

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
SUPPLEMENTAL 2018 EE BUDGET INFORMATION
PORTFOLIO SUMMARY⁽¹⁾**

Sector	2016 EE Portfolio Expenditures				2018 EE Portfolio Budget ⁽²⁾				2016 EE Portfolio Savings			2018 EE Portfolio Forecasted Savings		
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	M THERMS	KWH	KW	M THERMS
Residential	\$ 334,357	\$ 4,860,526	\$ 9,303,147	\$ 14,498,030	\$ 342,000	\$ 6,471,000	\$ 9,790,000	\$ 16,603,000	2,916,844	1,537,812	0.37	3,000,000	1,650	0.45
Commercial	\$ 10,605	\$ 111,826	\$ -	\$ 122,431	\$ 34,000	\$ 2,509,000	\$ 500,000	\$ 3,043,000	0	0	0	2,600,000	945	0.30
Agricultural														
Industrial														
Public (GP)	\$ -	\$ -	\$ -	\$ -	\$ 20,000	\$ 480,000	\$ -	\$ 500,000	0	0	0	1,300,000	270	0.11
Cross Cutting*	\$ 140,474	\$ 1,724,090	\$ -	\$ 1,864,564	\$ 530,000	\$ 2,551,000	\$ -	\$ 3,081,000	0	0	0	0	0	0.00
Total	\$ 485,436	\$ 6,696,442	\$ 9,303,147	\$ 16,485,025	\$ 926,000	\$ 12,011,000	\$ 10,290,000	\$ 23,227,000	2,916,844	1,537,812	0.37	6,900,000	2,865.00	0.86
EM&V-PA				\$ -		\$ 400,950		\$ 400,950						
EM&V-ED				\$ -				\$ -						
OBF - Loan Pool**		\$ 380,000		\$ 380,000		\$ 830,000		\$ 830,000						
REN				\$ -				\$ -						
CCA				\$ -				\$ -						
EE Total	\$ 485,436	\$ 7,076,442	\$ 9,303,147	\$ 16,865,025	\$ 926,000	\$ 13,241,950	\$ 10,290,000	\$ 24,457,950	2,916,844	1,537,812	0.37	6,900,000	2,865.00	0.86

Notes: * Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Financing.

(1) BayREN does not track costs by the functional categories provided in this template. BayREN has endeavored to provide a good faith estimate of the costs broken down by these categories.

(2) In the BayREN Business Plan, the administrative budget is a separate line item. However, given the template format, the administrative budget is allocated by functional category in each sector.

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
SUPPLEMENTAL 2018 EE BUDGET INFORMATION
FUNCTION DEFINITIONS**

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and regulatory support	Planning & Compliance	DSM Goal Planning; lead legislative review/positioning; policy support on reg proceedings; portfolio optimization; end use-market strategy; DSM lead for PRP, DRP, ES; locational targeting; audit support; SOX certifications; developing control plans; developing action plans; continuous monitoring; inspections; program/product QA/QC; decision compliance oversight/tracking; data requests; policies & procedures
		Company Regulatory Support	Case management for EE proceedings
Program management	Includes labor, contracts, admin costs for program design, program implementation, product and channel management for all sectors	Program Management & Delivery	Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking
		Product Management	Manage end-to-end new products and services (P&S) intake, evaluation, and launch process; develop and facilitate P&S governance teams, coordination of all sub-process owners, stakeholders, and technical resources required to evaluate and launch new products; evaluate and launch new services and OOR opportunities; develop external partnerships & strategic alliances; work with various companies and associations to help advance standards, products, and tech.; work with external experts to help reduce SCE costs to deliver new prog. and products; develop and launch new customer technologies, products, services for residential and business customers; conduct customer pilots of new technologies and programs; lead customer field demonstrations of new technologies and products; align new P&S to savings programs/incentives; develop new programs/incentives in support of savings goals
		Channel Management	
		Contract Management	Budget forecasting, spend tracking, invoice processing, and contract management with vendors and suppliers; Regulatory support for ME&O activities
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project technical reviews and design assistance	Custom project support	Management of Emerging Products projects; Customized reviews; LCR/RFO support; Ex-ante review management; Technical policy support; Technical assessments; Workpapers; Tool development; End use subject matter expertise
		Deemed workpapers	
		Project management	
Customer Application/Rebate and Incentive Processing	Costs associated with application management and rebate and incentive processing (deemed and custom)	Rebate & Application Processing	
Inspections	Costs associated with project inspections	Inspections	
Portfolio Analytics	Includes analytics support, including internal performance reporting and external reporting	Data analytics	Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients ; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support ; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance
EM&V	EM&V expenditures	EM&V Studies	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTTP and IEPR; market potential study; integration w/ procurement planning; CPUC Demand Analysis Working Group
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research
Account Management / Sales	Costs associated with account rep energy efficiency sales functions	Account Management	
IT	IT project specific costs and regular O&M	IT - project specific	Projects and minor enhancements. Includes project management/business integration ("PMO/BID"). Excluded: maintenance (which SCE defines as when something goes down, normal batch processing, verifying interfaces, etc.).
		IT - regular O&M	
Call Center	Costs associated with call center staff fielding EE program questions	Call Center	
Incentives	Costs of rebate and incentive payments to customers	Incentives	

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
 SUPPLEMENTAL 2018 EE BUDGET INFORMATION
 PORTFOLIO STAFFING**

Functional Group	2016 EE Portfolio FTE	2018 EE Portfolio FTE ⁽¹⁾⁽²⁾
Policy, Strategy, and Regulatory Reporting Compliance	1.01	1.26
Program Management	0.77	2.37
Engineering Services	0.00	0.00
Customer Application/Rebate/Incentive Processing	0.00	0.00
Customer Project Inspections	0.00	0.00
Portfolio Analytics	0.08	0.13
EM&V	0.00	0.00
ME&O	0.09	0.19
Account Management / Sales	0.00	0.00
IT	0.01	0.01
Call Center	0.00	0.00
Total	1.96	3.96

Notes

2018: +1 FTE for C&S Program Management

2018: +1 FTE for PAYS Program Management

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
SUPPLEMENTAL 2018 EE BUDGET INFORMATION
RESIDENTIAL BUDGET DETAIL**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures	2018 EE Portfolio Budget
Residential	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 174,180	\$ 180,000
		Program Management	\$ 122,733	\$ 128,000
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics	\$ 13,957	\$ 15,000
		ME&O (Local)	\$ 21,633	\$ 17,000
		Account Management / Sales		
		IT	\$ 1,853	\$ 2,000
		Call Center		
	Labor Total		\$ 334,357	\$ 342,000
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts ^{(2) (3)}	\$ 3,354,145	\$ 3,916,000
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 47,339	\$ 90,000
		Program Management	\$ 140,000	\$ 350,000
		Engineering services	\$ 50,923	\$ 175,000
		Customer Application/Rebate/Incentive Processing	\$ 414,031	\$ 590,000
		Customer Project Inspections	\$ 169,743	\$ 250,000
		Portfolio Analytics	\$ 109,601	\$ 220,000
		ME&O (Local)	\$ 174,527	\$ 200,000
		Account Management / Sales		
		IT	\$ 8,487	\$ 30,000
		Call Center	\$ 391,730	\$ 650,000
		Facilities		
		Incentives--Core Programs	\$ 9,303,147	\$ 9,790,000
		Incentives--Third Party Program		
	Non-Labor Total		\$ 14,163,673	\$ 16,261,000
Residential Total			\$ 14,498,030	\$ 16,603,000
	Other (collected through GRC)	Labor Overheads		

- Notes:
- (1) Labor rates are fully loaded, inclusive of overhead and fringe benefits
 - (2) BayREN member local government agency contracts
 - (3) 2018 Budget excludes \$830,000 loan capital tracked in portfolio summary in cell G17. In BayREN's Business Plan filing, this balance is included in the sector budget.

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
SUPPLEMENTAL 2018 EE BUDGET INFORMATION
COMMERCIAL BUDGET DETAIL**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures	2018 EE Portfolio Budget
Commercial	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 5,243	\$ 15,000
		Program Management	\$ 701	\$ 10,000
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)	\$ 4,661	\$ 5,000
		Account Management / Sales		
		IT		\$ 4,000
		Call Center		
	Labor Total		\$ 10,605	\$ 34,000
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts ⁽²⁾	\$ 77,133	\$ 898,000
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 10,521	\$ 10,000
		Program Management		\$ 112,000
		Engineering services		\$ 662,000
		Customer Application/Rebate/Incentive Processing		\$ 40,000
		Customer Project Inspections		
		Portfolio Analytics	\$ 802	\$ 20,000
		ME&O (Local)	\$ 23,370	\$ 343,000
		Account Management / Sales		
		IT		
		Call Center		\$ 424,000
		Facilities	\$ -	
		Incentives--Core Programs	\$ -	\$ 500,000
		Incentives--Third Party Program	\$ -	
	Non-Labor Total		\$ 111,826	\$ 3,009,000
Commercial Total			\$ 122,431	\$ 3,043,000
	Other (collected through GRC)	Labor Overheads		

Notes: (1) Labor rates are fully loaded, inclusive of overhead and fringe benefits
(2) BayREN member local government agency contracts

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
SUPPLEMENTAL 2018 EE BUDGET INFORMATION
PUBLIC SECTOR BUDGET DETAIL**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures	2018 EE Portfolio Budget
Public Sector	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance		\$ 10,000
		Program Management		\$ 5,000
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		\$ 5,000
		Account Management / Sales		
		IT		
		Call Center		
	Labor Total		\$ -	\$ 20,000
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts ⁽²⁾		\$ 120,000
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		\$ 100,000
		Program Management		\$ 128,000
		Engineering services		\$ 100,000
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		\$ 10,000
		ME&O (Local)		\$ 20,000
		Account Management / Sales		
		IT		\$ 2,000
		Call Center		
		Facilities		\$ -
		Incentives--Core Programs		\$ -
		Incentives--Third Party Program		\$ -
	Non-Labor Total		\$ -	\$ 480,000
Public Sector Total			\$ -	\$ 500,000
	Other (collected through GRC)	Labor Overheads		

Notes: (1) Labor rates are fully loaded, inclusive of overhead and fringe benefits
(2) BayREN member local government agency contracts

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
SUPPLEMENTAL 2018 EE BUDGET INFORMATION
CROSS -CUTTING BUDGET DETAIL**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures	2018 EE Portfolio Budget
Cross Cutting	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 69,503	\$ 26,500
		Program Management	\$ 59,810	\$ 450,500
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics	\$ 6,564	
		ME&O (Local)	\$ 4,242	\$ 53,000
		Account Management / Sales		
		IT	\$ 355	
		Call Center		
	Labor Total		\$ 140,474	\$ 530,000
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts ⁽²⁾	\$ 827,250	\$ 1,411,000
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 63,246	\$ 80,000
		Program Management	\$ 700,000	\$ 835,000
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics	\$ 131,267	\$ 40,000
		ME&O (Local)	\$ 2,327	\$ 20,000
		Account Management / Sales		
		IT		\$ 165,000
		Call Center		
		Facilities		
		Incentives--Core Programs / Loan Capital		
		Incentives--Third Party Program		
	Non-Labor Total		\$ 1,724,090	\$ 2,551,000
Cross Cutting Total			\$ 1,864,564	\$ 3,081,000
	Other (collected through GRC)	Labor Overheads		

Notes: (1) Labor rates are fully loaded, inclusive of overhead and fringe benefits
(2) BayREN member local government agency contracts

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
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INDUSTRIAL BUDGET DETAIL**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures	2018 EE Portfolio Budget
Industrial	Labor	Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
	Labor Total		\$ -	\$ -
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts		
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
		Facilities		
		Incentives--Core Programs		
		Incentives--Third Party Program		
	Non-Labor Total		\$ -	\$ -
Industrial Total			\$ -	\$ -
	Other (collected through GRC)	Labor Overheads		

Notes:

**BAY AREA REGIONAL ENERGY NETWORK (BAYREN)
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 AGRICULTURAL BUDGET DETAIL**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures	2018 EE Portfolio Budget
Agricultural	Labor	Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
	Labor Total		\$ -	\$ -
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts		
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
		Facilities		
		Incentives--Core Programs		
		Incentives--Third Party Program		
	Non-Labor Total		\$ -	\$ -
Agricultural Total			\$ -	\$ -
	Other (collected through GRC)	Labor Overheads		

Notes: