

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



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To: Pacific Gas and Electric (PG&E)

From: Lisa Paulo and Peter Biermayer, California Public Utilities Commission (CPUC)

Cc: R.25-04-010 Service Lists

Subject: 2024 EX ANTE REVIEW (EAR) SCORING AND EVALUATION  
PERFORMANCE

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## I. Summary of 2024 EAR Scores - Custom Projects and Measure Packages

Pursuant to Decision (D).13-09-023, D.15-10-028, D.16-08-019, and D.20-11-013, California Public Utilities Commission (CPUC) staff and consultants score the investor-owned utilities (IOUs) based on their performance during the pre-approval phase (or “ex ante” phase) of developing an energy efficiency project or measure. The ex ante review (EAR) scoring is a part of the EAR awards.<sup>1</sup> D.20-11-013 placed a moratorium on EAR awards but directed that EAR scoring shall continue. CPUC staff and consultants completed the 2024 EAR performance review scoring as prescribed in Table 3 of D.16-08-019. Decision D.16-08-019 established consolidated metrics to evaluate and further direct the utilities. Ordering Paragraph 19 of this decision states that the EAR scores “shall be weighted for the utility program administrators based on the proportion of deemed savings and custom measures in each utility’s portfolio”.

A breakdown of PG&E’s 2024 EAR performance score of 72.63/100 for measure packages<sup>2</sup> and custom projects is shown below in Table 1. PG&E’s 2024 total points is a 5.6 point decrease from its 2023 total points of 78.23 with a decrease noted for measure packages and a slight increase noted for custom projects. Scores for 2023 are provided in Table 2 on the following page.

Table 1: PG&E 2024 EAR Scoring for Measure Packages and Custom Projects<sup>3</sup>

PG&E 2024 EAR Performance Scores and Points		Measure Packages				Custom			
Metric	Metric Area of Scoring	Metric Score	Metric Weight Factor	Points	Max Points	Metric Score	Metric Weight Factor	Points	Max Points
1	Timing and Timeliness of Submittals	2.50	10%	2.5	5.00	5.00	10%	5.00	5.00
2	Content, Completeness, and Quality of Submittals	2.50	30%	7.50	15.00	3.91	30%	11.73	15.00
3	Proactive Initiative of Collaboration	2.50	10%	2.50	5.00	4.50	10%	4.50	5.00
4	Due Diligence and QA/QC Effectiveness	3.64	25%	9.09	12.5	4.29	25%	10.73	12.5
5	Responsiveness to Needs for Process/Program Improvements	3.75	25%	9.38	12.5	3.88	25%	9.70	12.5
Total				30.97	50			41.66	50

<sup>1</sup> The EAR awards were part of the Efficiency Savings and Performance Incentive (ESPI) awards.

<sup>2</sup> A Measure Package documents the data, methodologies, and rationale used to develop values for deemed measures. A Measure Package is prepared and submitted by program administrators and approved by the CPUC.

<sup>3</sup> A metric score is the rating from assigned to each ESPI performance category, reflecting the IOU’s performance based on CPUC evaluation. Points are the weighted contribution of each metric score to the final ESPI score. They are calculated using the formula: **Points = Metric Score × Metric Weight**

Table 2: PG&E 2023 EAR Scoring for Measure Packages and Custom Projects

PG&E 2023 EAR Performance Scores and Points		Measure Packages				Custom			
Metric	Metric Area of Scoring	Metric Score	Metric Weight Factor	Points	Max Points	Metric Score	Metric Weight Factor	Points	Max Points
1	Timing and Timeliness of Submittals	3.59	10%	3.59	5	4.85	10%	4.85	5
2	Content, Completeness, and Quality of Submittals	5.00	30%	15.00	15	4.26	30%	12.78	15
3	Proactive Initiative of Collaboration	5.00	10%	5.00	5	5.00	10%	5.00	5
4	Due Diligence and QA/QC Effectiveness	2.78	25%	6.94	12.5	4.05	25%	10.13	12.5
5	Responsiveness to Needs for Process/Program Improvements	2.78	25%	6.94	12.5	3.20	25%	8.00	12.5
Total				37.47	50			40.76	50

The metric scoring area descriptions are expanded in [Attachment A](#). The final category scores are explained in more detail below as well as in [Attachment B](#) through [Attachment D](#) to this memo.

## II. CPUC Staff Findings 2024 Activities

### A. Custom Projects Review Overview

From the period beginning January 2024 to the end of December 2024, CPUC staff issued 22 scored dispositions for PG&E.<sup>4</sup>

A review of the project dispositions and the Review Process Score Enhancements points<sup>5</sup> resulted in PG&E's custom project score increasing by 0.90 points from its 2023 scores (41.66 in 2024 vs. 40.76 in 2023) as shown in Tables 1 and 2 above. While certain aspects of project submission have improved, PG&E must continue to work to improve its overall performance.

### 1. Summary of 2024 Achievements

CPUC staff's observed PG&E to have improved in:

- **Continued improvements in Documentation Submission Timeline.** In 2024, PG&E submitted all projects on time or earlier than the required 15 days by Senate Bill (SB) 1131. Furthermore, 82 percent of their submissions were submitted five or more days earlier than required, an increase of 12 percent from 2023, signaling that PG&E is continuing to improve its document submission processes to meet timeline requirements.
- **Consistent collaboration** through active participation in statewide initiatives and subgroups

<sup>4</sup> Some of the dispositions are for projects submitted at the end of 2023. Some projects that were selected in 2023 had dispositions issued in 2024. The memo is for dispositions issued in 2024.

<sup>5</sup> Section IV.E provides details on the score enhancement methodology.

and proactively introducing topics to CPUC staff on bi-weekly calls.

- **Disposition Actions frequency reduced in 2024** through more project-related discussions on bi-weekly meetings and clearer expectations between the PG&E team and the CPUC staff ex-ante review team. In 2023, projects submitted for review averaged 2.9 actions per disposition and in 2024 that number reduced to 2.4 actions per disposition.
- **Issues Related to Documentation Issues and Program Influence** improved in 2024 totaling 6 percent of all disposition issues compared to 25 percent of all disposition issues in 2023.

## 2. Summary of Areas Requiring Improvement

Areas that were most problematic, frequent, and/or need improvement include:

- **Issues Related to Gross Savings Impacts.** In 2024, there were 30 issues related to Gross Savings Impacts, which comprised 57 percent of all issues noted. This was a notable increase from 2023, particularly related to the Measure and Verification (M&V) Plan issues.
- **Issues in Process, Policy, and Program Rules.** In 2023, there were 47 issues related to Process, Policy, and Program rules that comprised 41 percent of all issues noted. In 2024, this problem area remains high, with 20 issues noted comprising 38 percent of all issues noted. Specifically, PGE has struggled with correct effective useful live/remaining useful live (EUL/RUL) and baseline selection.

## B. Measure Packages Review Overview

PG&E's measure packages score has decreased compared to last year by 6.50 points (from 37.47 in 2023 to 30.97 in 2024) as shown in Tables 1 and 2 above.

### 1. Summary of 2024 Achievements

CPUC staff observed improvements in PG&E's development and management of measure package submissions in the following areas:

- **PG&E has demonstrated initiative by leading the statewide Deemed Rulebook.**
- **PG&E has met expectations with their measure package submittals.**
- **PG&E has continued to be prompt and timely with their measure package submittals.** This was especially apparent for the DEER2024 measure package update cycle.

### 2. Summary of Areas Requiring Improvement

CPUC staff highlight the following recommendations for improvement which are centered on quality control:

- **There is room for improvement in the QA/QC process for measure packages.** While QA/QC has improved, PG&E should continue to prioritize measure package quality control before submitting to the CPUC, as many review comments and typos still persist.

### III. Discussion

The following sections of this memorandum provide a detailed description of the findings, including areas of achievement, areas requiring improvement and scoring for both custom projects and measure packages.

#### A. Custom Projects Performance Review

Each year, CPUC staff reviews a selected sample of energy efficiency programs custom project applications. The review findings and directions to the program administrators (PA) are presented in documents referred to as “dispositions”.

**From the period beginning January 2024 to the end of December 2024, 22 PG&E projects received dispositions.** The comments below are organized by the five metric areas of scoring prescribed in D.16-08-019 with metric scores shown prior to any enhancement points. CPUC staff may award enhancement points, at their discretion, to recognize exceptional efforts or innovative practices that go beyond standard ESPI metric expectations and contribute to improved program performance or evaluation outcomes. A summary table of all issued dispositions, along with the dispositions individual score and feedback from the reviewer, is included in [Attachment B](#). [Attachment D](#) contains an embedded custom scores workbook that includes a tab with details on the individual project level disposition scores and feedback from the project reviewer.

Table 3 below presents the custom disposition points given to PG&E for each metric both with and without the addition of any Enhancement Points.

Table 3: PG&E 2024 Custom Disposition Points Awarded by Metric

Metric	Metric Area of Scoring	Weight Factor	Custom Disposition Points		Max Points
			With Enhance Pts <sup>6</sup>	w/o Enhance Pts	
1	Timeliness of Submittals	10%	5.00	5.00	5
2	Content, Completeness, and Quality of Submittals	30%	11.73	11.73	15
3	Proactive Initiative of Collaboration	10%	4.50	4.50	5
4	PA's Due Diligence and QA/QC	25%	10.73	10.73	12.5
5	PA's Responsiveness	25%	9.70	8.45	12.5
<b>Total</b>			<b>41.66</b>	<b>40.41</b>	<b>50</b>

#### 1. Timeliness of Submittals

In 2024, PG&E received a custom disposition score of 5.0 out of 5.0 for Metric 1 (Timeliness of Submittals) on the 22 PG&E custom project reviews completed in 2024. Out of these 22 projects reviewed, all 22 projects were submitted on time or early. Additionally, 18 of the projects (82 percent) were submitted five days or earlier than required per the timeline mandated in Senate Bill 1131 and

<sup>6</sup> Section IV.E provides details on the score enhancement methodology.

Section 381.2 of the Public Utilities Code<sup>7</sup>. This is a 10% increase from 2023. This demonstrates that PG&E continues to exceed expectations with regards to timeliness.

## 2. Content, Completeness, and Quality of Submissions

In 2024, PG&E received a custom disposition score of 11.73 out of 15.0 for Metric 2 (Content, Completeness, and Quality of Submissions)<sup>22</sup> PG&E custom project reviews. Of these 22 dispositions issued, 1 project was approved without exception, 7 projects (32 percent) were marked Advisory, and 14 projects (64 percent) were approved with exceptions.<sup>8</sup> There were no projects rejected in 2024, an improvement from 2023. The projects approved with exceptions and some advisory approvals were approved with noted deficiencies which resulted in a loss of points under this metric.

Table 4 below summarizes the 58 action items identified across the 22 scored dispositions<sup>9</sup> issued in 2024. These action items illustrate errors that impacted the project's eligibility, documentation, and efficiency savings estimate calculations.

Table 4: Summary of Categorized Action Items for Custom Projects

Issue Area	Action Categories	Summary of CPUC Staff Required Action <sup>10</sup> by the PA:	Summary of CPUC Staff Notes or Instructions <sup>11</sup> :	Percent of Total Actions
Issues Related to Gross Savings Impacts	Analysis assumptions	7	3	12%
	Calculation method	13	4	22%
	Calculation tool	3	0	5%
	M&V plan	12	4	21%
	<b>Subtotals</b>	<b>35</b>	<b>11</b>	<b>60%</b>
Process, Policy, Program Rules	Baseline	2	0	3%
	CPUC Policy	2	1	3%
	Eligibility	3	1	5%
	EUL/RUL	6	1	10%
	Fuel switching	1	0	2%

<sup>7</sup> “The electrical corporation or gas corporation shall make the project application supporting documentation available to the CPUC for review within 15 business days of the CPUC review selection date”.

<sup>8</sup> The objective of Advisory reviews is not to approve project savings claims, but to provide early feedback for implementation and to inform CPUC staff-led evaluation. NMEC project reviews are Advisory. The guidance for Prospective reviews applies to future projects that are not already in the PA's pipeline of projects. CPUC staff use Prospective reviews to provide feedback on new programs.

<sup>9</sup> This table includes action items issued on the 7 Advisory dispositions.

<sup>10</sup> For Action items, the PA must make revisions or changes as noted in CPUC Staff's review comments before signed agreement with customer.

<sup>11</sup> Notes or Instructions are informational observations that do not require revision by the PA but should be considered for similar projects moving forward. They may also include documentation of pre-installation items to inform possible post-installation review(s). They are typically minor suggestions or clarifications that should not affect ESPI scoring.

Issue Area	Action Categories	Summary of CPUC Staff Required Action <sup>10</sup> by the PA:	Summary of CPUC Staff Notes or Instructions <sup>11</sup> :	Percent of Total Actions
	Incentive calculation	0	2	0%
	Measure cost	2	2	3%
	Measure type	3	1	5%
	PA program rules	1	0	2%
	Self generation	0	1	0%
	<b>Subtotals</b>	<b>20</b>	<b>9</b>	<b>34%</b>
<b>Documentation Issues</b>	Continue Document Upload	2	6	3%
	Missing documents	0	3	0%
	<b>Subtotals</b>	<b>2</b>	<b>9</b>	<b>3%</b>
<b>Issues Related to Net Impacts</b>	Program influence	1	5	2%
	<b>Subtotals</b>	<b>1</b>	<b>5</b>	<b>2%</b>
<b>Other Issues</b>	Other 1 - CPUC Project ID not appropriate with measure type	0	1	0%
	Other 2 - Incorrect address in bimonthly	0	1	0%
	Other 3 - Misplaced savings in bimonthly	0	1	0%
	Other 4 - Savings in project files do not match	0	1	0%
	Other 5 - Incorrect incentive amount in bimonthly	0	1	0%
	Other 6 - Resubmission of rejected project	0	1	0%
	Other 7 - Lack of clear documentation and supporting materials in post installation report	0	1	0%
	Other 8 - PFS template includes language that does not match current customer projects	0	1	0%
	<b>Subtotals</b>	<b>0</b>	<b>8</b>	<b>0%</b>
<b>Grand Total</b>		<b>58</b>	<b>42</b>	<b>100%</b>

Specific examples of project and measure level deficiencies are provided below.

- **Incorrect Analysis or Calculation methods and assumptions** were found in 12 out of the 22 projects receiving dispositions, which resulted in a significant reduction in points for this metric. Sampled projects containing this deficiency were CPUC Project IDs 891, 897,

909, 912, 915, 923, 924, 928, 930, 935, 947, and 949. Deficiencies noted include omitting mass and energy balance calculations, hard-coded demand savings that needed more explanation, not sufficient explanation of calculation methodology per Statewide Guidance Document Section 3.5, using the maximum 15-minute interval reading within an hour instead of averaging the hour to determine hourly kW values, incorrect fractional savings uncertainty formulas, and diverting from CPUC approved Modified Lighting Calculator (MLC) heating, ventilation and air-conditioning (HVAC) interactive effects.

- **Incorrect Measure EUL/RUL** was found in 4 out of the 22 projects receiving dispositions which resulted in a significant reduction in points for this metric. Sampled projects containing this deficiency were CPUC Project IDs 913, 914, 921, and 947. Deficiencies noted include using the incorrect EUL ID, omitting the use of the default RUL of host equipment as outlined in the project feasibility study (PFS), improper use of EUL instead of RUL for add-on equipment measures, and to provide EUL source and justifications when needed.
- **Incomplete M&V Plan** was found in 11 out of the 22 projects receiving dispositions which resulted in a significant reduction in points for this metric. Sampled projects containing this deficiency were CPUC Project IDs 897, 913, 914, 915, 923, 924, 930, 931, 935, 945, and 952. Deficiencies noted include recommendations to increase duration of post-project metering, expanding metering to energy consuming equipment related to the project installation, omitting CAGI (Compressed Air and Gas Institute) performance curves in the M&V plan, more clear descriptions of how pre- and post-project efficacies that directly impact savings will be measured and calculated, and including parameters of all energy consuming equipment related to the project in the M&V Plan.
- **Incomplete or Missing Documentation** was found in 2 out of the 22 projects receiving dispositions which was a substantial improvement from 2023. Sampled projects containing this deficiency were CPUC Project IDs 915 and 940. Deficiencies noted include recommending a resubmission at post-installation stage and a request to collect data to substantiate age of the host equipment prior to project implementation to feed into the EUL/RUL determination of the project.

### 3. Proactive Initiative of Collaboration

In 2024, PG&E received a custom disposition score of 4.5 out of 5.0 for Metric 3 (Proactive Initiative of Collaboration) CPUC staff determined that PG&E made efforts to bring measures, projects, and studies forward for discussion prior to CPUC staff review. PG&E was highly active, bringing Early Opinion requests and submission to CPUC staff for review. In addition, PG&E initiated development of the to-code memo and led cross-platform and statewide collaboration on preponderance of evidence (POE) influence viability job aid.

PG&E remained active in statewide initiatives, working groups, and subcommittees, and have taken leadership roles to update guidance documents and custom best practices. As such, CPUC staff determined that PG&E continues to exceed the minimum expectations under this metric.

#### **4. PA's Due Diligence, Quality Assurance, and Quality Control (QA/QC)**

In 2024, PG&E received a custom disposition score of 10.73 out of 12.5 for Metric 4 (PA's Due Diligence, Quality Assurance, and Quality Control) Project and measure level disposition performance results reviewed under Metric 2 were used as a proxy for the level of QA/QC performed by the PA. Of the 22 projects reviewed, 1 project approved without exception, 7 projects (32 percent) were marked Advisory, and 14 projects (64 percent) were approved with exceptions. The projects proceeding with exceptions noted, resulted in most projects receiving some negative points with lower-than-expected performance with regards to effective QC of projects prior to submitting for review. With that said, the average count of actions in 2024 was 2.4 actions per disposition compared to 2.9 in 2023, meaning projects are receiving less actions in their dispositions compared to last year.

CPUC staff found that PG&E's QC procedures have improved since 2023 and are well documented. PG&E has reduced the number of project rejections to zero and as such has met CPUC staff expectations for this metric.

#### **5. PA's Responsiveness**

In 2024, PG&E received a custom disposition score of 8.45 out of 12.5 for Metric 5 (PA's Responsiveness) prior to the addition of any enhancement points. This category earned enhancement points. Please see Section IV below for a more detailed description. When reviewed at the portfolio level, CPUC staff assessed the time series of rejections and exceptions, the alignment of program policy and procedures with the number of actual rejections and exceptions based on eligibility and attribution, and adaptation to rule changes over time. PG&E projects reviewed in 2024 exhibited a slight improvement in project performance. PG&E continues to experience issues related to Program Policy, as 38 percent of all issues identified in 2024 were related to this category, which is a slightly smaller percentage compared to 41 percent in 2023. Additionally, CPUC staff noted 35 actions related to Gross Savings Impacts, which was a marginal increase compared to 32 2023. However, the issue per disposition rate is decreasing and there were no projects rejected in 2024. These combined actions demonstrate lower-than-expected compliance with CPUC policies and as such CPUC staff determined that PG&E complied with the minimum elements of this metric, but that improvement is warranted.

CPUC staff found that PG&E's continued focus and development of the on-bill financing (OBF) program's pre-screening process and stakeholder engagement including M&V providers and Trade Pro's indicated improvement for this metric.

#### **B. Measure Packages Performance Review**

PG&E submitted 22 measure packages in 2024 which were reviewed and disposed. This end of year memo provides measure package specific feedback on the 22 reviewed and disposed measure packages in 2024.

The comments below are organized by the five scoring metric areas created in D.16-08-019.<sup>12</sup> The narrative includes observations common to multiple measure packages and feedback related to the measure package development process. Specific measure package feedback is provided in [Attachment C](#) at the end of this document. The Measure Package Detailed Review Table provides feedback on specific measure packages. The Measure Package Submissions Table lists all measure packages submitted by PG&E or PG&E measure packages that were disposed during the review period. Measure packages were selected for feedback from those that were submitted by PG&E and were either disposed or reached approval status during the review period. CPUC staff acknowledges that measure package development may have been supported by multiple PAs; however, at this time, there is no mechanism for apportioning feedback among PAs. Therefore, feedback is only provided for the submitting PA, with the assumption that they are the lead PA. The scoring rubric for measure packages is defined as follows:

- ‘+’ indicates a positive scoring impact which receives 100% of total points for the metric
- ‘-’ indicates a negative scoring impact which receives 0% of total points for the metric
- ‘Yes’ indicates meeting minimum expectation which receives 50% of total points for the metric
- ‘No’ indicates the review feedback is not applicable to a metric and does not impact the average

The assigned percentage scores were averaged across all the reviewed items.

Table 5 below presents the measure package disposition points given to PG&E for each metric both with and without the addition of any Enhancement Points.

Table 5: PG&E Measure Package Disposition Points Awarded by Metric

Metric	Metric Area of Scoring	Weight Factor	Measure Package Disposition Points		Max Points
			With Enhance Pts <sup>13</sup>	w/o Enhance Pts	
1	Timeliness of Submittals	10%	2.50	2.50	5.00
2	Content, Completeness, and Quality of Submittals	30%	7.50	7.50	15.00
3	Proactive Initiative of Collaboration	10%	2.50	2.50	5.00
4	PA's Due Diligence and QA/QC	25%	9.09	5.97	12.50
5	PA's Responsiveness	25%	9.38	6.25	12.50
<b>Total</b>			<b>30.97</b>	<b>24.72</b>	<b>50.00</b>

## 1. Timeliness of Submittals

In 2024, PG&E received a measure package disposition score of 2.5 out of 5.0 for Metric 1 (Timeliness of Submittals) .. All PG&E measure packages met minimum expectations.

<sup>12</sup> See [D.16-08-019](#) at 87.

<sup>13</sup> Section IV.E provides details on the score enhancement methodology.

## **2. Content, Completeness, and Quality of Submissions**

In 2024, PG&E received a measure package disposition score of 7.5 out of 15 for Metric 2. PG&E's content, completeness, and quality of measure packages has generally met standards with no measure packages exceeding or not meeting expectations.

## **3. Proactive Initiative of Collaboration**

In 2024, PG&E received a measure package disposition score of 2.5 out of 5 for Metric 3. All measure packages met the minimum expectations of collaboration which was required to ensure each measure package met all PA's needs.

## **4. PA's Due Diligence, Quality Assurance, and Quality Control (QA/QC)**

In 2024, PG&E received a measure package disposition score of 5.97 out of 12.50 for Metric 4 (PA's Due Diligence, Quality Assurance, and Quality Control) prior to the addition of any enhancement points. All but one measure package submissions met minimum expectations. One measure package had three major comments that required resolving which resulted in a negative score.

## **5. PA's Responsiveness**

In 2024, PG&E received a measure package disposition score of 6.25 out of 12.50 for Metric 5 prior to the addition of any enhancement points. PG&E met minimum requirements for this metric.

# **IV. The Scoring Methodology**

The 2024 performance score was developed using five detailed scoring metrics for each directly reviewed work product (i.e., measure package and custom project), as well as a scoring of the utility's internal due diligence processes, QA/QC procedures and methods, as well as program implementation enhancements to support improved forecasted values.

[Attachment A](#) summarizes the Metrics adopted in D.16-08-019 as well as the CPUC staff developed scores and points for 2024. D.16-08-019 also directed that the custom and measure package scores be weighted together into a final score based on the PA total claims for custom and deemed activities, respectively.

In accordance with D.13-09-023, the PA's activities are assessed against a set of five metrics on a rating scale of 1 to 5. Once activities are assessed, the ratings for each are converted onto this scale, where 1 is the lowest score assigned and 5 is the highest score assigned. A maximum score on all metrics for both measure packages and custom projects will yield 100 points whereas a minimum score on all metrics would yield 20 points. The 1 to 5 rating scale is distinguished as follows:

1. Consistent underperformer in meeting the basic expectations.
2. Makes a minimal effort to meet CPUC expectations but needs dramatic improvement.
3. Makes effort to meet CPUC expectations, however improvement is required.
4. Sometimes exceeds CPUC expectations while some improvement is expected.

5. Consistently exceeds CPUC expectations.

As with the 2023 performance scores, the final scores were “built-up” from a metric-by-metric assessment of each reviewed work product. It is CPUC staff’s expectation that this detailed scoring approach, along with the detailed qualitative measure package and custom project level feedback, is consistent with the direction provided in D.13-09-023. We believe this scoring approach provides specific guidance to the utilities on how to improve their due diligence review and scores moving forward.

A “Direct Work Product Review” portion of each metric score was developed based upon the individual scoring of dispositions issued for custom project or measure packages. Each reviewed utility work product was first determined to have components either applicable or not applicable to a metric.<sup>14</sup> If a metric was determined to be not applicable to a given disposition, the metric was identified as not applicable (“N/A”) and the metric was assigned a score equal to the average 1 to 5 score from the remaining applicable metrics. Assigning this average score to any “N/A” metrics essentially normalized the final score so that a disposition neither benefitted nor was penalized as a result of a non-applicable metric.

For custom projects, each applicable metric was directly scored according to the unique metric scoring methodology outlined below. A project-by-project summary of the custom project scoring is included in a custom tables workbook which has been included as an embedded Excel file in [Attachment D](#).

## **A. Measure Package Metric 1-5 Scoring Methodology**

For measure packages, if an item was determined to have activity applicable to a metric, the item was then assigned a qualitative rating as to the level of due diligence applied to the item. The scoring rubric for measure packages is defined as follows:

- ‘+’ indicates a positive scoring impact which receives 100% of total points for the metric
- ‘-’ indicates a negative scoring impact which receives 0% of total points for the metric
- ‘Yes’ indicates meeting minimum expectation which receives 50% of total points for the metric
- ‘No’ indicates the review feedback is not applicable to a metric and does not impact the average

The assigned percentage scores were averaged across all the reviewed items Individual Measure Package level disposition scoring, as well as related Measure Package activities, are provided in [Attachment C](#). Note the following approach to scoring individual measure packages by metric:

- Metric 1 Timeliness: The measure package submission schedule was designed to distribute

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<sup>14</sup>An example is the No Savings procedural measure package, which does not include any savings, costs, or permutations and therefore would not receive scoring for Metric 2 (“Content, Completeness, and Quality of Submittal”). Another example would be a minor measure package which may not require proactive collaboration with CPUC staff and therefore not receive a score for Metric 3 (“Proactive Initiation of Collaboration”).

the measure packages throughout the year. Measure packages receive “+” if schedule was followed.

- Metric 2 Content: Straightforward measure package received a “Yes”, complex revisions received a “+”, unless there were errors in the content, which warranted a “-“.
- Metric 3 Collaboration: Straightforward consolidation effort measure package received a “Yes”, initiative to work with other PAs and CPUC receives “+”.
- Metric 4 Quality Assurance: Measure packages that were complete, consistent, and without meaningful errors received a “Yes”. Those measure packages with inconsistencies between the data tables and narrative or where values were left undefined received a “-“.
- Metric 5 Process: Measure package responsiveness to program needs received a “Yes” for straightforward and “+” for complex measure package submissions.

## **B. Custom Metric 1 Scoring Methodology**

This metric is related to the timeliness of submittals and a maximum of 5 points is allocated to this metric based on the PA’s responsiveness to requests and follow-up documentation required to complete the review. Scoring for this metric occurs at the individual project review stage.

Per Senate Bill (SB) 1131 requirement an allocation of 15 business days is given for the PA to submit materials following the date selected for review. PAs begin with a score of 5 and after 15 business days have passed, 1.0 point is deducted for each day the submittal is late.

## **C. Custom Metric 2 Scoring Methodology**

This metric is related to the content and completeness of submittals and a maximum of 15 points is allocated to this metric. Scoring occurs on each custom project during the individual project review stage. On a percentage basis Metric 2 is the single greatest determinant of the overall EAR score. Scoring for Metric 2 is achieved through numerous areas throughout the custom project review workbook. PA’s begin with a full score of 5 for each custom project in the review workbook with each noted deficiency reducing the points accordingly. Deficiencies are not weighted equally, with significant issues such as failure of the fuel substitution test or inadequate documentation of program influence receiving a heavier weighting compared to tests such as incorrect site location information. The scores from all custom projects are then averaged together to arrive at an average disposition score for Metric 2.

## **D. Custom Metric 3, 4, and 5 Scoring Methodology**

Whereas Metrics 1 and 2 are assessed at the project level, Metrics 3 and 5 are assessed at the portfolio level for each PA. As such, no individual custom project receives a unique score for these metrics. Additionally, unlike Metrics 1 and 2 which rely on deductions under each metric, scores for Metrics 3 and 5 are awarded based on the PA’s performance as it relates to the components of each metric.

For Metric 3, points are awarded when the PA proactively brought high impact or unique projects

forward to CPUC staff prior to developing a study or project. The final score for Metric 3 is therefore representative of the average performance of custom projects across the portfolio of projects.

Scoring for Metric 4 relies upon disposition results and findings identified under Metric 2 as well as the overall depth and correctness of the technical review team. The PA's performance on dispositions assists in serving as a proxy for quality control under Metric 4. In addition, several project specific elements such as whether changing market practices and updates to DEER were considered, or if a project demonstrated evidence of review activities are used to assess the scoring for this metric. Like Metric 3, a final score is representative of the average performance of custom projects across the portfolio of projects.

With Metric 5, a review of process enhancement tools and techniques, tracking improved disposition performance over time, and highlights provided throughout the year by the PA assist in determining an average score related to process and programmatic improvements. Similar to Metrics 3 and 4, a final score is representative of the average performance of custom projects across the portfolio of projects.

## **E. Score Enhancement Methodology**

The above process resulted in custom project and measure package work product review scores. Next, PA-specific "Review Process Score Enhancements" were developed for each applicable metric based on observed policy and technical reviews or program implementation processes/procedures developed and implemented in 2023 to positively impact future project reviews. CPUC staff believes it is important to provide EAR "Enhancement" points for positive due diligence developments to recognize the effort and to provide additional encouragement even before a change in project-level results is observed.

In the custom scoring process, CPUC staff added "Enhancement" points for Metric 2 "Utility Responsiveness to Needs for Process and Program Improvements" as indicated earlier in the memo. This included:

- Metric 1 Timeliness: There were no adder points for this metric.
- Metric 2 Content: There were no adder points for this metric.
- Metric 3 Collaboration: There were no adder points for this metric.
- Metric 4 Due Diligence: There were no adder points for this metric.
- Metric 5 Process Improvements: Led and expanded the on-bill financing (OBF) pre-screening process and incorporated Trade Pros meetings among other M&V collaborations.

Measure package scores also include "Review Process Score Enhancements." Process issues represent critical deemed measure development topics where CPUC staff believes improvement is needed or improvement has occurred, but those activities are not necessarily reflected in the areas of direct review. These activities, as discussed above, are noted in the narrative, but are summarized here by metric as:

- Metric 1 Timeliness: There were no added points for this metric.
- Metric 2 Content: There were no added points for this metric.
- Metric 3 Collaboration: There were no added points for this metric.
- Metric 4 Due Diligence: PG&E implemented additional QC checks to ensure data compliance with the California Energy and Data Reporting System (CEDARS), developed new validation rules, and enhanced internal QC processes to improve data quality.
- Metric 5 Process Improvements: PG&E continued planning and proposing updates to the PG&E resource rulebook, and planned alignment with the CPUC staff rulebook when that version is finalized.

To produce the final measure package scores, the metric scores for the two measure package contributing areas were added together, using a 50 percent weight for the process issues score. The 50 percent weight given to the process review has the effect of being a “score enhancement” or increase to the direct review score. Furthermore, within each contributing area (direct and process review areas), CPUC staff also assigned weights for individual items as a way to reflect greater importance of different individual review items. The separate process scoring provides an avenue for assessing overall QA/QC processes and procedures put into place by PG&E.<sup>15</sup>

[Attachment D](#) contains custom and measure package summary tables showing the components and total scores and points for each metric in each of the two component areas of scoring described above.

Questions or comments about the feedback or final scores should be directed to Lisa Paulo ([lisa.paulo@cpuc.ca.gov](mailto:lisa.paulo@cpuc.ca.gov)) or Peter Biermayer ([peter.biermayer@cpuc.ca.gov](mailto:peter.biermayer@cpuc.ca.gov)). Note that pursuant to D.13-09-023, CPUC staff will schedule a meeting with PG&E staff to discuss this memorandum and its final scores by October 30, 2025.

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<sup>15</sup> The guidance on scoring approach provided in D.13-09-023, at 74, provides that when only a small number of submissions are available for scoring and the submissions have varying impacts on the portfolio overall, that appropriate weighting should be allied to the submission and observed performance that should carry across multiple metrics. “Low scores for metrics that assess specific and important quantities (e.g., if the utility only uploads a small percentage of custom projects and receives a low score for Metric 1), will have a proportional impact on the total score the utility could receive for later metrics that measure the quality of custom project submittals.” “For example, doing an outstanding job on a large number of very low-impact, standardized projects will not make up for doing a poor job on a few projects that represent a major portion of portfolio dollars.”

Attachment A: Final EAR Performance Scores (without Enhancement Points)

Metric		Measure Packages				Custom			
		Max Points	Max Percent of Total Points	2024 Score	2024 Points	Max Points	Max Percent of Total Points	2024 Score	2024 Points
1	Timing and Timeliness of Submittals	5.00	10%	2.50	2.50	5	10%	5.00	5.00
	Timely submittals: all lists, inventories, plans, studies, Measure Packages and project/measure documentation; timing and advanced announcement of submittals (spreading out submission when available rather than holding and turning in large batches); timely follow-up PA responses to review disposition action items including intention to submit/re-submit with proposed schedule.								
2	Content, Completeness, and Quality of Submittals	15.00	30%	2.50	7.50	15	30%	3.98	11.73
	Completeness, appropriateness, comprehensiveness, accuracy, and clarity of submittals. Submittal adherence to CPUC policies, Decisions, and prior CPUC staff dispositions and/or guidance. Do the submittals include all materials required to support the submittal proposed values, methods and results. Is the project or measure clearly articulated. Are proposed or utilized methods clearly explained including step-by-step method or procedure descriptions. Will the proposed or utilized approach provide accurate results. Are all relevant related or past activities and submittals appropriately noted or disclosed, analyzed or discussed. Are the pros/cons of alternate possible approaches or conclusions discussed to support that the chosen one is most appropriate.								
3	Proactive Initiative of Collaboration	5.00	10%	2.50	2.50	5	10%	4.50	4.50
	PA efforts to bring either measures, projects, studies, questions, and/or savings calculation methods and tools to CPUC staff for discussion in the early formative stages, before CPUC staff review selection. In the case of tools, before widespread use in the programs. CPUC staff expects collaboration among the PAs to develop common or coordinated submissions and for the PAs to undertake joint or coordinated planning activities and study work. The PAs are expected to engage with CPUC staff in early discussions on unique or high profile, high impact measures or projects before program or customer commitments are made. The PAs are expected to engage with CPUC staff on planning and execution of studies that support proposed offerings, tools, or determination of proposed baselines or other programmatic assumption that can impact ex ante values to be utilized.								
4	Program Administrator’s Due Diligence and Quality Assurance/Quality Control Effectiveness	12.5	25%	2.39	5.97	12.5	25%	4.34	10.73

Metric		Measure Packages				Custom			
		Max Points	Max Percent of Total Points	2024 Score	2024 Points	Max Points	Max Percent of Total Points	2024 Score	2024 Points
	CPUC staff expects the PA to have effective Quality Control (QC) and Quality Assurance (QA) processes for their programs and measures. The PAs are expected to have a pro-active approach to reviewing existing measure and project assumptions, methods and values and updating those to take into account changes in market offerings, standard practice, updates to DEER methods and assumptions, changes to codes, standards and regulations, and other factors that warrant such updates. The depth and correctness of the PA's technical review of their ex ante parameters and values, for both Core, Local Government and Third Party programs, are included under this metric. The depth and correctness of the PA's technical review of their own staff and subcontractor work related to supporting deemed and custom measure and project submissions are included in this metric. Evidence of review activities is expected to be visible in submissions so that CPUC staff can evaluate the effectiveness of the PA internal QA/QC processes.								
5	Program Administrator’s Responsiveness to Needs for Process and Program Improvements	12.5	25%	2.50	6.25	12.5	25%	3.38	8.45
	This metric reflects the PAs ongoing efforts to improve their internal processes and procedures resulting in increased ex post evaluated gross and net savings impacts. CPUC staff looks not only to the PA's internal QC/QA processes, but also whether individual programs and their supporting activities incorporate and comply with CPUC policies and prior CPUC staff disposition guidance in their program rules, policies, procedures and reporting. This includes changes to program rules, offerings and internal operations and processes required to improve overall review and evaluation results.								
Total		50	100%		24.72	50	100%		40.41

**Attachment B Custom Project Scores and Feedback**

The table below lists the identification numbers associated with each disposition. All custom projects were scored using new metrics adopted in 2016. The metrics are shown in the Table below.

*Table 3 2016 Adopted Performance Metrics*

Metric	2016 CPUC Adopted ex ante Metrics	Maximum Points	Percent of Total Points	Total Scored Points	# Scored Dispositions PG&E	Scoring Notes (Portfolio Level <sup>16</sup> )
<b>Metric 1</b>	<b>Timeliness and Timing of Submittals</b> Timely submittal of all documentation and follow-up utility responses to review disposition action items.	5	10%	5.00	22	In 2024, PG&E continued to submit all projects on time or earlier than required by Senate Bill (SB) 1131. Furthermore, 82 percent of their submissions were submitted five or more days earlier than required, an increase of 12 percent from 2023, signaling that PG&E is continuing to improve its document submission processes to meet timeline requirements.
<b>Metric 2</b>	<b>Content, Completeness and Quality of Submittals</b> Completeness, appropriateness, comprehensiveness, accuracy, and clarity of submitted documentation. In addition, this metric is an assessment of the utility's adherence to CPUC policies, Decisions, and prior CPUC Staff disposition guidance.	15	30%	11.73	22	In 2024, 22 of the projects with dispositions issued, 1 project (4.5 percent) was approved without exception, 7 projects (32 percent) were marked Advisory, and 14 projects (64 percent) were approved with exceptions. These action items illustrate errors that impacted the project's eligibility, documentation, and efficiency savings estimate calculations. There were no projects rejected in 2024, an improvement from 2023. The projects approved with exceptions and some advisory approvals were approved with noted deficiencies which resulted in a loss of points under this metric.
<b>Metric 3</b>	<b>Proactive Initiation of Collaboration</b> Utility's efforts to bring either measures, questions, and/or savings calculation tools to CPUC staff for discussion in the early formative stages, before CPUC staff review selection. In the case of tools, before widespread use in the programs. CPUC staff expects collaboration among the utilities and for the program administrators to engage with CPUC staff in early discussions on high profile, high impact measures well before customer commitments are made.	5	10%	4.50	22	Commission Staff found that PG&E made significant efforts to bring measures, projects, early opinions, or initiatives for discussion prior to review. PG&E was highly active bringing Early Opinion requests before CPUC for review and were engaged on bi-weekly calls and took active part in the MLC updates and feedback. In addition, PG&E took the lead on developing the to-code memo and led cross-platform and statewide collaboration on POE influence viability job aid.
<b>Metric 4</b>	<b>Utility Due Diligence and QA/QC Effectiveness</b> CPUC Staff expects the utility to have effective Quality Control (QC) and Quality Assurance (QA) processes for its programs and measures. The depth and correctness of the utility's technical review of its ex ante parameters and values, for both Core and Third Party programs, are included under this metric.	12.5	25%	10.73	22	Project and measure level disposition performance results reviewed under Metric 2 were used as a proxy for the level of QA/QC performed by the PA. Of the 22 projects reviewed, 1 project (4.5 percent) was approved without exception, 7 projects (32 percent) were marked Advisory, and 14 projects (64 percent) were approved with exceptions. The projects proceeding with exceptions noted, resulted in most projects receiving some negative points with lower-than-expected performance with regards to effective QC of

<sup>16</sup> The Metric 1, 2 and 4 scores for each of the individual custom projects are included in the final custom workbook which is embedded in Attachment D.

Metric	2016 CPUC Adopted ex ante Metrics	Maximum Points	Percent of Total Points	Total Scored Points	# Scored Dispositions PG&E	Scoring Notes (Portfolio Level <sup>16</sup> )
						projects prior to submitting for review. With that said, the average count of actions in 2024 was 2.4 actions per disposition compared to 2.9 in 2023, meaning projects are receiving less actions in their dispositions compared to last year. CPUC staff found that PG&E’s QC procedures have improved since 2023 and are well documented. PG&E has reduced the number of project rejections to zero and as such has met CPUC expectations for this metric.
Metric 5	<b>Utility Responsiveness to Needs for Process &amp; Program Improvements (Course Corrections)</b> This metric reflects the utility's efforts to improve, operationalize, and improve its internal processes which are responsible for the creation and assignment of ex ante parameters and values. CPUC staff looks not only to the utility's internal QC/QA process, but also whether individual programs incorporate and comply with CPUC policies and prior CPUC staff disposition guidance in its program rules, policies, and procedures.	12.5	25%	8.45	22	PG&E Projects reviewed in 2024 exhibited a slight upward trend in terms of project performance over time (i.e. project submissions garnered less issues compared to 2023 on average). PG&E continues to experience issues related to Program Policy, as 38 percent of all issues identified in 2024 were related to this category, which is a slightly smaller percentage from 2023. Additionally, CPUC Staff noted 30 actions related to Gross Savings Impacts, which was a substantial increase in issue percentage from 2023. However, the issue per disposition rate is decreasing and there were no project rejections in 2024. These combined actions demonstrate lower-than-expected compliance with CPUC policies and as such CPUC staff determined that PG&E complied with the minimum elements of this metric, but that improvement is warranted.

Attachment C: Measure Package Scores and Feedback

The table below lists the ID numbers associated with each Measure Package submission or disposition and the Measure Package review process “score enhancements” scoring area. The listed weight is used in the combining all the individual rows together into a single score for all the rows in the two scoring components (“direct review” and “process issues”); then each category total score gets equal weighting in the final total score for the metric. The PA may refer to the individual dispositions for more detailed descriptions of the specific actions staff required for each Measure Package. The qualitative EAR scoring feedbacks are designated as follows:

- ‘+’ indicates a positive (from midpoint) scoring impact on a metric,
- ‘-’ indicates a negative (from midpoint) scoring impact on a metric,
- ‘Yes’ indicates meeting expectation; neutral (midpoint) scoring impact on a metric,
- ‘No’ indicates the review feedback is not applicable to a metric.

Measure Package Reviews – Scored Measure Packages									
				EAR Metrics					
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWSV014	2	Lifecycle Refrigerant Management, Residential	PY2024 measure package update to include RACC v2.2, data collection requirement updates, and program requirements and exclusions updates and clarification. Measure package approved after addressing three major comments requesting consolidation of five RACC v2.2 workbooks to a single RACC v2.2 workbook, resubmission of the RACC v2.2 workbook to correct baselines and offerings, and clarification of use cases of measure application types.	1	yes	yes	yes	-	yes
SWWB002	2	Universal Audit Tool	DEER2026 measure package update to update delivery type and PA designation. Measure package approved after addressing one minor comment on updating and clarifying eligible building vintages.	1	yes	yes	yes	yes	yes
SWPR006	3	VSD for Ventilation Fan, Agricultural	Updated data collection requirements, updated costs, added Tech IDs, updated lifecycle to use full EUL	1	yes	yes	yes	yes	yes
SWCR020	4	Medium-Temperature Open Display Case Retrofit	Updated data collection requirements, updated costs, updated data sources for calculations, added Tech IDs, updated lifecycle to use full EUL	1	yes	yes	yes	yes	yes
SWCR018	5	Reach-In Refrigerator or Freezer, Commercial	Updated data collection requirements, updated costs, updated data sources for calculations, added Tech IDs, updated lifecycle to use full EUL	1	yes	yes	yes	yes	yes
SWPR002	3	VFD for Glycol Pump Motor	Added SWWP002 offerings into SWWP005, updated delivery types and MIT, updated costs	1	yes	yes	yes	yes	yes
SWPR005	3	VFD for Dust Collection Fan	Updated costs, delivery types, tech IDs, and data collection requirements	1	yes	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages									
MP ID	Rev	Title	Comments	Weight	EAR Metrics				
					1	2	3	4	5
SWSV014	3	Lifecycle Refrigerant Management, Residential	Adding Tier 2 offering, updated parameters and curves on new tier parameter, updated data collection requirements, updated costs	1	yes	yes	yes	yes	yes
SWFS006	4	Ice Machine, Commercial	Updated delivery types, updated costs, updated EFLH, added Tech IDs	1	yes	yes	yes	yes	yes
SWHC062	1	Occupancy Fan Controller, Commercial	Updated costs, delivery types, tech IDs, and data collection requirements	1	yes	yes	yes	yes	yes
SWCR017	5	Ultra-Low Temperature Freezer	Updated costs, delivery types, tech IDs, and data collection requirements	1	yes	yes	yes	yes	yes
SWWP005	4	Variable Frequency Drive on Irrigation Pump	New measure package	1	yes	yes	yes	yes	yes
SWPR001	3	Ventilation Fan, Agricultural	Updated data collection requirements, updated costs, added Tech IDs	1	yes	yes	yes	yes	yes
SWPR008	2	VFD on Rod Beam Pump	Updated data collection requirements, new data sources for calculations, updated costs, added Tech IDs, updating lifecycle to use full EUL	1	yes	yes	yes	yes	yes
SWHC006	4	Demand Control Ventilation for Single Zone HVAC	Added commercial building types, updated costs, migrated savings from eQuest to EnergyPlus prototypes	1	yes	yes	yes	yes	yes
SWCR019	4	Low-Temperature Coffin To Reach-In Display Case Conversion	Updated to use EnergyPlus Res prototypes, updated costs, updated data collection requirements, updated delivery types, new measures due to R410a refrigerant requirement	1	yes	yes	yes	yes	yes
SWHC018	5	VSD for HVAC Fan Controls, Commercial	Migrated savings from eQuest to EnergyPlus, updated costs, added MLI buliding type, updated EUL ID, removed DCV and ADEC measures	1	yes	yes	yes	yes	yes
SWHC023	5	VFDs for Unitary HVAC Systems, Commercial	Migrated savings from eQuest to EnergyPlus, updated costs, removal of ADEC offerings, updated bldg HVAC types	1	yes	yes	yes	yes	yes
SWCR007	5	Floating Temperature Controls, Multiplex	Updated savings to use EnergyPlus prototypes, updated costs, added Tech IDs	1	yes	yes	yes	yes	yes
SWCR015	4	Medium-Temperature Case Doors	Updated delivery types, updated costs, updated data collection requirements, updated baseline Title 24 requirements, added Tech IDs	1	yes	yes	yes	yes	yes
SWCR021	4	Medium or Low-Temperature Display Case With Doors	Updated savings to use EnergyPlus prototypes, updated costs, added Tech IDs	1	yes	yes	yes	yes	yes
SWWB004	3	Home Energy Reports	DEER2026 measure package update to update delivery type, PA designation, and electric impact profile. Measure package approved after addressing one minor comment on updating and clarifying eligible building vintages and one minor comment on text formatting.	1	yes	yes	yes	yes	yes



Measure Package and Measure Package Plan Submission Status – All Measure Packages and Plans submitted in 2024			
MP ID	Rev	Title	Comments
SWSV014	2	Lifecycle Refrigerant Management, Residential	Interim approval
SWWB002	2	Universal Audit Tool	Interim approval
SWPR006	3	VSD for Ventilation Fan, Agricultural	Interim approval
SWCR020	4	Medium-Temperature Open Display Case Retrofit	Interim approval
SWCR018	5	Reach-In Refrigerator or Freezer, Commercial	Interim approval
SWPR002	3	VFD for Glycol Pump Motor	Interim approval
SWPR005	3	VFD for Dust Collection Fan	Interim approval
SWSV014	3	Lifecycle Refrigerant Management, Residential	Interim approval
SWFS006	4	Ice Machine, Commercial	Interim approval
SWHC062	1	Occupancy Fan Controller, Commercial	Interim approval
SWCR017	5	Ultra-Low Temperature Freezer	Interim approval
SWWP005	4	Variable Frequency Drive on Irrigation Pump	Interim approval
SWPR001	3	Ventilation Fan, Agricultural	Interim approval
SWPR008	2	VFD on Rod Beam Pump	Interim approval
SWHC006	4	Demand Control Ventilation for Single Zone HVAC	Interim approval
SWCR019	4	Low-Temperature Coffin To Reach-In Display Case Conversion	Interim approval
SWHC018	5	VSD for HVAC Fan Controls, Commercial	Interim approval
SWHC023	5	VFDs for Unitary HVAC Systems, Commercial	Interim approval
SWCR007	5	Floating Temperature Controls, Multiplex	Interim approval
SWCR015	4	Medium-Temperature Case Doors	Interim approval
SWCR021	4	Medium or Low-Temperature Display Case With Doors	Interim approval
SWWB004	3	Home Energy Reports	Interim approval

Process Adder		EAR Metrics				
	Weight	1	2	3	4	5
PG&E collaborated with the CPUC and led the v4.0 Statewide Rulebook update and monthly newsletter.	1	No	No	No	Yes	No
PG&E collaborated with CPUC and IOUs to lead and complete the ISP study on their agricultural VFD water pump measure packages	1	No	No	No	No	Yes

Attachment D: 2024 Performance Annual Ratings

Custom Scoring

2024 Annual Custom Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	
Direct Work Product Review Score	Disposition Score (1-5)	5.00	3.91	4.50	4.29	3.38	
Review Process Score Enhancements	Technical & Policy QC Increase	0.00	0.00	0.00	0.00	0.50	
	Implementation Increase	0.00	0.00	0.00	0.00	0.00	
Total Score	Adjusted Final Metric Score (1-5)	5.00	3.91	4.50	4.29	3.88	Total Points
	Adjusted Metric Points	5.00	11.73	4.50	10.73	9.70	41.66

2023 Annual Custom Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	
Direct Work Product Review Score	Disposition Score (1-5)	4.85	3.76	4.50	4.05	3.20	
Review Process Score Enhancements	Technical & Policy QC Increase	0.00	0.00	1.00	0.00	0.00	
	Implementation Increase	0.00	0.50	0.00	0.00	0.00	
Total Score	Adjusted Final Metric Score (1-5)	4.85	4.26	5.00	4.05	3.20	Total Points
	Adjusted Metric Points	4.85	12.78	5.00	10.13	8.00	40.76

Measure Package Scoring

2024 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5
Direct Work Product Review Score	PG&E "-"	0%	0%	0%	5%	0%
	PG&E "+"	0%	0%	0%	0%	0%
	PG&E "Yes"	100%	100%	100%	95%	100%
	Dispositions Score %	50%	50%	50%	48%	50%
	Dispositions Score	2.50	2.50	2.50	2.39	2.50
Review Process Score Enhancements	PG&E "-"				0%	0%
	PG&E "+"				0%	0%
	PG&E "Yes"				100%	100%
	Process Score %	0%	0%	0%	50%	50%
	Process Increase Score	0.00	0.00	0.00	2.50	2.50
	Process Increase Weight	0.50	0.50	0.50	0.50	0.50
	Process Increase Wtd Score	0.00	0.00	0.00	1.25	1.25
Total Score	Final Metric Score (1-5)	2.50	2.50	2.50	3.64	3.75
	Metric Points with Weighting	2.50	7.50	2.50	9.09	9.38
Total Points						30.97

2023 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5
Direct Work Product Review Score	PG&E "-"	0%	0%	0%	0%	0%
	PG&E "+"	44%	6%	11%	11%	11%
	PG&E "Yes"	56%	94%	89%	89%	89%
	Dispositions Score %	72%	53%	56%	56%	56%
	Dispositions Score	3.59	2.64	2.78	2.78	2.78
Review Process Score Enhancements	PG&E "-"		0%	0%		
	PG&E "+"		100%	100%		
	PG&E "Yes"		0%	0%		
	Process Score %	0%	100%	100%	0%	0%

2023 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	Total Points
	Process Increase Score	0.00	5.00	5.00	0.00	0.00	
	Process Increase Weight	0.50	0.50	0.50	0.50	0.50	
	Process Increase Wtd Score	0.00	2.50	2.50	0.00	0.00	
Total Score	Final Metric Score (1-5)	3.59	5.00	5.00	2.78	2.78	
	Metric Points with Weighting	3.59	15.00	5.00	6.94	6.94	37.47

Explanations of scoring tables row entries

- The row labeled with PA “-“ lists the percent of Measure Package reviews undertaken where the CPUC staff evaluation of the materials or information indicated that the PA performance in this metric for the submission did not meet minimum expectations or requirements relative to the metric.
- The row labeled with PA “+“ lists the percent of Measure Package reviews undertaken where the CPUC staff evaluation of the materials or information indicated that the PA performance in this metric for the submission exceeded minimum expectations or requirements relative to the metric.
- The rows labeled with PA “Yes“ lists the percent of Measure Package reviews undertaken where the CPUC staff evaluation of the materials or information indicated that the PA performance in this metric for the submission exceeded met minimum expectations or requirements relative to the metric.
- The “Dispositions Score %” row (and “Process Increase Score” for Measure Packages) indicates how the combination of the three rows of scores (+, -, and yes) sum into a total points multiplier for each metric. Each row contributes to the total based on the row count over the total count for all three rows.
- The “Disposition Score” (and “Process Increase Score” for Measure Packages) row converts the percent score into a numeric value of up to five by directly applying the percent to a value of 5.
- The custom row labeled with “Technical & Policy QC Increase” lists CPUC staff points added to the metric based on an evaluation of the overall PA performance in putting into place quality assurance and/or quality control methods, documents and/or training for staff and contractors related to this metric area that are expected to improve the ability of review personnel to identify and cure issues going forward on projects started during 2016 but not yet seen in the custom review activity.
- The custom row labeled with “Implementation Increase” lists CPUC staff points added to the metric based on an evaluation of the overall PA performance in putting into place new or changed program rules, eligibility criteria, incentive structures, application and implementation contract processes and procedures in 2016 related to this metric area that are expected to improve performance going forward on projects started but not yet seen in the custom review activity.
- The Measure Package rows labeled with “Review Process Score Enhancements” lists CPUC staff scoring for each metric based on an evaluation of the overall PA performance in putting into place quality assurance and/or quality control methods, documents and/or training for staff and contractors that are expected to improve the ability of review personnel to identify and cure issues going forward on Measure Packages. This score is weighted as an increase to the disposition score based on the fractional weight listed in the “Process Increase Weight” row.
- The “Final Metric Score” row indicates the total score for each metric as a sum of the Direct Work product Review Score plus the Review Process Score Enhancements (either as a simple sum for custom or a weighted value sum for Measure Packages) to provide a final metric score with the final score constrained between a maximum score of 5 and a minimum score of 1.

- The “Metric Points” row provides the point value derived from the Final Metric Score row. If the maximum point value associated with a metric is greater than 5 then the score is multiplied by the max point value divided by 5 to obtain the metric point value related to the final score.