



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: Marin Clean Energy (MCE)

Utility type:

☒ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Wade Stano

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E-mail Disposition Notice to: wstano@mcecleanenergy.org

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

November 04, 2025.

Advice Letter (AL) #: 91-E

Tier Designation: 2

Subject of AL: RE: Marin Clean Energy's Energy Efficiency Mid-Cycle Advice Letter

Keywords (choose from CPUC listing): Energy Efficiency;

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.18-05-041; D.21-05-031; D.23-06-055

Does AL replace a withdrawn or rejected AL?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

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? ☐ Yes ☒ No

If yes, specification of confidential information:

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

Resolution required? ☐ Yes ☒ No

Requested effective date: 12/4/25

No. of tariff sheets: 0

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

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

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed¹: N/A

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

¹Discuss in AL if more space is needed.

Protests and correspondence regarding this AL are to be sent via email and are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

California Public Utilities Commission
Energy Division Tariff Unit Email:
EDTariffUnit@cpuc.ca.gov

Contact Name: Wade Stano
Title: Senior Policy Counsel
Utility/Entity Name: Marin Clean Energy (MCE)

Telephone (xxx) xxx-xxxx: 415-464-6024
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Contact Name: Alice Havenar-Daughton
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CPUC
Energy Division Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Clear Form

ENERGY Advice Letter Keywords

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



November 04, 2025

California Public Utilities Commission
Energy Division
Attention: Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, CA 94102-3298

MCE Advice Letter 91-E

RE: Marin Clean Energy's Energy Efficiency 2024-2027 Mid-Cycle Advice Letter

I. PURPOSE

Pursuant to Decision (“D.”) D.21-05-031 *Assessment of Energy Efficiency Potential and Goals and Modification of Portfolio Approval and Oversight Process*, D.23-06-055 *Authorizing Energy Efficiency Portfolios for 2024-2027 and Business Plans for 2028-2031*; D.25-08-034 *Adopting Energy Efficiency Goals for 2026-2037* and guidance issued from the California Public Utilities Commission (“CPUC” or “Commission”), Marin Clean Energy (“MCE”) hereby submits the following Advice Letter (“AL” or “MCAL”) to update the technical inputs, forecasts, and related information for its 2024-2027 energy efficiency (“EE”) portfolio. MCE additionally includes its request to launch the Multifamily Energy Savings Resource (“MFES-R”) program. MCE respectfully submits these collective requests as MCE AL 91-E.

II. TIER DESIGNATION

This AL has a Tier 2 designation pursuant to Ordering Paragraph (“OP”) 10 of D.21-05-031.

III. EFFECTIVE DATE

Pursuant to G.O. 96-B; D.21-05-031; and D.23-06-055, MCE respectfully requests that this Tier 2 AL be approved pending Energy Division disposition effective December 04, 2025, 30 days from the date filed.

IV. BACKGROUND

MCE has administered Energy Efficiency (“EE”) funds under California Public Utilities Code (“Code”) Section 381.1(a)-(d) since 2013. Pursuant to D.21-05-031, MCE filed its *Application of Marin Clean Energy for Approval of 2024-2031 Energy Efficiency Business Plan and 2024-2027 Energy Efficiency Portfolio Plan* (“Application”) with the Commission pursuant to Article 2 of its Rules of Practice and Procedure, California Public Utilities Code § 381.1 and D. 21-05-031 on March 04, 2022. On July 3rd, 2023, the Commission issued D.23-06-055 approving MCE’s

Application and MCE’s proposed EE portfolio for Program Years (“PYs”) 2024-2027.¹ The Commission approved a four-year budget cap of \$78,217,316 for MCE.² D.23-06-055 specifically approved all of MCE’s proposed programs except for its PeakFLEXmarket program.³ MCE filed its True-Up Advice Letter (“MCE AL 70-E” or “2023 TUAL”) pursuant to D.23-06-055 on October 16, 2023, and submitted additional details on its EE program budgets and portfolio consistent with Energy Division guidance.⁴ The CPUC accepted MCE AL 70-E approving its proposed budget amount of \$76,670,990 for PYs 2024-2027, and portfolio details in a Disposition with the effective date of November 15, 2023.

On December 28, 2023, Energy Division served *Energy Division Guidance on Integrated Demand-Side Management (IDSM) Tier 3 Advice Letter Submissions from the Energy Efficiency Portfolio Administrators (PAs)* to interested parties of the Application (“A.”) 22-02-005 et al service list detailing further direction on IDSM AL filings. The guidance directs PAs to propose “specific programs or propose the framework and structure for future multi-DER programs” and includes a template of questions.⁵ MCE submitted its IDSM Tier 3 AL, MCE AL 74-E, pursuant to D.23-06-055; and guidance issued by the Commission on December 28, on March 15, 2024. In MCE AL 74-E, MCE requested approval of its proposed IDSM program, the Peak Flex Market program, for PYs 2024-2027. On September 23rd, 2025, the Commission issued Resolution E-5387 approving MCE AL 74-E and its Peak Flex Market program.⁶

On June 24, 2024, MCE submitted MCE AL 77-E RE: Notice of Marin Clean Energy’s Small Business Energy Advantage (“SBEA”) Program Launch pursuant to D.21-05-031 and *ENERGY DIVISION PROCESS CHECKLIST TO ENERGY EFFICIENCY PROGRAM ADMINISTRATORS FOR PROGRAM CLOSURES AND LAUNCHES (12/31/2021)*. In MCE AL 77-E, MCE notified the Commission of its request to launch the SBEA program within its Equity segment to serve historically underserved businesses in environmental and social justice (“ESJ”) communities.⁷ On July 24, 2024, the Commission approved MCE AL 77-E and its SBEA program.

On August 24, 2025, Commission Executive Director Rachel Peterson granted an extension until 60 days after the issuance date of the decision adopting energy efficiency goals for MCALs in compliance with OP 10 in D.21-05-031.⁸ On September 5, 2025, the Commission issued D.25-08-034 Adopting Energy Efficiency Goals for 2026-2037.

¹ See D.23-06-055 at p. 93 (Table 7).

² *Id.*

³ D.23-06-055 at pp. 103 (approving all non-discussed programs), 104-105 (stating general support for Peak FLEXmarket’s approach, but failing to authorize additional funding).

⁴ MCE AL 70-E, pp. 12-13 (updating the Commercial Equity program ID to MCE02e).

⁵ Energy Division Guidance on Integrated Demand-Side Management (IDSM) Tier 3 Advice Letter Submissions from the Energy Efficiency Portfolio Administrators (PAs), December 2023, at pp. 2, 5.

⁶ CPUC, E-5387, pp. 1, A-32 - A-35.

⁷ MCE AL 77-E, pp. 2-5 (program description).

⁸ CPUC, RE: Request for Extension of Time to Comply with Decision 21-05-031 Requiring a Tier 2 Mid-Cycle True-Up Advice Letter by September 1, 2025, pp. 1-2.

A. Regulatory Filing Requirements⁹

1. D.21-05-031 *Assessment of Energy Efficiency Potential and Goals and Modification of Portfolio Approval and Oversight Process*

a. MCAL Requirements

- OP 10 requires each EE PA to file a mid-cycle review (in year two of a four-year portfolio) Tier 2 AL adjusting its “technical inputs, forecasts, and portfolio to account for the changes in energy efficiency potential and goals.”¹⁰
- Conclusion of Law (“COL”) 31 requires: CPUC staff to review MCALs according to Section 5.2.6 of this decision.
- Section 5.2.6 requires:
 - PAs to update portfolio and savings forecasts and goals.
 - PAs must meet Total System Benefit (“TSB”) and Total Resource Cost (“TRC”) four-year forecasted goals.
 - PAs must demonstrate Equity and Market Support segments do not collectively exceed 30% of total portfolio budgets.
 - PAs submit a report on progress on metrics relevant to each portfolio segment.¹¹

b. Program Launch Requirements

- OP 12 requires:
 - All PAs to file a Tier 2 AL when opening a new program or closing an existing program.
 - PAs may include program launch proposals in other Tier 2 ALs that may be filed for other reasons such as budget requests.
 - PAs shall follow the corresponding program launch checklist provided by CPUC staff on its website.¹²

⁹ CPUC Energy Division staff provided direction in its MCAL Template to address decisions D.21-05-031; D.23-06-055; new potential and goals decision; and “natural gas phase-out #2” in 2025 in this section. At the time of filing, to MCE’s knowledge, the CPUC has not yet issued “natural gas phase-out #2” referenced in this template. However, MCE confirms it will comply with any related subsequent decisions.

¹⁰ D.21-05-031, OP 10.

¹¹ D.21-05-031, pp. 42-43.

¹² D.21-05-031, at pp. 83-84 (OP 12).

2. D.23-06-055 *Authorizing Energy Efficiency Portfolios for 2024-2027 and Business Plans for 2028-2031*

a. MCAL Requirements

- OP 1:
 - Approves MCE as a non-IOU EE portfolio administrator.¹³
- OPs 5-6:
 - Approves MCE's EE portfolio budget of \$78,217,316 for PY 2024-2027 and \$80,063,445 budget forecast for 2028-2031.¹⁴
- OP 16:
 - Requires PAs to include descriptions of how they incorporated or addressed impact evaluations recommendations in 2025 MCAL submissions.¹⁵
- OP 23:
 - Requires PAs to work with the Reporting Policy Coordination Group to submit a demographic report on participation in portfolio programs by September 1st, 2025.¹⁶
- OP 24:
 - Requires PAs to develop and include community engagement indicators in 2025 MCAL submissions.¹⁷
- OP 34:
 - Requires PAs to submit updated Joint Cooperation Memorandums ("JCMs") 60 days following the approval of True-Up or MCAL to the Commission and relevant EE service list.¹⁸

3. D.25-08-034 *Adopting Energy Efficiency Goals for 2026-2037*

- a. Recognizes a request for an MCAL submission extension was submitted and addressed through the appropriate Rule 16.6 of the Commission's Rules of Practice and Procedure process.¹⁹
- b. OP 1:
- Updates the TSB and energy savings goals for 2026 – 2037 pursuant to the 2025

¹³ D.21-05-031, OP 1.

¹⁴ *Id.* at pp. 93-94; OPs 5-6.

¹⁵ *Id.* at OP 16.

¹⁶ *Id.* at OP 23. MCE participated in the Reporting PCG Demographic Data Report which was submitted to the Commission on August 6th, 2025.

¹⁷ *Id.* at OP 24.

¹⁸ *Id.* at OP 35.

¹⁹ D.25-08-034, p. 25.

B. Contents of this Filing

The contents of this MCAL are as follows:

- Narrative Document
- Attachment A: *Appendices from Excel Template in PDF*
- Attachment B: *Community Engagement Indicators Results*
- Attachment C: *PA Response to Recommendations*
- Attachment D: *CEDARS Filing Confirmation*
- Attachment E: *MCE Multifamily Energy Savings Resource Program Implementation Plan*; and
- Attachment F: *MCE Multifamily Energy Savings Resource Program Webinar Slides*.

V. DISCUSSION

MCE submits its proposed EE portfolio updates for PYs 2024-2027 in compliance with D.21-05-031, D.23-06-055, D.25-08-034, Energy Division MCAL template, and Commission guidance for Resource Acquisition segment programs.²¹

A. Portfolio Overview

1. Recent CPUC Decisions or Guidance Impacting EE Portfolios

On January 22nd, 2025, the Commission closed Rulemaking (R.) 13-11-005 Order Instituting Rulemaking Concerning Energy Efficiency Rolling Portfolios, Policies, Programs, Evaluation, and Related Issues in D. 25-01-006. In D.25-01-006, the Commission denied the motion of Association of Bay Area Governments and County of Ventura on behalf of Bay Area Regional Energy Network (“BayREN”) and Tri-County Regional Energy Network (“3C-REN”) on the categorization of all multifamily properties as “hard-to-reach.”²² The Commission noted it may scope multifamily issues and how to better serve multifamily residents in a successor EE proceeding.²³

On April 29th, 2025, the Commission issued R.25-04-010 the new *Order Instituting Rulemaking for Oversight of Energy Efficiency Portfolios, Policies, Programs, and Evaluation* that included a preliminary scope of issues and proposed schedule. On July 23rd, 2025, President Reynolds issued an Assigned Commissioner’s Scoping Memo and Ruling with a final scope and proposed schedule for the proceeding. The scope includes oversight of the PYs 2024-2027 portfolios, treatment of

²⁰ *Id.* at OP 1.

²¹ D.21-05-031, p. 14 (“Resource Acquisition: Programs with a primary purpose of, and a short-term ability to, deliver cost-effective avoided cost benefits to the electricity and natural gas systems. Short-term is defined as during the approved budget period for the portfolio, which will be discussed further later in this decision. This segment should make up the bulk of savings to achieve TSB goals.”); Application, Exhibit 2, Chapter 3.

²² D.25-01-006 at p. 11.

²³ *Id.*

multifamily buildings, cost-effectiveness, the Commission's response to Governor Newsom's Executive Order N-5-24 regarding electricity affordability,²⁴ and other implementation issues.

On June 17th, 2025, the Commission issued Resolution E-5351 approving metrics for the Equity and Market Support segments. In E-5351 the Commission also refines common metrics and related reporting processes across the EE portfolios.²⁵

On September 23rd, 2025, the Commission issued Resolution E-5387 approving IDSM programs and frameworks including MCE's Peak Flex Market program.²⁶ E-5387 outlines IDSM program implementation and reporting requirements.

2. Forecast Approach

MCE rooted its forecast approach in a review of historical program expenditures, commitments, and performance trends, adjusted for anticipated implementation activity and timing over the remainder of the PYs 2024-2027 portfolio cycle. In addition, MCE's forecasts remain aligned with its approved Application by prioritizing the maximization of TSB for its Population Normalized Metered Energy Consumption ("NMEC") Market Access programs, while also fully utilizing its allowable budgets for Market Support and Equity segment programs serving customers that historically faced barriers to accessing EE portfolio programs.

3. Portfolio Changes

This section describes updates MCE has made to its portfolio since submitting its 2023 TUAL, MCE AL 70-E, that are not the result of CPUC guidance or decisions discussed above in **Section IV. A.**

Overall, MCE's portfolio budget and TSB have decreased by approximately 8 percent and 24 percent, respectively. However, this year's filing introduces TSB forecasts for three additional programs, the Multifamily Energy Savings Resource ("MFES-R"), IDSM, and Small Business Energy Advantage ("SBEA") programs, which previously had placeholder budgets without TSB forecasts in MCE's 2023 TUAL²⁷.

In MCE's 2023 TUAL, MCE adopted a very conservative forecasting approach by excluding a TSB forecast for the SBEA program. Since that filing, MCE successfully launched the SBEA program and includes corresponding TSB forecasts in this MCAL.

²⁴ CPUC, CPUC Response to Executive Order N-5-24, February 18, 2025, at 18, available at: <https://www.cpuc.ca.gov/-/media/cpuc-website/industries-and-topics/reports/cpuc-response-to-executive-order-n-5-24.pdf> (requiring analysis of costs and benefits of ratepayer funded programs).

²⁵ CPUC, E-5351, pp. 5-15.

²⁶ CPUC, E-5387, pp. 1, A-32 - A-35.

²⁷ MCE AL 70-E.

On September 23, 2025, the Commission issued Resolution E-5387 approving IDSM programs and frameworks including MCE’s Peak Flex Market program. MCE plans to launch its IDSM program in the first quarter of 2026 and incorporates corresponding TSB forecasts in this filing.

MCE made no other material changes to its portfolio beyond those noted above. MCE further discusses additional portfolio details in **Section VI**.

B. Summary of Forecasted Portfolio Impacts

This section presents MCE’s summary of forecasted portfolio impacts, including tables summarizing forecasted budgets, TSB, and cost-effectiveness, as requested in the Energy Division’s Final Mid-Cycle Advice Letter (MCAL) Excel-based budget filing appendix.

Overall, MCE forecasts the following for the 2024-2027 portfolio period:

- Total portfolio expenditures and forecasts of \$70.4 million, including actual 2024 expenditures and forecasted budgets for PYs 2025–2027;
- Achievement of 78 percent of the cumulative TSB goal;
- A TRC ratio of 1.01 and PAC ratio of 1.48; and
- Allocation of approximately 29% of the total portfolio budget to Market Support and Equity segment programs.

1. Portfolio Budget Summary

As shown in *Table 2.3a*, MCE’s total portfolio expenditures and forecasts for 2024–2027 amount to \$70.4 million. These totals include actual expenditures incurred in 2024 and forecasted expenditures for 2025–2027. The total remains below the Commission’s approved 2024–2027 portfolio budget cap of \$78,217,316, pursuant to D.23-06-055.²⁸

MCE’s Market and Equity Support segments represent 29 percent of the total portfolio, as shown in *Table 2.3a*, consistent with the 30 percent portfolio budget cap.²⁹

Compared to the \$76.7 million cumulative portfolio forecast presented in MCE’s 2023 TUAL shown in *Table 2.3b*, the updated forecast is approximately \$6 million lower, reflecting adjustments based on actual 2024 spending and updated program pacing assumptions for PYs 2025–2027.

Table 1.5 provides a breakdown of MCE’s four-year portfolio by fuel type (electric and gas). The table reflects program funding by fuel type and excludes cost-recovery offsets.

²⁸ D.23-06-055, pp. 93, 95.

²⁹ D.21-05-031, pp. 42-43.

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 5,329,717	\$ 12,667,443	\$ 13,475,653	\$ 13,475,653	\$ 44,948,465
2	Market Support	\$ 965,264	\$ 982,711	\$ 1,081,086	\$ 1,081,086	\$ 4,110,146
3	Equity	\$ 4,272,503	\$ 4,775,218	\$ 4,850,610	\$ 4,850,610	\$ 18,748,941
4	Codes and Standards	\$ -	\$ -	\$ -	\$ -	\$ -
5	EM&V (PA and ED)	\$ 204,138	\$ 767,724	\$ 808,639	\$ 808,639	\$ 2,589,141
6	Total Budget w/o OBF Loan Pool	\$ 10,771,623	\$ 19,193,096	\$ 20,215,987	\$ 20,215,987	\$ 70,396,693
7	Market Support and Equity, percent of the Total Portfolio Budget w/o OBF Loan Pool					29%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 10,771,623	\$ 19,193,096	\$ 20,215,987	\$ 20,215,987	\$ 70,396,693
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 10,771,623	\$ 19,193,096	\$ 20,215,987	\$ 20,215,987	\$ 70,396,693
12	Approved Budget Cap ^[4]					\$ 78,217,316

[4] Decision 23-06-055 OP5

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 12,968,308	\$ 12,667,443	\$ 12,544,743	\$ 12,422,359	\$ 50,602,854
2	Market Support	\$ 975,340	\$ 982,711	\$ 990,102	\$ 997,858	\$ 3,946,010
3	Equity	\$ 4,919,346	\$ 4,775,218	\$ 4,712,055	\$ 4,648,669	\$ 19,055,287
4	Codes and Standards	\$ -	\$ -	\$ -	\$ -	\$ -
5	EM&V (PA and ED)	\$ 785,958	\$ 767,724	\$ 760,287	\$ 752,870	\$ 3,066,840
6	Total Budget w/o OBF Loan Pool	\$ 19,648,951	\$ 19,193,096	\$ 19,007,187	\$ 18,821,757	\$ 76,670,990
7	Market Support and Equity, percent of the Total Portfolio Budget w/o OBF Loan Pool					30%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 19,648,951	\$ 19,193,096	\$ 19,007,187	\$ 18,821,757	\$ 76,670,990
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 19,648,951	\$ 19,193,096	\$ 19,007,187	\$ 18,821,757	\$ 76,670,990

Table 1.5 - 4 Year Funding Sources - RENS/CCAs (RENS/CCAs Only)

Line		PG&E		SDG&E		SCE	SCG
	Year	Electric \$	Gas \$	Gas \$	Electric \$	Electric \$	Gas \$
1	2024	\$ 11,592,881	\$ 8,056,070				
2	2025	\$ 11,707,788	\$ 7,485,307				
3	2026	\$ 12,533,912	\$ 7,682,075				
4	2027	\$ 11,725,273	\$ 8,490,715				
5	Total	\$ 47,559,854	\$ 31,714,167	\$ -	\$ -	\$ -	\$ -

2. Total System Benefit Forecast

As shown in *Table 2.1a*, MCE's cumulative TSB forecast for PYs 2024–2027 is \$72.45 million, representing 78 percent of MCE's revised cumulative TSB goal of \$92.77 million. The total TSB forecast reflects actual TSB achieved in 2024 and forecasted TSB for PYs 2025–2027.

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

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 2,488,664	\$ 22,662,424	\$ 19,569,409	\$ 21,490,567	\$ 66,211,064
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 793,573	\$ 1,093,988	\$ 2,119,714	\$ 2,235,414	\$ 6,242,689
4	Total TSB Forecast	\$ 3,282,237	\$ 23,756,413	\$ 21,689,123	\$ 23,725,981	\$ 72,453,754
5	CPUC TSB Goal	\$ 23,601,101	\$ 23,753,413	\$ 21,689,123	\$ 23,725,981	\$ 92,769,618
6	TSB Forecast / TSB Goal ^[1]	14%	100%	100%	100%	78%

[1] D.21-09-037 at 24: Non-IOU program administrators may propose to revise their goals and savings forecasts in the true-up or mid-cycle advice letter.

3. Portfolio Cost Effectiveness Forecast

As shown in *Table 3a*, MCE's updated cost-effectiveness forecast for the 2024–2027 portfolio period reflects a TRC ratio of 1.01, a PAC ratio of 1.48, and a Ratepayer Impact Measure ("RIM") ratio of 0.35 for Resource Acquisition programs, indicating overall cost-effective performance. At

the portfolio level (excluding Codes and Standards), MCE forecasts a TRC ratio of 0.80, a PAC ratio of 1.04, and a RIM ratio of 0.34. These ratios incorporate 2024 actuals and forecast ratios for PYs 2025-2027.

Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)^[1]

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.01	1.48	0.35
2		Market Support	0.00	0.00	0.00
3		Equity	0.37	0.39	0.30
4		Codes and Standards (C&S)	N/A	N/A	N/A
5	Portfolio	Including C&S	N/A	N/A	N/A
6		Excluding C&S	0.80	1.04	0.34

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

4. Statewide and Third-Party Compliance (IOU Only)

This section is not applicable to MCE.

5. Market Support and Equity Forecast

MCE's Market and Equity Support segments represent 29 percent of the total portfolio, as shown in *Table 2.3a* above, consistent with the 30 percent portfolio budget cap.³⁰

6. Codes and Standards Savings Forecast (All PAs, as applicable)

This section is not applicable to MCE.

7. Non-Advocacy Codes and Standards Budget Forecast

This section is not applicable to MCE.

VI. ENERGY EFFICIENCY PORTFOLIO DETAILS

A. Segment Metrics

Pursuant to D.18-05-041,³¹ MCE has reported sector-level metrics and associated targets for each program year through 2024 in its annual EE Report filings. These reports, including all corresponding metrics, are publicly available on CPUC's CEDARS website.³²

B. Program Changes

Since MCE's 2023 TUAL, MCE transitioned to new implementers for its Commercial and Residential Efficiency Market Access programs. Additionally, MCE significantly reduced the budgets and TSB forecasts for its Agricultural Strategic Energy Management ("SEM") and

³⁰ D.21-05-031, pp. 42-43.

³¹ D.18-05-041 at OP 11.

³² CPUC, California Energy Data and Reporting System, available at: <https://cedars.cpuc.ca.gov/>.

Residential Efficiency Market programs to reflect lower participation levels and limited opportunities for additional savings.

C. New Programs

In this filing, MCE proposes to launch a new Multifamily Energy Savings Resource program in Program Year 2026 to expand energy efficiency offerings for multifamily properties.

MCE followed the *ENERGY DIVISION PROCESS CHECKLIST TO ENERGY EFFICIENCY PROGRAM ADMINISTRATORS FOR PROGRAM CLOSURES AND LAUNCHES (12/31/2021)* provided by Commission staff, including the following requirements:

- MCE notified service lists R.13-11-005, A.22-02-005 et al. and R.25-04-010 of the requested MFES-R program launch on September 9, 2025, at least 45 days prior to the filing of this AL.
- MCE hosted a public webinar soliciting stakeholder feedback on its program launch proposal and providing information on proposed next steps on September 30, 2025, 20 days prior to the filing of this AL.
- MCE posted the MFES-R public webinar slides to the California Energy Efficiency Coordinating Committee (“CAEECC”) on October 1, 2025.³³
- MCE timely filed this AL on November 04, 2025, over 45 days following its notice to required energy efficiency service lists and over 20 days following its public webinar.
- In this AL, MCE details how its MFES-R program aligns with its Application, supports greenhouse gas emissions reductions, advances EE goals, is in the best interest of ratepayers, and incorporates the received stakeholder feedback.

MCE designed the MFES-R program to comply with the Resource Acquisition segment requirements to deliver short-term cost-effective avoided cost benefits to the electricity and natural gas systems.³⁴ The MFES-R program focuses on high-impact, cost-effective measures that deliver significant energy savings as discussed further below. By focusing on electrification measures that reduce the use of natural gas, the MFES-R program supports progress on the state’s greenhouse gas emissions reductions and decarbonization goals and is in the best interest of ratepayers.

The MFES-R program is also consistent with MCE’s approved EE portfolio strategies as it:

- Supports electrification and building decarbonization efforts;³⁵
- Helps MCE deliver cost-effective savings to priority communities and customers;³⁶ and

³³ CAEECC, Program Information (e.g., program closures, updates, etc.), available at: <https://www.caeccc.org/program-closures>.

³⁴ D.21-05-031, p. 14.

³⁵ MCE Application, Exhibit 2, Chapter 3, p. 1-11.

³⁶ *Id.* at p. 3-3.

- Works to maximize TSB.³⁷

The MFES-R program aims to advance the following goals and objectives:

- Extend access to electrification incentives beyond deed-restricted affordable properties, reaching more multifamily communities and residents in MCE’s service area.
- Support multifamily property owners in initiating electrification through targeted, high-impact measures.
- Provide customized technical assistance to guide projects from initial assessment through construction.
- Reduce market barriers to decarbonization for multifamily residents and properties by bridging the funding gap for electrification retrofits.

The Association for Energy Affordability (“AEA” or “Implementor”) a nonprofit organization specializing in EE for new and existing buildings will implement the MFES-R program. AEA presently implements MCE’s existing Multifamily Energy Savings (“MFES”) program within the Equity segment of its portfolio.

The MFES Resource Program is designed to reduce market barriers that limit electrification adoption in multifamily buildings while applying best practices informed by MCE’s experience implementing its MFES Equity segment program. By extending access to all multifamily properties, the program addresses challenges unique to market-rate and mixed-income properties while providing a streamlined, customer-centered approach in the best interest of ratepayers.

The MFES-R program supports a range of electrification measures in both common areas and in-unit applications.

Primary measures incentivized in this program include:

- Heat Pump Water Heating;
- Heat Pump Space Heating & Cooling;
- Induction Ranges & Cooktops;
- Technical Assistance - Each property is assigned a technical assistant to streamline the customer experience and minimize administrative barriers; and
- Comprehensive assessment with targeted measures: Incentives focus on the most cost-effective measures, and assessments identify additional beneficial opportunities and connect owners to other available programs.

Measure Type	Measure	Location
Electrification	Heat Pump Water Heater	In-Unit
Electrification	Heat Pump Water Heater	Common Area

³⁷ *Id.* at p. 1-10.

Electrification	Ductless Mini Split	In-Unit
Electrification	Heat Pump Water Heater	Central
Electrification	Package Terminal Heat Pump	In-Unit
Electrification	Ducted Heat Pump	Common Area
Electrification	Heat Pump Water Heater	Pool
Electrification	Induction Range	In-Unit

Further program details are available in **Attachment F** to this filing: *MCE Multifamily Energy Savings Program Implementation Plan*.

D. Program Closures

MCE did not close any programs between its 2023 TUAL and this MCAL filing. Presently, MCE does not anticipate any program closures during PYs 2026–2027.

E. EM&V (2024-2027)

As shown in *Table 2.3a* above, the total Evaluation, Measurement, and Verification (“EM&V”) budget for MCE’s portfolio is \$2,589,141, representing approximately 4 percent of the \$70,396,693³⁸ total portfolio amount. MCE proposes a 40/60 cost split between MCE-administered EM&V activities and CPUC-administered EM&V funds for PYs 2026–2027.

F. Cost Recovery, Unspent Funds and Fund Transfers

MCE’s unspent and uncommitted funds from PYs 2021 through 2025 are being applied as offsets to its PYs 2024 and 2026 cost recovery requests.

2024 Offset (TUAL):

- MCE reported a total of \$12.47 million in unspent and uncommitted funds from PYs 2021–2023.
- MCE incorporated these funds into its 2023 TUAL to offset its PY 2024 cost recovery request.

2026 Offset (MCAL):

- For this MCAL, MCE projects \$20.10 million in unspent and uncommitted funds from PYs 2021–2025.
- These funds will offset MCE’s 2026 cost recovery request.

In total, \$32.57 million in unspent and uncommitted funds are available across PYs 2024–2027 to offset MCE’s future budgets and cost recovery requests. This ensures that MCE’s spending remains

³⁸ See **Portfolio Budget Summary** discussion at p. 7 of this filing.

below and is compliant with the Commission-authorized portfolio budget and CPUC direction to return unspent funds.³⁹

MCE's Unspent and Uncommitted Funds

MCE	2021	2022	2023	2024	2025	2024-2027
MCE Unspent and Uncommitted Funds for 2024 Offset (TUAL)	(\$8,216,227)	(\$3,999,799)	(\$253,033)			(\$12,469,059)
MCE Unspent and Uncommitted Funds for 2026 Offset (MCAL)	(\$74,272)	(\$323,172)	(\$5,321,854)	(\$7,644,320)	(\$6,735,056)	(\$20,098,673)
MCE Total Unspent and Uncommitted Funds	(\$8,290,499)	(\$4,322,971)	(\$5,574,887)	(\$7,644,320)	(\$6,735,056)	(\$32,567,733)

The table below presents MCE's Spending Budget Request for PYs 2024–2027, incorporating adjustments for carryover funding and unspent/uncommitted offsets.

- The Spending Budget Request excluding offsets totals \$79.27 million across PYs 2024–2027.
- After accounting for \$3.66 million in carryover funding from prior years, MCE's Actual Spending Budget Request including carryover totals \$75.61 million in compliance with D.23-06-055.⁴⁰
- After applying unspent and uncommitted funds as offsets, MCE submits the resulting Total Cost Recovery Request of \$43.04 million.

It is important to note that the \$3.66 million in carryover funding was already incorporated into MCE's 2023 TUAL and, therefore, is not an additional budget request under PYs 2026–2027. MCE included this amount in its 2024 cost-recovery request and is reflected here solely to maintain transparency and continuity in the multi-year budget presentation.

Because the \$3.66 million carryover has already been used to offset the 2023 TUAL cost-recovery request, it is not additive to MCE's 2026 MCAL cost-recovery request. In other words, MCE's 2026 spending budget request of approximately \$20.2 million already includes the carryover

³⁹ D.23-06-055 at OP 7 (“For any unspent and uncommitted funds, portfolio administrators shall: (a) use any unspent and uncommitted funds from prior approved portfolio periods, with the exception of funds required to be sent to the California Energy Commission according to Assembly Bill 841 (Stats. 2020, Ch. 372), to offset budget and collection needs during the 2024-2027 portfolio period approved in this decision; and (b) report any funds collected and spent over the four-year portfolio cycle, annually and cumulatively, and any unspent funds applied to offset collections in subsequent years in the annual reports.”).

⁴⁰ D.23-06-055, pp. 93, 95 (Tables 7 and 9: CPUC authorizing \$78,217,316 for MCE's Approved 2024-2027 Budget Cap and \$78,217,316 PG&E Revenue Requirement (Collections) REN and CCA Budget by IOU, 2024-2027 for MCE).

funding and does not represent an incremental or new request beyond Commission authorized portfolio funding.

Although MCE’s Spending Budget Request displayed below totals \$79.27 million, this reflects the revised program cycle after updating the 2026–2027 budget years. Once prior-year carryover is accounted for, the Actual Spending Budget Request of \$75.6 million remains below MCE’s authorized limit and within the Commission-approved portfolio limit and cost recovery cap of \$78,217,316 established under D.23-06-055.⁴¹

Spending Budget Request

MCE	2024	2025	2026	2027	2024-2027
MCE Spending Budget Request for 2024-2027 Excluding Offset	\$19,648,951	\$19,193,096	\$20,215,987	\$20,215,987	\$79,274,022
Carryover Funding for Spending Budget Request & Cost Recovery Offsets			(\$3,661,414)		(\$3,661,414)
MCE Actual Spending Budget Request for 2024-2027 Including Carryover Offset	\$19,648,951	\$19,193,096	\$16,554,573	\$20,215,987	\$75,612,608
MCE Unspent and Uncommitted Funds for Offset	(\$12,469,059)		(\$20,098,673)		(\$32,567,733)
MCE Total Cost Recovery Request (including Offset to 2024 & 2026 Cost Recovery)	\$7,179,892	\$19,193,096	(\$3,544,100)	\$20,215,987	\$43,044,874

The table below provides MCE’s requested payment and transfer schedule for the 2026–2027 program years. MCE requests that PG&E provide these payments, allocated between electric and gas budgets, through quarterly transfers as shown, and issue a one-time transfer of the 2026–2027 EM&V budgets by January 15 of each program year.

MCE Requested Payments

Year	Electric Quarterly Transfer	Gas Quarterly Transfer	Quarterly Transfer Subtotal	One-time EM&V MCE Transfer	Annual Total
2026	\$1,459,734	\$973,156	\$2,432,890	\$161,727	\$9,893,287
2027	\$1,459,734	\$973,156	\$2,432,890	\$161,727	\$9,893,287

⁴¹ D.23-06-055, pp. 93, 95 (Tables 7 and 9: CPUC authorizing \$78,217,316 for MCE’s Approved 2024-2027 Budget Cap and \$78,217,316 PG&E Revenue Requirement (Collections) REN and CCA Budget by IOU, 2024-2027 for MCE).

H. Integrated Demand-Side Management (IDSM) Budget

Pursuant to D.23-06-055, PAs may allocate up to 2.5 percent, or \$4 million, whichever is greater, up to a maximum of \$15 million, from their total approved 2024–2027 budgets to fund innovative IDSM projects, including ongoing load-shifting that is not event-based.⁴² Pursuant to D.23-06-055 and E-5387 approving its IDSM program, MCE proposes to allocate \$3 million from its 2024–2027 portfolio to support IDSM activities in its Peak Flex Market program.

VII. CONCLUSION

MCE respectfully submits MCE AL 91-E to notify the Commission of its 2024-2027 EE portfolio updates and request to launch the MFES-R program.

VIII. NOTICE

MCE served a copy of this AL via email on the official Commission service list for R.13-11-005, A.22-02-005 et al. and R.25-04-010 on November 4, 2025.

For changes to these service lists, please contact the Commission’s Process Office at (415) 703-2021 or by electronic mail at Process_Office@cpuc.ca.gov or MCE Regulatory at regulatory@mcecleanenergy.org.

IX. PROTESTS

Anyone wishing to protest this advice filing providing updates on MCE’s 2024-2027 EE portfolio and proposal to launch MCE’s new MFES-R program may do so electronically no later than 20 days after the date of this advice filing on November 24, 2025.

Protests should be addressed to the attention of the Energy Division Tariff Unit:

Email: EDTariffUnit@cpuc.ca.gov.

In addition, protests and all other correspondence regarding this AL should also be sent electronically to the attention of:

Wade Stano
Senior Policy Counsel
MARIN CLEAN ENERGY
1125 Tamalpais Avenue
San Rafael, CA 94901
Telephone: (415) 464-6024x104
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⁴² D.23-06-055 at COL 41 and OP 29.

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

X. CORRESPONDENCE

For questions, please contact Wade Stano at (415) 464-6024 or by electronic mail at wstano@mceCleanEnergy.org.

/s/ Wade Stano

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Appendices

Attachment A: Appendices from Excel Template in PDF⁴³

Attachment B: Community Engagement Indicators Results

Attachment C: PA Response to Recommendations

Attachment D: CEDARS Filing Confirmation

Attachment E: *MCE Multifamily Energy Savings Resource Program Implementation Plan*; and

Attachment F: *MCE Multifamily Energy Savings Resource Program Webinar Slides*.

cc: Service List for R.13-11-005; A.22-02-005 et al.; and R.25-04-010.

DATED: November 4, 2025.

⁴³ See CEDARS (<https://cedars.cpuc.ca.gov/>) for an excel version of *Attachment A*.

Table 1.1a - MCAL Updated Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 T10)

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 9,304,434	\$ -	\$ 15,036,095	\$ -	\$ 24,340,529
2	Commercial Sector	\$ 27,752,480	\$ -	\$ 3,310,383	\$ -	\$ 31,062,863
3	Industrial Sector	\$ 4,305,483	\$ -	\$ -	\$ -	\$ 4,305,483
4	Agricultural Sector	\$ 1,478,400	\$ -	\$ -	\$ -	\$ 1,478,400
5	Public Sector	\$ -	\$ -	\$ -	\$ -	\$ -
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 3,945,003	\$ -	\$ 3,945,003
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ -	\$ -
11	Portfolio Support	\$ 2,107,821	\$ -	\$ 145,440	\$ 5,777,203	\$ 8,030,464
12	Off Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal (P)	\$ 44,848,463	\$ -	\$ 18,146,518	\$ -	\$ 62,994,981
(1) 2024 Actuals and the 2025 T10 forecast are used in the updated forecast.						
(2) excludes EM&V and Portfolio Oversight						

Table 1.1b - TUAL Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 T10)

Line	Budget Category	Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ 13,777,840	\$ -	\$ 14,193,206	\$ -	\$ 27,971,046
2	Commercial Sector	\$ 33,095,155	\$ -	\$ 3,440,740	\$ -	\$ 36,535,895
3	Industrial Sector	\$ 1,131,400	\$ -	\$ -	\$ -	\$ 1,131,400
4	Agricultural Sector	\$ 1,773,410	\$ -	\$ -	\$ -	\$ 1,773,410
5	Public Sector	\$ -	\$ -	\$ -	\$ -	\$ -
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 3,850,418	\$ -	\$ 3,850,418
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ -	\$ -
11	Portfolio Support	\$ 1,225,400	\$ 95,594	\$ 461,406	\$ -	\$ 1,782,400
12	Off Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal (P)	\$ 16,602,654	\$ 95,594	\$ 18,655,287	\$ -	\$ 35,353,535
(1) 2024 Actuals and the 2025 T10 forecast are used in the updated forecast.						
(2) excludes EM&V and Portfolio Oversight						

Table 1.1c - Change Portfolio Budget by Sector and Segment (Cumulative for PY 2024-2027 T10)

Line	Budget Category	Change Program Segment				Total
		Resource Acquisition	Market Support	Equity	Codes & Standards	
1	Residential Sector	\$ (2,073,251)	\$ -	\$ (2,000,000)	\$ -	\$ (4,073,251)
2	Commercial Sector	\$ (5,342,675)	\$ -	\$ (8,257,704)	\$ -	\$ (13,600,379)
3	Industrial Sector	\$ (1,174,628)	\$ -	\$ -	\$ -	\$ (1,174,628)
4	Agricultural Sector	\$ (274,842)	\$ -	\$ -	\$ -	\$ (274,842)
5	Public Sector	\$ -	\$ -	\$ -	\$ -	\$ -
6	Cross Cutting Sector	\$ -	\$ -	\$ -	\$ -	\$ -
7	Emerging Tech	\$ -	\$ -	\$ -	\$ -	\$ -
8	WE&T	\$ -	\$ -	\$ 114,587	\$ -	\$ 114,587
9	Finance	\$ -	\$ -	\$ -	\$ -	\$ -
10	Codes & Standards	\$ -	\$ -	\$ -	\$ -	\$ -
11	Portfolio Support	\$ 882,221	\$ 49,549	\$ 115,757	\$ -	\$ 1,047,527
12	Off Loan Pool	\$ -	\$ -	\$ -	\$ -	\$ -
13	Portfolio Subtotal (P)	\$ (5,654,388)	\$ 145,143	\$ (106,347)	\$ -	\$ (5,515,592)
(1) 2024 Actuals and the 2025 T10 forecast are used in the updated forecast.						
(2) excludes EM&V and Portfolio Oversight						

Table 1.2a - MCAL Total Cost Recovery Request, Including RENECCA and Other Costs (IOU Only)

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offsets[2]	(f) Total
1	Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	Local REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	SC-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	REN Central	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	REN North	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	BayREN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	San Joaquin Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	ClearPowerSP	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Penninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	CE-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	Collected 2024 Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
18	Expected 2025 Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19	Remaining Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(1) Funding reserved for EE technical consultants pursuant to D.23-06-055 OP 9							
(2) Rural REN was split into two RENs in D. 24-09-031 and budgets were adjusted to account for split and timing of when REN started							

Table 1.2b - TUAL Total Cost Recovery Request, Including RENECCA and Other Costs (IOU Only)

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offsets[2]	(f) Total
1	Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	Local REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	SC-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	REN Central	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	REN North	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	BayREN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	San Joaquin Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	ClearPowerSP	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Penninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	CE-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	Collected 2024 Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
18	Expected 2025 Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19	Remaining Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(1) Funding reserved for EE technical consultants pursuant to D.23-06-055 OP 9							
(2) Rural REN was split into two RENs in D. 24-09-031 and budgets were adjusted to account for split and timing of when REN started							

Table 1.2c - Change Total Cost Recovery Request, Including RENECCA and Other Costs (IOU Only)

Line	Portfolio Administrator	(a) PA Programs	(b) ED Portfolio Oversight [5]	(c) EMV PA	(d) EMV ED	(e) Unspent & Uncommitted Funds for 2024-2027 Offsets[2]	(f) Total
1	Southern California Edison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	Local REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	SC-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	REN Central	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	REN North	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	BayREN (SW Program)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	San Joaquin Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	ClearPowerSP	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Marin Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Penninsula Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Redwood Coast Energy Authority	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	CE-REN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	San Jose Clean Energy	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	Sonoma Clean Power	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	Collected 2024 Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
18	Expected 2025 Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19	Remaining Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(1) Funding reserved for EE technical consultants pursuant to D.23-06-055 OP 9							
(2) Rural REN was split into two RENs in D. 24-09-031 and budgets were adjusted to account for split and timing of when REN started							

Table 1.3 Portfolio Cost Recovery by Fuel (IOU Only)

Line	Spending Budget & Cost Recovery Request	2023 Unspent Funds	2024	2025	2026	2027	2024-2027
1	IOU (exclusive fuel substitution budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2	IOU Budget Forecasted to support fuel sub	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	Total cost recovery request for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4	Uncommitted Funds to Offset 2024-2027 Cost Recovery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	Total Cost Recovery Request for IOU Portfolio (excluding offset)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	Applicable electric unit	100%	100%	100%	100%	100%	100%
7	Electric portion for cost recovery (including fuel sub budget)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	Fuel sub applicable electric unit	100%	100%	100%	100%	100%	100%
9	Electric portion for cost recovery (fuel sub)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Total electric portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Gas portion for cost recovery for IOU portfolio	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	Electric unit (fuel sub)	RDV/00	RDV/00	RDV/00	RDV/00	RDV/00	RDV/00
13	Gas unit (fuel sub)	RDV/00	RDV/00	RDV/00	RDV/00	RDV/00	RDV/00
14	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Table 1.4 Prior Year Unspent Funds as of August 2024 (All PA)

Line	Unspent & Uncommitted	PY 2017	PY 2018	PY 2019	PY 2020	PY 2021	PY 2022	PY 2023	PY 2024	TOTAL 2017-2024
1	Unspent & Uncommitted	\$ -	\$ -	\$ -	\$ -	\$ (24,772)	\$ (133,172)	\$ (5,321,854)	\$ (7,644,300)	\$ (13,365,618)
2	EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3	Total	\$ -	\$ -	\$ -	\$ -	\$ (24,772)	\$ (133,172)	\$ (5,321,854)	\$ (7,644,300)	\$ (13,365,618)
4	Unspent & Uncommitted Pre-2023 EM&V, and IOU Program Funds for 2024-2027 Rule Offset	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5	EM&V - PA Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6	EM&V - C&C Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7	IOU Program Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Table 1.5 - 4 Year Funding Sources - RENECCA (RENECCA Only)

Line	Year	Electric \$	Gas \$	Electric \$	Gas \$
1	2024	\$ 11,592,881	\$ 8,056,076	\$ -	\$ -
2	2025	\$ 11,707,788	\$ 7,485,387	\$ -	\$ -
3	2026	\$ 12,515,813	\$ 7,683,075	\$ -	\$ -
4	2027	\$ 11,725,273	\$ 8,480,715	\$ -	\$ -
5	Total	\$ 47,559,855	\$ 33,715,153	\$ -	\$ -

Table 1.6 - Mid-Cycle Advice Letter Funding Breakdown (All PA)

Line	Year	2024 Reported Expenditures	2024 Carryover Funding[7]	2025 TUAL	2026 MCAL	2027 MCAL	Unspent/Uncommitted Funds for Offsets[8]	2024-2027 Funding Total
1	2024	\$ 8,143,217	\$ -	\$ -	\$ -	\$ -	\$ (14,468,031)	\$ (6,324,814)
2	2025	\$ -	\$ -	\$ 16,193,206	\$ -	\$ -	\$ -	\$ 16,193,206
3	2026	\$ -	\$ 3,661,414	\$ -	\$ 20,215,987	\$ -	\$ (20,098,677)	\$ 117,514
4	2027	\$ -	\$ -	\$ -	\$ -	\$ 20,215,987	\$ -	\$ 20,215,987

(7) Funding committed in 2024 but not yet spent will be carried forward into future years of the funding cycle or funding that is being intentionally moved to future years.

(8) 2024 Carryover funding is already included in the MCAL budgets and is not added to the totals.

(9) The 2024 Unspent/Uncommitted amount matches MCAL's TUAL amount of \$12,469,009.

(10) The 2026 Unspent/Uncommitted amount consists of \$5,719,296 in pre-2024 funds, \$7,644,320 in unspent 2024 funds, and \$6,735,056 in estimated unspent 2025 funds.

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

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 2,488,864	\$ 22,662,424	\$ 19,569,409	\$ 21,490,567	\$ 66,211,064
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 793,573	\$ 1,093,988	\$ 2,119,714	\$ 2,235,414	\$ 6,242,689
4	Total TSB Forecast	\$ 3,282,237	\$ 23,756,413	\$ 21,689,123	\$ 23,725,981	\$ 72,453,754
5	CPUC TSB Goal	\$ 23,601,101	\$ 23,753,413	\$ 21,689,123	\$ 23,725,981	\$ 92,769,618
6	<i>TSB Forecast / TSB Goal^[1]</i>	<i>14%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>78%</i>

[1] D.21-09-037 at 24: Non-IOU program administrators may propose to revise their goals and savings forecasts in the true-up or mid-cycle advice letter.

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

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 22,566,920	\$ 22,662,424	\$ 22,770,876	\$ 22,834,597	\$ 90,834,817
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ 1,034,181	\$ 1,093,988	\$ 1,157,605	\$ 1,224,826	\$ 4,510,600
4	Total TSB Forecast	\$ 23,601,101	\$ 23,756,413	\$ 23,928,480	\$ 24,059,424	\$ 95,345,418
5	CPUC TSB Goal	\$ 23,601,101	\$ 23,753,413	\$ 23,928,480	\$ 24,059,424	\$ 95,342,418
6	<i>TSB Forecast / TSB Goal^[2]</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>

[2] D.21-09-037 at 23: The goals from the potential and goals studies apply to IOU program administrators and not to non-IOU program administrators.

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

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ (20,078,156)	\$ -	\$ (3,201,467)	\$ (1,344,030)	\$ (24,623,753)
2	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -
3	Equity	\$ (240,608)	\$ -	\$ 962,109	\$ 1,010,588	\$ 1,732,089
4	Total TSB Forecast	\$ (20,318,864)	\$ -	\$ (2,239,357)	\$ (333,443)	\$ (22,891,664)
5	CPUC TSB Goal	\$ -	\$ -	\$ (2,239,357)	\$ (333,443)	\$ (2,572,800)
6	<i>TSB Forecast / TSB Goal^[3]</i>	<i>-86%</i>	<i>0%</i>	<i>0%</i>	<i>0%</i>	<i>-22%</i>

[3] Difference in % of goals achieved from the TUAL to the MCAL

Table 2.2a - MCAL Updated Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[1]	N/A	N/A	N/A	N/A	-
2	GWh CPUC Target ^[1]	N/A	N/A	N/A	N/A	-
3	<i>GWh Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
4	MW Forecast	N/A	N/A	N/A	N/A	-
5	MW CPUC Target ^[1]	N/A	N/A	N/A	N/A	-
6	<i>MW Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
7	MMThm Forecast	N/A	N/A	N/A	N/A	-
8	MMThm CPUC Target ^[1]	N/A	N/A	N/A	N/A	-
9	<i>MMThm Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>

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

Table 2.2b - TUAL Annual and Cumulative Codes and Standards Savings Forecast

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[2]	N/A	N/A	N/A	N/A	-
2	GWh CPUC Target ^[2]	N/A	N/A	N/A	N/A	-
3	<i>GWh Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
4	MW Forecast	N/A	N/A	N/A	N/A	-
5	MW CPUC Target ^[2]	N/A	N/A	N/A	N/A	-
6	<i>MW Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
7	MMThm Forecast	N/A	N/A	N/A	N/A	-
8	MMThm CPUC Target ^[2]	N/A	N/A	N/A	N/A	-
9	<i>MMThm Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>

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

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

Line	Savings Unit	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	GWh CPUC ^[3]	N/A	N/A	N/A	N/A	-
2	GWh CPUC Target ^[3]	N/A	N/A	N/A	N/A	-
3	<i>GWh Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
4	MW Forecast	N/A	N/A	N/A	N/A	-
5	MW CPUC Target ^[3]	N/A	N/A	N/A	N/A	-
6	<i>MW Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
7	MMThm Forecast	N/A	N/A	N/A	N/A	-
8	MMThm CPUC Target ^[3]	N/A	N/A	N/A	N/A	-
9	<i>MMThm Forecast/Target</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>

[3] Difference in % of goals achieved from the TUAL to the MCAL

Table 2.3a - MCAL Updated Annual and Cumulative Budget

Line	Segment	PY 2024-Actual	PY 2025 TUAL	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 5,329,717	\$ 12,667,443	\$ 13,475,653	\$ 13,475,653	\$ 44,948,465
2	Market Support	\$ 965,264	\$ 982,711	\$ 1,081,086	\$ 1,081,086	\$ 4,110,146
3	Equity	\$ 4,272,503	\$ 4,775,218	\$ 4,850,610	\$ 4,850,610	\$ 18,748,941
4	Codes and Standards	\$ -	\$ -	\$ -	\$ -	\$ -
5	EM&V (PA and ED)	\$ 204,138	\$ 767,724	\$ 808,639	\$ 808,639	\$ 2,589,141
6	Total Budget w/o OBF Loan Pool	\$ 10,771,623	\$ 19,193,096	\$ 20,215,987	\$ 20,215,987	\$ 70,396,693
7	Market Support and Equity, percent of the Total Portfolio Budget w/o OBF Loan Pool					29%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 10,771,623	\$ 19,193,096	\$ 20,215,987	\$ 20,215,987	\$ 70,396,693
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 10,771,623	\$ 19,193,096	\$ 20,215,987	\$ 20,215,987	\$ 70,396,693
12	Approved Budget Cap^[4]					\$ 78,217,316

[4] Decision 23-06-055 OPS

Table 2.3b - TUAL Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ 12,968,308	\$ 12,667,443	\$ 12,544,743	\$ 12,422,359	\$ 50,602,854
2	Market Support	\$ 975,340	\$ 982,711	\$ 990,102	\$ 997,858	\$ 3,946,010
3	Equity	\$ 4,919,346	\$ 4,775,218	\$ 4,712,055	\$ 4,648,669	\$ 19,055,287
4	Codes and Standards	\$ -	\$ -	\$ -	\$ -	\$ -
5	EM&V (PA and ED)	\$ 785,958	\$ 767,724	\$ 760,287	\$ 752,870	\$ 3,066,840
6	Total Budget w/o OBF Loan Pool	\$ 19,648,951	\$ 19,193,096	\$ 19,007,187	\$ 18,821,757	\$ 76,670,990
7	Market Support and Equity, percent of the Total Portfolio Budget w/o OBF Loan Pool					30%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ 19,648,951	\$ 19,193,096	\$ 19,007,187	\$ 18,821,757	\$ 76,670,990
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ 19,648,951	\$ 19,193,096	\$ 19,007,187	\$ 18,821,757	\$ 76,670,990

Table 2.3c - Change Annual and Cumulative Budget

Line	Segment	PY 2024	PY 2025	PY 2026	PY 2027	Cumulative
1	Resource Acquisition	\$ (7,638,591)	\$ -	\$ 930,909	\$ 1,053,293	\$ (5,654,388)
2	Market Support	\$ (10,076)	\$ -	\$ 90,984	\$ 83,228	\$ 164,136
3	Equity	\$ (646,842)	\$ -	\$ 138,555	\$ 201,940	\$ (306,347)
4	Codes and Standards	\$ -	\$ -	\$ -	\$ -	\$ -
5	EM&V (PA and ED)	\$ (581,820)	\$ -	\$ 48,352	\$ 55,769	\$ (477,698)
6	Total Budget w/o OBF Loan Pool	\$ (8,877,328)	\$ -	\$ 1,208,800	\$ 1,394,231	\$ (6,274,297)
7	Market Support and Equity, percent of Total Budget w/o OBF Loan Pool					2%
8	OBF Loan Pool Addition	\$ -	\$ -	\$ -	\$ -	\$ -
9	Budget excluding Portfolio Oversight	\$ (8,877,328)	\$ -	\$ 1,208,800	\$ 1,394,231	\$ (6,274,297)
10	ED Portfolio Oversight	\$ -	\$ -	\$ -	\$ -	\$ -
11	Total Portfolio Budget w/ ED Portfolio Oversight	\$ (8,877,328)	\$ -	\$ 1,208,800	\$ 1,394,231	\$ (6,274,297)

Table 3a - MCAL Updated Portfolio Cost Effectiveness Ratios (PY 2024-2027)^[1]

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.01	1.48	0.35
2		Market Support	0.00	0.00	0.00
3		Equity	0.37	0.39	0.30
4		Codes and Standards (C&S)	N/A	N/A	N/A
5	Portfolio	<i>Including</i> C&S	N/A	N/A	N/A
6		<i>Excluding</i> C&S	0.80	1.04	0.34

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

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	1.03	1.79	1.08
2		Market Support	0.00	0.00	0.00
3		Equity	0.26	0.26	0.27
4		Codes and Standards (C&S)	N/A	N/A	N/A
5	Portfolio	<i>Including</i> C&S	N/A	N/A	N/A
6		<i>Excluding</i> C&S	0.84	1.25	0.88

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

Line			TRC ratio	PAC ratio	RIM ratio
1	Segment	Resource Acquisition	-0.02	-0.31	-0.73
2		Market Support	0.00	0.00	0.00
3		Equity	0.11	0.12	0.03
4		Codes and Standards (C&S)	N/A	N/A	N/A
5	Portfolio	<i>Including</i> C&S	N/A	N/A	N/A
6		<i>Excluding</i> C&S	-0.04	-0.21	-0.54

Table 3d - Societal Cost Test for 2026-2027

Line			2026		2027		2 Yr Total	
1			Base	High	Base	High	Base	High
2	Segment	Resource Acquisition	1.45	1.50	1.56	1.60	1.41	1.46
3		Market Support	0.00	0.00	0.00	0.00	0.00	0.00
4		Equity	0.75	0.75	0.78	0.78	0.78	0.78
5		Codes and Standards (C&S)	N/A	N/A	N/A	N/A	N/A	N/A
6	Portfolio	<i>Including</i> C&S	N/A	N/A	N/A	N/A	N/A	N/A
7		<i>Excluding</i> C&S	1.19	1.23	1.28	1.31	1.18	1.21

Table 4 - Portfolio Statewide and Third-party Contribution Percentage Requirements (IOU only)

Line	Budget Component	Third Party Budget	Cumulative Total Budget w/o OBF Loan Pool	Contribution Percentage	Minimum Threshold
1	Statewide ^[1]	\$ 285,586,875	\$ 76,670,990	372%	20%
2	Third-party ^[2]	\$ 754,298,117	\$ 76,670,990	984%	60%

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

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

[X] Updated Forecasts for 2024-2027 include 2024 Actuals, 2025 TWA Forecast, and updated forecasts for 2026 and 2027.
Please ensure that on Table A1, each IOU lists all of the SW program and the associated IOU specific budget.

[illegible]

Appendix 2 - Energy Efficiency Cap And Target Expenditure Projections (Cumulative for PY 2024-2027)
Program level budgets can be found on tab A1 - Program Table

Line	Budget Category	Expenditures			Performance		
		(a) Non-Third Party Qualifying Costs	(b) Third Party Qualifying Costs	(c) Total Portfolio	(d) Percent of Budget ^[6]	(e) Cap Percentage	(f) Target %
1	Administrative Costs						
2	PA ^[1]	\$ 3,030,271		\$ 3,030,271	4.5%	10.0%	
3	Non-PA Third Party & Partnership ^[2]	\$ 1,471,513	\$ -	\$ 1,471,513	2.2%		10.0%
4	PA & Non-PA Target Exempt Programs ^[3]	\$ 160,276	\$ -	\$ 160,276			
5	Marketing and Outreach Costs						
6	Marketing & Outreach	\$ 1,645,999	\$ -	\$ 1,645,999	2.4%		6.0%
7	Direct Implementation Costs						
8	Incentives and Rebates	\$ 31,562,653	\$ -	\$ 31,562,653			
9	Non Incentives and Non Rebates	\$ 23,132,113	\$ -	\$ 23,132,113	34.3%		20.0%
10	Target Exempt (Non Incentives and Non Rebates)	\$ 3,804,728	\$ -	\$ 3,804,728			
11	EM&V Costs (PA and ED) ^[4]	\$ 2,589,141	\$ -	\$ 2,589,141	3.8%	4.0%	
11a	EM&V - PA	\$ 1,158,140		\$ 1,158,140			
11b	EM&V - ED	\$ 1,431,002		\$ 1,431,002			
12	PA Spending Budget Request (excluding OBF Loan Pool Additions and excluding ED Portfolio Oversight)	\$ 67,396,693	\$ -	\$ 67,396,693			
13	Total Third-Party Qualifying Costs ^[5]				0.0%		60.0%
14	OBF Loan Pool Addition	\$ -		\$ -			
15	PA Spending Budget Request (excluding ED Portfolio Oversight) ^[6]			\$ 67,396,693			
16	ED Portfolio Oversight ^[10]	\$ -		\$ -			
17	EE-Funded IDSM	\$ 3,000,000		\$ 3,000,000		2.5%	
	Multi-DER IDSM ^[7]	\$ -					
18	PA Spending Budget Request			\$ 70,396,693			

[1] 10% cap requirement based on D. 09-09-047 for IOU only

[2] New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.

[3] Target Exempt Programs include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).

[4] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED = \$0. The EM&V percentage is based on PA's total portfolio budget (from line 13) RENs, and CCAs

[5] IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets. Calculation of (d) Percent of Budget for Third-Party Implementer Contracts uses \$1,179,559,488 as its denominator.

[6] With the exception of Third Party Implementer Contracts as noted in footnote [5], calculation of (d) Percent of Budget uses \$1,143,059,488 as the denominator; equal to line 15 PA Budget Spending Request.

[7] D.23-06-055 OP 29: Portfolio administrators (PAs) may set aside up to 2.5 percent, or \$4 million, whichever is greater, up to a maximum of \$15 million, from within their total budgets during 2024-2027 approved in this decision to fund innovative integrated demand-side management projects, including ongoing load-shifting that is not event-based. Energy efficiency funding shall not be used for rebating capital costs of non-efficiency technologies, except as already provided for electric panel upgrades in Decisions 19-08-009 and 23-04-035.

[8] \$33,815,039 Pensions & Benefits Budget was excluded; not funded by the EE Portfolio

[9] Includes actual expenditures for 2024, 2025 TUAL forecasts, and updated values for 2026-2027 forecasts.

[10] Funding reserved for EE technical consultant pursuant to D.23-06-055 OP 9

[11] D.23-06-055, COL 1, COL 4, and table 1 (p.6), which set the SW funding allocations for IOUs and 10% for SoCalGas only.

[12] D.18-05-041 OP10: Each IOU PA should set aside a minimum annual amount of \$1 million for the residential sector and a load-share-proportional amount of \$20 million for the commercial sector from each IOU PA's IDSM budget to test and deploy integration strategies, which may test multiple program design and customer incentive approaches, as well as multiple technology types, with emphasis on demand-response-capable control technologies.

Appendix 3 - RTR Implementation Descriptions per 0.23.06.001

CAIMAC requests that the describe their progress on recommendations from FY2022 annual evaluations that impact programs in the current budget cycle.

	Study	Best Practice / Recommendation (Verbatim from Final Report)	Recommendation Recipient	PA Response		Proposed RTR Implementation				
				PA Response	PA Response Notes	Next Steps:	Timeline:	Status:	Notes:	Initiated Programs:
CAIMAC ID	Study Name	Recommendations	If incorrect, please indicate and redraft in notes.	Accepted, Rejected, or Other	Describe specific program change, give reason for rejection, or indicate that it's under further review.	For each accepted recommendation: outline the steps required for implementation, responsible parties, and deadlines. For each rejected recommendation: document the reason provided for rejection. Outline any potential follow up actions or considerations for the future.	Set deadlines for the completion of each action. Include a start date and end date when available.	Track the status of each action item (e.g., Not Started, In Progress, Completed).	Add notes for any additional information or updates.	Identify which programs (program IDs) would be impacted by the action items.
Overall conclusions and recommendations						Proposed Next Steps				
CPX0272.01	FY 2022 Regional Energy Networks Impact	DRW recommends that the PAs (utilities, RECs, and CCAs) and/or their representative (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the ERM. Even when third-party implementers manage the programs, the PAs should attend the coordination meetings and thus direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the ERM and PIP that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the ERM and PIP documentation. DRW also recommends that attendance at the meetings be documented and made available to future evaluations.	All RECs, MZ	Accepted	MCE's program staff and/or technical and regulatory consultants currently attend coordination meetings, as described in the Joint Cooperation Memo. MCE has Joint Cooperation Memo with PG&E and BayREN, which outline how program managers and consultants meet on a regular basis to review program changes, provide double-checking, and check on data sharing needs. Attendance is taken at these meetings, and can be made available to evaluators upon request. MCE's ERM and PIP don't currently have RACI charts dedicated to roles for coordination meetings, but this could be developed, if deemed helpful. The ERM and PIP currently specify the roles and responsibilities of PAs, implementers, and other stakeholders.	MCE will review the feasibility of developing RACI charts for both the Joint Cooperation Memo (JCM) and Program Implementation Plans (PIPs) to further clarify stakeholder roles and responsibilities. If implemented, MCE will coordinate with BayREN and PG&E to align the format and definitions used in the RACI charts. MCE will also explore including these RACI charts as appendices in future ERM and PIP updates to ensure they remain living documents.	Q2 2026 – Evaluate feasibility and develop draft RACI chart framework Q3 2026 – Collaborate with BayREN and PG&E on alignment and finalize format. Q4 2026 – Include RACI charts in updated ERM and PIP.	Planned	MCE's ERM and PIPs already define key coordination roles and responsibilities. The addition of RACI charts would further enhance clarity but will depend on inter-PA agreement for committing across documentation.	All energy efficiency programs managed under the Joint Cooperation Memo (including Residential, Commercial, Industrial, Agricultural, and Cross-Cutting).

CALMAC ID	Study Name	PA	Recommendation
CPU0367.01	PY 2018 - 2021 Forward-looking Smart Thermostat Study	SCE	There are program opportunities to increase smart thermostat penetration in households with air-conditioning in hot climate zones. Programs should aim to expand the penetration of smart thermostats that can operate as part of a "fleet" serve as virtual power plants (VPPs) to provide direct relief to the overloaded parts of the grid
CPU0380.01	PY 2022 Midstream Commercial Water-Heating Impact	SCG	To increase the effectiveness and adoption of the online coupon tool, the Program implementer should enhance awareness and promotion of the tool among contractors. This could include targeted communication campaigns, training sessions on how to use the tool, and demonstrating the benefits and ease of purchasing equipment from big box stores using the coupons.
		SCG	The Program implementer should target outreach efforts and support to distributors and contractors in other parts of the state beyond southern California. This could include tailored marketing campaigns, incentives, and training programs to increase awareness and participation statewide.
		SCG	The Program administrator and implementer should formalize a process of verifying the eligibility of multifamily installations to ensure equipment is only installed on nonresidential/commercial rate meters.
CPU0369.01	PY 2022 Local 3-Party Programs Impact	All IOUs	Other programs should consider emulating the strategies these programs have taken to achieve success, including offering measures that better align with customer preferences, such as electrification and deeper gas usage saving measures, and employing more effective outreach strategies, such as direct multi-language outreach and community engagement (e.g., events).
		All IOUs	Track efforts to obtain input from HTR/DAC communities and track HTR/DAC community input. It is essential to track when outreach includes two-way communication that allows communities to provide feedback.
		All IOUs	Existing and developing local 3PPs should take note of the marketing and outreach innovations that have continued to work for this pool of programs year-over-year: direct outreach and strategic partnerships.
		All IOUs	The next time PAs negotiate contracts with local 3PP implementers, they should include terms that cover a standardized equity framework.
CPU0372.01	PY 2022 Regional Energy Networks Impact	All RENs	RENs are in the unique position of being able to support more effectively CPUC policies and California's larger decarbonization goals through innovative solutions and scalable activities. For this reason, RENs should consider increasing efforts to create a pathway to electrification such as higher incentives and rebates, varying levels of incentives, and equity-focused multipliers that target low-income participants, DACs, and environmental justice areas
		All RENs	Given their mandate to pilot activities where there is no current utility or CCA program offering, specifically where there is potential for scalability to a broader geographic reach, we recommend that the RENs consider sharing their successes serving the multifamily sector (including best practices for addressing split incentives and renter equity) during their coordination meetings with utilities. This type of sharing could expand useful approaches beyond the RENs
		All RENs	We recommend that the RENs collaborate with the utilities and other stakeholders to share best practices and lessons learned from their experience and to identify opportunities for coordination and alignment of programs and incentives, particularly for programs that traditionally experience challenges serving the multifamily sector
		All RENs, MCE	DNV recommends that the PAs (utilities, RENs, and CCAs) and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the JCMs even when third-party implementers manage the programs. The PAs should attend the coordination meetings and then direct the program implementers to follow through with any necessary actions identified during the meetings. The PAs should consider including a RACI (responsible, accountable, consulted, informed) chart in the JCMs and PIPs that defines the role of PAs, implementers, and any other stakeholders. A RACI chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RACI chart should be a living document and an updated version of the RACI could be included with both the JCM and PIP documentation. DNV also recommends that attendance at the meetings be documented and made available to future evaluators.
		All RENs	The program should continue its successful effort to electrify and achieve realistic and ambitious single-family energy consumption reductions. However, the program should target more underserved populations that would not undertake similar upgrades without program support. To reach such customers, the program could increase incentives for populations unlikely to install expensive fuel substitution technologies without program support.
CPU0352.01	PY 2021 Local 3-Party Programs Impact (RZNET – SDGE4002)	SDG&E	Build more community input into all phases of program delivery.
		SDG&E	Local 3PPs are still in their nascent stages and more time is needed to determine the success of program delivery innovations in delivering deeper savings.
		SDG&E	PAs should include equity- and access-related metrics for all programs. Provide additional guidance relating to what practices and outcomes are consistent with ESJ Goals 4.1, 5.1, 8, and 9.
		SDG&E	Local 3PPs should work on consistently integrating equity and access in program design while continuing the current efforts. Strive to directly collaborate with community partners to improve outreach.
CPU0357.01	PY 2021 SoCalGas Residential EE Portfolio Impact	SCG	Recommendation 5a: A market study should be conducted to determine the share of tankless water heaters among recently installed water heaters for both the replacement and new construction market.
CPU0377.01	PY 2020-2022 Site-Level Normalized Metered Energy Consumption (NMEC) Impact and Net-to-Gross Evaluation	PG&E	Improve alignment between program implementers, PA staff, and evaluators on program evaluation and qualification requirements. Increasing clarity on data requirements among all parties and streamlining the process of data sharing across parties can reduce duplicative work and confusion. Follow-on work led by ED can facilitate this process.
		PG&E	To protect participants, the implementer should ensure that equipment is operational and meets the functional needs of the building and that the 12 months of pre-installation data is an actual representation of baseline energy usage with functional equipment. A simple functional check by the implementer on the existing equipment during the investigation phase could eliminate this risk without adding additional burden on the participants.

MCE will report on all community indicators that received unanimous approval from all Program Administrators. These indicators represent the final set of approved equity metrics to be included in the Annual Report Narrative and Spreadsheet.

MCE also recognizes that several additional indicators received mixed approval among Program Administrators. These potential indicators may be incorporated into future reporting cycles as methodologies are refined, data collection practices are standardized, and alignment across Program Administrators is achieved.

Agreed Upon Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No
Engagement Activities							
Participation	Description of types of engagement activities conducted relevant to equity segment, the number of activities conducted, and additional context for PAs to add about their engagement activities	Provide context to the overall annual engagement for the equity segment each year.	Summary Narrative	Description of engagement activities relevant to equity segment, including types of activities conducted, number of activities, audiences targeted, number of people reached, outreach methods, and any additional context.	Annual Report Narrative	12	0
Summary of Feedback							
Input	Number of people who provided feedback relevant to the equity segment	Track the number of people who provided equity segment feedback. These changes should also be tracked year to year to assess progress over time.	Count	Total number of people who provided feedback relevant to the equity segment during engagement activities.	Annual Report Spreadsheet	12	0
Input	Feedback themes from engagement activities relevant to the equity segment	Understand input from engagement activities related to the equity segment to then help make	List of key themes	List of key themes sentences from all equity segment engagement activities feedback in the Annual Report Key	Annual Report Narrative	12	0
Changes to Program							
Input	Changes to equity segment program design as needed, based on feedback	Ensure feedback for equity segment programs is informing equity segment programming.	Summary Narrative	Thematic summary of description of changes that were addressed and incorporated into equity segment	Annual Report Narrative	12	0
Additional Potential Indicators							
Indicator Type	Indicator	Purpose	Unit of Measurement	Methodology	Reporting Platform	Total Yes	Total No
Engagement Activities							
Participation	Number of people in all engagement activities relevant to the equity segment	Track equity segment engagement. These changes should also be tracked year to year to assess	Count	Total number of people in all engagement activities relevant to the equity segment annually.	Annual Report Spreadsheet	7	5
Participation	People in partners' engagement activities relevant to the equity segment	Understand how effective partners are in engaging and building trust with equity segment	Percent	Percentage determined by the number of participants in partners' engagement activities divided by the number of participants in all engagement activities. Partners would	Annual Report Spreadsheet	6	6
Input	Funding for partners' engagement activities related to the equity segment	Assess how funding correlates with how effective partners are in engaging and building trust with populations.	Dollars	Amount of money spent to fund partners' engagement activities related to equity segment. Funding includes	Annual Report Spreadsheet	6	6
Awareness	People reached through online, telephone, or other outreach for the equity segment	Assess awareness of equity programs from equity segment population.	Percent	Percentage of emails opened from email campaign, rate of social media clicks, likes and shares, or percentage of	Annual Report Spreadsheet	6	6
Awareness	Equity segment inquiries	Assess awareness of equity programs from equity segment population.	Count	Total number of unique submissions of interest forms on websites, number of calls, number of emails, or forms for more information across all equity segment programs.	Annual Report Spreadsheet	7	5
Summary of Feedback							
Satisfaction	Equity segment participant satisfaction survey responses	Provides the count of surveys.	Count	Total number of completed surveys.	Annual Report Spreadsheet	6	6
Satisfaction	Rating from equity segment participant satisfaction surveys	Understand participant satisfaction with equity segment programs.	Numerical Rating	Average post-participation satisfaction rating for equity segment and/or programs using standard rating system of	Annual Report Spreadsheet	6	6

	Study	Best Practice / Recommendation (Worksheet from Final Report)	Recommendation Recipient	PA Decision		Proposed RTE Implementation				
				PA Decision	PA Decision Notes	Next Steps	Timeline	Status	Notes	Involved Programs
CAIMAC ID	Study Name	Recommendations	If interest, please indicate and reflect in notes.	Chosen:	Excluded:	For each accepted recommendation, outline the steps required for implementation, responsible parties, and deadlines. For each rejected recommendation, document the reason provided for rejection. Outline any potential follow-up actions or considerations for the future.	Set deadlines for the completion of each action. Include a start date and end date when possible.	Track the status of each action item (e.g., Not Started, In Progress, Completed).	Add notes for any additional information or updates.	Identify which programs (programs IDs) would be impacted by the action items.
Overall conclusions and recommendations						Proposed Next Steps				
CP03272-01	PT 2022 Regional Energy Networks Impact	DRW recommends that the PA, utilities, RCBs, and CCAJ and/or their representatives (e.g., technical and regulatory consultants) continue or begin to attend all official coordination meetings as defined in the KCMs even when third-party implementers manage the programs. The PA should attend the coordination meetings and thus drive the program implementers to follow through with any necessary actions identified during the meetings. The PA should consider including a RAC (responsible, accountable, consulted, informed) chart in the KCM and RPP that defines the role of PAs, implementers, and any other stakeholders. A RAC chart would help clarify who needs to attend the coordination meetings, define their role, and help eliminate any confusion related to coordination efforts. The RAC chart should be a living document and an updated version of the RAC could be included with both the KCM and RPP documentation. DRW also recommends that attendance at the meetings be documented and made available to future evaluators.	All RCBs, MCE	Accepted	MCE's program staff and/or technical and regulatory consultants currently attend coordination meetings, as described in the Joint Cooperation Memo. MCE has Joint Cooperation Memos with PG&E and BayREN, which outline how program managers and consultants meet on a regular basis to review program changes, prevent double-dipping, and check on data sharing needs. Attendance is taken at these meetings, and can be made available to evaluators upon request. MCE's KCMs and RPPs don't currently have RAC charts dedicated to roles for coordination meetings, but this could be developed, if deemed helpful. The KCMs and RPPs currently specify the roles and responsibilities of PAs, implementers, and other stakeholders.	MCE will review the feasibility of developing RAC charts for both the Joint Cooperation Memos (JCMs) and Program Implementation Plans (PIPs) to further clarify stakeholder roles and responsibilities. If implemented, MCE will coordinate with BayREN and PG&E to align the format and definitions used in the RAC charts. MCE will also explore including these RAC charts as appendices in future KCM and RPP updates to ensure they remain living documents.	Q2 2026 – Evaluate feasibility and develop draft RAC chart framework Q3 2026 – Coordinate with BayREN and PG&E on alignment and finalise format. Q4 2026 – Include RAC charts in updated KCMs and RPPs.	Planned	MCE's KCMs and RPPs already define key coordination roles and responsibilities. The addition of RAC charts would further enhance clarity but will depend on inter-PA agreement for consistency across documentation.	All energy efficiency programs managed under the Joint Cooperation Memos (including Residential, Commercial, Industrial, Agricultural, and Cross-Cutting).

CEDARS FILING SUBMISSION RECEIPT

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

PA: Marin Clean Energy (MCE)

Budget Filing Year: 2026

Submitted: 14:20 on 27 Oct 2025

By: Qua Vallery

Advice Letter Number: MCE91-E

* Portfolio Budget Filing Summary *

- TRC: 0.87
- PAC: 1.08
- TRC (no admin): 1.46
- PAC (no admin): 2.19
- RIM: 0.3
- SCB: 1.19
- SCH: 1.23
- Budget: \$20,215,987.33
- TotalSystemBenefit: \$21,689,122.52
- ElecBen: \$12,870,060.80
- GasBen: \$8,941,103.66
- WaterEnergyBen: \$244.79
- OtherBen: \$1,000,000.00
- TRCCost: \$26,286,342.66
- PACCost: \$21,075,306.99
- RIMCost: \$89,331,644.44
- SCBCost: \$26,896,912.30
- SCHCost: \$26,945,829.47

* Programs Included in the Budget Filing *

- MCE01: Multifamily Energy Savings Equity
- MCE01c: Multifamily Strategic Energy Management
- MCE01d: Residential Efficiency Market
- MCE01-R: Multifamily Energy Savings Resource

- MCE02a: Commercial Deemed
- MCE02b: Commercial Custom
- MCE02c: Commercial Strategic Energy Management
- MCE02d: Commercial Efficiency Market
- MCE02e: Small Business Energy Advantage
- MCE08: Single Family Home Energy Savings
- MCE100: Integrated Demand Side Management (IDSM)
- MCE101-Equity-PS: Equity Portfolio Support
- MCE101-MS-PS: Market Support Portfolio Support
- MCE101-RA-PS: Resource Acquisition Portfolio Support
- MCE10a: Industrial Deemed
- MCE10b: Industrial Custom
- MCE10c: Industrial Strategic Energy Management
- MCE11a: Agricultural Deemed
- MCE11b: Agricultural Custom
- MCE11c: Agricultural Strategic Energy Management
- MCE16: Green Workforce Pathways
- MCE97: CPUC EM&V;
- MCE98: MCE EM&V;

CEDARS FILING SUBMISSION RECEIPT

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

PA: Marin Clean Energy (MCE)

Budget Filing Year: 2027

Submitted: 14:21 on 27 Oct 2025

By: Qua Vallery

Advice Letter Number:

* Portfolio Budget Filing Summary *

- TRC: 0.95
- PAC: 1.18
- TRC (no admin): 1.59
- PAC (no admin): 2.39
- RIM: 0.31
- SCB: 1.28
- SCH: 1.31
- Budget: \$20,215,987.33
- TotalSystemBenefit: \$23,725,981.00
- ElecBen: \$13,283,338.93
- GasBen: \$9,400,674.54
- WaterEnergyBen: \$251.22
- OtherBen: \$2,200,000.00
- TRCCost: \$26,322,339.61
- PACCost: \$21,111,303.95
- RIMCost: \$91,410,458.95
- SCBCost: \$26,942,470.30
- SCHCost: \$26,980,868.35

* Programs Included in the Budget Filing *

- MCE01: Multifamily Energy Savings Equity
- MCE01c: Multifamily Strategic Energy Management
- MCE01d: Residential Efficiency Market
- MCE01-R: Multifamily Energy Savings Resource

- MCE02a: Commercial Deemed
- MCE02b: Commercial Custom
- MCE02c: Commercial Strategic Energy Management
- MCE02d: Commercial Efficiency Market
- MCE02e: Small Business Energy Advantage
- MCE08: Single Family Home Energy Savings
- MCE100: Integrated Demand Side Management (IDSM)
- MCE101-Equity-PS: Equity Portfolio Support
- MCE101-MS-PS: Market Support Portfolio Support
- MCE101-RA-PS: Resource Acquisition Portfolio Support
- MCE10a: Industrial Deemed
- MCE10b: Industrial Custom
- MCE10c: Industrial Strategic Energy Management
- MCE11a: Agricultural Deemed
- MCE11b: Agricultural Custom
- MCE11c: Agricultural Strategic Energy Management
- MCE16: Green Workforce Pathways
- MCE97: CPUC EM&V;
- MCE98: MCE EM&V;



Multifamily Energy Savings Program
Resource Acquisition (MFES01-R)

Implementation Plan

PY2026

September 2025
Version 1

Program Overview

The Multifamily Energy Savings (MFES) Resource Program is designed to deliver cost-effective energy savings in the multifamily sector by expanding access to electrification incentives beyond deed-restricted affordable housing. The program provides technical assistance and incentives to property owners and tenants to support the adoption of high-efficiency electrification measures, with a targeted focus on heat pump HVAC, heat pump water heating, and induction stoves.

The program budget is allocated across administration, implementation, marketing and outreach, and incentives, with the majority directed toward customer incentives and direct implementation activities. Savings will be claimed through deemed, in alignment with CPUC guidance.

By focusing on high-impact, cost-effective measures, the MFES Resource Program supports broader electrification adoption in multifamily properties across MCE's service territory and contributes to decarbonization goals while delivering significant lifecycle savings during the portfolio period.

Program Budget and Savings

1. Program and/or Sub-Program Name:

Multifamily Energy Savings Resource Program

2. Sub-Program ID number:

MCE01-R

3. Sub-Program Budget Table:

MCE01-R Budget Categories	2026 Budget
Administration	\$9,656.76
Marketing, Education, and Outreach	-

Direct Implementation Non-Incentives	\$197,254.04
Incentives	\$690,836
Total	\$897,746.80

4. Sub-program Net Impacts Table:

MCE01-R Impacts	2026 Targets
Net kWh Reduced	-265,885
Net kW Reduced	0
Net Therms Reduced	29,583
Total System Benefits	\$470,381

5. Sub-Program Cost Effectiveness (TRC):

0.69

6. Sub-Program Cost Effectiveness (PAC):

0.69

7. Type of Sub-Program Implementer (Core, Third Party, or Partnership):

Third Party

8. Market Sector (including multi-family, low income, etc.):

Multifamily

9. Sub-program Type (Non-resource, Resource Acquisition, Market Transformation):

Resource Acquisition

10. Intervention Strategies (Upstream, Downstream, Midstream, Direct Install, Non-Resource, Finance, etc.):

Downstream

Implementation Plan Narrative

1. Program Description

The MCE Multifamily Energy Savings (MFES) Resource Program is designed to expand access to electrification upgrades for multifamily properties across MCE's service area. While MCE's existing Equity Multifamily Program focuses exclusively on deed-restricted affordable housing and offers a comprehensive suite of incentives, the Resource Program was created to serve a broader segment of the multifamily market.

Drawing on lessons from MCE's experience delivering the Equity Multifamily Program, the Resource Program uses a similar delivery approach but is tailored to meet the needs of properties that may not be ready—or eligible—for a full building retrofit. Instead, the program targets the most impactful and cost-effective measures: heat pump HVAC systems, heat pump water heaters, and induction stoves. By focusing on these measures, the program helps overcome upfront cost barriers and accelerates adoption of electrification technologies in a wider range of multifamily properties.

The MFES Resource Program services include no-cost property assessments, development of project scopes, and ongoing assistance throughout the project lifecycle. Property owners will receive rebates to help offset the cost of electrification upgrades, with program design structured to balance meaningful incentives with cost-effectiveness requirements.

The program's objectives are to:

- Extend access to electrification incentives beyond deed-restricted affordable properties, reaching more multifamily communities in MCE's service area.
- Support property owners in initiating electrification through targeted, high-impact measures.
- Provide customized technical assistance to guide projects from initial assessment through construction.
- Reduce market barriers by bridging the funding gap for electrification retrofits.

2. Program Delivery and Customer Service

Program Implementer Role

The MFES Resource Program is implemented by the **Association for Energy Affordability (AEA)**, a nonprofit organization specializing in energy efficiency for new and existing buildings.

AEA provides technical assistance, project management, and quality control (QC) services to ensure successful project delivery.

Program Delivery Approach

The MFES Resource Program is a downstream program that delivers site-specific recommendations and incentives to encourage adoption of electrification measures. The program focuses on three key measures, heat pump HVAC systems, heat pump water heaters, and induction stoves, selected for their cost-effectiveness and impact.

Each participating property is assigned a Technical Assistant (TA) from AEA who serves as the single point of contact throughout the customer journey. The TA provides:

- Initial engagement through phone calls to gather building information and understand property goals.
- No-cost energy assessments, including onsite verification of building data.
- Technical guidance through contractor bid walks, equipment review, and development of project scope.
- Assistance with incentive reservations and coordination with other funding sources.
- Project closeout services, including installation verification and document collection.

Property owners receive rebates to offset the cost of eligible electrification measures, with program design intended to reduce upfront barriers while providing consistent technical support.

Customer Service and Tools

The program provides a full suite of customer services, including:

- **Targeted outreach** to multifamily property owners and managers.
- **Customized technical assistance** to guide projects from initial assessment through construction.
- **Program navigation support**, helping participants identify and stack incentives from other programs where possible.
- **Quality assurance and verification** to ensure installations meet program specifications.

Partner Program Coordination

MFES Resource will coordinate closely with partner programs to maximize participant benefits and avoid duplication of incentives. TAs will assess whether properties are a better fit for other offerings, and if so, connect them accordingly. When multiple programs are co-leveraged, the TA will ensure that measures are clearly attributed to distinct funding sources, avoiding double-counting and “double dipping.”

Projects that qualify for both MFES Resource and MFES Equity may participate in both programs; however, they may not receive incentives for the same measure from more than one program. This approach ensures clear attribution of savings and incentives while enabling participants to pursue more comprehensive upgrades.

Outreach Strategy

The program's outreach efforts will leverage existing organizational networks and communication channels, including customer contacts, local government partners, industry associations, and property management organizations. AEA will continue to build upon established relationships with affordable housing organizations, multifamily developers, and property owners and managers to extend the program's reach.

Outreach activities will include coordination with:

- BayREN and local government agencies.
- Property-owner and developer organizations.
- Property management companies and service providers.
- Industry professionals such as mechanical engineers and general contractors.

3. Program Design and Best Practices

The MFES Resource Program is designed to reduce market barriers that limit electrification adoption in multifamily buildings while applying best practices informed by MCE's experience implementing the Equity Multifamily Program. By extending access to all multifamily properties, the program addresses challenges unique to market-rate and mixed-income properties while providing a streamlined, customer-centered approach.

Primary Measures Offered

Primary measures incentivized in this program include:

- Heat Pump Water Heating
- Heat Pump Space Heating & Cooling
- Induction Ranges & Cooktops

Additional measures may be added based on available workpapers at the time of program offering.

Market Barriers Addressed

The program is structured to overcome barriers commonly faced by multifamily properties, including:

- **Program navigation challenges.** Property owners are often unsure which program(s) apply to their property type or project scope. MFES assigns a Technical Assistant (TA) to guide owners through the entire process, from assessment to incentive reservation, ensuring they connect with the most appropriate offerings.
- **Limited technical expertise.** Many owners lack the tools to evaluate the technical and economic potential of electrification. The TA provides site-specific analyses and practical recommendations to support decision-making.
- **Diversity of building stock.** Multifamily properties vary widely in size, age, and systems. MFES offers customized technical assistance to tailor recommendations to each property's unique conditions.
- **Timing of capital improvements.** Energy upgrades are often most feasible during major equipment replacement or refinancing events. MFES recognizes these "trigger points" and aligns program support with them.
- **Split incentives.** Tenants typically pay energy bills while owners make capital decisions. MFES mitigates this barrier through rebates that reduce owner costs, and by stacking incentives with partner programs where available.
- **Perceived disruption and cost concerns (market-rate properties).** Market-rate owners may perceive electrification as costly, disruptive, or not aligned with tenant demand. MFES addresses this through simplified participation, meaningful incentives, and TA support that reduces administrative burden.

Program Design and Best Practices

MFES incorporates lessons learned from MCE's Equity Multifamily Program, adapting them to broaden access while maintaining effectiveness. Best practices reflected in this design include:

- **Single Point of Contact (SPOC):** Each property is assigned a TA to streamline the customer experience and minimize administrative barriers.
- **Comprehensive assessment with targeted measures:** While incentives focus on the most cost-effective measures, assessments identify additional opportunities and connect owners to other programs.
- **Program alignment and referrals:** MFES coordinates with BayREN, PG&E, TECH, LIWP and other offerings to maximize customer benefits and avoid duplication.
- **Flexible design:** By focusing on cost-effective measures and recognizing project timing, MFES accommodates diverse property needs and investment cycles.
- **Equity-informed delivery model:** While MFES Equity prioritizes higher incentives and resources for lower-income properties that face greater financial barriers, while MFES Resource targets the broader market with moderate incentives, ensuring equitable access and support for market-rate properties.

Through this design, MFES builds on proven strategies while expanding electrification opportunities across the multifamily market, positioning the program as a best-practice model for delivering scalable, customer-focused savings.

4. Program Metrics

The MFES Resource Program will track progress using a combination of property- and unit-level metrics across four key project stages. Given that multifamily projects involve multiple stakeholders and phases that often span several program years, the program will monitor:

- a) **Projects Developed:** Number of properties receiving technical assistance, initial assessments, and scope development. This stage captures early engagement and planning activities that prepare a property for participation.
- b) **Projects Reserved:** Number of properties with reserved incentives, indicating commitment to proceed with installation.
- c) **Projects Under Construction:** Number of properties where installation of program measures has begun.
- d) **Projects Completed:** Number of properties and units for which rebates and incentives have been issued, representing completed, verified installations.

Projected Participation – PY 2026		
Project Stages	Number of Properties ¹	Number of Households (Units) ¹
Developed	1-3	70-120
Reserved	1-2	30-60
Under Construction	1-3 (subtotal)	120
Project Completed	1-3 (subtotal)	120

Table 1: MFES Resource Program Targets

Project Development includes technical assistance to identify, refine, and coordinate installation of scoped measures, spanning from initial interest through construction completion.

Metrics are designed to capture program progress at both the property and unit level, providing visibility into program uptake and measure adoption.

¹ These are not cumulative numbers. Properties and units can go through one or more of these stages within a year.

Supporting Documents

1. Program Manuals and Program Rules

Program Manual attached.

2. Program Logic Model

The logic informing the MCE Multifamily Sub-Program design is aligned with recommendations from industry stakeholders and best practices from existing programs.

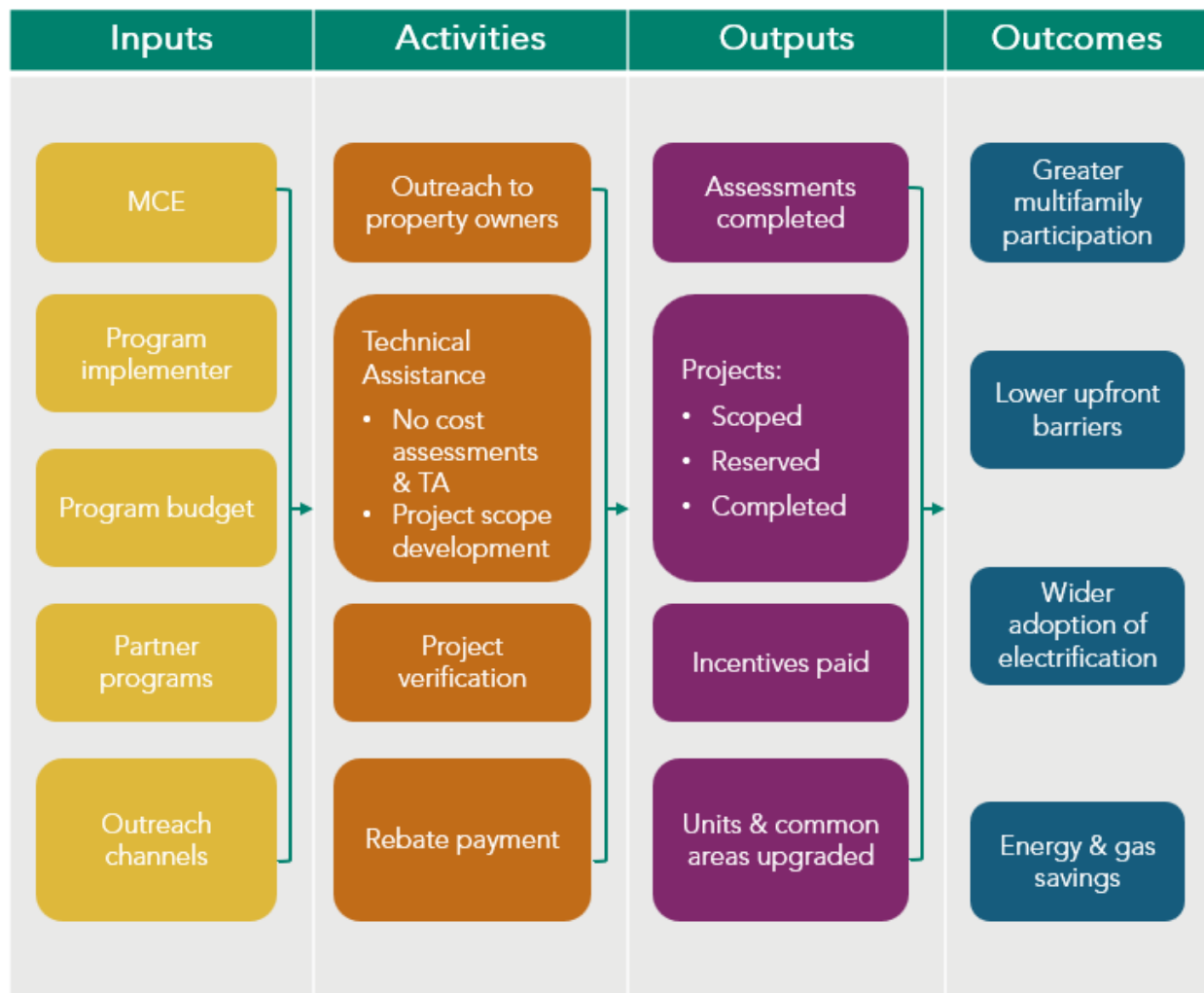


Figure 1: MFES Logic Model

3. Process Flow Chart

AEA's Technical Assistance (TA) and Implementation team follows a structured process when a new applicant applies to the MFES Resource Program. Participants begin by submitting an interest form and completing a brief intake call. If eligible, the program moves forward with a site assessment and energy report to identify opportunities. From there, the project scope is finalized, and incentives are reserved to support installation. Once measures are installed and confirmed through verification, the participant signs off on completion. The process concludes with final documentation and rebate payment.

Throughout these steps, the TA also ensures coordination with other MCE programs and external partners. This prevents duplicative incentives, connects participants to the most appropriate offerings, and streamlines the experience across programs and agencies.

MFES RESOURCE PROGRAM FLOWCHART

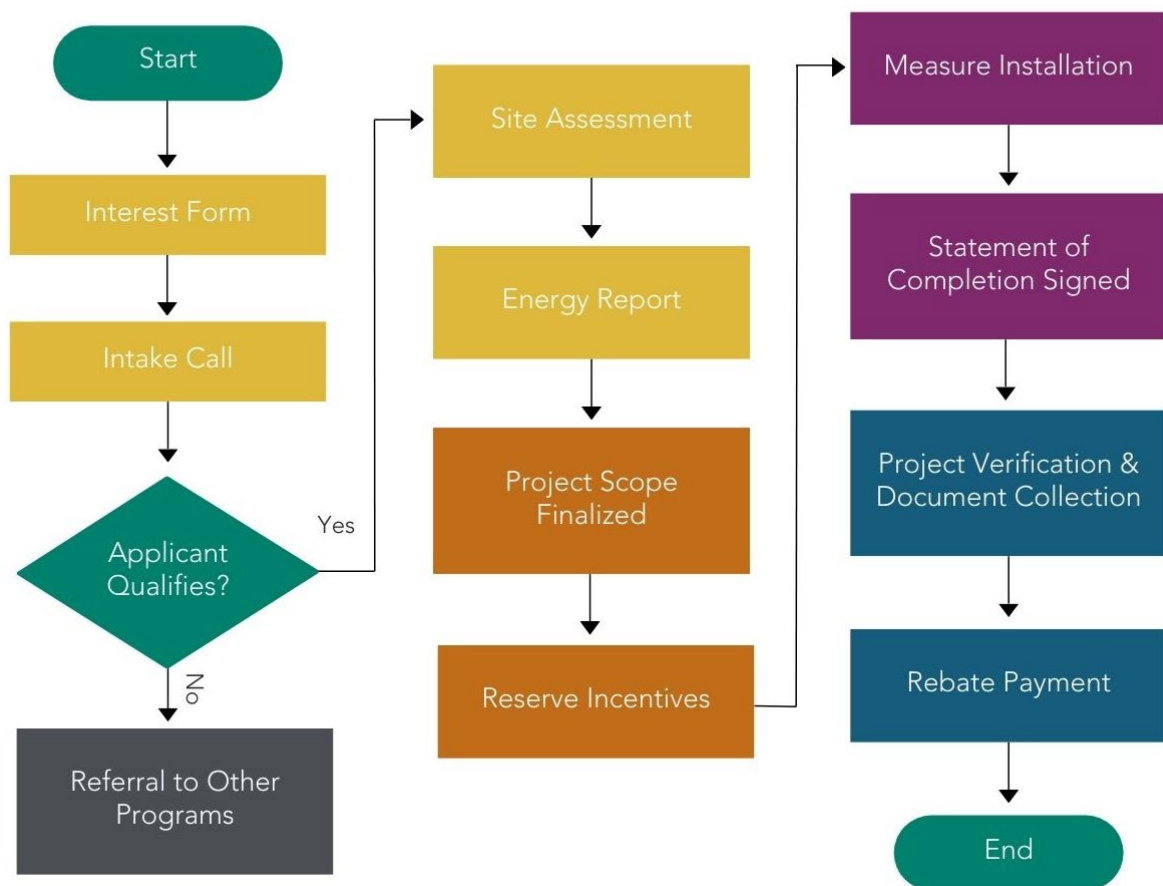


Figure 2: MFES Resource Flowchart

4. Incentive Tables, Workpapers, Software Tools

The MFES Program supports a range of electrification measures in both common areas and in-unit applications. Incentive levels are designed to offset upfront costs and accelerate adoption. Savings will be calculated using deemed values from the Database for Energy Efficient Resources (DEER) or site-specific custom calculations. Additional measures will be incorporated as workpapers are approved.

Program Requirement: To qualify for rebates, existing gas equipment must be fully removed, disconnected, and capped.

Measure Type	Measure	Location	Incentive ² Level	Workpaper / Tool Reference
Electrification	Heat Pump Water Heater	In-Unit	\$3,000 / ea.	Deemed Workpaper
Electrification	Heat Pump Water Heater	Common Area	\$3,000 / ea.	Deemed Workpaper
Electrification	Ductless Mini Split	In-Unit	\$4,000 /ea. + \$500 per ea. additional head	Deemed Workpaper
Electrification	Heat Pump Water Heater	Central	\$2,600 / unit served	Deemed Workpaper
Electrification	Package Terminal Heat Pump	In-Unit	\$2,200 / ea.	Deemed Workpaper
Electrification	Ducted Heat Pump	Common Area	\$3,000 / ea.	Deemed Workpaper
Electrification	Heat Pump Water Heater	Pool	\$3,750 / ea.	Deemed Workpaper
Electrification	Induction Range	In-Unit	\$1,000 / ea.	Deemed Workpaper

Table 2: MFES Incentives for Common EE Measures

² Exact incentive levels to be finalized based on budget allocations and approved workpapers.

5. Quantitative Program Targets

For Program Year 2026, the MFES Resource Program anticipates achieving the following outcomes based on program design and historical participation:

Energy Savings and System Benefits	
Impact Metric	2026 Target
Net kWh Reduced	265,885
Net kW Reduced	0
Net Therms Reduced	29,583
Total System Benefits	\$470,381

Table 3: MFES Program Targets

Participation

- **Properties and Households:** As tracked through program stages, the program expects to engage 1–3 properties representing 70–120 units, with completed installations in 1–3 properties covering 120 units.
- **Non-Incentive Services:** Technical assistance, assessments, and scope development will be provided as part of the program stages described in the metrics section.

These targets reflect anticipated results based on program design assumptions and historical participation data and are intended to guide annual planning and reporting.

6. Diagram of Program

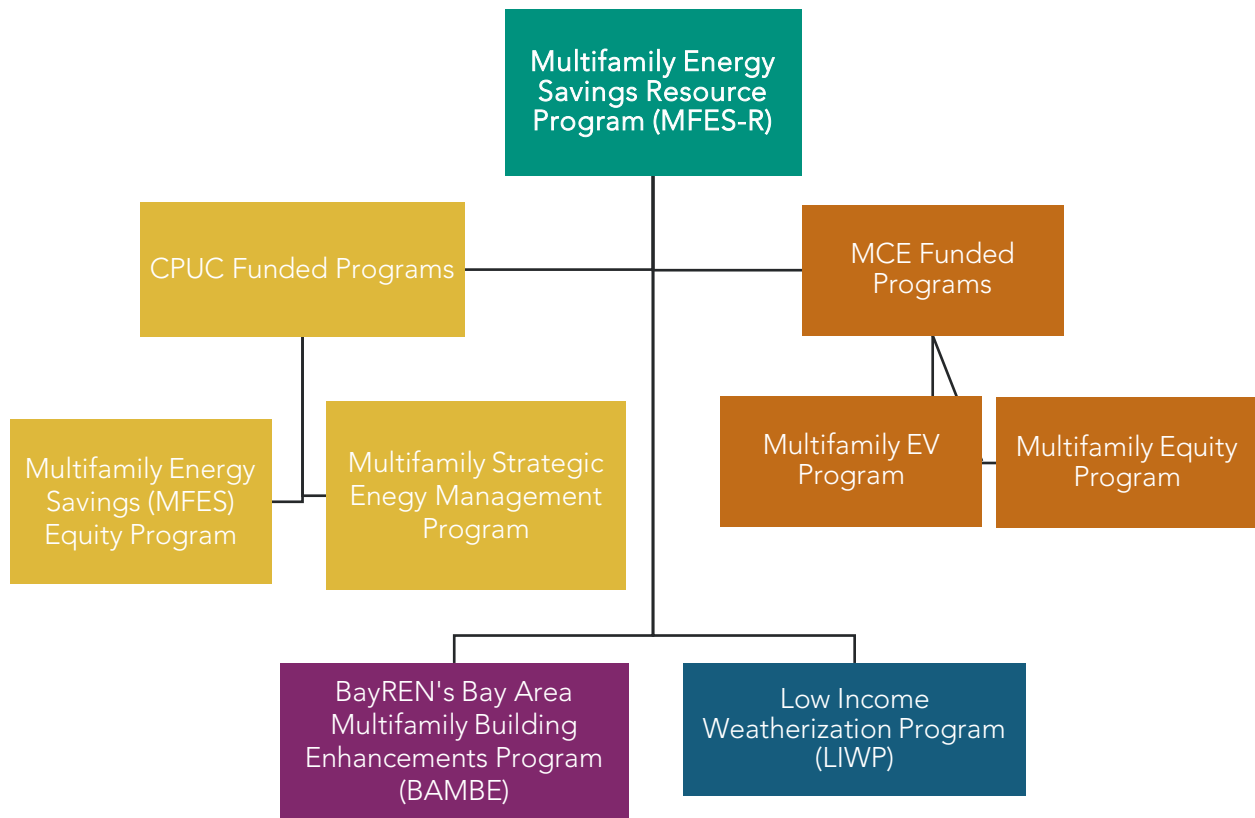


Figure 3: MFES Resource Program Diagram

7. Evaluation, Measurement & Verification (EM&V)

The program will use a combination of deemed measure savings and baseline assessments to determine appropriate workpapers. The Technical Assistant (TA) will visit sites during and after construction to verify that installations are completed across the property. To ensure accurate representation of the building while controlling implementation costs, a sampling of tenant units will be assessed alongside all common area spaces.

QA Activity	QA Sampling Rate (Indicate Pre/Post Sample)	QA Personnel Certification Requirements
Initial Site Visit by Technical Assistant	Sampling of tenant units, 100% of common areas	BPI Accredited

Pre-construction Bid Walks and Mid-construction Site Visits	Sampling of tenant units, 100% of common areas	BPI Accredited
Post Implementation Site Visit by Technical Assistant	Sampling of tenant units, 100% common area installations	BPI Accredited

Table 4: Site Visit QA Requirements

This approach ensures verification of installations and accurate measurement of energy savings while maintaining cost-effective program implementation.

Program Manual

1. Eligible Measures

The program incentivizes cost-effective electrification measures for multifamily properties within MCE service area. Eligible measures include:

- Heat pump HVAC systems
- Heat pump water heating systems
- Induction stoves

Measures must be installed according to program specifications and applicable workpapers. Only installations meeting these technical standards are eligible for program incentives.

2. Customer Eligibility Requirements

Multifamily properties within MCE service area are eligible to participate. Properties must:

- Be residential rental housing, such as multifamily buildings
- Have at least five rental units
- Be existing properties (no new construction)
- Be utility customers of Pacific Gas & Electric (PG&E) or MCE

3. Contractor Eligibility Requirements

Properties may choose the contractor they work with, provided the contractor:

- Holds applicable trade licenses and certifications
- Employs personnel accredited by BPI (or equivalent) for technical assistance and quality assurance activities
- Follows program specifications, reporting, and documentation requirements

4. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners

Not applicable.

5. Additional Services

Not applicable.

6. Audits

Technical assessments are conducted to establish baseline conditions and verify installation of program measures. Key points include:

- **Pre- and Post-Audits:** Conducted as part of program delivery.
- **Scope:** Includes all common areas and a sampling of tenant units to verify energy efficiency and electrification measures.
- **Personnel:** Technical Assistants with BPI accreditation conduct all assessments

7. Sub-Program Quality Assurance Provisions

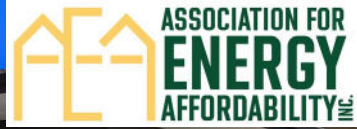
Quality assurance and quality control activities include:

QA Activity	QA Sampling Rate (Indicate Pre/Post Sample)	QA Personnel Certification Requirements
Initial Site Visit by Technical Assistant	Sampling of tenant units, 100% of common areas	BPI Accredited
Pre-construction Bid Walks and Mid-construction Site Visits	Sampling of tenant units, 100% of common areas	BPI Accredited
Post Implementation Site Visit by Technical Assistant	Sampling of tenant units, 100% common area installations	BPI Accredited

8. Other Program Metrics

Program tracking relies on comprehensive documentation and data collection, including:

- Installation reports and incentive claim forms
- Technical assistance and site visit documentation
- Energy savings calculations using deemed measure savings or site-specific calculations
- Tracking of participating properties, units, and incentive distribution
- Sector- and portfolio-level reporting in alignment with CPUC requirements



Multifamily Energy Savings Resource Program Launch Webinar

SEPTEMBER 30, 2025

Agenda

- **Program Background:** Multifamily Energy Savings Resource Program Context
- **Program Overview:** Design, budget, implementation details and targets
- **Discussion and Q&A**



A young man and woman are smiling and standing together in front of a modern, multi-story house. The man is wearing a light blue and dark grey baseball-style shirt, and the woman is wearing a green long-sleeved shirt and a light-colored shawl. The background shows a residential street with parked cars and lush greenery.

Program Background



Why MFES-R?

- Expands access to all multifamily properties (beyond deed-restricted affordable housing)
- Builds on lessons from Equity Program
- Focus on high TRC electrification measures (HP HVAC, HP water heating, induction)
- Support MCE's decarbonization goals



Program Overview

Program Objectives



Extend Access

To electrification incentives to more multifamily properties



Impact Measures

To support properties initiating electrification



Customized TA

To guide projects from assessment through construction



Reduce Barriers

By bridging funding gap for electrification retrofits

Barriers Addressed by MFES-R



Program Delivery & Customer Service

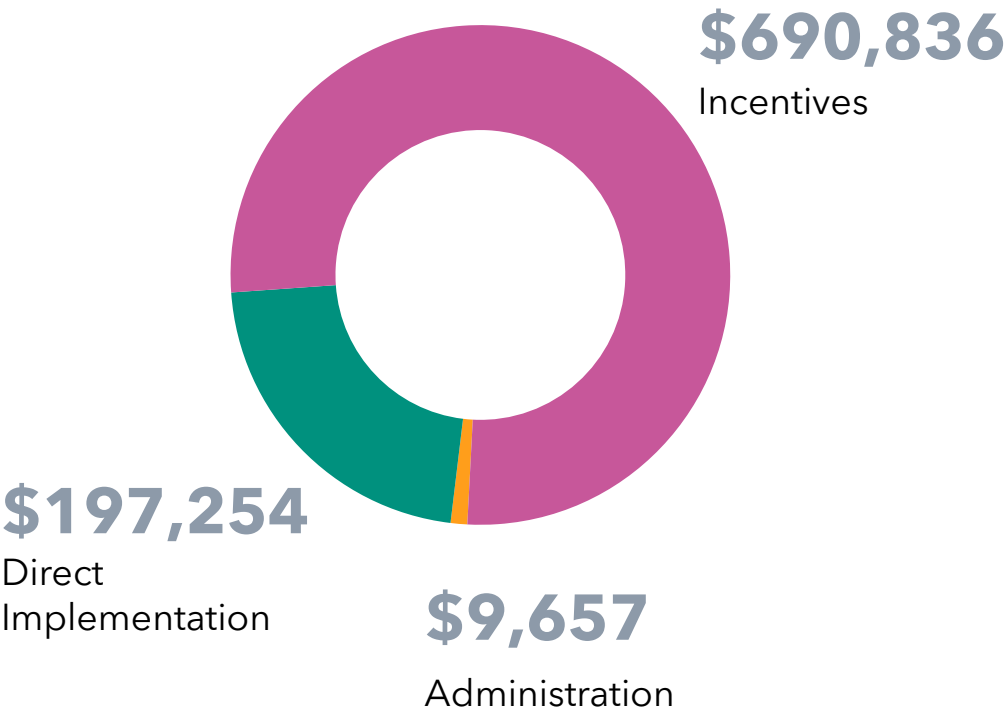
- **Program Implemented** by AEA
- **Program Delivery**
 - Downstream: Similar customer journey to MFES Equity
 - Rebated Measures: Heat pump HVAC, heat pump water heaters, induction stoves
- **Partner Coordination**: Maximize tenant/property benefits, avoid duplicate incentives, connect properties to best-fit programs
- **Targeted Outreach**: Focus on eligible properties, leverage existing networks



Budget & Incentives

2026 Program Budget

Total: \$897,747



Incentives Table		
Measure	Location	Incentive*
Heat Pump Water Heater	In-Unit	\$3,000 / ea.
Heat Pump Water Heater	Common Area	\$3,000 / ea.
Ductless Mini Split	In-Unit	\$4,000 /ea. + \$500 per ea. additional head
Heat Pump Water Heater	Central	\$2,600 / unit served
Package Terminal Heat Pump	In-Unit	\$2,200 / ea.
Ducted Heat Pump	Common Area	\$3,000 / ea.
Heat Pump Water Heater	Pool	\$3,750 / ea.
Induction Range	In-Unit	\$1,000 / ea.

* Exact incentive levels to be finalized based on budget allocations and approved workpapers.

Savings and Participation Targets - 2026

Impact Savings	Targets
Net kWh Reduced	-265,885
Net Therms Reduced	29,583
Total System Benefits	\$470,381

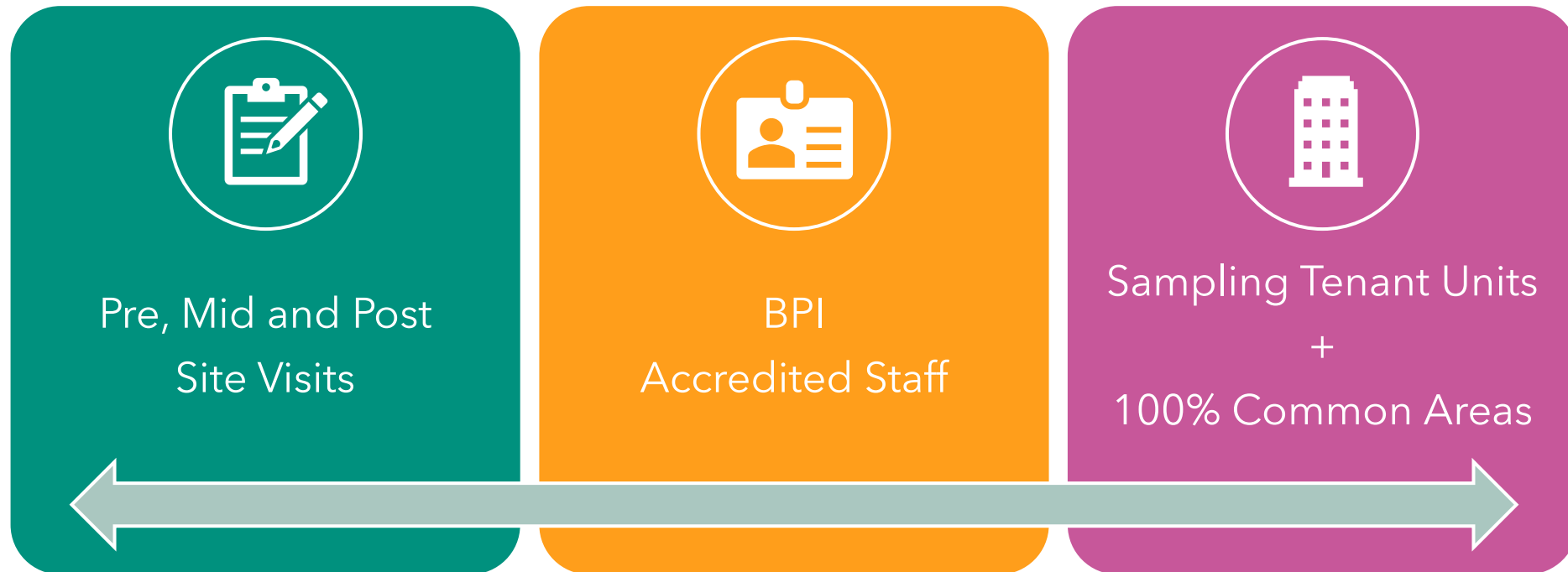
0.69
TRC

Project Stage	Number of Properties*	Number of Households / Units*
Developed	1-3	70-120
Reserved	1-2	30-60
Under Construction	1-3 (subtotal)	120
Project Completed	1-3 (subtotal)	120

0.69
PAC

* These are not cumulative numbers. Properties and units can go through one or more of these stages within a year.

QA & EM&V



This is what we call the
"duck's neck."

Discussion & Q&A

Next Steps

- Public Webinar
- Questions & Feedback by 10/7
regulatory@mcecleanenergy.org
- Finalize program documentation for MCAL submission
- Prepare for launch 2026
(pending MCAL approval)





Thank you!



Grace Peralta, Senior Customer Programs Manager