

PUBLIC UTILITIES COMMISSION

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To: Southern California Edison Company (SCE)

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Cc: R.25-04-010 Service Lists

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

Table of Contents

I. Summary of 2024 EAR Scores - Custom Projects and Measure Packages 2

II. CPUC Staff Findings 2024 Activities 3

 A. Custom Projects Review Overview 3

 B. Measure Packages Review Overview 4

III. Discussion 5

 A. Custom Projects Performance Review 5

 B. Measure Packages Performance Review 9

IV. The Scoring Methodology 11

 A. Measure Package Metric 1-5 Scoring Methodology 12

 B. Custom Metric 1 Scoring Methodology 12

 C. Custom Metric 2 Scoring Methodology 13

 D. Custom Metric 3, 4, and 5 Scoring Methodology 13

 E. Score Enhancement Methodology 13

Attachment A: Final EAR Performance Scores (without Enhancement Points) 16

Attachment B Custom Project Scores and Feedback 18

Attachment C: Measure Package Scores and Feedback 21

Attachment D: 2024 Performance Annual Ratings 34

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.¹ 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 SCE’s 2024 EAR performance score of 72.67/100 for measure packages² and custom projects is shown below in Table 1. SCE’s 2024 total points is a 11.60 point decrease from its 2023 total points of 84.27. Scores for 2023 are provided in Table 2 on the following page.

Table 1: SCE 2024 EAR Scoring for Measure Packages and Custom Projects³

SCE 2024 EAR Review 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	2.09	10%	2.09	5	5.00	10%	5.00	5
2	Content, Completeness, and Quality of Submittals	2.79	30%	8.36	15	3.96	30%	11.89	15
3	Proactive Initiative of Collaboration	2.83	10%	2.83	5	4.80	10%	4.80	5
4	Due Diligence and QA/QC Effectiveness	2.70	25%	6.76	12.5	4.83	25%	12.08	12.5
5	Responsiveness to Needs for Process/Program Improvements	3.91	25%	9.78	12.5	3.63	25%	9.08	12.5
Total				29.82	50			42.85	50

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

² 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.

³ 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: SCE 2023 EAR Scoring for Measure Packages and Custom Projects

SCE 2023 EAR Review 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	2.34	10%	2.34	5	5.00	10%	5.00	5
2	Content, Completeness, and Quality of Submittals	3.90	30%	11.69	15	4.75	30%	14.24	15
3	Proactive Initiative of Collaboration	2.79	10%	2.79	5	4.90	10%	4.90	5
4	Due Diligence and QA/QC Effectiveness	5.00	25%	12.50	12.5	5.00	25%	12.50	12.5
5	Responsiveness to Needs for Process/Program Improvements	4.19	25%	10.48	12.5	3.13	25%	7.83	12.5
Total				39.80	50			44.47	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 9 scored dispositions for SCE.⁴

A review of the project dispositions and the Review Process Score Enhancements points⁵ resulted in SCE's custom project score decreasing by 1.62 points from 2023 scores (44.47 in 2023 vs. 42.85 in 2024 as shown in Tables 1 and 2 above). While certain aspects of SCE's custom performance have improved, there are other areas with noted improvements to be made.

1. Summary of 2024 Achievements

CPUC staff observed SCE to have improved in:

- **SCE continues to submit documentation in a timely manner.** Projects were submitted ahead of the due date, with projects submitted early by ten or more days indicating SCE's processes for reducing the time for custom projects to be submitted with appropriate documentation is continuing to improve.
- **SCE continues to actively participate and take a lead role in Statewide Initiatives.** SCE was instrumental in helping lead the Statewide Coordination team, including managing the collaboration space for materials and dedicating staff resources to subgroup efforts.

⁴ 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.

⁵ Section IV.E provides details on the score enhancement methodology.

- **SCE has focused on reducing the number of issues regarding Program Influence.** In 2023, there were 5 issues regarding program influence which comprised 15% percent of all noted issues. This was improved in 2024 with no issues related to program influence.

2. Summary of Areas Requiring Improvement

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

- **The number of issues related to Gross Savings estimates has increased.** In 2023 there were 7 issues identified across 17 dispositions which comprised 54 percent of all issues identified. In 2024, this increased to 15 issues which comprised 68% of all issues identified. A majority of these were related to calculation methods.
- **The number of issues related to Process, Policy, and Program areas increased.** In 2024 there were 4 issues identified across 2 dispositions which comprised 18 percent of all issues identified which is an increase from 15 percent in 2023. The deficiencies noted were related to Effective Useful Life (EUL)/Remaining Useful Life errors, baseline, incentive calculation comments, and measure costs concerns. Deficiencies noted include omitting the EUL from the project package, incorrect incentive calculations, and omitting invoice documentation in the project files.
- **The number of issues related to Documentation issues increased.** In 2024 there were 3 issues across 2 dispositions related to documentation, which comprised 14 percent of all issues identified. This is an increase from 0% in 2023. The deficiencies noted were missing required information, clarity of project scope, and document upload. Deficiencies noted include missing project files documentation such as incentive calculations, cost estimates, payback analysis, EUL estimates, installed equipment details, and scope.

B. Measure Packages Review Overview

SCE's measure packages score decreased compared to the previous year by close to 10 points (from 39.80 in 2023 to 29.83 in 2024) as shown in Tables 1 and 2 above).

1. Summary of 2023 Achievements

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

- **SCE has met expectations on content, completeness, and quality of measure packages.** SCE did not have any measure package that fell below the minimum expectations.
- **SCE continued to actively engage and collaborate.** SCE proactively engaged on eight measure packages.

2. Summary of Areas Requiring Improvement

CPUC staff highlights the following recommendations for improvement:

- **There is room for improvement in the measure package timeliness.** SCE submitted 15 measure packages late.
- **SCE met minimum expectations but rarely exceeded expectations.**

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, 9 SCE 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 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 SCE for each metric both with and without the addition of any Enhancement Points.

Table 3: SCE 2024 Custom Disposition Points Awarded by Metric

Metric	Metric Area of Scoring		Weight Factor		Max Points
			With Enhance Pts ⁶	w/o Enhance Pts	
1	Timeliness of Submittals	10%	5.00	5.00	5
2	Content, Completeness, and Quality of Submittals	30%	11.89	11.89	15
3	Proactive Initiative of Collaboration	10%	4.80	4.30	5
4	PA’s Due Diligence and QA/QC	25%	12.08	10.83	12.5
5	PA’s Responsiveness	25%	9.08	9.08	12.5
Total			42.85	41.10	50

⁶ Section IV.E provides details on the score enhancement methodology.

1. Timeliness of Submittals

In 2024, SCE received a custom disposition score of 5.0 out of 5.0 for Metric 1 (Timeliness of Submittals). This disposition score was based on the 9 custom project reviews completed in 2024. In 2024, SCE submitted project documentation for review for all projects ten days or earlier than required per timeline mandated in Senate Bill (SB) 1131 and Section 381.2 of the Public Utilities Code.⁷ SCE continues to exceed expectations with regards to timeliness by submitting projects on time and ahead of the required due date.

2. Content, Completeness, and Quality of Submissions

In 2024, SCE received a custom disposition score of 11.89 out of 15.0 for Metric 2 (Content, Completeness, and Quality of Submissions). This disposition score was based on the completeness of the 9 SCE custom project reviews. Of the 9 projects with dispositions, 8 were SEM projects with Advisory only dispositions and 1 project was approved with exception⁸. The 1 project approved with exceptions and 1 Strategic Energy Management (SEM) project were the main contributors to the score with several disposition actions and lower scores on methodology and calculation methods.

Table 4 summarizes the 22 action items identified across 9 scored dispositions⁹ issued in 2024. These action items illustrate errors that impacted the project's net savings, documentation, and efficiency savings estimate calculations.

⁷ “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”.

⁸ 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.

⁹ This table includes action items issued on 9 Advisory dispositions.

Table 4: Summary of Categorized Action Items for Custom Projects

Issue Area	Action Categories	Summary of CPUC Staff Required Action ¹⁰ by the PA:	Summary of CPUC Staff Notes or Instructions ¹¹ :	Percent of Total Actions
Issues Related to Gross Savings Impacts	Analysis assumptions	2	0	9%
	Calculation method	11	10	50%
	Calculation tool	2	0	9%
	Subtotals	15	10	68%
Process, Policy, Program Rules	Baseline	1	0	5%
	EUL/RUL	1	0	5%
	Incentive Calculation	1	1	5%
	Measure Cost	1	0	5%
	Self generation	0	0	0%
	Subtotals	4	1	18%
Documentation Issues	Continue Document Upload	0	9	0%
	Missing required information	1	0	5%
	Missing documents	1	3	5%
	Project scope unclear	1	0	5%
	Subtotals	3	9	14%
Issues Related to Net Impacts	Program influence	0	1	0%
	Subtotals	0	1	0%
Other Issues	Other 1 - Project delays	0	1	0%
	Other 2 - Unclear BMU savings data	0	1	0%
	Subtotals	0	2	0%
Grand Total		22	23	100%

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

- **CPR 910** had 6 (27 percent) out of 22 deficiencies identified across all 9 projects receiving dispositions which resulted in a reduction in points for this metric. The deficiencies were

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

¹¹ 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.

related to project scope, calculations, EUL/RUL values, measure cost, and project documentation.

- **CPR 775** had 7 (32 percent) out of 22 deficiencies identified across all 9 projects receiving dispositions which resulted in a reduction in points for this metric. The deficiencies were related to calculation method, analysis assumptions and baseline.
- **Issues related to Gross Savings Impacts** were found in 6 out of the 9 projects receiving dispositions which resulted in a reduction in points for this metric. Sampled projects containing this deficiency were CPUC Project IDs 910, 775, 880, 881, 882 and 883. This specific issue area contributed to 68% of disposition actions in 2024.

3. Proactive Initiative of Collaboration

In 2024, SCE received a custom disposition score of 4.30 out of 5.0 for Metric 3 (Proactive Initiative of Collaboration) prior to the addition of any enhancement points. This category earned enhancement points. Please see Section IV below for a more detailed description. At the portfolio level, SCE continues to make a significant effort to bring measures, projects, and studies forward for discussion prior to CPUC staff review and active with early opinion requests on bi-weekly calls. The Early Opinion demonstrated a proactive approach to clarifying CPUC policy around SEM projects and their top-down modeling which fed into statewide guidance.

SCE continues to demonstrate leadership abilities by leading the Statewide Monthly Coordination meetings and, particularly, helping to resolve problems that have the potential to impact all PAs, such as SEM programs, Modified Lighting Calculator (MLC) updates, and lighting standard practice baselines. SCE continues to dedicate resources to prioritizing statewide initiatives, actively participating in monthly meetings, and sharing new initiatives. These actions demonstrate performance that exceeds CPUC staff's expectations compared to what is expected to demonstrate minimum proactive collaboration.

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

In 2024, SCE received a custom disposition score of 10.83 out of 12.5 for Metric 4 (PA's Due Diligence, Quality Assurance, and Quality Control) prior to the addition of any enhancement points. This category earned enhancement points. Please see Section IV below for a more detailed description. Project and measure level disposition performance results reviewed under Metric 2 were used as a proxy for the level of QA/QC occurring by the PA. Of the 9 projects reviewed in 2024, 8 were SEM projects with Advisory only dispositions, and 1 project was approved with exceptions as noted. Zero projects were rejected. CPUC staff found that SCE continued to have strong QC processes for its third-party project reviewers. However, the one project approved with exceptions as noted and one SEM project had significant materials and conditions deficiencies with several action items noted in the disposition, indicating that the QC processes are still in need of improvement.

CPUC staff acknowledges the efforts by SCE to continually collaborate on and update the MLC, especially with added stakeholders like the deemed programs for upcoming use.

5. PA's Responsiveness

In 2024, SCE received a custom disposition score of 9.08 out of 12.5 for Metric 5 (PA's Responsiveness) prior to the addition of any enhancement points. When reviewed at the portfolio

level, CPUC staff assessed the time series of rejections and expectations, the alignment of program policy and procedures with the number of actual rejections and exceptions based on eligibility and attribution, and adaptation to changes in rules over time. SCE had more disposition actions in 2024, but did not have any rejections and exceed expectations in the program improvements area by reinstating SEM ride along activities to collect findings and working on the SEM program eligibility memo to aid third-party programs.

B. Measure Packages Performance Review

SCE submitted 85 measure packages in 2024 which 61 were reviewed and disposed, and the remaining 24 went into detailed review into 2025. This end of year memo provides measure package specific feedback on the 61 which were reviewed and disposed.

The comments below are organized by the five scoring metric areas created in D.16-08-019.¹² 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 SCE or SCE measure packages that were disposed during the review period. Measure packages were selected for feedback from those that were submitted by SCE 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 SCE for each metric both with and without the addition of any enhancement points.

Table 5: SCE Measure Package Disposition Points Awarded by Metric

Metric	Metric Area of Scoring	Measure Package Disposition Points
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¹² See [D.16-08-019](#) at 87.

		Weight Factor	With Enhance Pts ¹³	w/o Enhance Pts	Max Points
1	Timeliness of Submittals	10%	2.09	2.09	5.00
2	Content, Completeness, and Quality of Submittals	30%	8.36	8.36	15.00
3	Proactive Initiative of Collaboration	10%	2.83	2.83	5.00
4	PA's Due Diligence and QA/QC	25%	6.76	6.76	12.50
5	PA's Responsiveness	25%	9.78	6.66	12.50
			29.83	26.70	50.00

1. Timeliness of Submittals

In 2024, SCE received a measure package disposition score of 2.09 out of 5.00 for Metric 1. SCE had issues with 15 measure packages missing deadlines for submission of statewide measure packages in the review period. Five measure packages exceeded expectations for timeliness and the remainder met expectations.

2. Content, Completeness, and Quality of Submissions

In 2024, SCE received a measure package disposition score of 8.36 out of 15.00 for Metric 2. SCE has improved on the quality and completeness of measure package submittals in 2024 with most measure packages only consisting of a few minor clarifying comments and less typos. One measure package did not meet expectations while eight exceeded expectations. The Fan Controller for Air Conditioner measure package was approved without comment. There were no measure packages that were submitted under the minimum quality content standards.

3. Proactive Initiative of Collaboration

In 2024, SCE received a measure package disposition score of 2.83 out of 5.00 for Metric 3. Most of the submittals received a yes and met minimum expectations. SCE has proactively engaged with CPUC on eight measure packages exceeding minimum expectations.

4. PA's Due Diligence, Quality Assurance, and Quality Control

In 2024, SCE received a measure package disposition score of 6.76 out of 12.5 for Metric 4. Eight of the measure packages received a '+' indicating they exceeded the minimum expectation. Measure packages were updated with minimal errors. One measure package did not meet expectations.

5. PA's Responsiveness

In 2024, SCE received a measure package disposition score of 6.66 out of 12.5 for Metric 5 prior to the addition of any enhancement points. Four measure packages exceeded expectations. All other measure packages met minimum expectations. CPUC staff and consultants have regularly and productively engaged with SCE and continue to rely on them to provide answers for the electric measure packages.

¹³ Section IV.E provides details on the score enhancement methodology.

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 2023. D.16-08-019 also directed that the custom and measure package scores be weighted together into a final score based on the IOU 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.¹⁴ 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 because 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

¹⁴ 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”).

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 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 “-” score.
- 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 five 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 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. Like 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 2024 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 decided that SCE’s efforts did rise to the level to be awarded “Enhancement” points in two of the metrics.

- Metric 1 Timeliness: No adder points for Metric 1.
- Metric 2 Content: No adder points for Metric 2.
- Metric 3 Collaboration: Facilitation of statewide Sharepoint and monthly meeting.
- Metric 4 Due Diligence: Continued technical and collaborative discussions on needs for the MLC lighting standard practice baseline update.
- Metric 5 Process: No adder points for Metric 5.

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, and are summarized here by metric as:

- Metric 1 Timeliness: No adder points for Metric 1.
- Metric 2 Content: No adder points for Metric 2.
- Metric 3 Collaboration: No adder points for Metric 3.
- Metric 4 Due Diligence: No adder points for Metric 4.
- Metric 5 Process: SCE has contributed significantly to the development of statewide measure package sunseting process with the California Technical Forum and IOUs.

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 SCE.¹⁵

[Attachment D](#) contains custom and measure package summary tables showing the components and

¹⁵ 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.”

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) or Peter Biermayer (peter.biermayer@cpuc.ca.gov). Note that pursuant to D.13-09-023, CPUC staff will schedule a meeting with SCE staff to discuss this memorandum and its final scores by **October 30, 2025**.

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	5	10%	2.09	2.09	5	10%	5.00	5.00
Timing and Timeliness of Submittals 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	15	30%	2.79	8.36	15	30%	3.96	11.89
Content, Completeness, and Quality of Submittals 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	5	10%	2.83	2.83	5	10%	4.30	4.30
Proactive Initiative of Collaboration 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	12.5	25%	2.70	6.76	12.5	25%	4.33	10.83
Program Administrator's Due Diligence and Quality Assurance/Quality Control Effectiveness								

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
<p>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.</p>								
<p>5 Program Administrator’s Responsiveness to Needs for Process and Program Improvements</p>	12.5	25%	2.66	6.66	12.5	25%	3.63	9.08
<p>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.</p>								
Total	50	100%		26.70	50	100%		41.10

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 4 2016 Adopted Performance Metrics

Metric	2016 CPUC Adopted ex ante Metrics	Maximum Points	% of Total Points	Total Scored Points	# of Scored Dispositions for SCE	Scoring Notes (Portfolio Level ¹⁶)
Metric 1	Timeliness and Timing of Submittals Timely submittal of all documentation and follow-up utility responses to review disposition action items.	5	10%	5.00	9	SCE complied with SB1131 guidelines for submitting documentation before the 15 business days required. No projects were found to be late, and projects were submitted early by 10 or more days, indicating that SCE is consistently exceeding expectations with regards to timeliness.
Metric 2	Content, Completeness, and Quality of Submittals 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%	11.89	9	In 2024, of the 9 projects with dispositions, 8 were SEM projects with Advisory Only dispositions and 1 project approved with exceptions. Though the 1 project approved with exceptions was the main contributor to the score with several disposition actions and lower scores on methodology and calculation methods, CPUC staff found that all 9 projects illustrated deficiencies that impacted the net savings, documentation, and efficiency savings estimate calculations.
Metric 3	Proactive Initiation of Collaboration 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%	4.30	9	CPUC staff found that SCE made significant efforts to bring measures, projects, or studies forward for discussion prior to review. In addition, they took an active and engaged lead in statewide collaboration efforts. Staff found SCE to be active during bi-weekly calls and took a leadership role in resolving problems that affected all PAs such as SEM programs, MLC updates, and lighting standard practice. SCE was active with Early Opinions and collaborated with CPUC and other stakeholders on SEM top-down models.
Metric 4	Utility Due Diligence and QA/QC Effectiveness 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%	10.83	9	Project and measure level disposition performance results reviewed under Metric 2 were used as a proxy for the level of QA/QC occurring by the PA. Of the 9 projects reviewed in 2024, 8 were SEM projects with Advisory only dispositions, and 1 project was approved with exceptions as noted. Zero projects were rejected. CPUC staff found that SCE continued to have strong QC processes for 3rd party reviewers. However, the one project approved with exceptions as noted had significant materials and conditions deficiencies with several

¹⁶ 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	% of Total Points	Total Scored Points	# of Scored Dispositions for SCE	Scoring Notes (Portfolio Level ¹⁶)
						action items noted in the disposition, indicating that the QC processes are still in need of improvement.
Metric 5	<p>Utility Responsiveness to Needs for Process & Program Improvements (Course Corrections) 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.</p>	12.5	25%	9.08	9	SCE Projects reviewed in 2024 exhibited a slight downward trend in terms of project performance over time. SCE had increased issues related to gross savings impacts, policy and program rules, and documentation issues. These areas should garner more internal QC and program collaboration in the future to avoid increased actions in dispositions. In 2024, the rate of actions per disposition increased from 0.88 actions per disposition in 2023 to 2.4 actions per disposition in 2024. SCE did not have any rejections in 2024 and exceed expectations in the development of the Modified Lighting Calculator update.

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 IOU 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
SWHC044	4	Ductless HVAC, Residential, Fuel Substitution	DEER2024 measure package update to aggregate building HVAC permutation values, removed upstream delivery type, and update data collection requirements. Measure package approved after one minor comment on Refrigerant Avoided Cost Calculator reference.	1	-	+	yes	yes	yes
SWHC046	3	Packaged Heat Pump Air Conditioner, Commercial, Fuel Substitution	DEER2024 measure package update to update building vintage values in permutations, update data collection requirements, and update Refrigerant Avoided Cost Calculator section. Measure package approved after clarifying comments to reference the most recent version of the Refrigerant Avoided Cost Calculator and to cite E-5221 when documenting building vintage changes.	1	-	yes	yes	yes	yes
SWCR002	4	Low-Temperature Display Case Doors with No Anti-Sweat Heaters	DEER2024 measure package update to update building vintage values in permutations, update data collection requirements, and update eligible products section. Measure package approved after clarifying comment on building vintage eligibility, minor grammatical comments on acronym usage, and clarifying comment on code requirement effectiveness.	1	yes	yes	yes	yes	yes
SWCR022	4	Efficient Adiabatic Condenser	DEER2024 measure package update to update building vintage values in permutations, remove upstream delivery, and updated TechType and TechGroup in permutations. Measure package approved after one clarifying comment on building vintage eligibility.	1	-	+	yes	yes	yes

Measure Package Reviews – Scored Measure Packages					EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWWH025	7	Heat Pump Water Heater, Residential, Fuel Substitution	DEER2024 measure package update to update data collection requirements, preponderance of evidence guidance documentation, add Title 24 code, eligibility requirements, and Refrigerant Avoided Cost Calculator update to version 2.2. Measure package approved after clarifying comments on measure application type eligibility, referencing the final version of the preponderance of evidence guidance document, and updating references to current version of the Refrigerant Avoided Cost Calculator.	1	-	yes	yes	-	yes
SWHC030	4	Whole House Fan, Residential	DEER2024 measure package update to update data collection requirements and minor characterization updates. Measure package approved without comment.	1	yes	+	yes	+	yes
SWCR010	4	Bare Suction Line Insulation	DEER2024 measure package update to update data collection requirements, building vintage values in permutations, and effective useful life updates per E-5221. Measure package approved after one minor typo in the data collection requirements section and eligibility section.	1	yes	yes	yes	yes	yes
SWHC041	5	Software-Controlled Switch Reluctance Motor	DEER2024 measure package update to update data collection requirements and add clarifications for measure eligibility. Measure package approved after building vintage eligibility clarifying comment.	1	-	yes	yes	+	yes
SWWH014	5	Heat Pump Water Heater, Residential	DEER2024 measure package update to update data collection requirements, update building vintage, add Title 24 code requirements, add measure application type eligibility requirements, and updated Refrigerant Avoided Cost Calculator to version 2.2. Measure package approved after clarifying comments on updating Refrigerant Avoided Cost Calculator references to the most recent version, removal of survey language, and clarifying comments on eligibility criteria. SCE worked collaboratively with Ex Ante Review Team to review and include NC permutations.	1	yes	yes	+	yes	+
SWCR014	4	Medium or Low-Temperature Display Case	DEER2024 measure package update to update building HVAC parameter and update data collection requirements. Measure package approved without comment.	1	-	+	yes	+	yes
SWCR008	4	Floating Suction Controls, Multiplex	DEER2024 measure package update to add Tech IDs, update data collection requirements, and remove 'Com' building type. Measure package approved without comment.	1	-	+	yes	+	yes
SWCR003	3	Fan Motor Retrofit for a Refrigerated Display Case	DEER2024 measure package update to remove 'Any' building vintage, add Tech IDs, and update data collection requirements. Measure package approved after one minor typo and one minor reference update.	1	-	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages				EAR Metrics					
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWFS012	3	Exhaust Hood Demand Controlled Ventilation, Commercial	DEER 2024 measure package update to include new permutation fields and update data collection requirements. Measure package approved without comment.	1	-	+	yes	+	yes
SWHC039	7	Smart Thermostat, Residential	DEER2024 measure package update to remove 'Any' building vintage, update data collection requirements, and updated HVAC system requirements. Measure package approved after clarifying comment on eligible building vintages and clarifying comment on heat pump code application.	1	-	yes	+	yes	yes
SWWH031	3	Heat Pump Water Heater, Commercial	DEER2024 measure package update to update data collection requirements, update building vintage to 'Ex' for NR, update tech IDs, updated Refrigerant Avoided Cost Calculator to v2.2, and removing 'Com' building type from downstream delivery types. Measure package approved after comment to reference current version of the Refrigerant Avoided Cost Calculator, comment to update data collection requirements section footnote, minor grammar correction, and clarifying comments on the building vintage eligibility.	1	yes	yes	yes	yes	yes
SWHC038	4	Brushless Fan Motor Replacement, Residential	DEER2024 measure package update to update data collection requirements, update technology type, and update technology group. Measure package approved after minor clarifying comment on building vintage eligibility.	1	yes	yes	yes	yes	yes
SWWH027	4	Heat Pump Water Heater, Commercial, Fuel Substitution	DEER2024 measure package update to update data collection requirements, removing 'Any' building vintage, updated Tech IDs, added eligibility clarifications, updated Refrigerant Avoided Cost Calculator to use v2.2, and removing 'Com' building type from downstream delivery types. Measure package approved after clarifying commercial versus residential code language, updating preponderance of evidence reference to use final guidance, and data collection requirement clarifications.	1	yes	yes	+	yes	yes
SWWH028	3	Large Heat Pump Water Heater, Commercial & Multifamily, Fuel Substitution	DEER2024 measure package update to update data collection requirements, removing 'Any' building vintage, updated eligibility, updating Refrigerant Avoided Cost Calculator to use v2.2, removing 'Com' building type from downstream delivery types, updating reference for preponderance of evidence, and updating eligibility requirements. Measure package approved after comments to reference the final preponderance of evidence guidance memo, minor text edits, reference v2.2 of the Refrigerant Avoided Cost Calculator, and clarifying comment on the kBtu/hr limit.	1	yes	yes	yes	-	yes

Measure Package Reviews – Scored Measure Packages				EAR Metrics					
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWCA001	4	VFD Retrofit for Air Compressor	DEER2024 measure package update to update data collection requirements and removing 'Any' building vintage. Measure package approved after clarifying applicability of NR, NC, and AOE permutations, comment to remove the eligibility survey, and clarifying comments on the newly listed data collection requirements.	1	+	yes	+	+	yes
SWFS023	3	Contact Conveyor Toaster, Commercial	DEER2024 measure package update to update NTG ID from Emerging Tech Default to sector defaults, removing 'Any' building vintage, and updated data collection requirements. Measure package approved after several typo comments, comment to fix units in calculations, removal of duplicate calculation line items, and clarifying comment on measure package eligibility and title since it is close to Radiant Conveyor Toaster measure package.	1	-	-	yes	yes	yes
SWHC024	4	Cogged V-Belt for HVAC Fan, Commercial	DEER2024 measure package update to update building vintage to use 'Ex', updated data collection requirements, and updating eligible building HVAC types. Measure package approved after comment to update building vintage eligibility reference.	1	yes	yes	yes	yes	yes
SWFS016	3	Refrigerated Chef Base	DEER2024 measure package update to remove 'Any' building vintage, updated Tech IDs, and updated data collection requirements. Measure package approved after minor clarifying comment on building vintage eligibility.	1	-	+	yes	+	yes
SWHC012	3	HVAC Occupancy Sensor, Classroom	DEER2024 measure package update to update building vintage parameter to 'Ex', updated Tech IDs, and updated data collection requirements. Measure package approved after clarifying rounding differences between calculations and permutations, correcting old references, and clarifying upstream data collection requirements.	1	-	yes	yes	yes	yes
SWHC042	4	Evaporative Pre-Cooler System and Controls for Packaged HVAC Unit	DEER2024 measure package update to remove 'Any' building vintage, updated Tech IDs, and updated data collection requirements. Measure package approved after clarifying comment on rounding differences between calculations and permutations and DEER Measure IDs in the permutations.	1	-	yes	yes	yes	yes
SWHC008	2	Variable Speed Drive for a Central Plant System	DEER2024 measure package update to add upstream delivery type, revise program requirements, updated costs, updated data collection requirements, and updated building HVAC values in permutations. Measure package approved after comment to update reference to current version of document, update the UseCategory in the permutations, and clarifying comment on the cost data source.	1	-	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages				EAR Metrics					
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWHC039	8	Smart Thermostat, Residential	Mid-cycle measure package update to add new offerings for gas furnaces with no cooling. Measure package approved after comment to track as new measure package version.	1	+	+	+	yes	yes
SWFS007	4	Insulated Hot Food Holding Cabinet	DEER2024 measure package update to remove 'Any' buliding vintage, update data collection requirements, update costs, add clarity for NC vs NR MAT, and updated technology group. Measure package approved after clarifying comment on hours per day assumption. Extra collaboration occurred to clarify the application of new construction.	1	+	yes	+	yes	+
SWFS009	3	Deck Oven, Electric, Commercial	DEER2024 measure package update to remove 'Any' buliding vintage, update data collection requirements, and add clarity for NC vs NR MAT. Measure package approved after clarifying comment building vintage eligibility, clarifying comment on new construction versus normal replacement eligibility, and removal of reference to a gas deck oven. Extra collaboration occurred to clarify the application of new construction.	1	+	yes	+	yes	+
SWFS010	3	Commercial Hand-Wrap Machine, Electric	DEER2024 measure package update to remove 'Any' buliding vintage, update data collection requirements, and add clarity for NC vs NR MAT. Measure package approved after clarifying comment building vintage eligibility and clarifying comment on new construction versus normal replacement eligibility. Extra collaboration occurred to clarify the application of new construction.	1	+	yes	+	yes	+
SWWH028	4	Large Heat Pump Water Heater, Commercial & Multifamily, Fuel Substitution	DEER2024 measure package correction to update savings for MFm DEER energy savings. Added language and addendum for rebates greater than IMC. Measure package approved after minor clarifying comments on the rebate greater than IMC addendum and DEER version for the savings records.	1	yes	yes	yes	yes	yes
SWHC045	3	Heat Pump HVAC, Residential, Fuel Substitution	NTG updates per E-5221, updated data collection requirements, RACC v2.2 updates	1	yes	yes	yes	yes	yes
SWFS021	5	Fryer, Commercial, Fuel Substitution	Adding Tech IDs, updating costs, Fuel Sub calc v3.0 update	1	yes	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages					EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWFS022	4	Convection Oven, Commercial, Fuel Substitution	Adding Tech IDs, updating costs, Fuel Sub calc v3.0 update	1	yes	yes	yes	yes	yes
SWCR010	5	Bare Suction Line Insulation	Updated costs, delivery types, and tech IDs	1	yes	yes	yes	yes	yes
SWWH031	4	Heat Pump Water Heater, Commercial	Updated costs, updated EUL, new RACC, updated code language	1	yes	yes	yes	yes	yes
SWAP011	5	Vending and Beverage Merchandise Controller	Updated code requirements, energy calculations, and cost data	1	yes	yes	yes	yes	yes
SWRE005	4	Heat Pump Pool Heater, Residential, Fuel Substitution	New heat pump pool heater offerings, updated COP based on Title 24, updated calculations, updated costs, added Tech IDs, new EUL based on EUL report	1	yes	yes	yes	yes	yes
SWFS023	4	Contact Conveyor Toaster, Commercial	Updated data collection requirements, added Tech IDs	1	yes	yes	yes	yes	yes
SWLG019	1	LED, Indoor Horticulture	New measure package	1	yes	yes	yes	yes	yes
SWFS016	4	Refrigerated Chef Base	Updated delivery types, updated costs, updated data collection requirements	1	yes	yes	yes	yes	yes
SWWH027	5	Heat Pump Water Heater, Commercial, Fuel Substitution	Updated costs, updated code, updated EUL, new RACC/FSC v3.0	1	yes	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages					EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWHC039	9	Smart Thermostat, Residential	Added delivery types, updated costs, added Tech IDs, updated code language, EM&V updates	1	yes	yes	yes	yes	yes
SWFS007	5	Insulated Hot Food Holding Cabinet	Updating costs, delivery types, and adding Tech IDs	1	yes	yes	yes	yes	yes
SWFS010	4	Commercial Hand-Wrap Machine, Electric	Updating costs, delivery types, and adding Tech IDs	1	yes	yes	yes	yes	yes
SWPR004	5	Circulating Block Heater	Updated data collection requirements, added Tech IDs, updated costs	1	yes	yes	yes	yes	yes
SWFS009	4	Deck Oven, Electric, Commercial	Updating costs, delivery types, and adding Tech IDs	1	yes	yes	yes	yes	yes
SWFS012	4	Exhaust Hood Demand Controlled Ventilation, Commercial	Updated data collection requirements, updated costs, added Tech IDs	1	yes	yes	yes	yes	yes
SWCR014	5	Medium or Low-Temperature Display Case	Updated delivery types, added Tech IDs, updated costs, updated data collection requirements	1	yes	yes	yes	yes	yes
SWLG020	3	UL Type B LED Screw-in Lamp HID Retrofits	Updated costs, added Tech IDs, updated baseline industry standard practice efficacies based on new proposed standard practice study	1	yes	yes	yes	yes	yes
SWWH028	5	Large Heat Pump Water Heater, Commercial & Multifamily, Fuel Substitution	Updated EUL, updated costs, updated RACC/FSC	1	yes	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages					EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWHC038	5	Brushless Fan Motor Replacement, Residential	Updated delivery types, code language update, eligibility and data collection requirements update	1	yes	yes	yes	yes	yes
SWAP013	4	Cooking Appliances, Residential, Fuel Substitution	New EnergyStar offerings, added Tech IDs, updated costs, updated Fuel Sub Calculator	1	yes	yes	yes	yes	yes
SWCR003	4	Fan Motor Retrofit for a Refrigerated Display Case	Updated savings to use EnergyPlus prototypes, updated costs	1	yes	yes	yes	yes	yes
SWHC044	5	Ductless HVAC, Residential, Fuel Substitution	Updated delivery types, data collection requirements, added Tech IDs, updated costs	1	yes	yes	yes	yes	yes
SWCR002	5	Low-Temperature Display Case Doors with No Anti-Sweat Heaters	Migrated savings from eQuest to EnergyPlus, updated costs and data collection requirements	1	yes	yes	yes	yes	yes
SWHC024	5	Drive Belt for HVAC Fan, Commercial	Updated savings to use EnergyPlus prototypes, added offerings for timing belts, updated costs	1	yes	yes	yes	yes	yes
SWHC012	4	HVAC Occupancy Sensor, Classroom	Updated savings to use EnergyPlus prototypes, occupancy and setpoint schedule research, updated costs	1	yes	yes	yes	yes	yes
SWCR001	5	Anti-Sweat Heater Controls	Migrated savings from eQuest to EnergyPlus, updated costs and data collection requirements	1	yes	yes	yes	yes	yes
SWCA001	5	VFD Retrofit for Air Compressor	Updated costs and minor permutation updates	1	yes	yes	yes	yes	yes

Measure Package Reviews – Scored Measure Packages					EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5
SWCR008	5	Floating Suction Controls, Multiplex	Updated savings to use EnergyPlus prototypes, updated costs	1	yes	yes	yes	yes	yes
SWHC041	6	Software-Controlled Switch Reluctance Motor	Migrated savings from eQuest to EnergyPlus, updated costs, added HP and AC only HVAC types	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	Submission Status
SWAP011	5	Vending and Beverage Merchandise Controller	Interim approval.
SWAP013	4	Cooking Appliances, Residential, Fuel Substitution	Interim approval.
SWCA001	4	VFD Retrofit for Air Compressor	Interim approval.
SWCA001	5	VFD Retrofit for Air Compressor	Interim approval.
SWCR001	5	Anti-Sweat Heater Controls	Interim approval.
SWCR002	4	Low-Temperature Display Case Doors with No Anti-Sweat Heaters	Interim approval.
SWCR002	5	Low-Temperature Display Case Doors with No Anti-Sweat Heaters	Interim approval.
SWCR003	3	Fan Motor Retrofit for a Refrigerated Display Case	Interim approval.
SWCR003	4	Fan Motor Retrofit for a Refrigerated Display Case	Interim approval.
SWCR008	4	Floating Suction Controls, Multiplex	Interim approval.
SWCR008	5	Floating Suction Controls, Multiplex	Interim approval.
SWCR010	4	Bare Suction Line Insulation	Interim approval.
SWCR010	5	Bare Suction Line Insulation	Interim approval.
SWCR014	4	Medium or Low-Temperature Display Case	Interim approval.
SWCR014	5	Medium or Low-Temperature Display Case	Interim approval.
SWCR022	4	Efficient Adiabatic Condenser	Interim approval.
SWFS007	4	Insulated Hot Food Holding Cabinet	Interim approval.
SWFS007	5	Insulated Hot Food Holding Cabinet	Interim approval.
SWFS009	3	Deck Oven, Electric, Commercial	Interim approval.
SWFS009	4	Deck Oven, Electric, Commercial	Interim approval.
SWFS010	3	Commercial Hand-Wrap Machine, Electric	Interim approval.
SWFS010	4	Commercial Hand-Wrap Machine, Electric	Interim approval.
SWFS012	3	Exhaust Hood Demand Controlled Ventilation, Commercial	Interim approval.
SWFS012	4	Exhaust Hood Demand Controlled Ventilation, Commercial	Interim approval.
SWFS016	3	Refrigerated Chef Base	Interim approval.
SWFS016	4	Refrigerated Chef Base	Interim approval.

Measure Package and Measure Package Plan Submission Status – All Measure Packages and Plans submitted in 2024

MP ID	Rev	Title	Submission Status
SWFS021	5	Fryer, Commercial, Fuel Substitution	Interim approval.
SWFS022	4	Convection Oven, Commercial, Fuel Substitution	Interim approval.
SWFS023	3	Contact Conveyor Toaster, Commercial	Interim approval.
SWFS023	4	Contact Conveyor Toaster, Commercial	Interim approval.
SWHC008	2	Variable Speed Drive for a Central Plant System	Interim approval.
SWHC012	3	HVAC Occupancy Sensor, Classroom	Interim approval.
SWHC012	4	HVAC Occupancy Sensor, Classroom	Interim approval.
SWHC024	4	Cogged V-Belt for HVAC Fan, Commercial	Interim approval.
SWHC024	5	Drive Belt for HVAC Fan, Commercial	Interim approval.
SWHC030	4	Whole House Fan, Residential	Interim approval.
SWHC038	4	Brushless Fan Motor Replacement, Residential	Interim approval.
SWHC038	5	Brushless Fan Motor Replacement, Residential	Interim approval.
SWHC039	7	Smart Thermostat, Residential	Interim approval.
SWHC039	8	Smart Thermostat, Residential	Interim approval.
SWHC039	9	Smart Thermostat, Residential	Interim approval.
SWHC041	5	Software-Controlled Switch Reluctance Motor	Interim approval.
SWHC041	6	Software-Controlled Switch Reluctance Motor	Interim approval.
SWHC042	4	Evaporative Pre-Cooler System and Controls for Packaged HVAC Unit	Interim approval.
SWHC044	4	Ductless HVAC, Residential, Fuel Substitution	Interim approval.
SWHC044	5	Ductless HVAC, Residential, Fuel Substitution	Interim approval.
SWHC046	3	Packaged Heat Pump Air Conditioner, Commercial, Fuel Substitution	Interim approval.
SWLG020	3	UL Type B LED Screw-in Lamp HID Retrofits	Interim approval.
SWPR004	5	Circulating Block Heater	Interim approval.
SWRE005	4	Heat Pump Pool Heater, Residential, Fuel Substitution	Interim approval.
SWWH014	5	Heat Pump Water Heater, Residential	Interim approval.
SWWH025	7	Heat Pump Water Heater, Residential, Fuel Substitution	Interim approval.
SWWH027	4	Heat Pump Water Heater, Commercial, Fuel Substitution	Interim approval.
SWWH027	5	Heat Pump Water Heater, Commercial, Fuel Substitution	Interim approval.

Measure Package and Measure Package Plan Submission Status – All Measure Packages and Plans submitted in 2024

MP ID	Rev	Title	Submission Status
SWWH028	3	Large Heat Pump Water Heater, Commercial & Multifamily, Fuel Substitution	Interim approval.
SWWH028	4	Large Heat Pump Water Heater, Commercial & Multifamily, Fuel Substitution	Interim approval.
SWWH028	5	Large Heat Pump Water Heater, Commercial & Multifamily, Fuel Substitution	Interim approval.
SWWH031	3	Heat Pump Water Heater, Commercial	Interim approval.
SWWH031	4	Heat Pump Water Heater, Commercial	Interim approval.
SWBE011	1	High Efficiency Window, Residential	Detailed review in progress.
SWHC008	3	Variable Speed Drive for a Central Plant System	Detailed review in progress.
SWHC045	4	Heat Pump HVAC, Residential, Fuel Substitution	Detailed review in progress.
SWHC046	4	Packaged Heat Pump Air Conditioner, Commercial, Fuel Substitution	Detailed review in progress.
SWLG031	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - Exterior Lighting	Detailed review in progress.
SWLG041	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - Parking Garage	Detailed review in progress.
SWLG051	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - High/Low Bay	Detailed review in progress.
SWLG061	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - TLEDS	Detailed review in progress.
SWLG071	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - Interior Retrofits	Detailed review in progress.
SWLG081	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - Interior Ambient	Detailed review in progress.
SWLG091	1	LED, Fixture and Retrofit Replacement, Statewide Lighting Offering - ENERGY STAR	Detailed review in progress.
SWWH014	6	Heat Pump Water Heater, Residential	Detailed review in progress.
SWWH025	8	Heat Pump Water Heater, Residential, Fuel Substitution	Detailed review in progress.

Process Adder	EAR Metrics					
	Weight	1	2	3	4	5
SCE has contributed significantly to the development of statewide measure package sunseting process with the California Technical Forum and IOUs.	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	3.96	4.30	4.33	3.63	
Review Process Score Enhancements	Technical & Policy QC Increase	0.00	0.00	0.00	0.50	0.00	
	Implementation Increase	0.00	0.00	0.50	0.00	0.00	
Total Score	Adjusted Final Metric Score (1-5)	5.00	3.96	4.80	4.83	3.63	Total Points
	Adjusted Metric Points	5.00	11.89	4.80	12.08	9.08	42.85

2023 Annual Custom Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	
Direct Work Product Review Score	Disposition Score (1-5)	5.00	4.75	4.40	4.82	3.13	
Review Process Score Enhancements	Technical & Policy QC Increase	0.00	0.00	0.00	0.50	0.00	
	Implementation Increase	0.00	0.00	0.50	0.00	0.00	
Total Score	Adjusted Final Metric Score (1-5)	5.00	4.75	4.90	5.00	3.13	Total Points
	Adjusted Metric Points	5.00	14.24	4.90	12.50	7.83	44.47

Measure Package Scoring

2024 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	
Direct Work product Review Score	SCE "-"	25%	2%	0%	3%	0%	
	SCE "+"	8%	13%	13%	11%	7%	
	SCE "Yes"	67%	85%	87%	85%	93%	
	Dispositions Score %	42%	56%	57%	54%	53%	
	Dispositions Score	2.09	2.79	2.83	2.70	2.66	
Review Process Score Enhancements	SCE "-"					0%	
	SCE "+"					0%	
	SCE "Yes"					100%	
	Process Score %	0%	0%	0%	0%	50%	
	Process Increase Score	0.00	0.00	0.00	0.00	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	0.00	1.25	
Total Score	Final Metric Score (1-5)	2.09	2.79	2.83	2.70	3.91	Total Points
	Metric Points with Weighting	2.09	8.36	2.83	6.76	9.78	29.83

2023 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5
Direct Work product Review Score	SCE "-"	13%	0%	0%	0%	0%
	SCE "+"	6%	6%	12%	12%	18%
	SCE "Yes"	81%	94%	88%	88%	82%
	Dispositions Score %	47%	53%	56%	56%	59%
	Dispositions Score	2.34	2.65	2.79	2.79	2.94
Review Process Score Enhancements	SCE "-"		0%		0%	0%
	SCE "+"		0%		100%	0%
	SCE "Yes"		100%		0%	100%
	Process Score %	0%	50%	0%	100%	50%
	Process Increase Score	0.00	2.50	0.00	5.00	2.50
	Process Increase Weight	0.50	0.50	0.50	0.50	0.50
	Process Increase Wtd Score	0.00	1.25	0.00	2.50	1.25
Total Score	Final Metric Score (1-5)	2.34	3.90	2.79	5.00	4.19
	Metric Points with Weighting	2.34	11.69	2.79	12.50	10.48

Explanations of scoring tables row entries

1. The row labeled with *IOU* "-" lists the percent of Measure Package reviews undertaken where the CPUC staff evaluation of the materials or information indicated that the IOU performance in this metric for the submission did not meet minimum expectations or requirements relative to the metric.
2. The row labeled with *IOU* "+" lists the percent of Measure Package reviews undertaken where the CPUC staff evaluation of the materials or information indicated that the IOU performance in this metric for the submission exceeded minimum expectations or requirements relative to the metric.
3. The rows labeled with *IOU* "Yes" lists the percent of Measure Package reviews undertaken where the CPUC staff evaluation of the materials or information indicated that the IOU performance in this metric for the submission exceeded met minimum expectations or requirements relative to the metric.
4. 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.
5. The "Disposition Score" (and "Process Increase Score" for Measure Packages) row converts the % score into a numeric value of up to five by directly applying the % to a value of 5.
6. The custom row labeled with "*Technical & Policy QC Increase*" lists CPUC staff points added to the metric based on an evaluation of the overall IOU 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.

7. The custom row labeled with “*Implementation Increase*” lists CPUC staff points added to the metric based on an evaluation of the overall IOU 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.
8. The Measure Package rows labeled with “*Review Process Score Enhancements*” lists CPUC staff scoring for each metric based on an evaluation of the overall IOU 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.
9. 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.
10. 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.