DRAFT

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

ENERGY DIVISION

AGENDA ID #23482
RESOLUTION E-5351
June 12, 2025

R E S O L U T I O N

Resolution E-5351. Clarification and revisions to adopted indicators and metrics related to energy efficiency portfolios in compliance with Decision (D.) 23-06-055

PROPOSED OUTCOME**:**

- Adopts with modifications Advice Letter (AL) 4438-E/ 3299-G et al. filed by San Diego Gas & Electric (SDG&E), Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), Southern California Gas Company (SoCalGas), Marin Clean Energy (MCE), Tri-County Regional Energy Network (3C-REN), Bay Area Regional Energy Network (BayREN), Inland Regional Energy Network (I-REN), and Southern California Regional Energy Network (SoCalREN)
- Clarifies certain indicators related to the Energy Efficiency Portfolios
- Approves the removal or revision of certain indicators and metrics
- Converts several metrics into indicators
- Confirms no change to reporting of certain metrics and indicators
- Provides guidance on new reporting requirements

SAFETY CONSIDERATIONS:

- There are no safety considerations associated with this resolution.

ESTIMATED COST**:**

- There are no costs associated with this resolution.

By Advice Letter 4438-E/3299-G et al. filed on May 1, 2024**.**

SUMMARY

By Advice Letter (AL) 4438-E/ 3299-G et al. filed on May 1, 2024, San Diego Gas & Electric (SDG&E), Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), Southern California Gas Company (SoCalGas), Marin Clean Energy (MCE), Tri-County Regional Energy Network (3C-REN), Bay Area Regional Energy Network (BayREN), Inland Regional Energy Network (I-REN), and Southern California Regional Energy Network (SoCalREN) (referred to as Joint Portfolio Administrators or Joint PAs) submitted clarification of indicators adopted in (D.) 23-06-055, including modifications to metrics and indicators adopted in (D.) 18-05-041. It also included information that Portfolio Administrators could use as baselines for future targets or methodologies for indicators to inform baselines.

This resolution approves or modifies proposed clarifications to Equity and Market Support indicators offered by the California Energy Efficiency Coordinating Committee (CAEECC) Equity and Market Support Working Group filed with the Joint PAs' advice letter. It also suspends, revises, or converts to indicators many of the 300 required Common Metrics.

BACKGROUND

(D.) 23-06-055 adopted thirteen Equity Indicators and twenty-five Market Support Indicators[1], many of which were metrics or indicators[2] recommended in the California Energy Efficiency Coordinating Committee's (CAEECC's) Equity Metrics Working Group (EMWG) and Market Support Metrics Working Group (MSMWG). (D.) 23-06-055 requested that the CAEECC re-engage the EMWG and MSMWG to discuss and develop recommendations to clarify the adopted Equity and Market Support Indicators. CAEECC reconvened by consolidating the two working group efforts into a single Equity and Market Support Working Group (EMSWG), which spanned from November 2023 – March 2024. The Decision noted:

> Many of the adopted indicators would benefit from clarification and further discussion about the valuation methodology. Guidance may be needed for PAs to ensure that baselines for target-setting are clear and consistently applied, to the greatest extent possible. For these reasons, we will ask the CAEECC to

[1] (D.) 23-06-055 Conclusion of Law (COL) 35 and 36.
[2] While both metrics and indicators perform identical functions to demonstrate progress or performance, the main difference between them is that metrics also have an associated baseline and target while indicators do not.

> re-engage and update, as necessary, the EMWG and MSMWG to discuss and develop recommendations.[3]

(D.) 23-06-055 specifies:

> [t]he portfolio administrators shall jointly submit a Tier 2 advice letter by no later than May 1, 2024 clarifying all of the indicators adopted in this decision, including any modifications from metrics and indicators adopted in Decision 18-05-041, and identifying information that could be used as baselines for future targets or methodologies for how the indicator information can be used as baselines.[4]

Ordering Paragraph (OP) 11 of (D.) 23-06-055 requires delineation of two parallel workstreams, the first being clarification of indicators that Portfolio Administrators included in (D.) 23-06-055, which occurred through the EMSWG[5]. The second workstream involved Joint PAs' modification of metrics and indicators included in (D.) 18-05-041 and the identification of methodologies for baselines.

The EMSWG met nine times over four months and culminated in a final EMSWG report.[6] The report provides clarification of a limited set of indicators as agreed upon in the working group. The EMSWG report includes several "non-consensus" items where the working group members did not reach a consensus on the issue.

During the consideration of the Joint PAs' advice letter the Governor signed Assembly Bill (AB) 3264. While the legislation does several things, Section 913.5 requires the Commission to report to the legislature certain information about demand side management programs every three years. This resolution adds or revises indicators related to this newly required information. Two changes as a result are a new requirement to report "customers served" and to report "projected and actual bill savings".

[3] (D.) 23-06-055 at 29.
[4] *Id.* at OP 11.
[5] This working group included the Joint PAs, Energy Division, utility stakeholders, and members of the public.
[6] The EMSWG Final Report (https://www.caeecc.org/equity-market-support-wg)

NOTICE

SDG&E declared that AL 4438-E et al. was mailed and distributed in accordance with General Order 96-B, Section IV. As required by General Order 96-B, Section IV, SDG&E served this advice letter to the relevant parties on the Service List R.13-11-005.

PROTESTS

California Public Advocates (Cal Advocates) timely submitted a protest to SDG&E AL 4438-E et al. on May 21, 2024. Cal Advocates declared that the Commission should reject the Advice Letter because the request to remove certain metrics is unjust and unreasonable. Specifically, Cal Advocates expressed concern about the set of metrics that focused on "penetration", especially those that focused on hard-to-reach and disadvantaged communities. Similar to the requirements of AB 3264, Cal Advocates wants to ensure that PAs are reporting on how many customers of different types are being served and whether those quantities are meaningful to the overall population.

The Joint PAs filed a timely response to the Cal Advocates protest. They point out that the penetration metrics Cal Advocates recommends keeping are often inconsistent year over year, and therefore unreliable and not useful. Furthermore, they argue that the common metrics at issue can be misleading regarding program performance in the various sectors and customer types, as they only consider the number of customers served and not the depth of the savings or the measures available. There have been significant fluctuations in these penetration metrics based off the type of measures available within certain program years, such as LED lighting workpapers that have sunset. Additionally, specific programs may take a whole-building, deeper savings approach that would serve fewer customers but provide a bigger impact for these customers.

We disagree with Cal Advocates that the Advice letter should be rejected; however, we believe modifications to how participation is reported are needed. We discuss Cal Advocates' claim in the "Discussion" section below related to Recommendation 3 in the EMSWG Report.

DISCUSSION

AL 4438-E is approved with modifications.

Discussion Section 1 highlights parts of a new law, AB 3264, that requires the Commission to provide information to legislators (and affects choices made herein for data from the PAs). Sections 2-7 include Commission guidance regarding specific recommendations made within the EMSWG report and section 8 has a table that shows the Commission guidance by common metric. In their protest, Cal Advocates raised the need for metrics concerning the programs' reach within the population of potential customers, also known as "penetration". We discuss this topic in Section 3.

Discussion Sections

1. AB 3264
2. Purpose of Indicators and Metrics
3. Estimating Participation
4. Quantifying & Calculating Benefits
5. Clarifications
6. Paused Indicators
7. New Reporting Requirements
8. Common Metrics and Other Market Support Indicators

1. ASSEMBLY BILL 3264

AB 3264 requires the Commission to submit a report to the Legislature every three years that evaluates all demand side management programs. Section 913.5 of this law revises the elements that Commission must include in these reports. Several of the elements, such as target population, public interest impacts, and details about actual customers served, are aligned with the market support and equity metrics and indicators. New requirements for the tri-annual report per AB 3264 that align with the metrics and indicators are below:

- 913.5 (2) (C) Projected and actual energy savings over the program cycle.
  - Aligns with multiple indicators and metrics
- 913.5 (2) (D) Projected and actual bill savings to the average participating and the average nonparticipating ratepayer.
  - Aligns with Equity Metrics 2 and 10
- 913.5 (2) (G) Actual customers served, aggregated by customer class, geographic distribution, and income level.

- Aligns with Equity Metrics 1, 2, 3, 4, and 13

2. PURPOSE OF INDICATORS & METRICS

Recommendation 1: Purpose of Indicators and Metrics

The Equity and Market Support Working Group report contained in the Joint PAs' advice letter proposed four purposes for the indicators. The Commission agrees with those stated purposes but modifies them as follows and applies them to all adopted indicators and metrics in the EE Portfolio:

1. Understanding the impact of energy efficiency programs by segment and sector across PAs;
2. Ensuring accountability of dollars spent in Resource Acquisition, Equity, Market Support, and Codes & Standards segments;
3. Enabling PAs to make adjustments to energy efficiency programs based on indicator and metric data;
4. Development and execution of goals for Equity and Market Support segments; and
5. Enabling the Commission to provide clear data, dashboards, and other materials to decision-makers and stakeholders to support their understanding of energy efficiency performance.

3. ESTIMATING PARTICIPATION

Recommendation 2: Defining Equity Participants

The Commission agrees with this recommendation from the CAEECC EMSWG:

> The term "**equity target participant**" (used in Equity Indicators #1-4, 10, and 13) is defined as a program participant that meets Commission-adopted criteria for being hard-to-reach, located in a disadvantaged community, OR [sic] underserved. The participant can be in an Equity, Market Support, or Resource Acquisition segment program.
>
> Relatedly, an **equity segment participant** *does NOT* [sic] have to be hard-to-reach, located in a disadvantaged community, or underserved but must be a participant in an Equity segment program.

> Lastly, an **equity market participant** is hard-to-reach, located in a disadvantaged community, and/or is underserved AND [sic] is a participant in an Equity segment program. Therefore, an equity target participant in an Equity Segment program is also considered an equity market participant.

Recommendation 3: Reporting Participant Counts

The EMSWG report suggests that PAs collect participant information using program data and include details of how participants were counted. The Commission agrees with the EMSWG report recommendation to collect participant information, as modified below.

The Commission finds it is reasonable to assess and report on participation in a consistent manner among all PAs, to ensure consistency and equivalency between counting "customers served" for AB 3264 913.5 (2) (G) and "participants" for equity indicators 1, 3, 4, and 13. Because the concept of addressing equity requires a better understanding of who is being served and who needs to be served more and better, information on participants and population should provide information beyond the person who is the billpayer to all the individuals being served. As described on p.14 in the EMSWG Report, participants include "people, households, businesses, and other entities that actually participated in an energy efficiency program… The unit to be counted as a participant varies across and within sectors."

The Commission directs the following for counting participants and population. Energy Division staff may provide guidance on an updated approach at a later date, after consultation with the PAs. Staff will collaborate with PAs to identify and fill gaps in participation data related to certain types of programs, like those that use midstream and upstream delivery channels. For multifamily and non-residential programs, Energy Division staff seeks to collaborate with PAs, and may provide further guidance on a reporting approach for participant and population counts.

For residential programs where benefits are tracked via the claims process, the following shall be reported by PAs:

Quarterly: Number of all unique premise accounts served, by program, categorized per Appendix C

Annually: Number of all unique premise accounts served, by program, categorized per Appendix C and Unique Residential Population Served (URPS)*

*URPS = (Number of Unique Premise Account per year x Average Household Population)[7]

The purpose of URPS is to calculate the likely residential population of people served (i.e., with program savings) annually by the portfolio and associated segments with the best attempts at preventing duplication as practical. These data will provide more insight into the unique population of people who participated in residential EE programs for single family and manufactured homes in a given year rather than assuming each claim is a unique participation event.

For programs for which participation or benefits are not tracked via the claims process, the PA must regularly report on the adopted metrics and indicators tracking this information.

With regards to Cal Advocates' protest and interest in preserving the "penetration" metrics, the Commission finds a better understanding of actual customers and population served will yield more meaningful and actionable information. Further, with better information about customers and population served, stakeholders can calculate what portion of a target customer group the Portfolio Administrator served.

Recommendation 9: Calculating Hard-To-Reach and Disadvantaged Community Participation

The Commission agrees with the EMSWG report nonconsensus recommendation to report Equity Indicators 11 and 12 by PA. Additionally, the Commission agrees that the denominator in each indicator is the total number of program participants but that the denominator should be at the building type level for the residential sector (i.e., single-family, multi-family, and mobile homes) and the denominator for commercial at the commercial building type level).

When calculating these indicators the numerator and denominator shall be as follows:

[7] The average household population should be determined from Census ACS 5-year table B25124 that has household size by California Census Tract for single family, multifamily, and mobile homes. Data in the table is available by owner and renter and can be used if the PA feels it is appropriate. However, a combination of data for owners and renters is acceptable for the URPS. When determining an average household population, use the value of 5 for all data that is indicated to be for 5+ in the household.

% HTR customers in portfolio = (HTR customer participants / All customer participants) by building type for residential and commercial sectors

% DAC customers in portfolio = (DAC customer participants / All customer participants) by building type for residential and commercial sectors

The Reporting Program Coordination Group (PCG) will collaborate to define the parameters for these calculations to facilitate reporting.

4. QUANTIFYING AND CALCULATING BENEFITS

Recommendation 4: Savings Values for Quantifying Benefits

The Commission does not agree with this nonconsensus recommendation on which benefits to report. For equity indicators 5, 6, 7, and 8, PAs shall report net and gross as well as lifecycle (except kW) and first year values. Since these values are already reported in the California Energy Data and Reporting System (CEDARS), these indicators plus equity indicator 9 (TSB) will be assessed via that instrument and these values need not be reported separately or in duplicate.

Recommendations 5 & 6: Calculating & Reporting Bill Savings

EMSWG Report suggests (nonconsensus recommendation) calculating bill savings for equity indicator 2 (Sum of equity target participants' expected first-year bill savings in equity segment, by sector (Q, S)) "using a PA-specific electric or gas rate multiplied by first-year, gross ex ante electric or gas savings." The Commission does not agree with this recommendation because it does not provide for time-of-use (TOU) rates which are prevalent across CA ratepayers. Also, Commission practice is to assess compliance by measuring net benefits.

AB 3264 Section 4 requests the Commission to report on "(D) Projected and actual bill savings to the average participating and the average nonparticipating ratepayer." This language essentially expands Equity indicator 2 to the entire portfolio and focuses on understanding bill savings to individual ratepayers.

Collaborating via the Reporting PCG, the PAs shall develop and implement a common methodology all PAs will use for estimating bill savings. The intention is not an analysis of the actual customer's load profile but an aggregated calculation of the participants' bill impacts. The methodology must meet the following criteria:

1. Must account for differences in customers in resource acquisition and equity segments;
2. Must account for net kWh, KW, and Therm benefits and TOU impacts;
3. Must account for fuel substitution effects;
4. Must account for CARE and FERA impacts to bill savings;
5. Must be able to be calculated by all PAs allowing all ample time for quarterly reporting;
6. Must be able to report actual and projected bill savings where:
   Projected = Forecasted in True-Up and Mid-Cycle Advice Letters
   Actual = Claims; and
7. Must account for local rates and may consider IOU or CCA rates as appropriate.

PAs should consider that this methodology could be used for the Energy Savings Assistance (ESA) ESA programs to maintain consistency across relevant Commission programs.

Recommendation 7: Nonclaimable Savings

The Commission agrees with the recommendation to not include nonclaimable savings in the calculation of equity indicators #2 and #5-9 at this time. We may revisit this topic after more data is collected and equity programs mature.

5. CLARIFICATIONS

Recommendation 8: Statewide Program Reporting

With regard to how PAs should report participant counts in statewide programs, instead of reporting participation by IOU budget allocation, the lead PA should count/calculate participation by program and location of participation, and provide those values to the respective IOUs. Values for SCE and SoCalGas should represent customers receiving electric energy savings or customers receiving gas energy savings, respectively. Where a customer receives both electric and gas energy savings, the lead PA should provide a value of "1" each to SCE and SoCalGas. Awareness of this issue will help Energy Division and the PAs monitor participation more closely to understand who is participating and how.

Recommendation 10: Defining Partnership

The Commission partially agrees with the main recommendation in the EMSWG report, with the following modified language to focus partnerships on a primary purpose of the EE Portfolio.

We define the term "partnership" (used in Market Support Indicators #2 and 20) as:
1. Agreement between at least two entities to engage in a mutually beneficial relationship to serve at least one primary purpose of the EE portfolio: resource acquisition, equity, or market support with regard to supply or delivery of products, services, education, and/or training.
2. The partnership may or may not be legally contracted.
3. In cases where a partnership is not contracted, PAs have other documents/materials demonstrating agreement to work together.

Recommendation 11: Defining Partner

The Commission agrees with the consensus recommendation in the EMSWG Report. For the energy efficiency portfolios, the term "partner" (used in Market Support Indicators #1, 18, and 20) is defined as an entity engaged in partnerships including and not limited to educational institutions/organizations, governments, community-based organizations, trade associations, suppliers, manufacturers, contractors, etc.

Recommendations 12 & 13: Defining Type & Purpose

The Commission agrees with the EMSWG Report recommendations.
The term "type" (used in Market Support Indicator #1 and #18) should be used to describe the nature of a partner or partnership. Only one type should be associated with each partner and partnership.

Recommendations 14 & 15: Market Support Indicator 18

The Commission agrees with the EMSWG Report consensus recommendations in clarifying what “taken action” and “type” refer to, and what the denominator of the percentage should include.

Recommendations 16 & 17: Defining Non-Ratepayer In-Kind Funds/Contributions

The Commission agrees with the EMSWG Report recommendation.

The terms "non-ratepayer in-kind funds" and "non-ratepayer in-kind contributions" (used in Market Support Indicator #2) are defined as:

1. "Non-ratepayer in-kind funds" refers to monetary contributions offered for free (e.g., through a grant or donation).
2. "Non-ratepayer in-kind contributions" refers to goods, services (e.g., human capacity), and other tangible assets that are provided for free or at less than the usual charge.

PAs should use these definitions together to develop a single total dollar value for both non-ratepayer in-kind funds and non-ratepayer in-kind contributions to be reported for this Indicator. The Working Group clarified its interpretation of the slash in the Indicator language to mean "both, and." Thus, we find it reasonable to also report separate dollar values to differentiate between non-ratepayer in-kind funds and non-ratepayer in-kind contributions as an additional level of granularity.

The translation from "in-kind contributions" to a dollar value should be transparent and well-supported in supporting documentation, made available when requested by Energy Division staff via data request. PAs shall include a summary describing the supporting documentation in the annual reports.

6. PAUSED INDICATORS

Recommendations 21, 22, & 24: Reporting Market Support Indicators 22, 23, & 13

The Commission agrees with the EMSWG Report recommendations to pause reporting of market support indicators 22, 23, and 13. In addition, we are pausing market support indicators 15, 16, 17, 21, 24, 25, and common metric 187. While they may provide useful and important information in the future, additional discussion among stakeholders is needed to clarify and prioritize reported indicators and metrics before they should be reported. Energy Division may provide staff guidance to allow PAs to begin reporting these indicators in the future to align with existing reporting schedules.

7. REPORTING REQUIREMENTS

The Commission adds the following requirements for reporting all data related to the Energy Efficiency Portfolios:

1. A metric or indicator already reported publicly in CEDARS claims need not be reported in duplicate, as long as the CEDARS data can be easily accessed.
2. All PAs shall use the same methodologies to consistently calculate and populate indicators and metrics unless exceptions are approved by Energy Division Staff. Data, including all data fields, must be able to be easily compared and contrasted between PAs.
3. For any indicator or metric that is represented as a relationship (e.g. percentage, ratio, fraction, rate, score, etc.) between two or more data points, all corresponding data points must be reported. For example, if DAC participation percent = DAC Participants / Total DAC Eligible Customers, then DAC Participation Percentage, DAC Participants, and Total DAC Eligible Customers must be reported.

Recommendation 25: Principles for Reporting

The Commission generally agrees with the principles for PA reporting recommended in the EMSWG Report, but modifies them as follows:

1. Indicator reporting should not duplicate existing reporting efforts. PAs report savings claims on a quarterly basis using CEDARS and prepare an Annual Report. These reporting requirements include data overlapping with Equity Indicators such as savings claims. Additionally, specific Indicators (e.g., Market Support Indicators #3-10) are also Common Metrics, currently reported in a workbook uploaded to CEDARS on an annual basis.
2. Indicator reporting should not be overly cumbersome for PAs.
3. Public reported data shall be easily accessible to and understandable for interested stakeholders.

The Reporting PCG will facilitate the process of determining which program related information is appropriate to include to facilitate awareness of additional context and better understanding. Principle 3 is revised to expand beyond indicators to all public reported data from the PAs.

Recommendation 26: Indicator Reporting Process

The Commission agrees with modifications with the EMSWG Report recommendation. Modifications were made to make the process directions more specific and timely.

1. PAs shall report indicators and metrics not reported through claims quarterly and/or annually by uploading an Excel CSV file based on an approved template in the Documents area of CEDARS.
2. PAs shall provide links to programmatic information and data in the spreadsheet to ensure readers can access contextual information when viewing the Indicator reporting.
3. PAs shall create and use a consistent template across the PAs to report on the Indicators.
4. The new template shall include a corresponding data dictionary that all PAs will be required to use to ensure data is reported cleanly, consistently, and timely.
5. The Reporting PCG shall collaborate to develop and finalize the template and data dictionary. The bill savings component of the reporting template will be added subsequently upon its completion.
6. Reporting with the new template should be tested and then made standard practice in time to report Q4 2025.

8. COMMON METRICS AND OTHER MARKET SUPPORT INDICATORS

This resolution removes nearly half of the Common Metrics and converts much of the other half to indicators as shown in Appendix B. *Only those metrics that directly tie to an adopted goal shall remain as metrics.* Consequently, the remaining metrics are directly related to the Commission's adopted TSB goals[8].

Appendix A shows categories of metrics and indicators and the associated number of them that are: Kept as Metric or Indicator, Converted to Indicator, Removed, or Paused.

Consistent with many of the PAs' recommendations in their advice letter, Appendix A shows that the Commission is removing eight entire categories of metrics and indicators. These are:

[8] (D.) 23-08-005 Commission Decision Adopting Energy Efficiency Goals For 2024-2035 (August 10, 2023)

- Advocacy
- Benchmarking
- Cost per Unit Saved
- Energy Intensity
- New Participation
- Penetration
- Water
- WE&T (largely replaced by Market Support)

COMMENTS

Public Utilities Code section 311(g)(1) provides that this Resolution must be served on all parties and subject to at least 30 days public review. Any comments are due within 20 days of the date of its mailing and publication on the Commission's website and in accordance with any instructions accompanying the notice. Section 311(g)(2) provides that this 30-day review period and 20-day comment period may be reduced or waived upon the stipulation of all parties in the proceeding.

The 30-day review and 20-day comment period for the draft of this resolution was neither waived nor reduced. Accordingly, this draft resolution was mailed to parties for comments, and will be placed on the Commission's agenda no earlier than 30 days from today.

FINDINGS AND CONCLUSIONS

1. (D.) 23-06-055 Conclusions of Law (COL) 35 and 36 adopted thirteen Equity Indicators and twenty-five Market Support Indicators.
2. In 2023, the California Energy Efficiency Coordinating Committee (CAEECC) convened an Equity Metrics Working Group (EMWG) and Market Support Metrics Working Group (MSMWG) with the goal to discuss and develop recommendations to clarify adopted Equity and Market Support Indicators.
3. On May 1, 2024, San Diego Gas & Electric (SDG&E), Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), Southern California Gas Company (SoCalGas), Marin Clean Energy (MCE), Tri-County Regional Energy Network (3C-REN), Bay Area Regional Energy Network (BayREN), Inland Regional Energy Network (I-REN), and Southern California

Regional Energy Network (SoCalREN) (referred to as the Joint PAs) filed Advice Letter 4438-E/ 3299-G et al. to clarify and revise adopted indicators and metrics related to energy efficiency portfolios in compliance with Decision (D.) 23-06-055.

4. California Public Advocates (Cal Advocates) submitted a protest to SDG&E AL 4438-E/ 3299-G et al. on May 21, 2024 expressing concern about the recommended removal of the set of metrics that focused on "penetration", especially those that focused on hard-to-reach and disadvantaged communities. The Commission rejects Cal Advocates' request to reject the Advice Letter.
5. On September 27, 2024, AB 3264 Section 913.5 revised the elements that the Commission must include in their evaluation of all energy efficiency and conservation program reports to the Legislature, which are required every three years. Several of the elements, such as target population, public interest impacts, and details about actual customers served, are aligned with the market support and equity indicators and metrics addressed in Advice Letter 4438-E/3299-G et al.
6. The Equity and Market Support Working Group (EMSWG) report contained in the Joint PAs' advice letter proposed four purposes for the indicators focusing just on the Equity and Market Support indicators. It is reasonable to apply these purposes to the entire energy efficiency portfolio, and to use these indicators to communicate energy efficiency performance to all interested parties.
7. The EMSWG report defined Equity Participants and suggests that PAs collect participant information using program data and include details of how participants were counted.
8. The unit to be counted as a participant varies across and within sectors. It is reasonable to ask the PAs to collect and report data such that it can be easily compared to existing data sets that allow inferences about penetration of energy efficiency into different markets and audiences.
9. For programs that are not tracked via the claims process, PAs report participation and benefits using metrics and indicators that are already adopted.
10. For residential programs that are tracked via the claims process, it is reasonable to require unique premise accounts and unique residential population to report participation. Guidance for counting residential participants and population may be updated in the future after Energy Division staff consult with the PAs. For multifamily and non-residential participation, the Energy Division may hold workshops that include participation as an agenda topic.

11. It is reasonable for the denominator for the total number of participants to be at the building type level in reporting for hard-to-reach and disadvantaged community participation.
12. Some saving values for quantifying benefits are already reported in CEDARS.
13. AB 3264 requests the Commission to report on bill savings for average individual ratepayers for the entire portfolio, not only for the equity segment programs.
14. The EMSWG Report recommends to not include nonclaimable savings in the calculation of equity indicators #2 and #5-9 at this time.
15. Calculating participation in statewide programs requires a different methodology than non-statewide programs.
16. The Commission agrees with the EMSWG report's definition of "partnership" as an agreement, either legally contracted or not, between at least two entities to engage in a mutually beneficial relationship within the context of energy efficiency products, services, education, and/or training with the clarification that the partnership serves at least one primary purpose of the energy efficiency portfolio: resource acquisition, equity, or market support.
17. There is consensus on the definitions of "partner", "type", "taken action", "non-ratepayer in-kind funds," and "non-ratepayer in-kind contributions."
18. As currently written, reporting on Market Support Indicators 13, 15-17, 21-25, and Common Metric 187, is not expected to be useful due to unclear or undefined parameters.
19. PAs report savings claims using CEDARS and in their Annual Report. Indicator reporting is useful for activities that do not directly result in energy savings.
20. Parties beyond the PAs and the Commission might have an interest in understanding the indicator data. Consistent and high-level reporting across PAs helps with readability, including for public viewers.
21. Roughly half of the existing Common Metrics are not currently useful because of challenges with data collection, lack of relevance to the current portfolios, uncertainty about data quality, comprehensiveness, or consistency, unjustifiable expense, or possible duplication with other data reported. Of the rest, many are more appropriate as indicators. Only Common Metrics that directly tie to an adopted goal, such as Total System Benefits, are currently useful as metrics.
22. If Equity and Market Support goals are adopted in the future, some of the Equity and Market Support Indicators might be converted to metrics with baselines and targets.

THEREFORE IT IS ORDERED THAT:

1. SDG&E's Advice Letter 4438-E/ 3299-G et al. is approved, with modification, as expressed herein.
2. The Equity Segment Indicators outlined in Appendix B are updated and clarified as described in this resolution.
3. The Market Support Indicators outlined in Appendix B are updated and clarified as described in this resolution.
4. The Common Metrics outlined in Appendix B are updated and clarified as described in this resolution.
5. These Equity Segment Indicators, Market Support Indicators, and Common Metrics revise and refine the Indicators and Metrics adopted in D.23-06-055 and D.18-05-041.
6. This Resolution clarifies and revises adopted Equity Segment Indicators, Market Support Indicators, and Common Metrics for use by all Portfolio Administrators.
7. The Portfolio Administrators shall collaborate via the Reporting PCG to develop a common methodology for estimated bill savings.
8. The lead PA of a Statewide energy efficiency program shall count/calculate the number of customers served by the program in the location they were served and provide those values to the respective IOUs. Where there are split electric/gas utilities, both utilities will be able to count the participant.
9. For non-ratepayer in-kind funds and contributions, documentation shall be available from the Portfolio Administrators upon request and summarized in their annual reports.
10. If a Portfolio Administrator would like to reinstitute an indicator or metric, they can submit a Tier 2 advice letter with their request.

This Resolution is effective today.

The foregoing resolution was duly introduced, passed, and adopted at a conference of the Public Utilities Commission of the State of California held on June 12, 2025; the following Commissioners voting favorably thereon:

Commissioner Signature blocks to be added
upon adoption of the resolution

Dated _____, at <Voting meeting location>, California

Appendix A

Appendix A - Revisions to Body of Metrics and Indicators by Category

Counts of Indicators and Metrics by Category and CPUC Determination in this Resolution

	Indicator	Remove	Pause	Convert to Indicator	Keep as Metric	Grand Total
Indicator and Metric Categories						
Access to Capital			4			**4**
Address disparities in access to EE programs	6					**6**
Advocacy		6				**6**
Benchmarking		9				**9**
Compliance Improvement	2	4		3		**9**
Cost per unit saved		42				**42**
Depth of interventions	3	21		6		**30**
Energy intensity		4				**4**
Energy Savings		40		80	39	**159**
ETP		8		15		**23**
GHG					7	**7**
Innovation and Accessibility	7		4			**11**
Investment in EE	1		1			**2**
New participation		3				**3**
NMEC	2					**2**
Partnerships	4					**4**
Penetration		21				**21**
Promote resilience, health, comfort, safety, energy affordability and/or energy savings	6					**6**
Reach Codes				1		**1**
Reduce energy-related GHG and criteria pollutant emissions	1					**1**
Satisfaction	1	1				**2**
Supply	5		1			**6**
Water		4				**4**
WE&T		6				**6**
Grand Total	**38**	**169**	**10**	**105**	**46**	**368**

Removal of indicators and metrics (entire categories are in *italics* in the table*)* is not a judgement on the importance of their intent to the assessment of PA and portfolio performance. Assuming perfect information could be provided easily, all adopted indicators and metrics would be highly useful. Though, for several of these categories in whole or in part, there are problems with: collection of data; relevance to current portfolio; quality, comprehensiveness, and consistency of the information; expense to ratepayers; and/or possible duplication of other data reported. While some of these problems may exist for some of the metrics and indicators advanced in this resolution, it is anticipated that PAs will work with Energy Division Staff to ensure that the value and quality of the information reported merits their continued collection.

There are ten Market Support indicators the Commission is deciding to pause for the near term. These indicators require additional collaboration to determine how they could be reported and yield useful and meaningful information.

END OF APPENDIX A

APPENDIX B

Appendix B - Revisions to Individual Metrics and Indicators

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
0	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
1	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kW gross	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross
2	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kW net	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net
3	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kWh gross	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross
4	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kWh net	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
5	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual Therm gross	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross
6	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual Therm net	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
7	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
8	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net
9	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kWh gross	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh gross
10	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kWh net	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
11	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante Therm gross	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm gross
12	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante Therm net	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm net
13	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kW gross in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross
14	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kW net in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net
15	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kWh gross in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross
16	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kWh net in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
17	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual Therm gross in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross
18	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual Therm net in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
19	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kW gross in Disadvantaged Communities	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
20	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kW net in Disadvantaged Communities	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net
21	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kWh gross in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante kWh gross
22	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kWh net in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
23	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante Therm gross in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante Therm gross
24	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante Therm net in Disadvantaged Communities	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante Therm net
25	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kW gross in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross
26	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kW net in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net
27	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kWh gross in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross
28	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kWh net in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
29	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual Therm gross in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross
30	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual Therm net in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
31	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kW gross in Hard-to-Reach Markets	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
32	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kW net in Hard-to-Reach Markets	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net
33	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kWh gross in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante kWh gross
34	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kWh net in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
35	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante Therm gross in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante Therm gross
36	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante Therm net in Hard-to-Reach Markets	Metric	Energy Savings	Convert to Indicator	N	Lifecycle ex-ante Therm net
37	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kW)
38	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kWh)
39	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/therm)
40	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kW)

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
41	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kWh)
42	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/therm)
43	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kW gross	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross
44	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kW net	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net
45	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kWh gross	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross
46	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kWh net	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
47	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual Therm gross	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross
48	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual Therm net	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
49	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
50	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
51	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kWh gross	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh gross
52	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kWh net	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh net
53	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante Therm gross	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm gross
54	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante Therm net	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
55	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
56	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kW net savings per participant - Opt-in - Downstream	Metric	Depth of interventions	Remove	N	Lifecycle NET kW
57	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Downstream	Metric	Depth of interventions	Convert to Indicator	Y	Lifecycle NET kWh
58	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Downstream	Metric	Depth of interventions	Convert to Indicator	Y	Lifecycle NET Therms

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
59	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kW net savings per participant - Opt-in - Midstream	Metric	Depth of interventions	Remove	N	Lifecycle NET kW
60	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Midstream	Metric	Depth of interventions	Remove	N	Lifecycle NET kWh
61	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Midstream	Metric	Depth of interventions	Remove	N	Lifecycle NET Therms
62	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kW net savings per participant - Opt-out	Metric	Depth of interventions	Remove	N	Lifecycle NET kW
63	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kWh net savings per participant - Opt-out	Metric	Depth of interventions	Remove	N	Lifecycle NET kWh

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
64	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante Therm net savings per participant - Opt-out	Metric	Depth of interventions	Remove	N	Lifecycle NET Therms
65	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kW net savings per participant - Opt-in - Upstream	Metric	Depth of interventions	Remove	N	Lifecycle NET kW
66	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Upstream	Metric	Depth of interventions	Remove	N	Lifecycle NET kWh
67	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Upstream	Metric	Depth of interventions	Remove	N	Lifecycle NET Therms
68	Percent of participation relative to eligible population	Percent of participation relative to eligible population	Metric	Penetration	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
69	Percent of participation in disadvantaged communities	Percent of participation in disadvantaged communities	Metric	Penetration	Remove	N	Percent
70	Percent of participation by customers defined as "hard-to-reach"	Percent of participation by customers defined as "hard-to-reach"	Metric	Penetration	Remove	N	Percent
71	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kW)
72	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kWh)
73	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/therm)
74	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kW)

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
75	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kWh)
76	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/therm)
77	Average energy use intensity of single family homes (average usage per household – not adjusted)	Average electric and gas usage per household	Indicator	Energy intensity	Remove	N	Btu
78	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kW gross - In Unit	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross
79	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kW net - In Unit	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
80	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kWh gross - In Unit	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross
81	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kWh net - In Unit	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net
82	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual Therm gross - In Unit	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross
83	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual Therm net - In Unit	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
84	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers	Lifecycle ex-ante kW gross - In Unit	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	(in-unit, common area, and master metered accounts)						
85	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kW net - In Unit	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net
86	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kWh gross - In Unit	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh gross
87	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kWh net - In Unit	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh net
88	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante Therm gross - In Unit	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm gross

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
89	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante Therm net - In Unit	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm net
90	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kW gross - Master Metered	Metric	Energy Savings	Convert to Indicator	Y	First year annual kW gross
91	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kW net - Master Metered	Metric	Energy Savings	Convert to Indicator	Y	First year annual kW net
92	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kWh gross - Master Metered	Metric	Energy Savings	Convert to Indicator	Y	First year annual kWh gross
93	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers	First year annual kWh net - Master Metered	Metric	Energy Savings	Convert to Indicator	Y	First year annual kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	(in-unit, common area, and master metered accounts)						
94	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual Therm gross - Master Metered	Metric	Energy Savings	Convert to Indicator	Y	First year annual Therm gross
95	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual Therm net - Master Metered	Metric	Energy Savings	Convert to Indicator	Y	First year annual Therm net
96	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kW gross - Master Metered	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
97	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kW net - Master Metered	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
98	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kWh gross - Master Metered	Metric	Energy Savings	Keep as Metric	Y	Lifecycle ex-ante kWh gross
99	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kWh net - Master Metered	Metric	Energy Savings	Keep as Metric	Y	Lifecycle ex-ante kWh net
100	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante Therm gross - Master Metered	Metric	Energy Savings	Keep as Metric	Y	Lifecycle ex-ante Therm gross
101	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante Therm net - Master Metered	Metric	Energy Savings	Keep as Metric	Y	Lifecycle ex-ante Therm net
102	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers	First year annual kW gross - Common Area	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	(in-unit, common area, and master metered accounts)						
103	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kW net - Common Area	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net
104	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kWh gross - Common Area	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross
105	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual kWh net - Common Area	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net
106	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual Therm gross - Common Area	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
107	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	First year annual Therm net - Common Area	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
108	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kW gross - Common Area	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
109	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kW net - Common Area	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net
110	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante kWh gross - Common Area	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh gross
111	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers	Lifecycle ex-ante kWh net - Common Area	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	(in-unit, common area, and master metered accounts)						
112	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante Therm gross - Common Area	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm gross
113	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)	Lifecycle ex-ante Therm net - Common Area	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm net
114	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
115	Energy savings (kWh, kw, therms) per project (building)	Lifecycle ex-ante kW net per project (building)	Metric	Depth of interventions	Remove	N	Lifecycle NET kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
116	Energy savings (kWh, kw, therms) per project (building)	Lifecycle ex-ante kWh net per project (building)	Metric	Depth of interventions	Convert to Indicator	N	Lifecycle NET kWh
117	Energy savings (kWh, kw, therms) per project (building)	Lifecycle ex-ante Therm net per project (building)	Metric	Depth of interventions	Convert to Indicator	N	Lifecycle NET Therms
118	Average savings per participant Savings per project (property)	Lifecycle ex-ante kW net per project (property)	Metric	Depth of interventions	Remove	N	Lifecycle NET kW
119	Average savings per participant Savings per project (property)	Lifecycle ex-ante kWh net per project (property)	Metric	Depth of interventions	Convert to Indicator	N	Lifecycle NET kWh
120	Average savings per participant Savings per project (property)	Lifecycle ex-ante Therm net per project (property)	Metric	Depth of interventions	Convert to Indicator	N	Lifecycle NET Therms
121	Energy savings (kWh, kw, therms) per square foot	Lifecycle ex-ante kW net per square foot	Metric	Depth of interventions	Remove	N	Lifecycle NET kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
122	Energy savings (kWh, kw, therms) per square foot	Lifecycle ex-ante kWh net per square foot	Metric	Depth of interventions	Remove	N	Lifecycle NET kWh
123	Energy savings (kWh, kw, therms) per square foot	Lifecycle ex-ante Therm net per square foot	Metric	Depth of interventions	Remove	N	Lifecycle NET Therms
124	Percent of participation relative to eligible population (by unit, and property)	Percent of participation relative to eligible population by property	Metric	Penetration	Remove	N	Percent
125	Percent of participation relative to eligible population (by unit, and property)	Percent of participation relative to eligible population by unit	Metric	Penetration	Remove	Y	Percent
126	Percent of square feet of eligible population participating (by property)	Percent of square feet of eligible population participating (by property)	Metric	Penetration	Remove	N	Percent
127	Percent of participation in disadvantaged communities	Percent of participation in disadvantaged communities	Metric	Penetration	Remove	Y	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
128	Percent of participation by customers defined as "hard-to-reach"	Percent of participation by customers defined as "hard-to-reach"	Metric	Penetration	Remove	Y	Percent
129	Percent of benchmarked multi-family properties relative to the eligible population	Percent of benchmarked multi-family properties relative to the eligible population	Metric	Benchmarking	Remove	N	Percent
130	Percent of benchmarking by properties defined as "hard-to-reach"	Percent of benchmarking by properties defined as "hard-to-reach"	Metric	Benchmarking	Remove	N	Percent
131	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kW)
132	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kWh)
133	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/therm)

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
134	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kW)
135	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kWh)
136	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/therm)
137	Average energy use intensity of multifamily units. including in-unit accounts)	Average electric and gas usage per unit	Indicator	Energy intensity	Remove	N	Btu
138	Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted	Average electric and gas usage per square foot	Indicator	Energy intensity	Remove	N	Btu
139	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kW gross	Metric	Energy Savings	Convert to Indicator	N	kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
140	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kW net	Metric	Energy Savings	Convert to Indicator	N	kW
141	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kWh gross	Metric	Energy Savings	Convert to Indicator	N	kWh
142	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual kWh net	Metric	Energy Savings	Convert to Indicator	N	kWh
143	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual Therm gross	Metric	Energy Savings	Convert to Indicator	N	Therm
144	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First year annual Therm net	Metric	Energy Savings	Convert to Indicator	N	Therm
145	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
146	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	kW
147	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kWh gross	Metric	Energy Savings	Keep as Metric	N	kWh
148	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante kWh net	Metric	Energy Savings	Keep as Metric	N	kWh
149	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante Therm gross	Metric	Energy Savings	Keep as Metric	N	Therm
150	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle ex-ante Therm net	Metric	Energy Savings	Keep as Metric	N	Therm
151	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent first year annual kW gross	Metric	Energy Savings	Convert to Indicator	Y	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
152	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent first year annual kW net	Metric	Energy Savings	Convert to Indicator	Y	Percent
153	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent first year annual kWh gross	Metric	Energy Savings	Convert to Indicator	Y	Percent
154	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent first year annual kWh net	Metric	Energy Savings	Convert to Indicator	Y	Percent
155	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent first year annual Therm gross	Metric	Energy Savings	Convert to Indicator	Y	Percent
156	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent first year annual Therm net	Metric	Energy Savings	Convert to Indicator	Y	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
157	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	Percent
158	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	Percent
159	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent lifecycle ex-ante kWh gross	Metric	Energy Savings	Remove	N	Percent
160	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent lifecycle ex-ante kWh net	Metric	Energy Savings	Remove	N	Percent
161	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent lifecycle ex-ante Therm gross	Metric	Energy Savings	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
162	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Percent lifecycle ex-ante Therm net	Metric	Energy Savings	Remove	N	Percent
163	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
164	Energy savings (gross kWh, therms) as a fraction of total project consumption	Percent lifecycle gross kW	Metric	Depth of interventions	Remove	N	Percent
165	Energy savings (gross kWh, therms) as a fraction of total project consumption	Percent lifecycle gross kWh	Metric	Depth of interventions	Remove	N	Percent
166	Energy savings (gross kWh, therms) as a fraction of total project consumption	Percent lifecycle gross Therms	Metric	Depth of interventions	Remove	N	Percent
167	Percent of participation relative to eligible population for small, medium, and large customers	Percent of participation relative to eligible population for large customers	Metric	Penetration	Remove	Y	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
168	Percent of participation relative to eligible population for small, medium, and large customers	Percent of participation relative to eligible population for medium customers	Metric	Penetration	Remove	Y	Percent
169	Percent of participation relative to eligible population for small, medium, and large customers	Percent of participation relative to eligible population for small customers	Metric	Penetration	Remove	Y	Percent
170	Percent of square feet of eligible population	Percent of square feet of eligible population	Metric	Penetration	Remove	N	Percent
171	Percent of participation by customers defined as “hard-to-reach”	Percent of participation by customers defined as “hard-to-reach”	Metric	Penetration	Remove	N	Percent
172	Percent of benchmarked square feet of eligible population	Percent of benchmarked square feet of eligible population	Metric	Benchmarking	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
173	Percent of benchmarked customers relative to eligible population for large customers	Percent of benchmarked customers relative to eligible population for large customers	Metric	Benchmarking	Remove	N	Percent
174	Percent of benchmarked customers relative to eligible population for medium customers	Percent of benchmarked customers relative to eligible population for medium customers	Metric	Benchmarking	Remove	N	Percent
175	Percent of benchmarked customers relative to eligible population for small customers	Percent of benchmarked customers relative to eligible population for small customers	Metric	Benchmarking	Remove	N	Percent
176	Percent of benchmarking by customers defined as "hard-to-reach"	Percent of benchmarking by customers defined as "hard-to-reach"	Metric	Benchmarking	Remove	N	Percent
177	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kW)
178	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kWh)

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
179	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/therm)
180	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kW)
181	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kWh)
182	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/therm)
183	Fraction of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings	Percent of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings	Indicator	NMEC	Indicator	Y	Percent
184	Fraction of total savings (gross kWh and therm) derived from NMEC analysis	Percent of total savings (gross kWh and therm) derived from NMEC analysis	Indicator	NMEC	Indicator	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
185	Improvement in customer satisfaction	Percent Improvement in customer satisfaction	Indicator	Satisfaction	Remove	N	Percent
186	Improvement in trade ally satisfaction	Percent Improvement in trade ally satisfaction	Indicator	Satisfaction	Indicator	Y	Percent
187	Fraction of total investments made by ratepayers and private capital	Percent of total investments made by ratepayers and private capital	Indicator	Investment in EE	pause	Y	Percent
188	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kW gross	Metric	Energy Savings	Convert to Indicator	N	First year annual kW gross
189	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kW net	Metric	Energy Savings	Convert to Indicator	N	First year annual kW net
190	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kWh gross	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh gross

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
191	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kWh net	Metric	Energy Savings	Convert to Indicator	N	First year annual kWh net
192	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual Therm gross	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm gross
193	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual Therm net	Metric	Energy Savings	Convert to Indicator	N	First year annual Therm net
194	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW gross
195	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	Lifecycle ex-ante kW net
196	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kWh gross	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh gross

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
197	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kWh net	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante kWh net
198	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante Therm gross	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm gross
199	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante Therm net	Metric	Energy Savings	Keep as Metric	N	Lifecycle ex-ante Therm net
200	Greenhouse gasses (MT CO2eq) based on net lifecycle kWh and Therms savings, reported on an annual basis, incorporating average fuel/technology mix	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
201	Average percent energy savings (kWh, kw, therms) per project building or facility	Percent annual net kW per project building or facility	Indicator	Depth of interventions	Indicator	Y	Percent annual NET kW
202	Average percent energy savings (kWh, kw, therms) per project building or facility	Percent annual net kWh per project building or facility	Indicator	Depth of interventions	Indicator	Y	Percent annual NET kWh

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
203	Average percent energy savings (kWh, kw, therms) per project building or facility	Percent annual net Therms per project building or facility	Indicator	Depth of interventions	Indicator	Y	Percent annual NET Therms
204	Average annual energy savings (kWh, kw, therms) per project building floor plan area	Average annual net kw savings per project building floor plan area	Indicator	Depth of interventions	Remove	N	Annual NET kW
205	Average annual energy savings (kWh, kw, therms) per project building floor plan area	Average annual net kw savings per project building floor plan area	Indicator	Depth of interventions	Remove	N	Annual NET kWh
206	Average annual energy savings (kWh, kw, therms) per project building floor plan area	Average annual net Therm savings per project building floor plan area	Indicator	Depth of interventions	Remove	N	Annual NET Therms
207	Average annual energy savings (kWh, kW therms) per annual flow through project water/wastewater facilities	Average annual Net kW savings per annual flow through project water/wastewater facilities	Indicator	Water	Remove	N	Annual NET kW
208	Average annual energy savings (kWh, kW therms) per annual flow through project water/wastewater facilities	Average annual Net kWh savings per annual flow through project water/wastewater facilities	Indicator	Water	Remove	N	Annual NET kWh

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
209	Average annual energy savings (kWh, kW therms) per annual flow through project water/wastewater facilities	Average annual Net Therms savings per annual flow through project water/wastewater facilities	Indicator	Water	Remove	N	Annual NET Therms
210	Percent of Public Sector accounts participating in programs	Percent of Public Sector accounts participating in programs	Metric	Penetration	Remove	N	Percent
211	Percent of estimated floorplan area (i.e., ft2) of all Public Sector buildings participating in building projects—estimate within +/-15% of sector-wide building area, +/-5% of project building area	Percent of estimated floorplan area (i.e., ft2) of all Public Sector buildings participating in building projects	Indicator	Penetration	Remove	N	Percent
212	Percent of Public Sector water/wastewater flow (i.e., annual average Million Gallons per Day) enrolled in non-building water/wastewater programs— estimate within +/-20% of flow through eligible facilities (treatment facilities pumping stations), +/-10% of flow through project facilities	Percent of Public Sector water/wastewater flow enrolled in non-building water/wastewater programs	Indicator	Water	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
213	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kW)
214	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/kWh)
215	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	PAC Levelized Cost ($/therm)
216	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kW)
217	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/kWh)
218	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	TRC Levelized Cost ($/therm)

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
219	Total program-backed financing distributed to Public Sector customers requiring repayment (i.e., loans, OBF)	Total program-backed financing distributed to Public Sector customers requiring repayment	Indicator	Investment in EE	Indicator	Y	$
220	Percent of Public Sector buildings with current benchmark	Percent of Public Sector buildings with current benchmark	Metric	Benchmarking	Remove	N	Percent
221	Average energy use intensity of all Public Sector buildings	Average energy use intensity of all Public Sector buildings	Metric	Energy intensity	Remove	N	Btu
222	Percent of floorplan area of all Public Sector buildings with current benchmark	Percent of floorplan area of all Public Sector buildings with current benchmark	Indicator	Benchmarking	Remove	N	Percent
223	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	First year annual kW gross	Metric	Energy Savings	Convert to Indicator	N	kW
224	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	First year annual kW net	Metric	Energy Savings	Convert to Indicator	N	kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
225	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	First year annual kWh gross	Metric	Energy Savings	Convert to Indicator	N	kWh
226	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	First year annual kWh net	Metric	Energy Savings	Convert to Indicator	N	kWh
227	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	First year annual Therm gross	Metric	Energy Savings	Convert to Indicator	N	Therm
228	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	First year annual Therm net	Metric	Energy Savings	Convert to Indicator	N	Therm
229	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	kW
230	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
231	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Lifecycle ex-ante kWh gross	Metric	Energy Savings	Keep as Metric	N	kWh
232	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Lifecycle ex-ante kWh net	Metric	Energy Savings	Keep as Metric	N	kWh
233	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Lifecycle ex-ante Therm gross	Metric	Energy Savings	Keep as Metric	N	Therm
234	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Lifecycle ex-ante Therm net	Metric	Energy Savings	Keep as Metric	N	Therm
235	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
236	Percent of participation relative to eligible population for small, medium and large customers	Percent of participation relative to eligible population for large customers	Metric	Penetration	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
237	Percent of participation relative to eligible population for small, medium and large customers	Percent of participation relative to eligible population for medium customers	Metric	Penetration	Remove	N	Percent
238	Percent of participation relative to eligible population for small, medium and large customers	Percent of participation relative to eligible population for small customers	Metric	Penetration	Remove	N	Percent
239	Percent of customers participating that have not received an incentive for the past three years, annually, by small, medium and large customer categories	Percent of large customers participating in reporting year that have not received an incentive for the past three years	Indicator	New participation	Remove	N	Percent
240	Percent of customers participating that have not received an incentive for the past three years, annually, by small, medium and large customer categories	Percent of medium customers participating in reporting year that have not received an incentive for the past three years	Indicator	New participation	Remove	N	Percent
241	Percent of customers participating that have not received an incentive for the past three years, annually, by small, medium and large customer categories	Percent of small customers participating in reporting year that have not received an incentive for the past three years	Indicator	New participation	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
242	Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	$/kW
243	Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	$/kWh
244	Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	$/therm
245	Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	$/kW
246	Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	$/kWh
247	Levelized cost of energy efficiency per kWh, therm and KW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	$/therm

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
248	Reduction in consumption (proposed by SCE and SDG&E)	Percent first year annual kW gross	Metric	Energy Savings	Remove	N	Percent first year annual kW gross
249	Reduction in consumption (proposed by SCE and SDG&E)	Percent first year annual kW net	Metric	Energy Savings	Remove	N	Percent first year annual kW net
250	Reduction in consumption (proposed by SCE and SDG&E)	Percent first year annual kWh gross	Metric	Energy Savings	Remove	N	Percent first year annual kWh gross
251	Reduction in consumption (proposed by SCE and SDG&E)	Percent first year annual kWh net	Metric	Energy Savings	Remove	N	Percent first year annual kWh net
252	Reduction in consumption (proposed by SCE and SDG&E)	Percent first year annual Therm gross	Metric	Energy Savings	Remove	N	Percent first year annual Therm gross
253	Reduction in consumption (proposed by SCE and SDG&E)	Percent first year annual Therm net	Metric	Energy Savings	Remove	N	Percent first year annual Therm net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
254	Reduction in consumption (proposed by SCE and SDG&E)	Percent lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	Percent lifecycle ex-ante kW gross
255	Reduction in consumption (proposed by SCE and SDG&E)	Percent lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	Percent lifecycle ex-ante kW net
256	Reduction in consumption (proposed by SCE and SDG&E)	Percent lifecycle ex-ante kWh gross	Metric	Energy Savings	Remove	N	Percent lifecycle ex-ante kWh gross
257	Reduction in consumption (proposed by SCE and SDG&E)	Percent lifecycle ex-ante kWh net	Metric	Energy Savings	Remove	N	Percent lifecycle ex-ante kWh net
258	Reduction in consumption (proposed by SCE and SDG&E)	Percent lifecycle ex-ante Therm gross	Metric	Energy Savings	Remove	N	Percent lifecycle ex-ante Therm gross
259	Reduction in consumption (proposed by SCE and SDG&E)	Percent lifecycle ex-ante Therm net	Metric	Energy Savings	Remove	N	Percent lifecycle ex-ante Therm net

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
260	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	First year annual kW gross	Metric	Energy Savings	Convert to Indicator	N	kW
261	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	First year annual kW net	Metric	Energy Savings	Convert to Indicator	N	kW
262	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	First year annual kWh gross	Metric	Energy Savings	Convert to Indicator	N	kWh
263	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	First year annual kWh net	Metric	Energy Savings	Convert to Indicator	N	kWh
264	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	First year annual Therm gross	Metric	Energy Savings	Convert to Indicator	N	Therm
265	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	First year annual Therm net	Metric	Energy Savings	Convert to Indicator	N	Therm

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
266	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	Lifecycle ex-ante kW gross	Metric	Energy Savings	Remove	N	kW
267	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	Lifecycle ex-ante kW net	Metric	Energy Savings	Remove	N	kW
268	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	Lifecycle ex-ante kWh gross	Metric	Energy Savings	Keep as Metric	N	kWh
269	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	Lifecycle ex-ante kWh net	Metric	Energy Savings	Keep as Metric	N	kWh
270	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	Lifecycle ex-ante Therm gross	Metric	Energy Savings	Keep as Metric	N	Therm
271	First year and lifecycle ex ante (pre-evaluation) annualized gas, electric, and demand savings in agriculture sector, gross and net	Lifecycle ex-ante Therm net	Metric	Energy Savings	Keep as Metric	N	Therm

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
272	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Metric	GHG	Keep as Metric	N	MT CO2eq
273	Percent of participation relative to eligible population for small, medium and large customers	Percent of participation relative to eligible population for large customers	Metric	Penetration	Remove	N	Percent
274	Percent of participation relative to eligible population for small, medium and large customers	Percent of participation relative to eligible population for medium customers	Metric	Penetration	Remove	N	Percent
275	Percent of participation relative to eligible population for small, medium and large customers	Percent of participation relative to eligible population for small customers	Metric	Penetration	Remove	N	Percent
276	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	$/kW
277	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	$/kWh

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
278	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	PAC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	$/therm
279	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kW)	Metric	Cost per unit saved	Remove	N	$/kW
280	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/kWh)	Metric	Cost per unit saved	Remove	N	$/kWh
281	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)	TRC Levelized Cost ($/therm)	Metric	Cost per unit saved	Remove	N	$/therm
282	Net Energy Savings: GWH	Net GWh savings	Metric	Energy Savings	Keep as Metric	N	Net GWh
283	Net Energy Savings: MM Therms	Net MMTherms savings	Metric	Energy Savings	Keep as Metric	N	Net MMTherms

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
284	Net Energy Savings: MW	Net MW savings	Metric	Energy Savings	Keep as Metric	N	Net MW
285	Number of measures supported by CASE studies in rulemaking cycle (current work)	Number of measures supported by CASE studies in rulemaking cycle (current work)	Metric	Advocacy	Remove	N	Count
286	Number of measures adopted by CEC in rulemaking cycle (indicator of past work)	Number of measures adopted by CEC in rulemaking cycle (indicator of past work)	Metric	Advocacy	Remove	N	Count
287	Number of T-20 measures supported by CASE studies in rulemaking cycle (current work)	Number of T-20 measures supported by CASE studies in rulemaking cycle (current work)	Metric	Advocacy	Remove	N	Count
288	Number of measures adopted by CEC in current year	Number of measures adopted by CEC in current year	Metric	Advocacy	Remove	N	Count
289	Number of federal standards adopted for which a utility advocated (IOUs to list advocated activites)	Number of federal standards adopted for which a utility advocated (IOUs to list advocated activites)	Metric	Advocacy	Remove	N	Count

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
290	Percent of federal standards adopted for which a utility advocated (#IOU supported / # DOE adopted)	Percent of federal standards adopted for which a utility advocated (#IOU supported / # DOE adopted)	Metric	Advocacy	Remove	N	Count
291	The number of local government Reach Codes implemented (this is a joint IOU and REN effort)	The number of local government Reach Codes implemented (this is a joint IOU and REN effort)	Metric	Reach Codes	Convert to Indicator	Y	Count
292	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the the total size (number of the target audience) by sector. (M) Number of training activities	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the the total size (number of the target audience) by sector. (M) Number of training activities	Metric	Compliance Improvement	Convert to Indicator	Y	Count
293	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the the total size (number of the target audience) by sector. (M) Number of participants	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the the total size (number of the target audience) by sector. (M) Number of participants	Metric	Compliance Improvement	Convert to Indicator	Y	Count

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
294	Increase in code compliance knowledge pre/post training	Increase in code compliance knowledge pre/post training	Metric	Compliance Improvement	Convert to Indicator	Y	Score
295	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	Metric	Compliance Improvement	Remove	N	Percent
296	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Indicator	Compliance Improvement	Indicator	Y	Count
297	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Indicator	Compliance Improvement	Indicator	Y	Percent
298	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Indicator	Compliance Improvement	Remove	N	Count
299	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Indicator	Compliance Improvement	Remove	N	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
300	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators	Indicator	Compliance Improvement	Remove	N	Count
301	Number of collaborations by Business Plan sector to jointly develop or share training materials or resources.	Number of collaborations by Business Plan sector to jointly develop or share training materials or resources.	Metric	WE&T	Remove	N	Count
302	Number of participants by sector	Number of participants by sector	Metric	WE&T	Remove	N	Count
303	Percent of participation relative to eligible target population for curriculum	Percent of participation relative to eligible target population for curriculum	Metric	WE&T	Remove	N	Percentage
304	Percent of total WE&T training program participants that meet the definition of disadvantaged worker.	Percent of total WE&T training program participants that meet the definition of disadvantaged worker.	Metric	WE&T	Remove	N	Percentage
305	Percent of incentive dollars spent on contracts* with a demonstrated commitment to provide career pathways to disadvantaged workers	Percent of incentive dollars spent on contracts* with a demonstrated commitment to provide career pathways to disadvantaged workers	Metric	WE&T	Remove	N	Percentage

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
306	Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training	Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training	Indicator	WE&T	Remove	N	Count
307	Number of TPMs initiated (gas and electric combined), including one technology-focused pilot (TFP) TPM *This number will be updated once all third party contracts have been awarded.	Number of TPMs initiated (gas and electric combined), including one technology-focused pilot (TFP) TPM	Metric	ETP	Convert to Indicator	Y	Count
308	Number of TPMs updated *This number will be updated once all third party contracts have been awarded.	Number of TPMs updated	Metric	ETP	Convert to Indicator	Y	Count of TPMs
309	Number of projects initiated *This number will be updated once all third party contracts have been awarded.	Number of projects initiated	Metric	ETP	Convert to Indicator	Y	Count of Projects
310	Number of outreach events with technology developers with products <1 year from commercialization, including new technology vendors, manufacturers, and entrepreneurs. *This number will be updated once all third party contracts have been awarded.	Number of outreach events with technology developers with products <1 year from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Metric	ETP	Convert to Indicator	Y	Count of Events

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
311	Number of outreach events with technology developers with products <5 years from commercialization, including new technology vendors, manufacturers, and entrepreneurs. *This number will be updated once all third party contracts have been awarded.	Number of outreach events with technology developers with products <5 years from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Metric	ETP	Convert to Indicator	Y	Count of Events
312	Number of projects initiated with cooperation from other internal IOU programs associated with each Technology-focused Pilot *This number will be updated once all third party contracts have been awarded.	Number of projects initiated with cooperation from other internal IOU programs associated with each Technology-focused Pilot	Metric	ETP	Convert to Indicator	Y	Count of TFPs
313	Number of Technology-Focused Pilot (TFP) initiated as part of the TFP TPM. *This number will be updated once all third party contracts have been awarded.	Number of Technology-Focused Pilot (TFP) initiated as part of the TFP TPM	Metric	ETP	Convert to Indicator	Y	Count of TFPs
314	Prior year: % of new measures added to the portfolio that were previously ETP technologies *The PAs believe this is not suited for a metric with targets because ETP does not make decisions about new measures.	Prior year: % of new measures added to the portfolio that were previously ETP technologies	Metric	ETP	Remove	N	Percent of New Measures

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
315	Prior Year: # of new measures added to the portfolio that were previously ETP technologies. *The PAs believe this is not suited for a metric with targets because ETP does not make decisions about new measures.	Prior Year: # of new measures added to the portfolio that were previously ETP technologies	Metric	ETP	Remove	N	Count of New Measures
316	Prior year: % of new codes or standards that were previously ETP technologies. *The PAs believe this is not suited for a metric with targets because ETP does not make decisions about new codes or standards.	Prior year: % of new codes or standards that were previously ETP technologies	Metric	ETP	Remove	N	Percent
317	Prior Year: # of new codes and standards that were previously ETP technologies. *The PAs believe this is not suited for a metric with targets because ETP does not make decisions about new codes or standards.	Prior Year: # of new codes and standards that were previously ETP technologies	Metric	ETP	Remove	N	Count
318	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available. *The PAs believe this is not suited for a metric with targets because ETP is a	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Metric	ETP	Remove	N	Lifecycle net kW

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	non-resource program and does not claim any savings.						
319	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available. *The PAs believe this is not suited for a metric with targets because ETP is a non-resource program and does not claim any savings.	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Metric	ETP	Remove	N	Lifecycle net kWh
320	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available. *The PAs believe this is not suited for a metric with targets because ETP is a non-resource program and does not claim any savings.	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Metric	ETP	Remove	N	Lifecycle net Therms
321	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process, for these categories of sources:	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by PA	Metric	ETP	Convert to Indicator	Y	Count of project ideas by PA

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.						
322	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process, for these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by National Lab	Metric	ETP	Convert to Indicator	Y	Count of project ideas by national labs

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.						
323	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process, for these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by Manufacturer	Metric	ETP	Convert to Indicator	Y	Count of project ideas by manufacturers
324	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process, for	Number and source (as reported by submitter) of project ideas submitted OUTSIDE OF the annual TPM research planning process by Entrepreneur	Metric	ETP	Convert to Indicator	Y	Count of project ideas by entrepreneurs

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.						
325	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process, for these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change	ETP-T7a Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by PA	Metric	ETP	Convert to Indicator	Y	Count of project ideas by PA

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.						
326	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process, for these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by National Lab	Metric	ETP	Convert to Indicator	Y	Count of project ideas by national labs

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
327	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process, for these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by Manufacturer	Metric	ETP	Convert to Indicator	Y	Count of project ideas by manufacturers
328	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process, for these categories of sources: PA, national lab, manufacturer, entrepreneur, etc.) *The PAs believe this is not suited for a metric with targets because ETP does not	Number and source (as reported by submitter) of project ideas submitted AS PART OF the annual TPM research planning process by Entrepreneur	Metric	ETP	Convert to Indicator	Y	Count of project ideas by entrepreneurs

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
	control the number of submissions nor their sources. Targets are set in a way to avoid forcing ETP to arbitrarily change existing processes in a way that may negatively impact the effectiveness of the program. Targets and sources may be updated in collaboration with ED after all 3P contracts are awarded.						
329	List of ETP projects aligned with statewide goals that were initiated in the reporting year with specificity as to what aspect of each goal it is fulfilling. Goals will also be labeled in the ETP database. A list of eligible goals will be developed collaboratively with ED.	List of ETP projects aligned with statewide goals that were initiated in the reporting year with specificity as to what aspect of each goal it is fulfilling	Metric	ETP	Remove	N	Number of lists
EQ1	Not applicable	Count of equity target participants **in equity segment**, by sector (Q, S);	Indicator	Address disparities in access to EE programs	Indicator	Y	Counts
EQ10	Not applicable	Median of equity target participants' expected first-year bill savings in **equity segment**, by sector (Q, S);	Indicator	Promote resilience, health, comfort, safety, energy affordability and/or energy savings	Indicator	Y	$

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
EQ11	Not applicable	Percent of hard-to-reach customer participants i**n portfolio**, by residential single family / multi-family and commercial sector (A, P);	Indicator	Address disparities in access to EE programs	Indicator	Y	Percents
EQ12	Not applicable	Percent of disadvantaged community customer participants in **portfolio**, by residential single-family / multi-family and commercial sector (A, P);	Indicator	Address disparities in access to EE programs	Indicator	Y	Percents
EQ13	Not applicable	Percent of equity target participants in **equity segment,** by sector (Q, S);	Indicator	Address disparities in access to EE programs	Indicator	Y	Percents
EQ2	Not applicable	Sum of equity target participants' expected first-year bill savings **in equity segment**, by sector (Q, S);	Indicator	Promote resilience, health, comfort, safety, energy affordability and/or energy savings	Indicator	Y	$
EQ3	Not applicable	Count of equity target participants in **market support segment**, by sector (Q, S);	Indicator	Address disparities in access to EE programs	Indicator	Y	Counts
EQ4	Not applicable	Count of equity target participants in **resource acquisition segment**, by sector (Q, S);	Indicator	Address disparities in access to EE programs	Indicator	Y	Counts
EQ5	Not applicable	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon	Indicator	Reduce energy-related GHG and criteria	Indicator	Y	GHG

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
		dioxide equivalent) in **equity segment** (Q, S);		pollutant emissions			
EQ6	Not applicable	Sum of all equity segment participants' kilowatt hour (kWh) savings in e**quity segment** (Q, S);	Indicator	Promote resilience, health, comfort, safety, energy affordability and/or energy savings	Indicator	Y	kWh
EQ7	Not applicable	Sum of all equity segment participants' kW savings in **equity segment** (Q, S);	Indicator	Promote resilience, health, comfort, safety, energy affordability and/or energy savings	Indicator	Y	kW
EQ8	Not applicable	Sum of all equity segment participants' therm savings in **equity segment** (Q, S);	Indicator	Promote resilience, health, comfort, safety, energy affordability and/or energy savings	Indicator	Y	Therm
EQ9	Not applicable	Sum of all equity segment participants' TSB in **equity segment** (Q, S);	Indicator	Promote resilience, health, comfort, safety, energy affordability and/or energy savings	Indicator	Y	Count of participants

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
MS1	Not applicable	Number of partners by type and purposes (Q, P);	Indicator	Partnerships	Indicator	Y	Count
MS10	Not applicable	Savings (lifecycle net kWh and therms, and kW) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available (A, P);	Indicator	Innovation and Accessibility	Indicator	Y	kWh, therms, kW
MS11	Not applicable	Number of new, validated technologies recommended to the California Technical Forum (A, P);	Indicator	Innovation and Accessibility	Indicator	Y	Count
MS12	Not applicable	Cost-effectiveness of a technology prior to market support program relative to cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness) (A, S);	Indicator	Innovation and Accessibility	Indicator	Y	percent
MS13	Not applicable	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A, P);	Indicator	Supply	Pause	Y	TBD
MS14	Not applicable	Number of unique participants by sector that complete training (Q, S);	Indicator	Supply	Indicator	Y	counts

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
MS15	Not applicable	Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology (A, P);	Indicator	Innovation and Accessibility	Pause	Y	TBD
MS16	Not applicable	Total projects completed/measures installed and dollar value of consolidated programs by sector (Q, P);	Indicator	Access to Capital	Pause	Y	TBD
MS17	Not applicable	Ratio of ratepayer funds expended to private capital leveraged by sector (Q, P);	Indicator	Access to Capital	Pause	Y	TBD
MS18	Not applicable	Percentage of partners that have taken action supporting energy efficiency by type (Q, P);	Indicator	Partnerships	Indicator	Y	percent
MS19	Not applicable	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency (Q, S);	Indicator	Supply	Indicator	Y	counts
MS2	Not applicable	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P);	Indicator	Partnerships	Indicator	Y	$
MS20	Not applicable	Assessed value of the partnership by partners (A, P);	Indicator	Partnerships	Indicator	Y	$
MS21	Not applicable	Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services (A, P);	Indicator	Innovation and Accessibility	Pause	Y	TBD

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
MS22	Not applicable	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P);	Indicator	Innovation and accessibility	Pause	Y	TBD
MS23	Not applicable	Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P);	Indicator	Innovation and Accessibility	Pause	Y	TBD
MS24	Not applicable	Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products) (A, P);	Indicator	Access to Capital	Pause	Y	TBD
MS25	Not applicable	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment) (A, P);	Indicator	Access to Capital	Pause	Y	TBD
MS3	Not applicable	Percent of participation relative to eligible target population for curriculum (Q, S);	Indicator	Supply	Indicator	Y	Percent
MS4	Not applicable	Percent of total WE&T program participants that meet the definition of disadvantaged worker (Q, S);	Indicator	Supply	Indicator	Y	Percent
MS5	Not applicable	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training (A, S);	Indicator	Supply	Indicator	Y	Counts
MS6	Not applicable	Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P);	Indicator	Innovation and Accessibility	Indicator	Y	Percent

Index	Business Plan Att A Description	Metric / Indicator	Metric or Indicator (Originally)	Metric Categories for CMs; sub-objectives for MS/EQ	CPUC Determination	Should be reported external to CEDARS Claims? Y or N	Units of Measurement
MS7	Not applicable	Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P);	Indicator	Innovation and Accessibility	Indicator	Y	Counts
MS8	Not applicable	Prior year percentage of new codes or standards that were previously ETP technologies (A, P);	Indicator	Innovation and Accessibility	Indicator	Y	Percent
MS9	Not applicable	Prior year number of new codes and standards that were previously ETP technologies (A, P);	Indicator	Innovation and Accessibility	Indicator	Y	Counts

END OF APPENDIX B

Appendix C

Appendix C – Describing Participants

Table 3 in the EMSWG report (replicated in Appendix C below) offers a good starting place for describing how to count participants.

In seeking additional information about population and participants, the Commission is not interested in requesting any additional Publicly Identifiable Information (PII) than what is already collected. Rather, we ask the PAs to collect and report data such that it can be easily compared to existing data sets that allow inferences about penetration of energy efficiency into different markets and audiences. The Commission and other stakeholders should be able to compare and contrast activity between census tracts, service territories, disadvantaged and/or underserved communities, and other relevant breakdowns of the data.

Table 1: Table 3 from the EMSWG Final Report: Possible Participant "Units" that Could be Counted[9]

Sector	**Residential** (single and multi-family)	**Commercial** (small, medium, and large)	**Public**	**Agricultural**	**Industrial**	**Cross-cutting** (Finance, WE&T, IDSM, C&S)
Unit	Households; Multi-family building; Individual apartment; Community based organization and the populations they serve	Business energy account; Single-site business; Multi-site business; Non-res building; Business owner; Business staff	Local govt; Public agency; Local govt or public building; Local govt officials	Farms; Buildings at a farm; Farm owners; Farm staff; Pumps or other meters not in a building	Facilities; Individual equipment or processes within facilities	Students; Transitional aged youth; Workers (different than disadvan-taged worker); Workers of a specific segment

[9] See CAEECC EMSWG Final Report (March 2024) https://www.caeecc.org/_files/ugd/849f65_811eb0401da74baebe65034d82232234.pdf

The Commission is providing the following example of a "Bill Savings Table" to clarify our expectations from PAs about what is anticipated to be reported quarterly and annually. PAs should work with Energy Division to make improvements where possible.

Bill Savings by Sector and Segment	Participants								Non-Participants							
	Average				Total				Average				Total			
	Gas		Electric		Gas		Electric		Gas		Electric		Gas		Electric	
	Bill $	Savings $	Bill $	Savings $	Bill $	Savings $	Bill $	Savings $	Bill $	Savings $	Bill $	Savings $	Bill $	Savings $	Bill $	Savings $
Res SF Equity Projected																
Res SF Equity Actual																
Res SF RA Projected																
Res SF RA Actual																
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END OF APPENDIX C