CALIFORNIA

Efficiency + Demand Management

COUNCIL

Advancing Our Clean Economy

EE + DR/DER Call

February 3, 2026

REC

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Today's Agenda

CALIFORNIA Efficiency + Demand Management COUNCIL

- CEDMC EM&V Forum is Next Week
- Review Request: Custom Rulebook
- Legislative update
- Near-term filings
- Council reply comments on Staff proposal on natural gas efficiency incentives
- Decision denying SDG&E AfR of IOU guidelines for demand flexibility rates
- Proposed decision on EPIC strategic objectives
- Party comments on 2026 Flex Alert funding

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EM&V Forum

Role of EM&V in Achieving Decarbonization Affordably in California

- Date: Tuesday, February 10, 2026
- Time: 10:00 am – 5:00 pm, with reception following until 6:30 pm
- Registration opens at 9:00 am
- Location: Berkeley, CA (in-person only)

  - **Keynote** – Role of EM&V in Achieving Decarbonization and Affordability in California
  - **Session 1** – Role of Cost-Effectiveness in Meeting California's Energy Affordability Challenge: What's next after TSB?
  - **Session 2** – Counting the Full Benefits: Emerging Approaches to Non-Energy Impacts
  - **Session 3** – Navigating the Future: The Role of NMEC in California
  - **Session 4** – Continuous Improvement of Custom Project Review: One Year Later
  - **Session 5** – Don't Tell Me It Didn't Happen: Evaluating Demand Response for a Grid-Responsive Future
  - **Session 6** – I Don't Want to Wait a Year for an Evaluation: Real-Time Evaluation Approaches from Across the Country

Event website:
cedmc.org/events/emv-forum/

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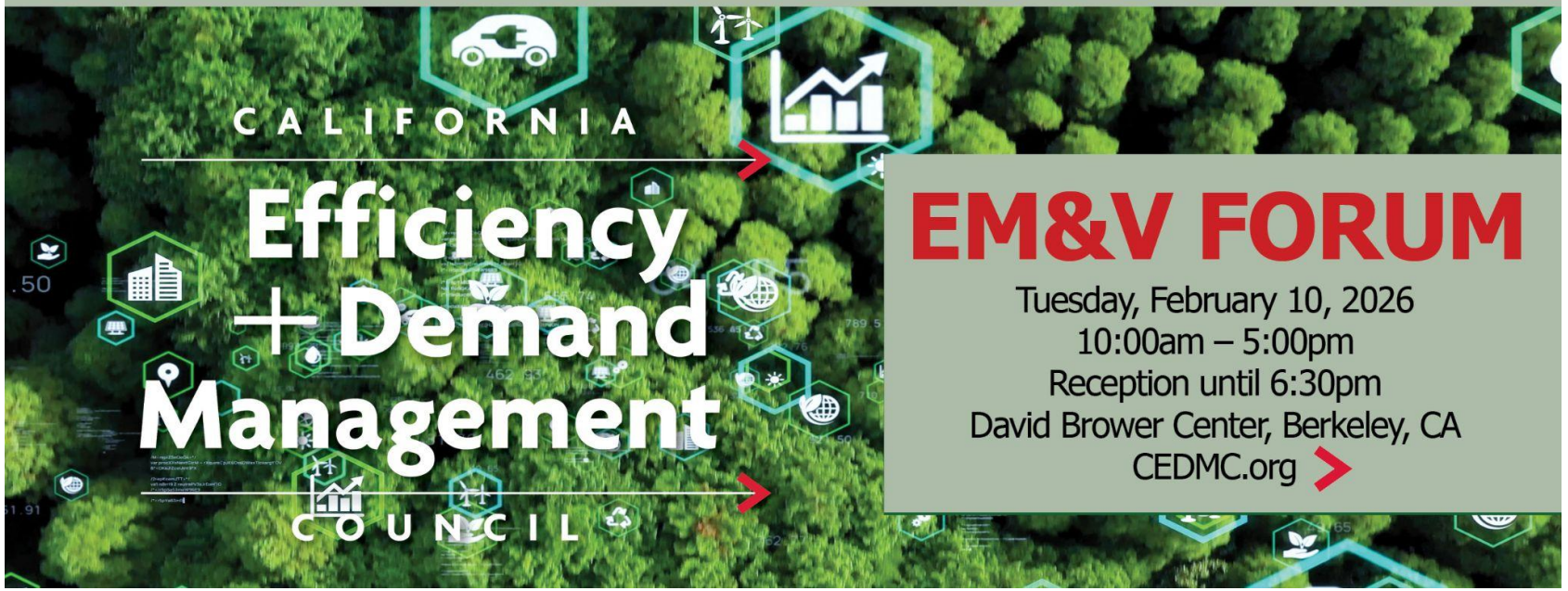
Session 1 – The Role of Cost-Effectiveness in Meeting California's Energy Affordability Challenge: What's Next After TSB?

Jennifer McWilliams
Principal Engineer, DNV

Coby Rudolph
Supervisor, CPUC

Siva Sethuraman
VP, Business Development - Utilities, Cascade

Moderator:
Amul Sathe,
Director, Guidehouse



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Session 2 - Counting the Full Benefits: Emerging Approaches to Non-Energy Impacts

Ali Ahmad
EM&V Energy Efficiency Conservation Senior, SoCalGas

Steve Campbell
Senior Analyst, Innovation Strategy, Peninsula Clean Energy

Lujuana Medina
Environmental Initiatives Div. Mgr., County of Los Angeles, and SoCalREN

Leigh Michael
Principal Consultant, Illume Advising

Moderator:
Casey Dailey
Director, WRCOG, and I-REN

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Session 3 - Navigating the Future: The Role of NMEC in California

Arash Kialashaki
Supervisor, PG&E

Christie Torok
Public Utilities Regulatory Analyst, CPUC

Sarah Sturdy
Senior Program Manager - AESC, Franklin Energy

Stephanie Whalley
Head of Section, DNV

Moderator:
Jon Taffel
Supervisor of EE Evaluation and Analytics, CPUC

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Session 5 – Don't Tell Me It Didn't Happen: Evaluating Demand Response for a Grid-Responsive Future

Brian Gerke
Sr. Director, Analytics & Data Science, Recurve

Ansel Lundberg
Senior Policy Developer, CAISO

Erik Lyon
DR and VPP Energy Regulatory Manager, Renew Home

Moderator:
Collin Smith
Regulatory Affairs Manager, Leap

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Session 6 - I Don't Want to Wait a Year for an Evaluation: Real-Time Evaluation Approaches from Across the Country

Case Study 1 - Evaluating TECH

&

Anna Frankowski Nelson
Senior Project Manager, Energy Solutions

Dr. Ellen Steiner
Vice President
E Source

Case Study 2 - Examples from Across the Country

Allie Marshall
Principal, Cadmus

Moderator:

Andrea Marr
Senior Vice President, Cadmus

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Review Request: Custom Rulebook

- **Purpose** – Consolidate all rules and guidance for custom-calculated measures and projects in one place + clarify, simplify.

- **Draft Custom Rulebook materials out for review**
  - **Custom Rulebook** – comprehensive document with context, custom process, rules and guidance, maintenance plan, etc.
  - **Custom Rulebook Workbook** – all rules in one table, plus list of rules/guidance proposed for "retirement"
  - **Data Dictionary** – data/documentation requirements

- **Deadline for initial review – Feb 18**
  - Materials available on Cal TF Custom Initiative SharePoint > Custom Rulebook Materials
  - Comment directly in materials on SharePoint or send to caltf@futee.biz
- **Questions:** caltf@futee.biz

Legislative update

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Near-term filings

- **Energy Efficiency (R.25-04-010):** The natural gas EE incentives Ruling; a Proposed Decision should come out shortly
- **EE Applications:** The Utilities, CCAs, and RENs are going to file their EE Applications on March 16
- **Demand Response (R.25-09-004):** Reply Comments on the Flex Alert Ruling are due on January 30. We are waiting for a Scoping Memo in this proceeding
- **Income Qualified Programs (A.26-01-003, et al.):** PG&E, SCE, SDG&E and SoCalGas have submitted Income Qualified Program Applications.
  - It's likely these proceedings will be consolidated and given the same Response/Protest date but that has not happened yet.
  - Responses/Protests to the PG&E and SCE Applications are due on **February 13** and Responses/Protests to the SDG&E and SoCalGas Applications are due on **February 20**
- **Electric Program Investment Charge (EPIC) (R.19-10-005):** On January 23, ALJ Glegola issued the Proposed Decision Adopting EPIC Strategic Objectives. Opening Comments are due on **February 12** and Reply Comments are due on **February 17**
- **Resource Adequacy (RA):** Parties and Energy Division submitted Track 1 Proposals on January 23, some of which contained DR proposals. Opening Comments on the Proposals are due **March 6** and Reply Comments are due on **March 20**

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Council reply comments on Staff proposal on natural gas efficiency incentives

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Decision denying SDG&E AfR of IOU guidelines for demand flexibility rates

- On 1/16, CPUC issued D.26-01-026 which denied the SDG&E Application for Rehearing (AfR) of IOU demand flexibility rate guidelines approved in D.25-08-049
- Background
  - D.25-08-049 specified how all of the various cost components should be incorporated into RTP proposals, including marginal costs of energy, T&D losses, generation capacity, distribution capacity, and transmission capacity
  - In its AfR, SDG&E argued that guidelines were akin to a rate design which requires a finding it be just and reasonable, no evidentiary basis for guidelines
- Decision overview
  - Cites D.25-08-049 use of "guidance" and "guidelines" to refute rate design allegation; DF rates will be resolved in IOU application proceedings
  - Refutes that it delegated ratemaking authority to CEC but cites CEC LMS requirement for hourly rates
  - Refutes SDG&E claim that D.25-08-049 violated its due process rights
- Next steps: SDG&E filed its Demand Flexibility rate application on 2/2

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Proposed decision on EPIC strategic objectives

- On 1/23, CPUC issued a proposed decision adopting Electric Program Investment Charge (EPIC) strategic objectives
- Overview
  - Adopts 13 Strategic Objectives for the EPIC 5 investment plan (2026-2030)
  - Finds that IOUs made sufficient improvements to remain EPIC administrators
  - Authorizes IOUs to collect rates to fund their EPIC 5 investment plan budgets ($147M for CEC, $18.44M for PG&E, $3.24M for SDG&E, and $15.3M for SCE)
  - Authorizes next EPIC evaluation in 2028 and delegates ED Staff to facilitate it; directs it be more robust than 2024 Evaluation
  - Modifies State intellectual property rights for EPIC projects
  - Extends EPIC 5 investment plan deadline to 6/26/26
- Next steps: Opening comments due 2/12, reply comments due 2/17

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Party comments on 2026 Flex Alert funding

- On 12/30, the CPUC issued a Ruling in the DR rulemaking seeking comment on extending Flex Alert program funding through 2026
- Background
  - Flex Alert is a program that sends alerts to all customers in the state during periods of acute grid stress to request conservation during a specified period of time; was used as a trigger for Power Saver Rewards
  - Current annual budget is $22M through 2025
- Ruling requested feedback on a proposal to extend the current contract at the same funding amount through 2026
- Overview of comments
  - Council strongly supported w/ caveat that messaging be more customer-specific, and more pre- and post-event messaging used

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Party comments on 2026 Flex Alert funding (cont.)

- Overview of comments (continued)
  - PAO: Sunset it due to high costs and inequitable cost allocation
  - TURN: Keep it but reduce budget in 2026 with competitive solicitation for 2027
  - PG&E: Enhance it to support more specific actions & targeted outreach; $12M budget; competitive solicitation for 2027
  - CalCCA: Keep it at current budget but monitor costs in 2026
  - UCAN: Keep it but improve behavioral response, use feedback loops (e.g., post-event dashboards; same budget
  - SCE: Keep it but at a lower budget; use performance-based metrics; in 2027 and beyond, use a competitive solicitation
  - SBUA: Keep it but include more performance metrics; same budget; more customer-specific outreach
  - SDG&E: Funding should be more broad-based; evaluation reports should quantify benefits; should consider elimination to save money or funded by taxpayers; $4M budget
  - Leapfrog Power: Do not extend; budget is greater than DRAM and CBP; should use budget for pay-for-performance program w/ targeted outreach
- Next steps: Possibly a proposed decision in the near future

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Discussion and Questions

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Thank You!

Please contact us if you have any questions.

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