

PUBLIC UTILITIES COMMISSION

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Date: October 1, 2025

To: San Diego Gas & Electric (SDG&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.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 (PAs) based on the proportion of deemed savings and custom measures in each utility’s portfolio”.

A breakdown of SDG&E’s 2024 EAR performance score of 75.55/100 for measure packages² and custom projects is shown below in Table 1. SDG&E’s 2024 total points is a 7.22-point decrease from its 2023 total points of 82.77. Scores for 2023 are provided in Table 2 on the following page.

Table 1: SDG&E 2024 EAR Scoring for Measure Packages and Custom Projects³

SDG&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%	2.50	5	5.00	10%	5.00	5
2	Content, Completeness, and Quality of Submittals	2.57	30%	7.72	15	4.33	30%	13.00	15
3	Proactive Initiative of Collaboration	3.90	10%	3.90	5	4.50	10%	4.50	5
4	Due Diligence and QA/QC Effectiveness	2.72	25%	6.80	12.5	4.60	25%	11.50	12.5
5	Responsiveness to Needs for Process/Program Improvements	3.75	25%	9.38	12.5	4.50	25%	11.25	12.5
Total				30.30	50			45.25	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: SDG&E 2023 EAR Scoring for Measure Packages and Custom Projects

SDG&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	3.25	10%	3.25	5	5.00	10%	5.00	5
2	Content, Completeness, and Quality of Submittals	2.95	30%	8.86	15	3.56	30%	10.67	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	4.43	25%	11.08	12.5	4.59	25%	11.47	12.5
5	Responsiveness to Needs for Process/Program Improvements	3.98	25%	9.94	12.5	5.00	25%	12.50	12.5
Total				38.13	50			44.64	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 2 scored dispositions for SDG&E.⁴

A review of the project dispositions and the Review Process Score Enhancements points⁵ resulted in SDG&E's custom project score increasing by 0.61 points from 2023 scores (44.64 in 2023 vs. 45.25 in 2024 as shown in Tables 1 and 2 above). SDG&E continues to demonstrate timely submission of documentation, quality project submissions, and proactive collaboration.

⁴ This memo is for all dispositions issued in 2024.

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

1. Summary of 2024 Achievements

CPUC staff observed SDG&E to have improved in:

- **The proportion of process, policy, and program rules issues continue to decrease.** SDG&E has shown a consistent decrease in the number of deficiencies noted in their conformance with CPUC policy and program rules. SDG&E has shown a steady decrease in deficiencies from 2022 to 2024, with 30 percent in 2022, 24 percent in 2023, and 0 percent in 2024 of total issues respectively. This indicates an improvement in their quality assurance practices to standardize policy documents and templates to streamline ex-ante project reviews.
- **The proportion of program influence issues continue to decrease.** SDG&E has shown a consistent decrease in the number of deficiencies noted in their net impacts, specifically program influence documentation. In 2023, program influence made up 28 percent of total issues identified, and this decreased to 0 percent in 2024. This indicates that SDG&E is making significant progress in improving its adherence and documentation to CPUC's program influence policy and preponderance of evidence expectations.
- **SDG&E continues to improve its processes for submitting documentation in a timely manner.** All 2 projects (100 percent) were submitted early by eight or more days indicating SDG&E's processes for reducing the time for custom projects to be submitted with appropriate documentation is continuing to improve.

2. Summary of Areas Requiring Improvement

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

- **The number of issues regarding Gross Savings Impacts increased.** In 2023 issues related to gross savings impacts (analysis assumptions, M&V plans, and calculation methods) comprised 24 percent of total issues. In 2024, this increased to 75 percent, indicating that SDG&E should ensure that the gross savings estimates are well-documented and accurate. While it is acknowledged that there were less dispositions issued in 2024 compared to 2023⁶, contributing to the higher percentage of issues on the gross savings impacts, this is still a noteworthy finding and suggests more focus on the gross savings estimates in ex-ante review project submissions moving forward. Deficiencies noted include incorrect usage of SEM tool to calculate demand savings, improper baseline normalization methodology, and inadequate post-installation verification details in the M&V Plan.

B. Measure Packages Review Overview

SDG&E's measure packages score has decreased compared to last year by 7.83 points (from 38.13 in 2023 to 30.30 in 2024 as shown in Tables 1 and 2 above). SDG&E should continue its efforts to improve its performance.

Summary of 2023 Achievements

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

⁶ 9 disposition were issued in 2023.

- **SDG&E continues to show strong collaboration and communication with CPUC staff.** SDG&E continues to show due diligence and collaboration outside of the measure packages review process and leads the California Technical Forum.

1. Summary of Areas Requiring Improvement

CPUC staff highlights the following recommendations for improvement which are centered on improved QC and communication considering the current transition to eTRM:

- **SDG&E should continue to focus on their content, completeness, and quality.** Most measure packages had at least one comment requiring resolution before approval.
- **SDG&E met minimum expectations.** They did not exceed expectations very frequently.

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 PA are presented in documents referred to as “dispositions”.

From the period beginning January 2024 to the end of December 2024, 2 SDG&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 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 SDG&E for each metric both with and without the addition of any Enhancement Points.

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

Metric	Metric Area of Scoring	Weight Factor	Custom Disposition Points		Max Points
			With Enhance Pts ⁷	w/o Enhance Pts	
1	Timeliness of Submittals	10%	5.00	5.00	5
2	Content, Completeness, and Quality of Submittals	30%	13.00	13.00	15
3	Proactive Initiative of Collaboration	10%	4.50	4.00	5
4	PA's Due Diligence and QA/QC	25%	11.50	11.50	12.5
5	PA's Responsiveness	25%	11.25	10.00	12.5
Total			45.25	43.50	50

1. Timeliness of Submittals

In 2024, SDG&E 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 2 custom project reviews completed in 2024. In 2024, SDG&E submitted project documentation for review for all 2 reviewed projects early. All projects (100 percent) were submitted seven days or earlier than required per timeline mandated in Senate Bill (SB) 1131 and Section 381.2 of the Public Utilities Code.⁸ SDG&E continues to improve and continues to exceed expectations with regards to timeliness by submitting projects well ahead of the required submission due date.

2. Content, Completeness, and Quality of Submissions

In 2024, SDG&E received a custom disposition score of 13.0 out of 15.0 for Metric 2 (Content, Completeness, and Quality of Submissions). This disposition score was based on the completeness of the 2 SDG&E custom project reviews. Of these 2 dispositions, one project was approved without exception and 1 project was marked Advisory.⁹ There were no projects approved with noted deficiencies contributing to a high content, completeness, and quality of submission score for 2024.

Table 4 below summarizes the 4 action items identified across the 2 scored dispositions¹⁰ 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	Summary of CPUC Staff	Percent of Total Actions
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⁷ Section IV.E provides details on the score enhancement methodology.

⁸ "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".

⁹ 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.

¹⁰ This table includes action items issued on 3 Advisory dispositions.

		Action ¹¹ by the PA:	Notes or Instructions ¹² :	
Issues Related to Gross Savings Impacts	Calculation method	1	0	25%
	Calculation tool	1	0	25%
	M&V plan	1	0	25%
	Subtotals	3	0	75%
Process, Policy, Program Rules	Baseline	0	0	0%
	Subtotals	0	0	0%
Documentation Issues	Continue Document Upload	0	9	0%
	Missing documents	1	0	25%
	Subtotals	1	9	25%
Issues Related to Net Impacts	Program influence	0	0	0%
	Subtotals	0	0	0%
Other Issues	Other 1	0	0	0%
	Subtotals	0	0	0%
	Grand Total	4	9	100%

In 2023, SDG&E had several action items on analysis assumptions, EUL/RUL values, and program influence, all of which have seen considerable improvement in 2024. In 2023, SDG&E averaged roughly 2.8 actions per disposition and that number decreased to 1 action per disposition in 2024, indicating overall improvement in the quality of ex-ante review project submissions.

3. Proactive Initiative of Collaboration

In 2024, SDG&E received a custom disposition score of 4.0 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, SDG&E continues to bring measures, projects, or studies forward for discussion prior to CPUC staff review, including clarification of Net-To-Gross (NTG) IDs and ongoing efforts to improve the ex-ante review process and its documentation by following up at bi-weekly or Ad Hoc meetings. SDG&E remains an active participant in statewide meetings and initiated a forum to explore best practices and process improvement used in Lean Six-Sigma. These activities demonstrated that SDG&E exceeded expectations with regards to proactive collaboration under this metric. The CPUC staff recognizes an implementation bonus metric for SDG&E's continued proactive dialogue with CPUC staff where appropriate to clarify guidance and incorporating feedback into the ex-ante review process to help streamline the process and avoid re-work.

¹¹ For Action items, the PA must make revisions or changes as noted in CPUC Staff's review comments before signed agreement with customer.

¹² 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.

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

In 2024, SDG&E received a custom disposition score of 11.5 out of 12.5 for Metric 4 (PA's Due Diligence, Quality Assurance, and Quality Control) disposition performance results reviewed under Metric 2 were used as a proxy for the level of QA/QC performed by the PA. As such, the number of dispositions proceeding without exception was weighed against those that required resubmissions or resulted in rejections. Of these 2 dispositions, one project was approved without exception and 1 project was marked Advisory. In contrast to the previous year, SDG&E demonstrated an increased performance for this metric as it pertains to effective due diligence and QC of projects prior to submitting for review, reducing the number of rejections and minimizing significant disposition actions.

5. PA's Responsiveness

In 2024, SDG&E received a custom disposition score of 10.0 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 expectations, 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. Like 2023, SDG&E did not have any rejections in 2024. CPUC staff also noted improvement in some issue areas (like program influence and policy), but noted declines in other issue areas (like gross savings methods and estimates). The CPUC staff recognizes a QA/QC bonus metric for SDG&E's continued maintenance of the Custom Disposition Database for statewide use.

B. Measure Packages Performance Review

SDG&E had 34 measure packages submitted in 2024, which were reviewed and disposed. This end of year memo provides measure package feedback on the 34 measure packages which were reviewed and disposed.

The comments below are organized by the five scoring metric areas created in D.16-08-019.¹³ 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 SDG&E during the review period. Measure packages were selected for feedback from those that were led by SDG&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

¹³ See [D.16-08-019](#) at 87.

- ‘-‘ 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 SDG&E for each metric both with and without the addition of any enhancement points.

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

Metric	Metric Area of Scoring	Weight Factor	Measure Package Disposition Points		Max Points
			With Enhance Pts ¹⁴	w/o Enhance Pts	
1	Timeliness of Submittals	10%	2.50	2.50	5
2	Content, Completeness, and Quality of Submittals	30%	7.72	7.72	15
3	Proactive Initiative of Collaboration	10%	3.90	2.65	5
4	PA’s Due Diligence and QA/QC	25%	6.80	6.80	12.5
5	PA’s Responsiveness	25%	9.38	6.25	12.5
Total			30.29	25.92	50

1. Timeliness of Submittals

In 2024, SDG&E received a measure package disposition score of 2.50 out of 5.0 for Metric 1. SDG&E generally met deadlines for submission of statewide measure packages in the review period and most measure packages received a ‘Yes’, indicating that minimum expectations were met for timeliness.

2. Content, Completeness, and Quality of Submissions

In 2024, SDG&E received a measure package disposition score of 7.72 out of 15.0 for Metric 2. The majority of the measure packages met expectations with one not meeting expectations and two exceeding expectations. The majority had at least one minor comment that required addressing before approval.

3. Proactive Initiative of Collaboration

In 2024, SDG&E received a measure package disposition score of 2.65 out of 5.0 for Metric 3 prior to the addition of any enhancement points. SDG&E has continued to collaborate with CPUC Staff effectively. The majority of the measure packages met expectations with two exceeding expectations. Additionally, SDG&E administered the California Technical Forum activities in 2024, earning enhancement points.

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

In 2024, SDG&E received a measure package disposition score of 6.80 out of 12.5 for Metric 4. SDG&E maintained due diligence in 2024 in their measure package submissions. Three measure

¹⁴ Section IV.E provides details on the score enhancement methodology.

packages exceeded expectation while all other measure packages met the minimum expectations for quality control.

5. PA's Responsiveness

In 2024, SDG&E received a measure package disposition score of 6.25 out of 12.5 for Metric 5 prior to the addition of any enhancement points. SDG&E continues to respond to CPUC direction, and all measure packages met the minimum expectations.

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 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 2022 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.¹⁵ 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 benefited 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 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.

¹⁵ 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”).

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 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. 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 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 decided that SDG&E’s efforts did rise to the level to be awarded “Enhancement” points.

- 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: SDG&E continues proactive dialogue with the CPUC up front to clarify guidance and submit projects after incorporating feedback to avoid rework and streamline the review cycle (ex. Lighting NTG ID).
- Metric 4 Quality Assurance: There were no added points for this metric.
- Metric 5 Process: SDG&E continues to maintain the Custom Disposition Database for statewide use.

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: SDG&E continued administering the California Technical Forum.
- Metric 4 Quality Assurance: There were no added points for this metric.
- Metric 5 Process: SDG&E chartered various Low Global Warming Potential Refrigerant studies used to revise measure packages and create new measures consistent with recent CARB low GWP Refrigerant regulatory changes.

To produce the final measure package scores, the metric scores for the three 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 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 SDG&E.¹⁶

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

¹⁶ 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	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	30%	2.57	7.72	15	30%	4.33	13.00
	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	10%	2.65	2.65	5	10%	4.00	4.00
	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%	2.72	6.80	12.5	25%	4.60	11.50

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%	4.00	10.00
	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%	25.92		50	100%	43.50	

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 for SDGE	Scoring Notes (Portfolio Level ¹⁷)
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	2	SDG&E made notable efforts to comply with the SB1131 guidelines for submitting documentation well before the 15 business days required. All 2 projects with dispositions issued were submitted 7 days or more early, indicating that SDG&E continues to make significant improvements to submitting documentation earlier than required.
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%	14.00	2	Of the 2 projects with dispositions, 1 project was approved without exception and 1 project was marked Advisory. Staff identified 4 action items across the 2 dispositions which impacted the project's eligibility, documentation, and efficiency savings estimate calculations. There were no projects approved with noted exceptions contributing to a high content, completeness, and quality of submission score for 2024.
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%	4.00	2	Commission Staff found that SDG&E made efforts to bring measures, projects, and studies forward for discussion prior to review, for example the 0.91 lighting NTG ID. Topics reviewed during bi-weekly calls with Commission Staff were what was expected to demonstrate proactive collaboration. SDG&E continued to be a key stakeholder and participant in the custom ex-ante area, participating in statewide forums and other meetings with the CPUC, other IOUs, 3PIs, and CalTF. SDG&E is also credited for proactively communicate with CPUC ex-ante review team up front rather than wait for post-submittal review comments where applicable to streamline the review cycle.
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%	12.00	2	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. As such, the number of dispositions proceeding without exception was weighed against those that required resubmissions or resulted in rejections. Of the 2 dispositions issued, 1 project proceeded without exception and 1 project was marked Advisory. In contrast to the previous year, SDG&E demonstrated an increased performance for this metric as it pertains to effective due diligence and QC of projects prior to submitting for review,

¹⁷ 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 for SDGE	Scoring Notes (Portfolio Level ¹⁷)
						reducing the number of rejections and minimizing significant disposition actions.
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%	10.00	2	<p>SDG&E projects in 2024 showed a positive trend in improvement of their internal processes and procedures minimizing actions and notes on dispositions. Additionally, there is a continual trend in lower frequencies of policy issues and productive policy conversations during bi-weekly meetings, especially on the lighting 0.91 NTG ID. SDG&E is continuing to make changes in their internal operations to improve processes and therefore overall review and evaluation results.</p>

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 Detailed Reviews – Scored Measure Packages in 2024						EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5	
SWAP008	3	Room Air Cleaner, Residential	PY2024 measure package update to include data collection requirements updates, building HVAC updates, measure application type updates, building vintage updates, delivery type updates, and baseline class and restricted permutations entries to the permutations. Measure package approved after addressing one minor comment requesting clarification on PA tracking. New construction MAT added into measure.	1	yes	yes	+	yes	yes	
SWHC014	4	Unitary Air-Cooled Air Conditioner or Heat Pump, Under 65 kBtu/hr, Commercial	PY2024 measure package update to include new permutations, delivery type updates, cost updates, building vintage updates, building type and delivery type exclusions, data collection requirements updates, characterization updates, shared parameters and value tables updates, CET data, baseline class entries, restricted permutations entries to the permutations. Measure package approved after addressing three comments on code requirements, data collection requirements, and effective date.	1	yes	yes	yes	yes	yes	
SWHC013	4	Unitary Air-Cooled Air Conditioner, Over 65 kBtu/hr, Commercial	PY2024 measure package update to include building type and delivery type exclusions, data collection requirements updates, characterization updates, shared parameters and value tables updates, baseline class entries, and restricted permutation entries to the permutations. Measure package approved after addressing one comment on data collection requirements.	1	yes	yes	yes	yes	yes	

Measure Package Detailed Reviews – Scored Measure Packages in 2024						EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5	
SWLG020	2	UL Type B LED Screw-in Lamp HID Retrofits	PY2024 measure package update to include data collection requirements updates, program requirements updates, eligibility updates, technology group updates, net-to-gross ratio updates, baseline class updates, characterization updates, and reference updates. Measure package approved after addressing comments on data collection requirements, net-to-gross IDs, and references.	1	yes	yes	yes	yes	yes	
SWHC043	4	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 65 and 240 kBtu/hr	PY2024 measure package update to include new offerings with higher EER tiers, building vintage updates, building type updates, data collection requirements updates, cost updates, characterization updates, shared value tables updates, baseline class entries, and restricted permutation entries to the permutations. Measure package approved after addressing comments on DEER Measure, IDs, eligibility requirements, and data collection requirements.	1	yes	+	yes	+	yes	
SWAP001	6	Refrigerator or Freezer, Residential	PY2024 measure package update to include data collection requirements updates, code requirements updates, building HVAC updates, baseline class entries, restricted permutations entries to the permutations, and DEER Measure ID updates. Measure package approved after addressing comments on data collection requirements, Technology IDs, and DEER Measure IDs.	1	yes	yes	yes	yes	yes	
SWHC049	4	SEER Rated AC and HP HVAC Equipment, Residential	PY2024 measure package update to include accelerated replacement requirements updates, baseline class entries, restricted flag entries, and data collection requirements updates. Measure package approved after addressing clarifying comments on data collection requirements.	1	yes	yes	yes	yes	yes	
SWHC050	4	Ductless Heat Pump, Residential	PY2024 measure package update to include accelerated replacement requirements updates, data collection requirements updates, baseline class entries, restricted flag entries, and measure application type-baseline class exclusion table. Measure package approved after addressing clarifying comments on data collection requirements.	1	yes	yes	yes	yes	yes	
SWHC059	2	Smart Fan Controller, Residential	PY2024 measure package update to include data collection requirements updates, baseline class entries, restricted flag entries, and characterization updates. Measure package approved after addressing	1	yes	yes	yes	yes	yes	

Measure Package Detailed Reviews – Scored Measure Packages in 2024						EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5	
			clarifying comments on building vintage eligibility and characterization language.							
SWSV013	4	Duct Optimization, Residential	PY2024 measure package update to include data collection requirements updates, program exclusion updates, characterization updates, baseline class entries, and restricted permutations entries to the permutations. Measure package approved after addressing one clarifying comment on the effective date for applicable codes and standards.	1	yes	yes	yes	yes	yes	
SWAP007	3	Room Air Conditioner, Residential	Mid-cycle measure package update to include data collection requirements updates, eligibility requirements updates, Energy Star v5.0 requirements updates, electric savings updates with 2019 RASS values, costs updates, baseline class entries, restricted permutations entries to the permutations, net-to-gross ratio updates, and Energy Star Advanced Tier offering ID removal. Measure package approved after addressing three clarifying comments on NC and NR eligibility requirements and measure case description.	1	yes	yes	yes	+	yes	
SWMI003	1	High-Efficiency Toilets, Residential and Commercial	First version of measure package. Measure package approved after addressing comments requesting clarification in the characterization including documentation of assumptions.	1	yes	-	+	yes	yes	
SWMI002	3	No Savings	Updated measure impact types and delivery types	1	yes	yes	yes	yes	yes	
SWHC043	5	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 65 and 240 kBtu/hr	Refrigerant standard update	1	yes	yes	yes	yes	yes	
SWHC020	4	Air-Cooled Screw Chiller, Path A	Updated code section for new CARB/EPA refrigerant standard, updated data collection requirements	1	yes	yes	yes	yes	yes	

Measure Package Detailed Reviews – Scored Measure Packages in 2024						EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5	
SWHC027	5	Package Terminal Air Conditioner or Heat Pump, Under 24kBtu/hr	Refrigerant standard update	1	yes	yes	yes	yes	yes	
SWHC005	4	Water-Cooled Chiller	Updated data collection requirements and refrigerant standard update	1	yes	yes	yes	yes	yes	
SWHC049	5	Ducted AC and HP HVAC Equipment, Residential	Updated refrigerant GWP standard	1	yes	yes	yes	yes	yes	
SWHC050	5	Ductless Heat Pump, Residential	Updated refrigerant GWP standard	1	yes	yes	yes	yes	yes	
SWAP008	4	Room Air Cleaner, Residential	Updated costs, ENERGY Star QPL, added Tech IDs	1	yes	yes	yes	yes	yes	
SWAP007	4	Room Air Conditioner, Residential	Updated costs, clarifying NC language, minor CEER update, added Tech IDs	1	yes	yes	yes	yes	yes	
SWAP015	4	Efficient Electric Cooking Appliances, Residential	Adding EnergyStar analysis and RASS into calculations, updated costs	1	yes	yes	yes	yes	yes	
SWHC020	5	Air-Cooled Screw Chiller, Path A	Updated delivery types, updated NTG IDs, removed DEER measure IDs, added Tech IDs, updated savings language	1	yes	yes	yes	yes	yes	
SWHC050	6	Ductless Heat Pump, Residential	Updated delivery types, updated EUL, retired SEER offerings, updated costs	1	yes	yes	yes	yes	yes	
SWSV013	5	Duct Optimization, Residential	Updated costs, updated eligibility added Tech IDs, updated code requirements	1	yes	yes	yes	yes	yes	

Measure Package Detailed Reviews – Scored Measure Packages in 2024						EAR Metrics				
MP ID	Rev	Title	Comments	Weight	1	2	3	4	5	
SWSV005	4	Economizer Repair, Commercial	Migrated savings from eQuest to EnergyPlus, updated costs, added SWSV010 offerings	1	yes	yes	yes	yes	yes	
SWSV010	4	Economizer Controls, Commercial	Updated savings to use EnergyPlus prototypes, updated costs, economizer control replacement offerings now in SWSV005	1	yes	yes	yes	yes	yes	
SWHC027	6	Package Terminal Air Conditioner or Heat Pump, Under 24kBtu/hr	Updated to EnergyPlus model, delivery types, tech IDs, and costs	1	yes	yes	yes	yes	yes	
SWSV001	7	Duct Seal, Residential	Updated costs, updated eligibility added Tech IDs, updated code requirements	1	yes	yes	yes	yes	yes	
SWMI003	2	High-Efficiency Toilets, Residential and Commercial	Updated delivery types and measure impact types	1	yes	yes	yes	yes	yes	
SWHC059	3	Smart Fan Controller, Residential	Updated savings to use Res EnergyPlus prototypes, updated costs, updated delivery types, updated EUL ID, added tech IDs	1	yes	yes	yes	yes	yes	
SWHC043	6	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 65 and 240 kBtu/hr	Updated savings to use EnergyPlus prototypes, updated costs, updated NTG IDs	1	yes	yes	yes	yes	yes	
SWHC014	6	Unitary Air-Cooled Air Conditioner or Heat Pump, Under 65 kBtu/hr, Commercial	Updated savings to use EnergyPlus prototypes, updated costs, updated EULs	1	yes	yes	yes	yes	yes	
SWHC013	5	Unitary Air-Cooled Air Conditioner, Over 65 kBtu/hr, Commercial	PY2025 measure package update to include code requirements updates, program requirements updates, data collection requirements updates, removal of NC/DI permutations, characterization updates, and shared parameters and value tables updates due to new refrigerant GWP regulations. Measure package approved without comments.	1	yes	+	yes	+	yes	

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

MP ID	Rev	Title	Submission Status: EAR Team Comments
SWAP008	3	Room Air Cleaner, Residential	Interim approval.
SWHC014	4	Unitary Air-Cooled Air Conditioner or Heat Pump, Under 65 kBtu/hr, Commercial	Interim approval.
SWHC013	4	Unitary Air-Cooled Air Conditioner, Over 65 kBtu/hr, Commercial	Interim approval.
SWLG020	2	UL Type B LED Screw-in Lamp HID Retrofits	Interim approval.
SWHC043	4	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 65 and 240 kBtu/hr	Interim approval.
SWAP001	6	Refrigerator or Freezer, Residential	Interim approval.
SWHC049	4	SEER Rated AC and HP HVAC Equipment, Residential	Interim approval.
SWHC050	4	Ductless Heat Pump, Residential	Interim approval.
SWHC059	2	Smart Fan Controller, Residential	Interim approval.
SWSV013	4	Duct Optimization, Residential	Interim approval.
SWAP007	3	Room Air Conditioner, Residential	Interim approval.
SWMI003	1	High-Efficiency Toilets, Residential and Commercial	Interim approval.
SWMI002	3	No Savings	Interim approval.
SWHC043	5	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 65 and 240 kBtu/hr	Interim approval.
SWHC020	4	Air-Cooled Screw Chiller, Path A	Interim approval.
SWHC027	5	Package Terminal Air Conditioner or Heat Pump, Under 24kBtu/hr	Interim approval.
SWHC005	4	Water-Cooled Chiller	Interim approval.
SWHC049	5	Ducted AC and HP HVAC Equipment, Residential	Interim approval.
SWHC050	5	Ductless Heat Pump, Residential	Interim approval.
SWAP008	4	Room Air Cleaner, Residential	Interim approval.
SWAP007	4	Room Air Conditioner, Residential	Interim approval.
SWAP015	4	Efficient Electric Cooking Appliances, Residential	Interim approval.
SWHC020	5	Air-Cooled Screw Chiller, Path A	Interim approval.
SWHC050	6	Ductless Heat Pump, Residential	Interim approval.
SWSV013	5	Duct Optimization, Residential	Interim approval.

SWSV005	4	Economizer Repair, Commercial	Interim approval.
SWSV010	4	Economizer Controls, Commercial	Interim approval.
SWHC027	6	Package Terminal Air Conditioner or Heat Pump, Under 24kBtu/hr	Interim approval.
SWSV001	7	Duct Seal, Residential	Interim approval.
SWMI003	2	High-Efficiency Toilets, Residential and Commercial	Interim approval.
SWHC059	3	Smart Fan Controller, Residential	Interim approval.
SWHC043	6	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 65 and 240 kBtu/hr	Interim approval.
SWHC014	6	Unitary Air-Cooled Air Conditioner or Heat Pump, Under 65 kBtu/hr, Commercial	Interim approval.
SWHC013	5	Unitary Air-Cooled Air Conditioner, Over 65 kBtu/hr, Commercial	Interim approval.
SWAP008	3	Room Air Cleaner, Residential	Interim approval.

Process Adder	EAR Metrics					
	Weight	1	2	3	4	5
SDG&E serves as the lead IOU responsible for administering the California Technical Forum (CaTF) from 2023 through 2027, including oversight of the electronic Technical Reference Manual (eTRM).	1	no	no	yes	no	no
SDG&E chartered various Low Global Warming Potential (Low GWP) Refrigerant research studies. The results and recommendations from the studies were instrumental in identifying new measures, revising program budgets for PY2025-27, and updating legacy eTRM measure packages and mid-cycle 2025 HVAC equipment to adopt recent CARB Low GWP Refrigerant regulatory changes. This information has been shared with all measure package lead PAs, as well as DNV, CPUC staff, and other stakeholders/market actors, and is included in the MLM plan.	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	4.33	4.00	4.60	4.00	
Review Process Score Enhancements	Technical & Policy QC Increase	0.00	0.00	0.00	0.00	0.50	
	Implementation Increase	0.00	0.00	0.50	0.00	0.00	
Total Score	Adjusted Final Metric Score (1-5)	5.00	4.33	4.50	4.60	4.50	Total Points
	Adjusted Metric Points	5.00	13.00	4.50	11.50	11.25	45.25

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	3.56	5.00	4.09	4.00	
Review Process Score Enhancements	Technical & Policy QC Increase	0.00	0.00	0.00	0.50	1.00	
	Implementation Increase	0.00	0.00	0.50	0.00	0.00	
Total Score	Adjusted Final Metric Score (1-5)	5.00	3.56	5.00	4.59	5.00	Total Points
	Adjusted Metric Points	5.00	10.67	5.00	11.47	12.50	44.64

Measure Package Scoring

2024 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	
Direct Workproduct Review Score	SDG&E "-"	0%	3%	0%	0%	0%	
	SDG&E "+"	0%	6%	6%	9%	0%	
	SDG&E "Yes"	100%	91%	94%	91%	100%	
	Dispositions Score %	50%	51%	53%	54%	50%	
	Dispositions Score	2.50	2.57	2.65	2.72	2.50	
Review Process Score Enhancements	SDG&E "-"			0%		0%	
	SDG&E "+"			0%		0%	
	SDG&E "Yes"			100%		100%	
	Process Score %	0%	0%	50%	0%	50%	
	Process Increase Score	0.00	0.00	2.50	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	1.25	0.00	1.25	
Total Score	Final Metric Score (1-5)	2.50	2.57	3.90	2.72	3.75	Total Points
	Metric Points with Weighting	2.50	7.72	3.90	6.80	9.38	30.29

2023 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5
Direct Work product Review Score	SDG&E "-"	0%	9%	0%	0%	0%
	SDG&E "+"	30%	27%	18%	27%	9%
	SDG&E "Yes"	70%	64%	82%	73%	91%
	Dispositions Score %	65%	59%	59%	64%	55%
	Dispositions Score	3.25	2.95	2.95	3.18	2.73
Review Process Score Enhancements	SDG&E "-"			0%	0%	0%
	SDG&E "+"			100%	0%	0%
	SDG&E "Yes"			0%	100%	100%
	Process Score %	0%	0%	100%	50%	50%

2023 Annual Measure Package Ratings		Metric 1	Metric 2	Metric 3	Metric 4	Metric 5	
	Process Increase Score	0.00	0.00	5.00	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	2.50	1.25	1.25	
Total Score	Final Metric Score (1-5)	3.25	2.95	5.00	4.43	3.98	Total Points
	Metric Points with Weighting	3.25	8.86	5.00	11.08	9.94	38.13

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.