246 - Technology Introduction Support**
- **3247 - Technology Assessment Support**
- **3248 - Technology Development Support**
- **3261 - Residential Behavioral Program**
- **3317 - HOPPs Retrocommissioning**
- **3237 / 3220 / 3231 – Energy Efficiency Business Incentives**
- **3327 - Commercial Retrocommissioning**
- **3322 - SAE**
- **3227 - Industrial Strategic Energy Management**
- **3267 – Community College Partnership**
- **3268 - UC/CSU/Partnership**



Questions

Questions & Input

*First from CAEECC Members
then from the Public*

Public Members are able to participate using Slido. To access Slido:

- 1. Use your smartphone and scan the QR code*
- 2. Visit slido.com and enter code #7738434*



02: SoCal Performance Review II

SoCalREN

SoCalREN PY 2023 Performance Review

CAEECC
May 15, 2024



Summary of Core Metrics

| w/ Codes & Standard | Year |
|---------------------|------|
|---------------------|------|

Budget Spent \$24,055,800*

TSB \$9,179,673

| w/out Codes & Standard | Year |
|------------------------|------|
|------------------------|------|

Budget Spent \$24,055,800*

TSB \$9,179,673

| | 2023 | | | | |
|------------------------|--------------------------|-----------------------------|--------------------|------------|--|
| | Budget Expenditures (\$) | % of Portfolio Expenditures | TSB (\$) | % to Goal | |
| Resource Acquisition | \$9,979,172 | 41% | \$9,179,673 | 53% | |
| Equity | \$4,749,159 | 20% | \$0 | 0% | |
| Market Support | \$9,063,725 | 38% | \$0 | 0% | |
| EM&V | \$263,744 | 1% | N/A | N/A | |
| TOTAL Portfolio | \$24,055,800 | 100% | \$9,179,673 | 53% | |
| (Administration) | \$2,995,292 | 12% | N/A | N/A | |

| Year Cost Effectiveness | | | |
|-------------------------|--|--|--|
|-------------------------|--|--|--|

Portfolio

| TRC | | PAC | |
|-------|------|-------|------|
| Filed | EOY | Filed | EOY |
| 0.51 | 0.33 | 0.74 | 0.42 |

Resource Acquisition

| TRC | | PAC | |
|-------|------|-------|------|
| Filed | EOY | Filed | EOY |
| 0.83 | 0.60 | 1.64 | 0.98 |

*Budget spent includes prior year commitments and carryover

Total Portfolio Impact

| w/ C&S | | 2023 | |
|----------|--|--------|--|
| \$/kWh | | 3.20 | |
| \$/therm | | 222.93 | |

| w/out C&S | | 2023 | |
|-----------|--|--------|--|
| \$/kWh | | 3.20 | |
| \$/therm | | 222.93 | |

| 2023 | |
|------------------------|-----------|
| Net kWh Savings | 7,514,885 |
| Agricultural | N/A |
| Commercial | N/A |
| Public | 3,353,770 |
| Residential | 4,161,155 |
| Net kW Savings | 48.11 |
| Agricultural | N/A |
| Commercial | N/A |
| Public | 19.22 |
| Residential | 28.89 |

| 2023 | |
|--------------------------|--------------|
| Net Therm Savings | 107,905 |
| Agricultural | N/A |
| Commercial | N/A |
| Public | (0.46) |
| Residential | 107,906 |
| TSB (\$) | \$9,179,673 |
| Agricultural | N/A |
| Commercial | N/A |
| Public | \$487,105 |
| Residential | \$ 8,692,568 |

| 2023 | |
|----------------------|-------|
| GHG (MT CO2e) | 2,193 |
| Agricultural | N/A |
| Commercial | N/A |
| Public | 401 |
| Residential | 1,793 |

Some of SCR's 2023 UVM Achievements:

DELIVERING
Climate and Energy Impacts

-  **14,139,887*** kWh Savings
-  **690** kW Savings
-  **282,172** Therms Savings
-  **8,961** MTCO_{2e} GHG Avoided

BUILDING
Energy Capacity and Economic Resilience

-  **150** Completed Projects
300+ Jobs Supported
-  **\$5,899,529** Total Incentives Paid
-  **\$944,486** Estimated Annual Energy Cost Savings

EXPANDING
Access to Energy Efficiency

-  **8,000+** Students Introduced to Energy Efficiency
-  **300+** Courses Completed by Diverse Contractors
-  **48** Regional Workforce Alliance (RWA) Members

SoCalREN Core Values:

- 1) Deliver Energy & Climate Impacts
- 2) Building Energy Capacity & Economic Resilience
- 3) Expand Access to EE Benefits

Inaugural Future Green Leaders Summit

The 2023 Future Green Leaders Summit was a full-day, professional conference-format event held on March 15, 2023 at the Los Angeles Convention Center that aimed to create interest and excitement among middle school students regarding clean energy careers. The event was designed to provide inspiration for students to gain further education and consider future options. More than 1,800 students and educators attended the event.

Figure 6. Welcoming Future Green Leaders



SoCalREN Sectors

Residential

Public

Workforce Education & Training (WE&T)

Finance



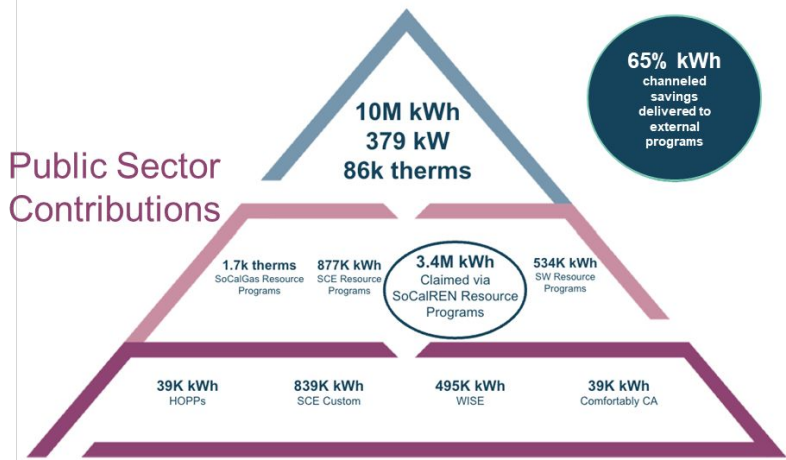
2023 Public Sector



Public Highlights

Includes:

- 1) Project Delivery Program
- 2) Metered Savings Program
- 3) Pathway to Zero Program
- 4) Streamlined Savings Pathway Program



DELIVERING Climate and Energy Impacts



9,978,732
kWh Savings

8,787,236 in Underserved Communities



379

kW Savings

379 in Underserved Communities



86,348

Therms Savings

77,688 in Underserved Communities



3,084

MTCO₂e GHG Avoided

2,754 in Underserved Communities

BUILDING Energy Capacity and Economic Resilience



120

Completed Projects

210

Jobs Supported



\$1,940,641

in Energy Bill Savings

\$2,834,665

in Incentives

\$100,066

in OBF Reserved



43

Unique Outreach Materials

19

New Agencies Enrolled

29

Outreach Events

EXPANDING Access to Energy Efficiency



90

Completed Projects in Underserved Communities in 2023



10

New Underserved Agencies Enrolled in SoCalREN



5

Regional Partners



7

Electrification Activities Delivered

*9.9 GWh savings includes SCR claims (3.449 GWh) and channeled (6.529 GWh)

Public Overview

2023 Challenges

- 1) Long equipment lead times; (i.e. 26-50 weeks for packaged rooftop units.)
- 2) Project funding delays
 - Obtaining Buy American Act waiver = 6-month delay
 - AB 841 CalSHAPE implementation grant delays
 - Public Agencies began re-assessing capital budget priorities for the fiscal year 23'-24'
- 3) Inflation increasing project costs and delaying implementation.

Lessons Learned

- 1) Interest in decarbonization measures increased in 2023. SoCalIREN deployed a mid-year strategy to help accelerate Heat Pump Water Heater (HPWH) installations.
 - 87 HPWH units installed in 6 months.
 - 83% of installations in underserved communities.
- 2) Public Agencies are receptive to faster procurement pathways to accelerate implementation.

Public Overview

Key Takeaways & 2024 Outlook

- 1) 96% of participating agencies indicated that SCR EE project completion would have not been possible without SoCalREN support.
- 2) Launching five new program offerings in 2024.
- 3) Support public agencies to obtain external funding such as IRA tax credits and grant opportunities.
- 4) Increased collaboration with Energy Service Companies (ESCOs) to encourage holistic EE projects.

“Without SoCalREN’s services and expertise, our Agency would not have been able to receive all these energy efficiency savings and incentives.”

–SoCalREN Enrolled Agency

“SoCalREN has been an immense help with not only moving efficiency projects forward but also emphasizing the importance of the inherent benefits that come with it.

SoCalREN Enrolled Agency”

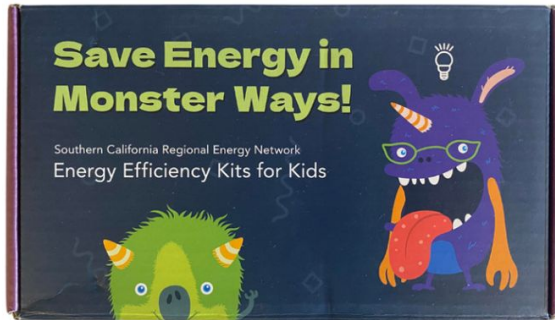
2023 Residential Sector



Residential Highlights

Includes:

- 1) Multifamily Program
- 2) Kits for Kids Program



**K4K
Achieved
140%
of DAC Goal!**

DELIVERING Climate and Energy Impacts



4,165,643
kWh Savings



75,123
Therms Savings



3,307
MTCO₂e GHG Avoided

BUILDING Energy Capacity and Economic Resilience



\$3,064,864
Total Incentives Paid
to Multifamily Properties
\$9,196,726
Total Construction Project Costs



30
Completed Projects
100
Construction Jobs Created



6,185
Elementary School
Students Educated

EXPANDING Access to Energy Efficiency



4,491
Tenant Units Impacted



63%
Completed Projects in
Disadvantaged Communities



71
Participating Schools
72%
DAC Schools

Residential Overview



Lessons Learned

- 1) Increasing MF project uptake of fuel substitution measures.
- 2) Continue expanding Kits for Kids program.
 - Achieved 100% 2023 enrollment. Currently a waitlist for 2024 enrollment.

Key Takeaways & 2024 Outlook

- 1) Launching HTR Multifamily Direct Install program to better reach underserved customers.
- 2) Leverage state and federal funding to support electrification measures.
- 3) Continue to grow number of participating MF contractors (25).

2023 Workforce Education & Training (WE&T)



WE&T Highlights

Offerings Include:

- 1) Architecture, Construction and Engineering Students (ACES) Pathway
- 2) E-Contractor
- 3) Green Path Careers
- 4) Future Green Leaders Summit



11
FTE Job
Placements
(GPC)



33 ACES Student Interns

BUILDING

Energy Capacity and Economic Resilience



302

E-Contractor Courses Completed by Contractors
15% Increase from 2022

251

Courses Completed by ACES Participants
148% Increase from 2022

40

Green Path Careers Cohort #5
300% Increase from 2022

44

Certifications Obtained by ACES Participants
175% Increase from 2022



\$52,805

Internship Dollars Earned by ACES Students
13% Increase from 2022

EXPANDING

Access to Energy Efficiency



68

Educational Institution and Industry Partners
466% Increase from 2022



48

Regional Workforce Alliance (RWA) Members
118% Increase from 2022



1,800

Future Green Leaders Summit Student Attendees
New in 2023

WE&T Overview

Lessons Learned

- 1) Continue successful Future Green Leaders Summit (~Fall 2024).
 - In 2023 SoCalREN hosted 1200 students from LIDACs and exposed them to over 32 workshops and multiple green career paths.
- 2) Further strengthen the local workforce to support expanded federal, state, and local funding such as Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA).

Key Takeaways & 2024 Outlook

- 1) Single existing program offering will be expanded to four stand-alone programs.
- 2) Launching Agriculture WE&T program.
- 3) Launching E-Contractor Decarbonization Academy to support SMWDVBEs to be trained on quality installations as well as the environmental benefits to consumers

2023 Finance



Finance Highlights

Public Agency Revolving Loan Fund (RLF) Highlights



\$2,081,806
Disbursed to Agencies



19
Projects Analyzed



3
Agency-Approved Loans

- *Entire loan pool uses CEC American Reinvestment and Recovery Act (ARRA) funds.
- 2023 funding contributed to 398,954 net kWh installed savings.

Key Sector Takeaways & 2024 Outlook

- 2) Launching similar Agriculture RFL program.
- 3) Requiring finance program participants to participate in SoCalREN resource incentive program.

Program Updates and Collaboration



2023 Program Updates & Collaboration

2023 Program Openings and Closures: none.



SoCalIREN Collaborators

Sites

- Schools
- Libraries
- Streetlights
- Data Centers
- Police Departments
- City Halls
- Community Centers
- Water and Wastewater Facilities

Partners

- Engineering Firms
- Contractors
- Regional Partners
- SCE
- SoCalGas
- Implementers
- Advisory Committee

Eligible Agencies

- Cities and Towns
- Counties
- School Districts
- Community Colleges
- Water Districts
- Special Districts

3P Updates:

1. Developed collaboration protocols for two 3rd party SCE Programs

SoCalIREN 2023 Collaboration:

- 1) Public Sector
 - a) Enrolled 10 new underserved agencies.
 - b) Collaborating with Statewide TECH program to stack Heat Pump Water Heater incentives.
- 2) Residential Sector
 - a) Kits for Kits engaged 250 classrooms across eight counties.
 - b) Increased # of participating MF contractors in 2023 from 18 to 25.

2024 Program Portfolio Outlook

- 9 new equity programs that will exist across the portfolio
 - *Emphasis and exclusivity to small commercial, small/rural public agencies, DAWs, HTR, DAC, communities facing significant environmental justice;*
- 10 new market support programs to drive and deliver impacts across the portfolio
- Leveraging external grant funds and IRA tax credit to support deeper impacts per community/member
- Launch and implement a Community Based Design Collaborative & Pilot that will support the community-based design and future implementation
- Implementing new collaborative Portfolio Administrator Sector Coordination (PASC) Meetings

Utilize all programs to drive savings, CE for RA programs and TSB so incrementally increase impact

Questions

Lujana Medina

Division Manager

SoCalREN

Imedina@isd.lacounty.gov



Budget Details

| 2023 Budget by Sector | 2023 Budget Expenditures (\$) | % of Portfolio Expenditures |
|------------------------|-------------------------------|-----------------------------|
| Residential | \$8,038,895 | 33% |
| Commercial | N/A | N/A |
| Public | \$13,714,460 | 57% |
| Agriculture | N/A | N/A |
| Industrial | N/A | N/A |
| WE&T | \$1,716,526 | 7% |
| Finance | \$322,175 | 1% |
| Emerging Technology | N/A | N/A |
| C&S | N/A | N/A |
| EM&V | \$263,744 | 1% |
| TOTAL Portfolio | \$24,055,800* | 100% |

*Budget expenditures includes prior year commitments and carryover

Thank You



Questions & Input

*First from CAEECC Members
then from the Public*

Public Members are able to participate using Slido. To access Slido:

- 1. Use your smartphone and scan the QR code*
- 2. Visit slido.com and enter code #7738434*



03

Wrap Up Annual 2023 Portfolio Performance Report Review

1. Identify common themes/challenges
2. Determine next steps, if any
3. Semi-Annual Performance Report Review Session will be in Q4 2024

CAEECC Members:
Were there **common themes** that
you've identified and would like to
act upon?

(i.e., create a CAEECC WG to discuss and propose solutions)

*Members of the Public - you may add your thoughts via the Slido Poll
(Visit [slido.com](https://www.slido.com) and enter code #7738434)*

| | | |
|----|------|--------------------------|
| 00 | 9:00 | Welcome and Introduction |
|----|------|--------------------------|

| | | |
|----|------|----------------------------|
| 01 | 9:05 | SoCal Performance Review I |
|----|------|----------------------------|

lunch

| | | |
|----|-------|-----------------------------|
| 02 | 11:45 | SoCal Performance Review II |
|----|-------|-----------------------------|

| | | |
|----|------|----------------------------|
| 03 | 1:30 | Wrap Up Performance Review |
|----|------|----------------------------|

| | | |
|----|------|---------------------------------|
| 04 | 2:00 | CAEECC Meeting Commences |
|----|------|---------------------------------|

| | | |
|----|------|-------------------------------------|
| 05 | 2:05 | Evolving CAEECC WG Shareouts |
|----|------|-------------------------------------|

break

| | | |
|----|------|------------------------------|
| 06 | 3:35 | CAEECC Business Items |
|----|------|------------------------------|

| | | |
|----|------|--|
| 07 | 4:50 | CAEECC Agenda Wrap Up + Adjournment |
|----|------|--|

**Break
until
2:00pm**

04

CAEECC Meeting Commences

Agenda + Goals

Housekeeping

CAEECC Agenda Goals

1

Meeting Goal #1

Participate in shareouts by Evolving CAEECC Working Group Members on their reflections and engage in clarifying questions for Full CAEECC Members

2

Meeting Goal #2

Discuss and seek agreement on co-chair next steps proposal for CAEECC 4.0

3

Meeting Goal #3

Present CAEECC Membership Process survey results and next steps

04: CAEECC Agenda Introduction

Housekeeping



CAEECC Member Input

There are 2 dedicated **CAEECC Member Question/Discussion opportunities**:

1. Evolving CAEECC WG Shareout - **Clarifying Questions** (Session 5, slides 156-158)
2. CAEECC Business Items - **Co-Chair Proposal for Next Steps on CAEECC Purpose & Scope** (Session 6, slides 172; 176-181)

How CAEECC Members Can Participate



CAEECC Members can raise their hand.

Members of the public (including Working Group Members) will be invited at dedicated Public Input times (next slide)



Email the facilitation team at facilitator@caeccc.org



For Anonymous Thoughts:
Chat Suhaila Sikand,
Facilitator or Co-Chair
Lujuana Medina, SoCalREN



For Tech Support: Chat
Susan Rivo, Facilitation
Team

How the Public Can Participate

There are 2 dedicated Public input opportunities as indicated on the agenda:

1. Evolving CAEECC WG Shareout - **Clarifying Questions** (Session 5, slides 125-158) via chat
2. CAEECC Business Items - **Co-Chair Proposal for Next Steps on CAEECC Purpose & Scope** (Session 6, slide 166-181)

During the dedicated Public Input times, the Public may participate by **1)** using the chat or **2)** raising their hand to enter the queue to speak



Public comments may be made for up to 2 minutes unless otherwise specified. A Zoom Timer will appear at the top right of your zoom window when this begins.

Questions that are unanswered in the Meeting will be compiled in the Meeting Summary and will be addressed offline by 5/23.

If you have technical issues, please chat Susan Rivo or email Susan@raabassociates.org.



Proposed Meeting Norms

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

05

Evolving CAEECC Reflection Shareout

Context

Evolving CAEECC Member
Shareouts

Clarifying Questions

05: Evolving CAEECC Reflection Shareout

Context

Evolving CAEECC Working Group (ECWG)

The [Evolving CAEECC WG](#) was initially tasked to develop recommendations to modify CAEECC's purpose, scope, structure to better align with changes in the energy efficiency regulatory proceeding (R.13-11-005) and to justice, diversity, equity, and inclusion.

ECWG Members were invited to submit reflections to be put directly on the CPUC record.

Reflections are available on the [CAEECC Meeting Webpage](#).

ECWG Reflection Submissions

In total, there were 6 submissions from the following people:

- Group Submission: Aislyn Colgan, Alice Sung, Amaury Berteaud, Charles Reed, Jan Maes, Jason Minsky, Kate Woodford, Nicole Milner, Spencer Lipp, Sumire Gant, and Tanisha-Jean Martin
- Jenifer Lomeli
- Lauren Weston
- Lara Ettenson
- In relation to the group submission:
 - Tanisha-Jean Martin
 - Alice Sung

Affiliations on next slides

Evolving CAEECC Working Group Members

| CAEECC Affiliation | Organization | Name |
|--------------------------|--|-------------------------|
| CAEECC Member | Center for Sustainable Energy | Fabi Lao |
| CAEECC Member | NRDC | Lara Ettenson |
| CAEECC Member | San Joaquin Valley Clean Energy Organization | Kelsey Jones |
| CAEECC Member | The Energy Coalition | Laurel Rothschild |
| Ex-Officio CAEECC Member | CPUC | Pamela Rittelmeyer |
| Ex-Officio CAEECC Member | CEC | Kristina Duloglo |
| Non-CAEECC Member | Acterra | Leo Steinmetz |
| Non-CAEECC Member | Association of California Community & Energy Services | Jason Minsky |
| Non-CAEECC Member | Association of Monterey Bay Area Governments (AMBAG) | Amaury Berteaud |
| Non-CAEECC Member | Brightline Defense Project ("Brightline") | Sarah Xu |
| Non-CAEECC Member | Center for Accessible Technology | Kate Woodford |
| Non-CAEECC Member | Day One | Angelique Lopez |
| Non-CAEECC Member | Efficiency First California | Charles Cormany |
| Non-CAEECC Member | Emerald Cities Collaborative | Jenifer Lomeli-Quintero |
| Non-CAEECC Member | Energy Solutions | Evan Kamei |
| Non-CAEECC Member | Gateway Cities Council of Governments | Sumire Gant |
| Non-CAEECC Member | Individual | Aislyn Colgan |

Bold: Submitted a Reflection

Evolving CAEECC Working Group Members cont.

| CAEECC Affiliation | Organization | Name |
|--------------------|--|---------------------|
| Non-CAEECC Member | Individual | AJ Perkins |
| Non-CAEECC Member | Individual | Alice Sung |
| Non-CAEECC Member | Individual | Charles Reed |
| Non-CAEECC Member | Individual | Martin Homec |
| Non-CAEECC Member | Individual | Nicole Milner |
| Non-CAEECC Member | Individual | Spencer Lipp |
| Non-CAEECC Member | Marie Harrison Community Foundation for Social and Environmental Justice | Arieann Harrison |
| Non-CAEECC Member | MCR Performance Solutions | Melanie Gillette |
| Non-CAEECC Member | Nevada County Energy Action Plan Committee | Jan Maes |
| Non-CAEECC Member | San Diego Urban Sustainability Coalition | Tanisha-Jean Martin |
| Non-CAEECC Member | The Greenlining Institute | Jordyn Bishop |
| Non-CAEECC Member | Valley Clean Air Now | Tom Knox |
| Non-CAEECC Member | Willdan | Lou Jacobson |


05: Evolving CAEECC Reflection Shareout

Evolving CAEECC Working Group Member Shareouts

05: Evolving CAEECC Reflection Shareout | Member Shareouts

Self-Facilitated Collective Reflections [Group]

*Presented by **Mr. Charles Reed** (Individual), **Spencer Lipp** (Individual), and **Amaury Berteaud** (Association of Monterey Bay Area Governments)*

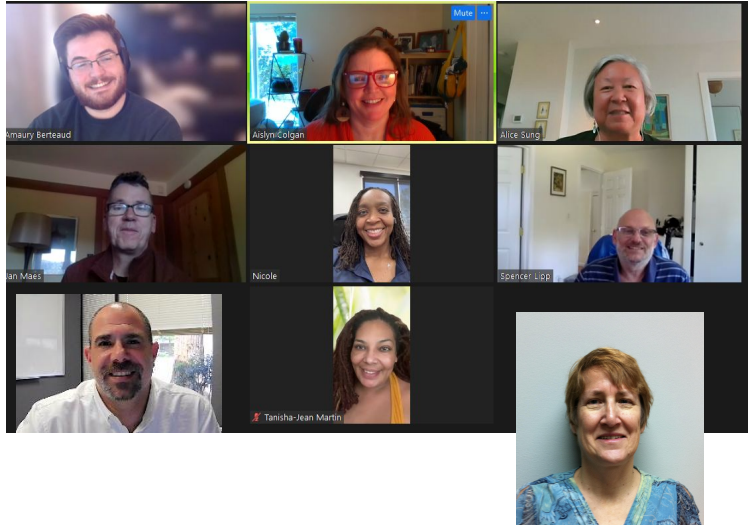


**Evolving CAEECC
Working Group Self
Facilitated Collective
Reflections**

Full CAEECC Meeting 5/15
presentation



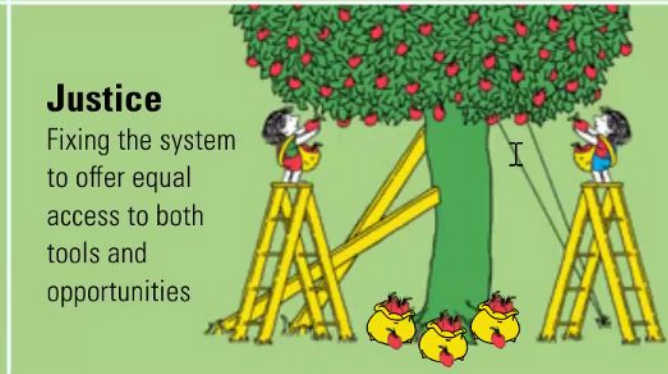
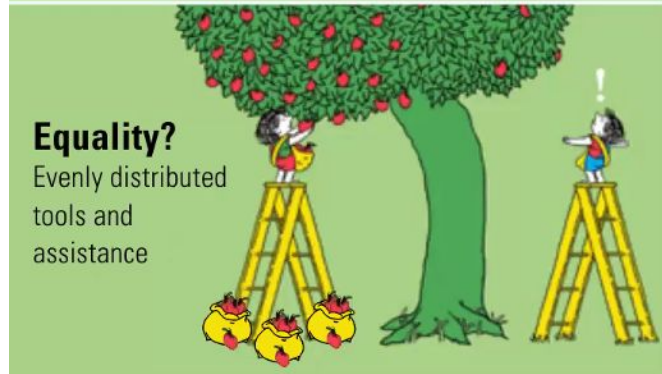
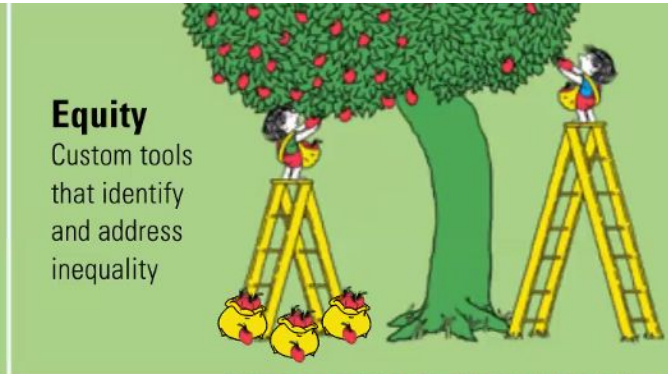
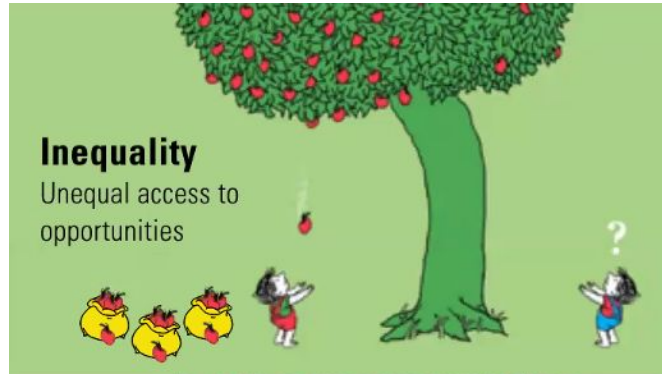
Our Self Facilitated Collective



This was a successful pilot!



What does Justice look like?



North Star/Guiding Vision



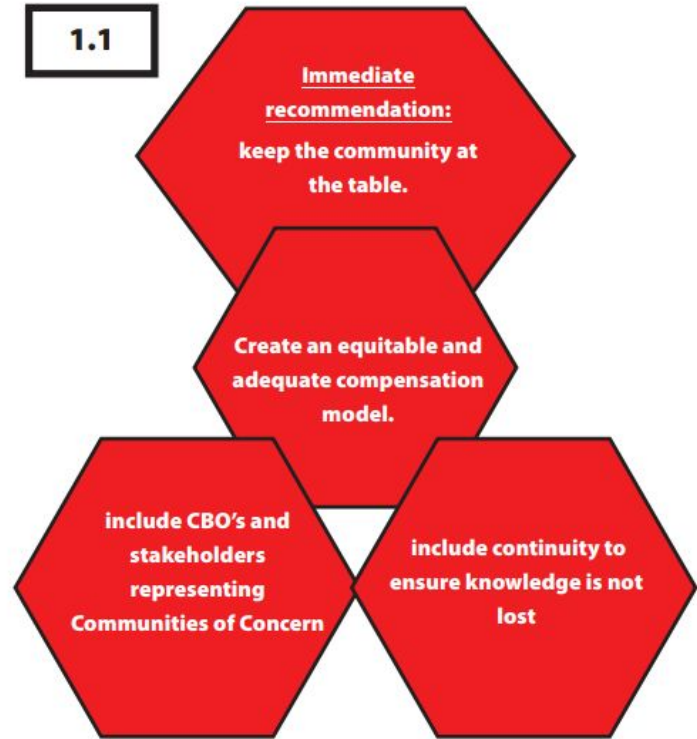
Empowering, inclusive,
transformative, democratic,
community-driven,
decision-making process that
centers equity, environmental
and social justice.

Problem statement

- Issue 1: Lack of Meaningful Stakeholder Participation in Decision-Making
- Issue 2: Lack of Meaningful Stakeholder Participation in Equitable Portfolio and Program Design, Implementation, and Measurement/Evaluation of Equity
- Issue 3: Policy Gaps and Impediments

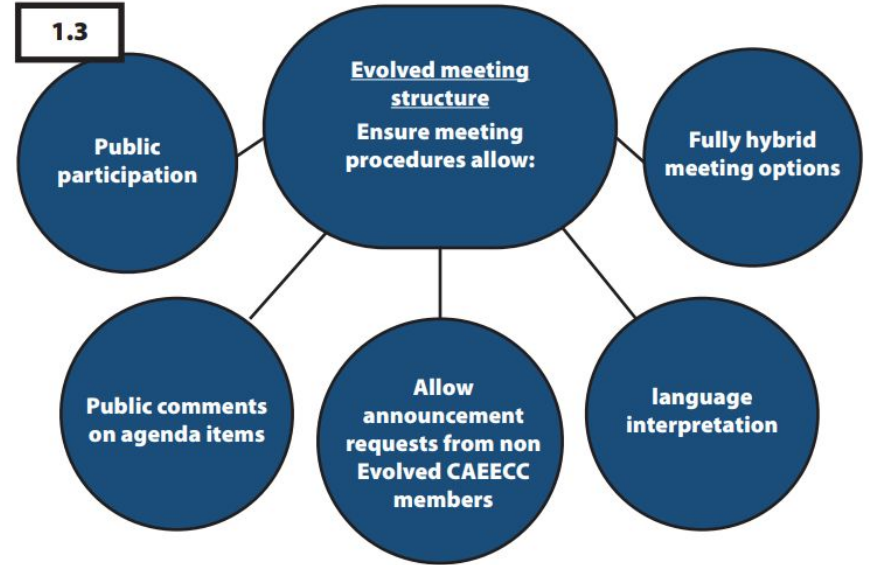
Recommendation 1- Membership & Meeting Structure

- Build on the success of and lessons learned from the compensation pilot
- Provide Adequate Compensation for Equity-focused stakeholders to serve as interim CAEECC members



Recommendation 1- Membership & Meeting Structure

- Short term: 1.2 Evolve CAEECC composition
- Short term: 1.3 Create an Equity-centered meeting structure



Recommendation 2 – Equity Advisory Body

- Short-term: 2.1 Creation of a CAEECC Equity Advisory Committee (EAC)
- Long-term: 2.2 Creation of an independent Equity Advisory Board (EAB)

Provide guidance and recommendations on incorporating Equity, Environmental and Social Justice into the Energy Efficiency Portfolio with three focus areas:

- Portfolio design and Goals
- Program design
- Program implementation and evaluation

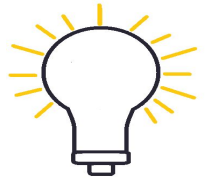
Recommendation 3 - Implementation Actions

- Immediate: 3.1 EE Sector Workforce Development and Education and Outreach in partnership with CBOs:
 - Partnerships between EE Program Implementers and Communities of Concern
 - Reduce barriers to accessing EE Program Implementation contracts for CBOs, and small MWBE
 - Share Equity-focused energy programming best practices and standards; align Non-Energy Benefits and Social Costs across State agencies



Recommendation 3 - Implementation Actions

- Immediate: 3.2 Increased collaboration with equity centered efforts across the CPUC and California State energy and climate landscape
- Short-term: 3.3 Develop best practices for designing, implementing, and evaluating energy efficiency programs in alignment with ESJ goals.
- Short-term: 3.4 Implementation of best practices integrating accountability to equity



Recommendation 3 - Policy

- Short-term: 3.5 Consider rapid modification of current policy to address equity and conflict of interest
- Long-term: 3.6 Provide the ability for an Equity Advisory Body to make policy recommendations

3.5

| <u>PUC modification of current policy to spur equitable participation</u> | | |
|---|--|---|
| Eliminate the inclusion for cost-effectiveness for equity-targeted participants in Resource Acquisition (RA) programs. | Simplify the hard-to-reach (HTR) definition to only use regional criteria to determine an HTR designation and other means of simplifying "eligibility". | Establish a 1 Net-to-gross (NTG) for the Equity segment due to little or no uptake similar to fuel substitution (D.19-08-009). |

Key Takeaways

- Bring Communities of Concern into a compensated “Evolved” CAEECC process
- Create an independent Equity Advisory Body
- Collaborate with equity-focused advisory bodies to share goals and align best practices
- Co-create equity best practices for portfolio, program design, program implementation, and evaluation.
- Enact policy changes to continue increasing Equity in the energy efficiency portfolio to re-align with State commitments to Environmental and Social Justice.

Concluding thoughts

" The work thus far of the independent subgroup of ECWG members, completed with minimal but essential support from the Compensation Pilot budget over 3-4 months, despite initial disruption of the ECWG, is exemplary of what progress towards equity, environmental and social justice for the common good in our energy sector could look like. We need much more of it."

The small group of passionate individuals who rose above the drama of the initial dissolve of the Evolving CAEECC Working Group and continued down this path is an inspiration. The final document speaks loudly as to the thoughtfulness and forward thinking of the group."

"Although, I was very disappointed that the working group had come to an abrupt halt, I am pleased with the motivation it enticed a small group to push forward and create a great work of recommendations. The small group that has developed the Evolving CAEECC Working Group Document was a true work of collaboration lead by passionate individuals in the space of equity, consciously considerate recommendations, and disciplined dedication to make sure it is being delivered with quality care. "

Concluding thoughts

“The biggest value I gained was that, coming from a rural background in an historically excluded community I have been able to bring information and education back to my community as learning from this process. We are learning how to be communities working together, learning from each other and increasing the collective power that we have.”

“Through this engagement with a diverse group of peers, the outcome represents a process that fostered collaboration and the realization that our collective strengths lie in our unique backgrounds and experiences.”

“To whom much is given, much is required. It is an honor to advocate for those who do not always have the opportunity to speak for themselves. I am thankful that this opportunity was afforded and that need for change is recognized.”

“Each one of us contributes what we have to offer.”

“This group effort underscores the power of deep collaboration when envisioning a just future and co-designing equitable solutions. I am thankful to have met so many amazing voices through this process and I hope our body of work will help guide CAEECC on their evolutions towards a more equitable future.”

05: Evolving CAEECC Reflection Shareout | Member Shareouts

Tanisha-Jean Martin, San Diego Urban Sustainability Coalition

The background features abstract green geometric shapes, including triangles and overlapping polygons, in various shades of green, creating a modern and dynamic look.

Tanisha-Jean Martin

CAEECC Working Group Member

May 15, 2024

Climate Community Director
San Diego Urban Sustainability Coalition

Tanisha@SDUSC.org



SDUSC was created..



To address systemic inequity
after it became increasingly clear across various
channels that

**Communities of Concern
lacked representation
in important discussions of sustainability
as well as opportunities
to enter the green job economy.**





The Mission



To create collaborations for **equitable and inclusive solutions** to climate change in Communities of Concern.

The Vision

Empowered individuals.

Innovative enterprises.

Vibrant communities.



Evolving CAEECC Working Group Roster

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2.1

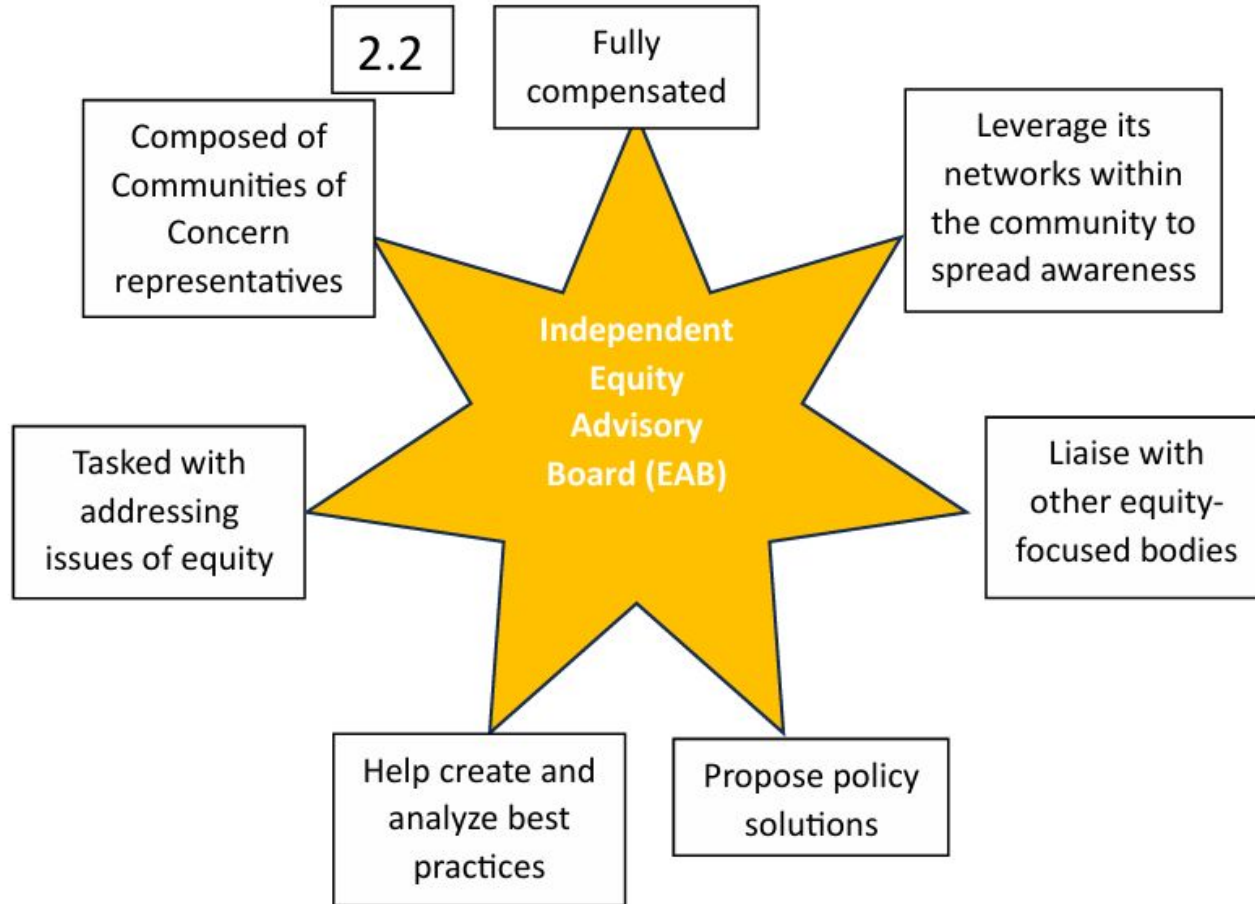
Creation of an equity
advisory body

CAEECC Equity Advisory
Committee (EAC)

composed of both Evolved
CAEECC and non Evolved
CAEECC members from
Communities of Concern

Compensation

Serve as a liaison to bring
more collaboration
between energy programs





LOCAL NEWS
Sweetwater Union High School District to go all-electric



Bachelor's Degree
Triple Majored:
Geography
Sociology
Political Science

1st Generation College Student

McNair Scholar

*SDSU Research Symposium,
Dean's Award*



CA State Capitol
Secretary of State,
Dr. Shirley Weber

**Introduced own Bill
AB832(2013)**

*2014 California State
Assembly Certificate of
Recognition: Salute to
Women Leaders in the 79th
District.*



Master's degree, SOLES
Life Coaching, Certificate
Black Student Union, President

**Holds the record for most awards
received by a graduating student**

- *"The Best Capstone Project Award Winner of the 2018 graduating cohort"*
- *Trailblazer Award Winner*
- *"USD Changemaker Hub 2017 Winner"*
- *"The L. Reuben Mitchell Award winner for Campus-Wide Impact, for contribution of Leadership, active involvement, and outstanding contributions to diversity, equality, and inclusion across campus"*

SDUSC Climate Ambassador Meetings:

- Youth Climate Ambassador Program (3rd Wed. 5pm-6pm)
- Senior Citizen Climate Ambassador (2nd Wed. 2-4pm)
- Org. Meetings (3rd Thurs. 6pm-7pm)
- Board meeting (1st Friday 9am-10:30am)
- National Meetings (3rd Thurs. 12pm-1pm)

San Diego Green New Deal

- **Steering Committee** (quarterly meetings)

San Diego Building Electrification Coalition

- Equity Working Group **Chair** (4th Tues. 12-1pm)
- School Teams Committee (4th Tues. 4pm-5pm)
- General meetings (1st Thur. 4-5pm)

Southeast SD STEM Ecosystem Committee (3rd Tues. 2:30-4pm)

City of SD Climate Equity Working Group (3rd Wed. 10:30-12)

San Diego 350

- JEDI Team (3rd Wed. 6-7:30pm)
- Leadership Committee

Appointed by the Mayor of San Diego

**The City of San Diego's
1st Climate Advisory Board**

- California Energy Efficiency Coordinating Committee (CAEECC) -Equity Working Group
- SDSU Interdisciplinary Climate Education for Action Group (ICEAG)

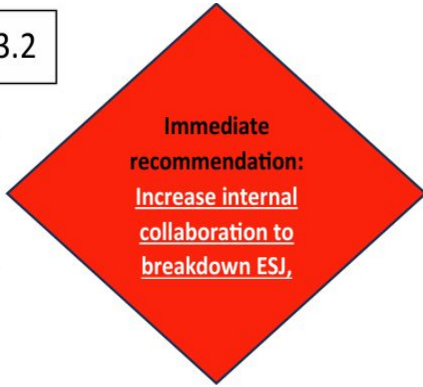
Climate Action Campaign

- API Initiatives support team (Asian Pacific Islanders initiative)

- San Diego Green Building Council
- TCC with UC Project
- In Good Company
- City of San Diego IPEG focus group
- San Diego County Live Well
- Tree San Diego
- SANDAG
- North County Climate Change Alliance
- PHATCAMP Advisory Board (a nonprofit grassroots organization) (1st Wed

The image is a screenshot of a news article from KPBS. At the top left is the KPBS logo and a 'Give Now' button. The main headline reads 'Activists rally at city hall over San Diego's Climate Action Implementation Plan'. Below the headline, it says 'By Jacob Aere / General Assignment Reporter' and 'Published March 9, 2023 at 5:42 PM PST'. There are social media sharing icons for Facebook, Twitter, WhatsApp, and Email. The main image shows a woman speaking at a microphone during a rally, with other people and signs in the background. One sign says 'SUPPORTING LOCAL CLIMATE' and another says 'IS OUR MON CLIMATE JUST'.

3.2



Coordinate design, and implement learning opportunities

Leverage technical expertise that exists outside of the traditional market-rate EE landscape.

- Everyone should have a minimal foundation of knowledge on topics being discussed.
- Everyone involved should be on the same page of what equity and environmental justice is.
- Everyone should always be given their moment to be heard at every meeting “Roundtable Spotlight.”

BECOME A CERTIFIED CLIMATE AMBASSADOR



Virtual: 2 Day National Workshop

Saturdays

5/18/24 & 5/25/24



10am-3:30pm PST/1pm-6:30pm EST

Register here!



Registered participants that ATTEND ALL DAYS get \$100 and an official certificate at the completion of the program.

San Diego Urban Sustainability Coalition (SDUSC) Climate Ambassador Training Program exists to equip community members with the tools they need for revitalizing their ecosystems and for cultivating the skills and knowledge required for stepping into leadership roles that promote environmental justice and equity for all.



GOALS OF THE PROGRAM

- Organize for Community Engagement
- Promote Widespread Environmental Education
- Lead and Execute Environmental and Climate Justice Community Projects
- Advocate for Local and Regional Policies that will support our communities.

BENEFITS OF THE PROGRAM

- Join Community of Climate Ambassadors
- Potential Funding for Projects
- Publishing Opportunities
- Invitation to Panel discussions
- Newsletter Spotlights
- Continued Networking

SDUSC.ORG

A question I was asked:

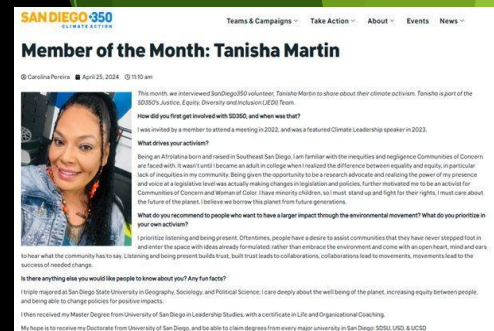
What do you recommend to people who want to have a larger impact through the environmental movement? What do you prioritize in your own activism?

My Answer:

I prioritize listening and being present. Oftentimes, people have a desire to assist communities that they have never stepped foot in and enter the space with ideas already formulated; rather than embrace the environment and come with an open heart, mind and ears to hear what the community has to say.

LISTENING AND BEING PRESENT BUILDS TRUST...
BUILT TRUST LEADS TO COLLABORATIONS...
COLLABORATIONS LEAD TO MOVEMENTS...
MOVEMENTS LEAD TO THE SUCCESS OF NEEDED CHANGE!

Evolution is never quick and easy!
Get comfortable being uncomfortable,
because all growth comes with a bit of discomfort!
That discomfort is the evidence of transformation!




SAN DIEGO 350
TEAMS & CAMPAIGNS TAKE ACTION ABOUT EVENTS NEWS

Member of the Month: Tanisha Martin

By Caroline Pereira April 25, 2024 11:10 am

This month, we interviewed San Diego 350 volunteer, Tanisha Martin to share about their climate activism. Tanisha is part of the 350SD's Justice, Equity, Diversity and Inclusion (JEDI) Team.



How did you first get involved with 350SD, and when was that?
I was invited by a mentor to attend a meeting in 2022, and was a featured Climate Leadership speaker in 2023.

What drives your activism?
Being an Alsatian born and raised in Southeast San Diego, I am familiar with the inequities and negligence Communities of Concern are faced with. It wasn't until I became an adult in college when I realized the difference between equity and justice, in particular, lack of inequities in my community. Being given the opportunity to be a research advocate and making the power of my presence and voice at a legislative level was actually making changes in legislation and policies, further motivated me to be an activist for Communities of Concern and Women of Color. There are only 10 billion, so I must stand up and fight for their rights. I must care about the future of the planet, before we become the planet from future generations.

What do you recommend to people who want to have a larger impact through the environmental movement? What do you prioritize in your own activism?
prioritize listening and being present. Oftentimes, people have a desire to assist communities that they have never stepped foot in and enter the space with ideas already formulated; rather than embrace the environment and come with an open heart, mind and ears to hear what the community has to say. Listening and being present builds trust, built trust leads to collaborations, collaborations lead to movements, movements lead to the success of needed change.

Is there anything else you would like people to know about you? Any fun facts?
I triple majored at San Diego State University in Geography, Sociology, and Political Science. I care deeply about the well being of the planet, increasing equity between people, and being able to change periods for people impacted.

I then received my Master Degree from University of San Diego in Leadership Studies, with a certificate in Life and Organizational Coaching.

I have received my Master Degree from University of San Diego, and the ability to take degrees from two more universities at San Diego (SDSU, USD, & UCSD)

05: Evolving CAEECC Reflection Shareout | Member Shareouts

Alice Sung, Individual

No slides

05: Evolving CAEECC Reflection Shareout | Member Shareouts

Lara Ettenson, NRDC

No slides

05: Evolving CAEECC Reflection Shareout | Member Shareouts

Lauren Weston, Acterra

No slides

05: Evolving CAEECC Reflection Shareout

Clarifying Questions

1. *CAEECC Members*
2. *ECWG Members*

Members of the Public will be invited to submit clarifying questions via the Chat during this section and may be responded to verbally (time permitting) or via a document after the meeting.

Clarifying Questions from CAEECC Members

This section is meant to be for comprehension and understanding questions and responses only.

Clarifying Questions from ECWG Members

This section is meant to be for comprehension and understanding questions and responses only.

| | | |
|----|------|--------------------------|
| 00 | 9:00 | Welcome and Introduction |
|----|------|--------------------------|

| | | |
|----|------|----------------------------|
| 01 | 9:05 | SoCal Performance Review I |
|----|------|----------------------------|

lunch

| | | |
|----|-------|-----------------------------|
| 02 | 11:45 | SoCal Performance Review II |
|----|-------|-----------------------------|

| | | |
|----|------|----------------------------|
| 03 | 1:30 | Wrap Up Performance Review |
|----|------|----------------------------|

break

| | | |
|----|------|--------------------------|
| 04 | 2:00 | CAEECC Meeting Commences |
|----|------|--------------------------|

| | | |
|----|------|------------------------------|
| 05 | 2:05 | Evolving CAEECC WG Shareouts |
|----|------|------------------------------|

| | | |
|----|------|------------------------------|
| 06 | 3:35 | CAEECC Business Items |
|----|------|------------------------------|

| | | |
|----|------|--|
| 07 | 4:50 | CAEECC Agenda Wrap Up + Adjournment |
|----|------|--|

**Break
until
3:35pm**

06

CAEECC Business Items

1. Membership Survey Results
2. Discuss and seek agreement on a proposal for next steps on CAEECC purpose and scope

06: CAEECC Business Items

Membership Survey Results

**After the Q1 3/14 Full CAEECC Meeting,
CAEECC Members filled out a survey to
seek consensus on proposed
Membership changes.**

Consensus was not reached.

—

Membership Survey Results

At the Q1 2024 Full CAEECC Meeting, CAEECC Members and the Public discussed potential interim changes to the CAEECC Membership process.

During the Meeting, CAEECC Members voted to make interim changes and revisit this topic after Evolving CAEECC WG Reflections were submitted.

Membership Survey was sent after the Q1 meeting

**No changes
were made
due to lack of
consensus**

Membership Survey Results - Summary

| Expertise <i>currently requires solely EE</i> | Documented Sponsorship <i>currently 2 CAEECC sponsors are required per applicant</i> | Onboarding <i>currently it is optional (but encouraged) and focused on CAEECC, EE, and ESJ</i> |
|---|--|--|
| Remain the same (4) | Remain the same (6) | Remain the same (6) |
| Revise to EE <u>and/or</u> ESJ (12 = $\frac{2}{3}$ MAJORITY) | Remove the requirement for documented sponsorship (7 = NOT $\frac{2}{3}$ MAJORITY) | Add a Groundrule that <u>requires</u> onboarding (10 = NOT $\frac{2}{3}$ MAJORITY) |
| Revise to <u>both</u> EE and ESJ (0) | No preference (3) | No preference (0) |

Note there were 16 survey respondents (meets proxy requirement for $\frac{3}{4}$ of members to vote); each item needed 11 votes to meet $\frac{2}{3}$ majority requirement to change Groundrules.



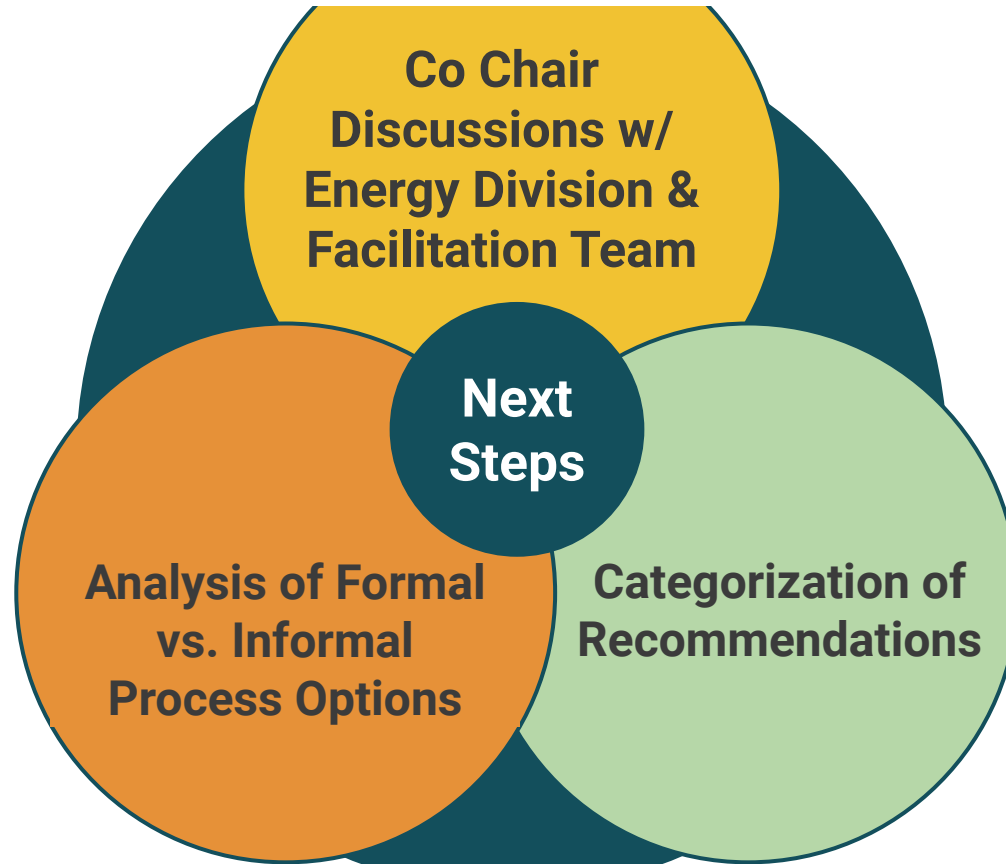
Next Steps

CAEECC Members will continue this conversation. This information informed the co-chair proposal to be discussed momentarily.

06: CAEECC Business Items

Co-Chair Proposal for Next Steps

How Co-Chairs Developed the “Next Steps” Proposal



Form Follows Function

PURPOSE

Why should
CAEECC
exist?

GOALS

What are
we trying to
achieve?

SCOPE

What
should
CAEECC
work on?

STRUCTURE

How should CAEECC
be designed?

Form Follows Function

PURPOSE

Why should
CAEECC
exist?

GOALS

What are
we trying to
achieve?

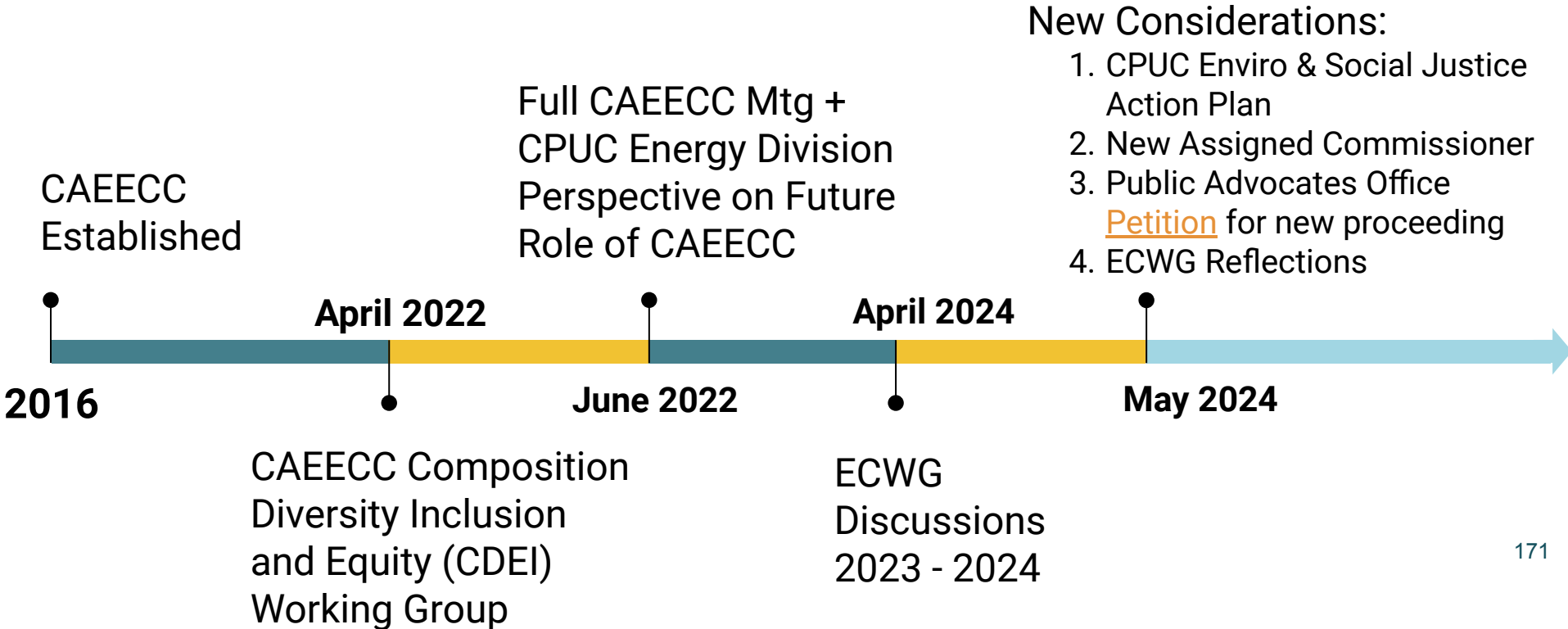
SCOPE

What
should
CAEECC
work on?

STRUCTURE

How should CAEECC
be designed?

CAEECC Goals & Scope Discussion Timeline



Current CAEECC Goals

1. Support the development and expansion of high-quality energy-efficiency programs that reduce greenhouse-gas emissions in line with state climate and energy goals while responding to customer needs and market dynamics
2. Provide meaningful and useful input to the Program Administrators (PAs) in the development and implementation of their energy-efficiency business plans
3. Improve collaboration and communication among parties and with the California Public Utilities Commission (CPUC) on energy-efficiency matters
4. Resolve disagreements among stakeholders whenever possible to reduce the number of matters that need to be litigated before the CPUC

CAEECC Voting Member Roster

Ex-Officio are not voting members

| Organization | First |
|---------------------|------------------------|
| 3C-REN | Alejandra Tellez |
| BayREN | Jane Elias |
| CEDMC | Joe Desmond |
| CodeCycle | Dan Suyeyasu |
| CSE | Rocky Fernandez |
| I-REN | Benjamin Druyon |
| LGSEC | Demian Hardman-Saldana |
| MCE | Alice Havenar-Daughton |
| NRDC | Lara Ettenson |
| PG&E | Lisa Hunter |
| RCEA/RuralREN | Stephen Kullmann |
| SBUA | Ted Howard |

| Organization | First |
|----------------------------------|------------------------|
| SCE | Jessica Lau |
| SDG&E | Stacie Atkinson-Risley |
| SF Department of the Environment | Lowell Chu |
| SJVCEO | Courtney Kalashian |
| SMW Local 104 | Randy Young |
| SoCalGas | Darren Hanway |
| SoCalREN | Lujuana Medina |
| The Energy Coalition | Laurel Rothschild |

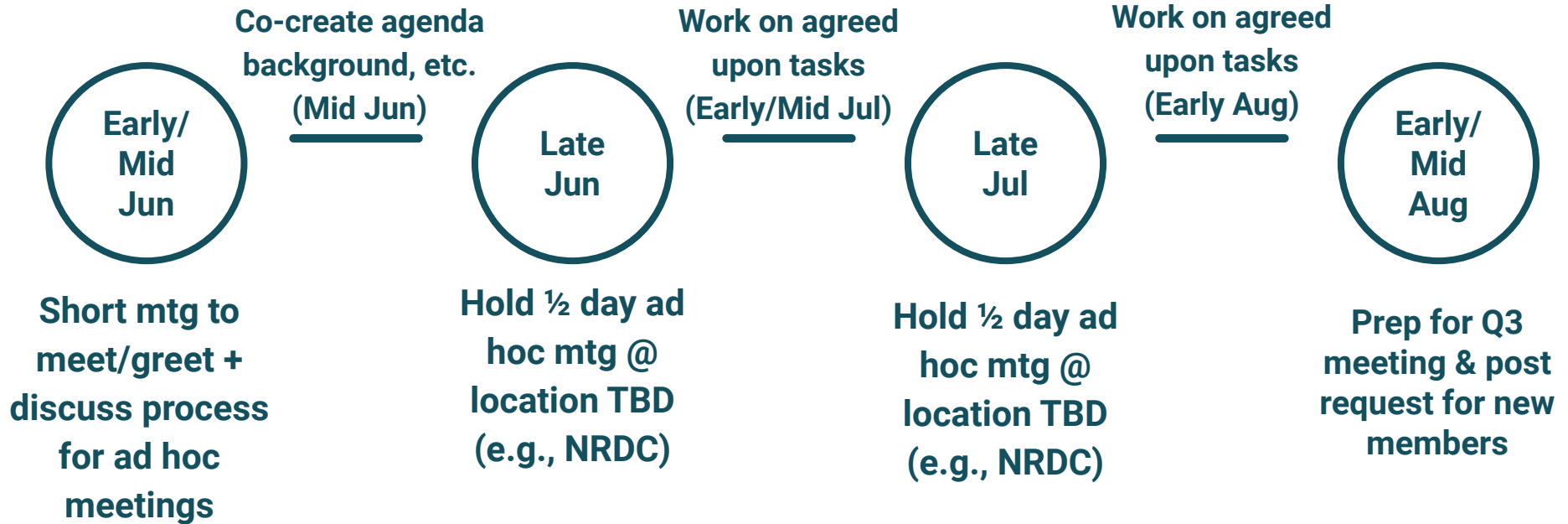
Full CAEECC Members, do you agree that updating CAEECC's goals is needed *before* acting upon scope, which would include ECWG Recommendations?

Yay =

Nay =

Result = (enter consensus, $\frac{3}{4}$ majority, or no majority)

Co-Chair Proposal to Update Goals for CAEECC 4.0



Co-Chair Proposal to Update Goals for CAEECC 4.0, Cont.



Mid/
Late
Aug

Sep
2024

B/n Q3
& Q4

Nov
2024

Post proposal for
updated goals
AND new member
applications

At Q3 Mtg:

- (1) Vote on new CAEECC members
- (2) Discuss and seek CAEECC member agreement on proposed goals
- (3) Discuss and seek CAEECC member agreement on process to update scope

Pending the outcome of

the Q3 votes:

- (1) Onboard new members, if needed
- (2) Draft proposal for CAEECC scope, considering ECWG recommendations

At Q4 Mtg:

- (1) Discuss and seek CAEECC member agreement on proposed scope

06: CAEECC Business Items: Co-Chair Proposal

**Possible pathways to
incorporate new voices**

Composition Options to Discuss for Proposed Summer Process

| Option 1 Full CAEECC members + Evolving CAEECC Working Group (ECWG) + the CAEECC Composition, Diversity, Equity, Inclusion group (CDEI) only | Option 2 Fully open process | Option 3 Combo process Use Option 1 and ADD public participation options (e.g., workshop + survey) |
|--|---|---|
| <i>Interested stakeholders from these groups sign up</i> | <i>Launch full application process (e.g., interested stakeholders apply and undergo an approval process like w/ ECWG)</i> | <i>Same as Option 1 AND public participants register for a workshop &/or complete survey</i> |

Other options?

Full CAEECC Members, are there other composition options to add to this list?

ECWG Members and Public, are there other composition options to add to this list?

Proposed Voting Process: $\frac{3}{4}$ required to move forward, if not $\frac{3}{4}$, take out least voted; and vote again. Do until we get a $\frac{3}{4}$ vote.

Full CAEECC Members, Which composition option do you support?

Option 1 =

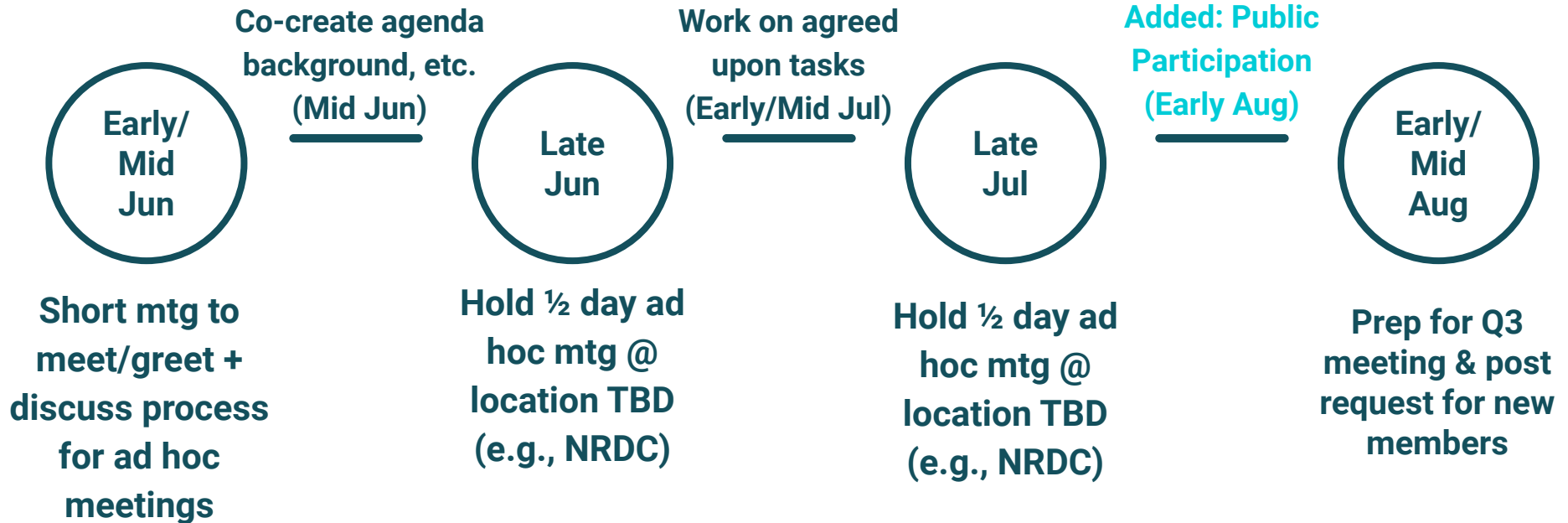
Option 2 =

Option 3 =

Other option =

Result = *(enter consensus, $\frac{3}{4}$ majority, or no majority)*

Co-Chair Proposal to Update Goals for CAEECC 4.0



Becoming a CAEECC Member ([Download Word Document](#))

Co-Chair Proposal to Update Goals for CAEECC 4.0, Cont.



Mid/
Late
Aug

Sep
2024

B/n Q3
& Q4

Nov
2024

Post proposal for
updated goals
AND new member
applications

At Q3 Mtg:

- (1) Vote on new CAEECC members
- (2) Discuss and seek CAEECC member agreement on proposed goals
- (3) Discuss and seek CAEECC member agreement on process to update scope

Pending the outcome of

the Q3 votes:

- (1) Onboard new members, if needed
- (2) Draft proposal for CAEECC scope, considering ECWG recommendations

At Q4 Mtg:

- (1) Discuss and seek CAEECC member agreement on proposed scope

Full CAEECC Members:

- 1. Any questions/comments on the proposal to update goals over the summer?**
 - 2. Any question/comments re: requesting new CAEECC member applications to vote on at Q3?**
-

ECWG Members & Public:

- 1. Any questions/comments on the proposal to update goals over the summer?**
 - 2. Any question/comments re: requesting new CAEECC member applications to vote on at Q3?**
-

Full CAEECC Members, do you agree with the summer process?

note: the voting on member proposal is next

Yay =

Nay =

Result = (enter consensus, $\frac{3}{4}$ majority, or no majority)

Full CAEECC Members, do you agree the proposal to solicit for new CAEECC members in August and vote at the top of Q3 CAEECC meeting?

Yay =

Nay =

Result = (enter consensus, $\frac{3}{4}$ majority, or no majority)

RESULTS SUMMARY SLIDE

1. Focus on Goals only?
 2. Which composition path?
 3. Move forward w/ summer process?
 4. Solicit for new members and vote at Q3 mtg?
-

07

Main Assembly Wrap Up

Topics for Q3

Evaluations

Meeting Goals

Proposed Topics for Q3 Full CAEECC Meeting

Main Assembly

- CAEECC Purpose and Scope
- Planning for Semi-Annual Portfolio Performance Report Review Sessions
- Compensation Pilot Final Report
- SDREN Update (if applicable)
- Other topics?

Optional Assembly

- Non-Energy Benefit Study Process
- CalMTA Market Transformation Pilot Updates
- CEC Equitable Building Decarbonization Program Updates
-

3/14/24 Meeting Evaluation Scores

| Evaluation Question Summaries | Avg. |
|--|------|
| Objectives of the meeting were accomplished. | 4.3 |
| Presentations and background documents were clear and helpful. | 4.9 |
| This meeting was an inclusive and trusting environment. | 4.9 |
| The facilitators were effective in running the meeting. | 4.7 |
| Overall, the meeting format was smooth and effective. | 4.4 |
| Overall, this Full CAEECC meeting was successful. | 4.4 |

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

*Scores based on responses from **18 respondents**: 14 CAEECC Members, 1 Ex-officio, 2 Stakeholders, 1 CAEECC Org not lead*

Facilitation Team and Co-Chairs reviewed and debriefed comments from respondents and will continue to adapt to address suggestions and concerns.

This Meeting Evaluations

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

Members of the Public are encouraged to complete the evaluations.



Evaluations will be sent by
CAEECC Facilitator



Complete evaluations **today** and
latest by May 21, 2024 close of
business

CAEECC Agenda Goals

1

Meeting Goal #1

Participate in shareouts by Evolving CAEECC Working Group Members on their reflections and engage in clarifying questions for Full CAEECC Members

2

Meeting Goal #2

Discuss and seek agreement on co-chair next steps proposal for CAEECC 4.0

3

Meeting Goal #3

Present CAEECC Membership Process survey results and next steps

Live Meeting Evaluation, *how'd we do?*

Do you feel today was an inclusive and trusting (i/t) environment?

Not at all i/t Somewhat i/t Very i/t

Do you feel today was effective?

Not at all effective Somewhat effective Very effective

What worked well? How can we improve?



Thank you!

For CAEECC Leads, Alternates, and Ex-officio only: DEI Sessions #1 & 2 on 6/12 and 7/31 respectively.

Next Full CAEECC Quarterly Meeting: September 17 or September 18 (pending the venue)



Appendix

- A. CAEECC Membership Structure
- B. Co-Chair Proposal - Categorization of ECWG Reflections
- C. 3rd-Party Program Solicitations
- D. Breakdown of Summary of Core Metrics

08: Appendix A

CAEECC Membership Structure



4 Advocate Members

- Natural Resources Defense Council
- Labor Management Cooperation Committee
- Sheet Metal Workers Local 104
- Small Business Utility Advocates

5 Implementer Members

- California Energy Efficiency + Demand Council
- Center for Sustainable Energy
- CodeCycle
- San Joaquin Valley Clean Energy Organization
- The Energy Coalition

5 Government Members

- California Air Resources Board (ex officio)
- California Energy Commission (ex officio)
- California Public Utilities Commission (ex officio)
- Local Government Sustainable Energy Coalition
- San Francisco Dept of Environment

10 Program Administrator Members

- Community Choice Aggregators (2): MCE and RCEA
- Investor-owned Utilities (4): PG&E, SCE, SDG&E, and SoCalGas
- Regional Energy Networks (4): 3C-REN, BayREN, I-REN, and SoCalREN

CAEECC Membership & Structure

08: Appendix B | Co-Chair Proposal for Next Steps

Categorizing CAEECC Authority For ECWG Reflection Recommendations

Path to Implement ECWG Recs: Structure

| # | Recommendation Category | Is it within CAEECC purview? | Is Commission direction needed? |
|---|------------------------------|------------------------------|---------------------------------|
| 1 | Membership/Representation | Yes | No |
| 2 | Education | Yes | No |
| 3 | Meeting Structure | Yes | No |
| 4 | Outreach/Engagement | Yes | No |
| 5 | Update Purpose/Scope | Yes | No |
| 6 | Compensation/Intervenor Comp | No | Yes |

Path to Implement ECWG Recs: Equity Part 1

| # | Recommendation Category | Is it within CAEECC purview? | Is Commission direction needed? |
|---|--|------------------------------|---------------------------------|
| 7 | Equity Advisory Committee = Part of CAEECC | Yes | No |
| 8 | Collaboration across related entities (e.g., LIOB/DACAG) | Yes | No |
| 9 | Equity Advisory Board = Independent Body | No | Yes |

Path to Implement ECWG Recs: Equity Part 2

| # | Recommendation Category | Is it within CAEECC purview? | Is Commission direction needed? |
|----|--------------------------------|------------------------------------|--|
| 10 | Equity Program Best Practices | Yes <i>If informal/advisory</i> | Yes <i>If PAs are required to act</i> |
| 11 | Equity Progress Tracker | No | Yes |
| 12 | Modify Equity-Related Policies | No | Yes |

08: Appendix C

3rd-Party Program Solicitations

Third Party Energy Efficiency Program Updates



SDG&E 2023 – 2025 Solicitation Schedule*

| Year | | 2023 | | | | | | | | | | | | 2024 | | | | | | | | | | | | 2025 | | | |
|---------------------|--------------------------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|
| Quarter | | Q1 | | | Q2 | | | Q3 | | | Q4 | | | Q1 | | | Q2 | | | Q3 | | | Q4 | | Q1 | | Q2 | | |
| Month | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr |
| Local Commercial | Groceries, Restaurants, Food Storage | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Local Commercial | Private Institutions, Healthcare | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Local Commercial | Lodging | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Local Commercial | Retail, Offices and Wholesale | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Local Cross-Cutting | Market Access Program | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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

In-flight Negotiations:

- Retail, Offices and Wholesale
- Groceries, Restaurants and Food Storage

In-flight Solicitations:

- Lodging: Hotels/Motels
- Private Institutions and Healthcare
- Market Access Program

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



3rd Party Program Solicitations Update

PG&E Energy Efficiency Solicitation Timeline 5/6/2024

| | | Year 2024 | | | | | | | | | | | | Year 2025 | | | | |
|--------------------------|----------------------|--|-------|-----|-------------|-------------|-------------|-----|-----|-----|-----|-----|-----|-----------|-----|-----|-----|-----|
| Customer Segment | Portfolio Segment | Quarter | Q1 | | | Q2 | | | Q3 | | | Q4 | | | Q1 | | | |
| | | | Month | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Codes & Standards | Codes & Standards | SW CODES & STANDARDS ADVOCACY RFP - Wave 2 | | | Contracting | | | AL | IP | | | | | | | | | |
| Codes & Standards | Codes & Standards | CODES & STANDARDS CODE READINESS RFP | | | Contracting | | | AL | IP | | | | | | | | | |
| Commercial & Residential | Resource Acquisition | 2024 SUMMER RELIABILITY PLATFORM ADMINISTRATOR RFP | | | Contracting | | | AL | IP | | | | | | | | | |
| Residential & Commercial | Equity | ZONAL ELECTRIFICATION (Residential & Commercial) RFP | | | Contracting | | | AL | | | IP | | | | | | | |
| Residential | Equity | RESIDENTIAL ELECTRIFICATION EQUITY RFA/RFP | | | Contracting | | | AL | | | IP | | | | | | | |
| Residential | Market Support | RESIDENTIAL WHOLE HOME LOAD MANAGEMENT (ResCEO) RFP | | | RFP | Contracting | | | AL | | | IP | | | | | | |
| Commercial | Resource Acquisition | COMMERCIAL ENERGY MANAGEMENT (SEM Expansion) RFP | | | RFP | Contracting | | | AL | | | IP | | | | | | |
| Residential | Market Support | RESIDENTIAL MARKET SUPPORT (Single Point-of-Contact) RFP | | | RFP PREP | RFP | Contracting | | | AL | | | IP | | | | | |

PG&E has been focused on launching new programs in the areas of:

- Equity
- Electrification
- Load Management
- Summer Reliability
- SEM-Expansion
- Codes & Standards

Upcoming Solicitations:

- Residential Single-Point-of-Contact

Potential Future Focus Areas:

- Customer Resiliency (Residential & Public)

SCE Solicitation Timeline

| IOU | Year | | 2024 | | | | | | | | | | | | 2025 | | | | | | | | | | | |
|-----|---------|----------------------------|------|-----|-------------|-----|-------------|-----|-----|-------------|-----|-----|-------------|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | Quarter | | Q1 | | | Q2 | | | Q3 | | | Q4 | | | Q1 | | | Q2 | | | Q3 | | | Q4 | | |
| | Month | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| SCE | Local | Residential - Multifamily | RFP | | Contracting | | | | AL | | IP | | | | | | | | | | | | | | | |
| SCE | Local | Large Industrial | RFP | | | | Contracting | | | | AL | | IP | | | | | | | | | | | | | |
| SCE | Local | MAP - All Sectors | RFP | | | | Contracting | | | | AL | | IP | | | | | | | | | | | | | |
| SCE | Local | Comprehensive Commercial | | RFP | | | | | | Contracting | | | | AL | | IP | | | | | | | | | | |
| SCE | Local | Residential | | | RFP | | | | | Contracting | | | | AL | | IP | | | | | | | | | | |
| SCE | Local | Large Industrial - Round 2 | | | | | RFP | | | | | | Contracting | | | | AL | | IP | | | | | | | |

Today

| LEGEND: |
|------------------------------------|
| RFA Prep |
| RFA |
| RFP Prep |
| RFP |
| Contract Negotiation |
| AL (if applicable) + Approval + IP |

In-flight Negotiations:

- Residential – Multifamily

Kicking off Negotiations:

- Large Industrial
- Market Access Program

In-flight Solicitations:

- Comprehensive Commercial
- Residential

Soon to Launch Solicitations:

- Large Industrial – Round 2

Pro Forma Revision Highlights:

- Condensed and clarified language (20% fewer pages)
- Eliminated Performance Assurance clauses
- Clarified language for Deemed, Custom, and NMEC (both site-based and population-based) review processes
- Added provisions governing permitted use of Customer Data and sharing Data with Subcontractors

Portfolio Updates

Program Solicitations

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

- IDEEA365 is a recurring competitive procurement process, utilizing a single-stage solicitation.
 - Round 1: Resulted in four contracts in 2023/2024
 - Round 2: In process of finalizing two contracts
 - Round 3: Estimated Q4 launch date
- In June, will be launching a single-stage solicitation for a Market Access Program solution for residential and commercial sectors.

08: Appendix D

Breakdown of Summary of Core Metrics

2023 Summary: Regional Energy Networks (RENs) and Community Choice Aggregators (CCAs) - % Total Expenditures by Segment

| | Equity | Market Support | Resource Acquisition | Other (C&S, EM&V) | Total Portfolio* (\$) |
|--------------|------------|----------------|----------------------|-------------------|-----------------------|
| PA | % | % | % | % | \$ |
| 3C-REN | 61% | 21% | 0% | 18% | \$6,127,259 |
| BayREN | 65% | 15% | 12% | 8% | \$27,366,187 |
| SoCalREN | 13% | 45% | 41% | 1% | \$23,707,599 |
| MCE | 33% | 7% | 57% | 2% | \$8,652,238 |
| Avg % | 43% | 22% | 28% | 3% | |

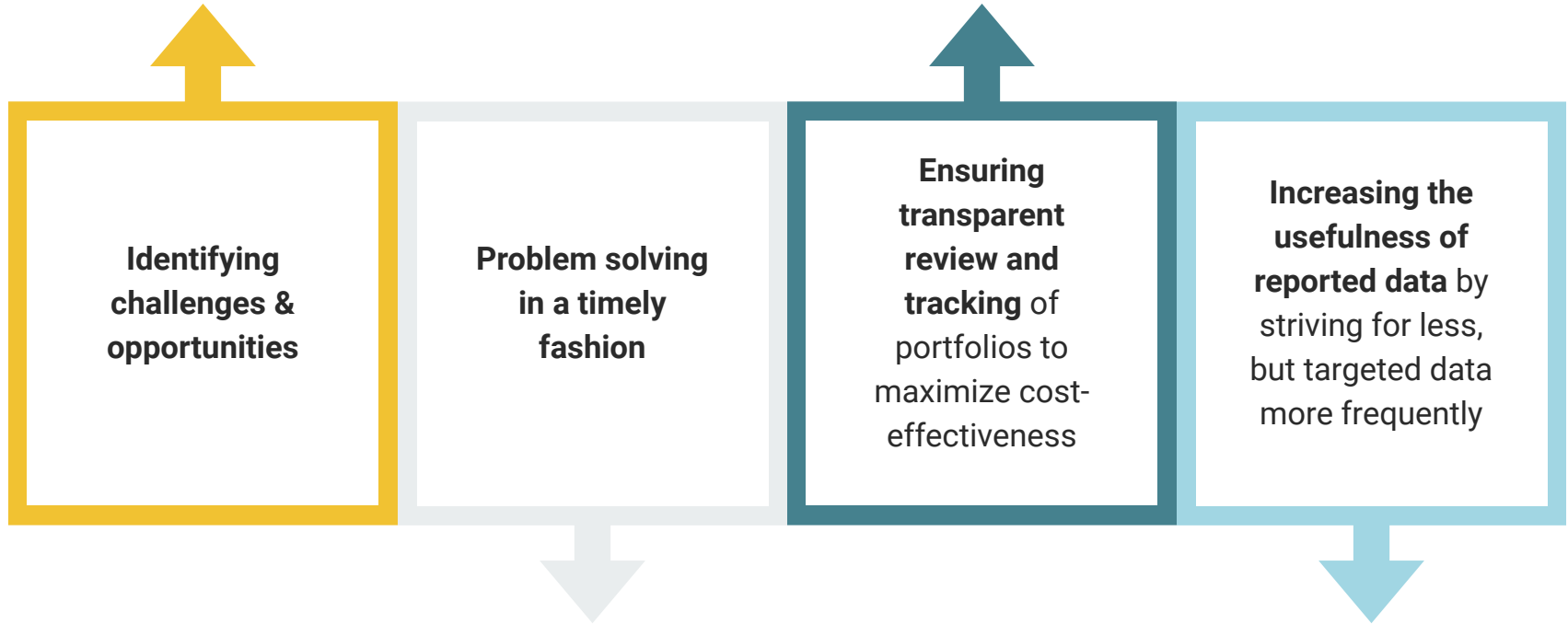
*Total Portfolio Expenditures includes the budget for programs, EM&V and C&S

2023 Summary: Investor-Owned Utilities (IOUs) - Goal Attainment and % Total Expenditures

| | Goal Attainment | Goal Attainment | Equity | Market Support | Resource Acquisition | Other (C&S, EM&V) | Total Portfolio* |
|--------------|-------------------------|----------------------------|-------------|----------------|----------------------|-------------------|------------------|
| PA | GWh % of Goal (w/o C&S) | MMTherms of Goal (w/o C&S) | % | % | % | % | \$ |
| PG&E | 63% | 136% | 1.7% | 16.2% | 61.1% | 21.1% | \$202,931,538 |
| SDG&E | 46% | 132% | 0.5% | 17.4% | 70.6% | 11.5% | \$57,504,529 |
| SCE | 47% | n/a | 0.8% | 16.5% | 64.1% | 18.6% | \$148,215,582 |
| SoCalGas | n/a | 121% | 4.0% | 15.7% | 78.4% | 1.9% | \$99,271,102 |
| Avg % | 52% | 129.7% | 1.7% | 16.5% | 68.6% | 13.3% | |

*Total Portfolio Expenditure includes the budget for programs, EM&V, ME&O, admin, and C&S

Purpose of CAEECC Engagement in Portfolio Review Process



Note: these purposes were identified in the *CAEECC 2020 Consensus EE Filing Process Proposal Motion* which was adopted in D.23-06-055

Summary of Core Metrics

Key Metrics from CAEECC
 Consensus Doc (042420)
 SEC 8.3.1 (p.16)
[\(Download Word Document\)](#)

D.21-05-031 p.14: Programs with a primary purpose of delivering cost-effective avoided cost benefits to the electricity and natural gas systems.

D.21-05-031 p.14: Programs with a primary purpose of providing energy efficiency to hard-to-reach or underserved customers and disadvantaged communities.

D.21-05-031 p.14: Programs with a primary objective of supporting the long-term success of the energy efficiency market (e.g., education, workforce, etc.)

EE Policy Manual v6 p.94: Evaluation, Measurement, and Verification Budget is capped at 4% of overall portfolio budget

EE Policy Manual p.17: Administrative costs for utility EE programs are limited to 10% of total EE budgets.

| | 2023 | | | |
|----------------------|------------------------|----------------|----------|------------|
| | Budget Authorized (\$) | % Budget Spent | TSB (\$) | % to Goal* |
| Resource Acquisition | \$ | % | \$ | |
| Equity | \$ | % | \$ | |
| Market Support | \$ | % | \$ | |
| EM&V | | | | |
| TOTAL Portfolio | \$ | % | \$ | |
| (Administration) | \$ | % | NA | |

Summary of Core Metrics

Key Metrics from CAEECC
Consensus Doc (042420)
SEC 8.3.1 (p.16)
[\(Download Word Document\)](#)

EE Policy Manual v6 p.30
requires cost-effectiveness to be reported with AND without codes and Standards (C&S)

| w/ Codes & Standards | Year |
|----------------------|------|
| Budget | \$ |
| TSB | \$ |

| w/out Codes & Standards | Year |
|-------------------------|------|
| Budget | \$ |
| TSB | \$ |

Decision (D).21-09-037, p.22 & 27
Total System Benefit = The sum of the benefit in \$\$ that an efficiency measure provides to the electric & natural gas systems

D.21-05-031, p.22
Total Resource Cost Test (the TRC must be reported on all segments but there is only a TRC ≥ 1 requirement for the resource acquisition segment)

| Year Cost Effectiveness | | | |
|-------------------------|------|-------|------|
| Portfolio | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |
| 0.00 | 0.00 | 0.00 | 0.00 |
| Resource Acquisition | | | |
| TRC | | PAC | |
| Filed | EOY | Filed | EOY |

D.21-05-031, p.22
Program Administrator Cost Test (PAC = report on all segments as info only)

End of Program Year 2023

Filed = The TRC and PAC that was calculated when the PAs submitted (aka filed) their applications and business plans to the CPUC in February 2022 as part of Application (A.) 22-02-005 et al.

Scope of Regional Energy Networks (RENs)

([EE Policy Manual v6](#) , p.20-21)

1. Activities that utilities or CCA program administrators cannot or do not intend to undertake.
2. Pilot activities where there is no current utility or CCA program offering, and where there is potential for scalability to a broader geographic reach, if successful.
3. Activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.