2024 Semi-Annual Portfolio Performance Report Review Agenda

Date: October 28, 2024
Time: 9:30am - 2:00pm PT
Location: Virtual

Overview

In accordance with D.23-06-055, the CAEECC hosts Semi-Annual Portfolio Performance Report Review Sessions for Portfolio Administrators (PAs) to report highlights, learnings, and findings on their 2024 programs. This meeting will provide insight into the progress of programs since the presentation on the prior year's Annual Report.

Objectives

- Highlight trends in PA portfolios
- Get input from CAEECC on possible course corrections
- Bring PA proposals for discussion (at least 3 months prior to filing)
- Optional use of Working Groups or Task Forces to tackle challenges raised in the Annual Report

Agenda

Supporting materials can be found on the CAEECC website:
https://www.caeecc.org/2024-semi-annual-portfolio-performance-report

Time	Topic + Description	Presenter
9:30	**Welcome & Introduction** Meeting goals and approach	Facilitator and Co-Chair
9:40	**Performance Overview** Summary of portfolio performance across PAs & Setting the stage with Q&A	Energy Division
9:55	**NorCal Performance Review** A. **PG&E** B. **MCE** C. **BayREN**	**PG&E:** Sebastien Csapo Q&A Support: Billy Roderick Angela McDonald Samantha McNabola

Time	Topic + Description	Presenter
	D. **Regional Q&A** *For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public.*	Michael Burger **MCE:** Alice Havenar-Daughton **BayREN:** Jane Elias & Tim Olsen
10:55	*Stretch*	

11:00	**Southern CA Performance Review**
	
	     A. **SCE**
	     B. **SoCalGas**
	     C. **SDG&E**
	     D. **SoCalREN**
	     E. **Regional Q&A**
	
	 For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public.
		SCE: Nicole Di Jerlando
		 SoCalGas: Roy Christian
		 Q&A Support: Darren Hanway
		 SDG&E: Kelvin Valenzuela
		 SoCalREN: Lujuana Medina & Fernanda Craig

12:10	**Lunch**	

12:40	**Central CA Performance Review**
	
	     A. **3C-REN**
	     B. **I-REN**
	     C. **Regional Q&A**
	
	 For each PA: 10 min presentation + 5 min Q&A from CAEECC Members then the Public.
		3C-REN: Alejandra Tellez & Erica Helson
		 I-REN: Benjamin Druyon & Tyler Masters

1:20	**Key Themes**
	     A. Open Q&A/Discussion
	     B. Summary of Key Themes and Segmentation
		Facilitator

1:50	**Wrap Up**
	     A. Overview of PPRR
	     B. Next Steps
		Facilitator

2:00	*Adjourn Semi-Annual Portfolio Performance Report Reviews*	

How to Engage

This meeting will be held on Zoom Webinar. We encourage you to use the desktop or web client of Zoom over the mobile app or dial-in mechanisms.[1] **Please ensure your Zoom client is [updated to the latest version](#) to ensure** all the features and functionalities are available to you for a seamless zoom experience.

CAEECC Members can engage verbally during Question and Input of the Sessions.

Non-CAEECC Members can engage via Slido[2] during Question and Input of the Sessions. A Slido link will be provided during the meeting via the Meeting Chat.

- Questions & Input can be added at any point during the presentations.
  - Use Slido Q&A for Questions (character limit is 300)
  - Use Slido Polls for Input (no character limit), there will be a poll per PA
- Questions & Input can be added at any point during the PA presentation.
- Please tag your Questions according to the PA Presenter.
- Questions can be upvoted to uplift common questions.
- Due to limited time, only a few questions may be addressed during the meeting.
- 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 to as many questions as they can in the Meeting Summary.

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[1] For more information, visit [Zoom Support](#)
[2] Tutorial for Slido Q&A: https://www.slido.com/features-live-qa#event-example