

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

Application of Southern California Edison
Company (U338E) for Approval of Energy
Efficiency Rolling Portfolio Business Plan.

And Related Matters.

Application 17-01-013
(Filed January 17, 2017)

Application 17-01-014
Application 17-01-015
Application 17-01-016
Application 17-01-017

**SAN DIEGO GAS & ELECTRIC COMPANY'S (U 902-M) SUPPLEMENTAL
BUDGET INFORMATION**

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June 12, 2017

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Application of Southern California Edison Company (U338E) for Approval of Energy Efficiency Rolling Portfolio Business Plan.	Application 17-01-013 (Filed January 17, 2017)
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**SAN DIEGO GAS & ELECTRIC COMPANY’S (U 902-M) SUPPLEMENTAL
BUDGET INFORMATION**

Pursuant to the Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges, dated April 14, 2017 (Scoping Ruling), the Program Administrators were to submit responses to supplemental questions in the Ruling’s Attachment A, and any supplemental budget information agreed upon through the meet and confer process, on May 15, 2017. However, pursuant to the E-mail Ruling of Administrative Law Judge Valerie Kao, dated May 15, 2017, the Commission granted an extension until June 12, 2017 to respond to certain portions of the Scoping Ruling’s Attachment A (Questions I.C.9, I.C.14 and I.C.15, and SDG&E-specific questions VII.C. 101.d, VII.C.102, and VII.C.103) and to submit the supplemental budget information. Accordingly, San Diego Gas & Electric Company (“SDG&E”) timely submits its supplemental responses to Attachment A, attached hereto as Attachment A, and its supplemental budget information, attached hereto as Exhibits A-F.

As part of the “meet and confer” process suggested by question C.9 in Attachment A of the Scoping Ruling, the investor-owned utility (IOU) Program Administrators (PAs) proposed three basic but important principles to guide the consideration of any supplemental budget showing. These principles are based on TURN’s early comment that TURN and ORA are

seeking PA budget information to understand how PAs currently operate their energy efficiency (EE) programs as a prelude to considering cost containment measures, and that EE program administration would evolve along with the changes in EE market structure under the Rolling Portfolio decisions. PA administrative organizations will evolve as non-IOU programs (CCAs and RENs), statewide programs and the minimum 60% third party programs are in place and EE programs are being administered under a more or less permanent structure. Thus, the IOU PAs, including SDG&E, provide their supplemental budget information agreed upon through the meet and confer process with the following understanding:

1. Budgets adopted in this proceeding should be indicative of expected PA activities until the Rolling Portfolio EE market structure has reached a steady state. Budget allocation for administrative functions should be flexible to accommodate process improvements that become necessary as the new market structure evolves.

2. The PAs must retain flexibility to manage their EE programs and costs to achieve maximum efficiencies. That is, PAs may adjust in-house EE organizational structure, including staffing level and budgets, without prior Commission or Commission staff approval, so long as changes are documented so that this information can inform future review of proposed administrative budgets.

3. There must be a level playing field for all PAs. All PAs should be required to provide the same level of budget transparency and be subject to the same program evaluation standard, e.g., cost-effectiveness by program level. The same budget template will be used to describe the administrative costs of all EE PAs. Any non-IOU PA that cannot provide information in the requested format should provide equivalent information and any necessary explanation.

4. Program costs and budgets are based on the Commission’s approved cost categories (i.e., Administrative, Marketing, Direct Implementation-Non-Incentives, and Incentives)—not according to the functional categories requested by ORA and TURN. Cost categories and functional group activities may not match perfectly.

5. 2018 Full-Time Equivalents (FTE’s) are also estimates at this time. Final staffing needs will depend on approval of Statewide programs lead administrator assignments and IOU support required for managing and supporting various third party programs (e.g., engineering support for work papers, account executive customer contact and support, local program ME&O, etc.). As these programs mature over time, staffing requirements will continue to change.

6. The proposed Solicitation schedules and budgets are also subject to Commission approval of budgets and Statewide programs lead administrator assignments.

Respectfully submitted,

/s/ Ellen N. Adler

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June 12, 2017

Attachment A
Questions for Business Plan Proponents
Part 2—Budget Related Questions

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This supplemental response provides the outstanding responses to a select set of questions from Attachment A of the Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges, dated April 14, 2017. In the “Email Ruling Granting Motion for Extension of Time,” dated May 15, 2017, an extension of time was granted to file and serve responses to Questions I.C.9, I.C.14 and I.C.15; and SDG&E-specific questions VII.C.101.d, VII.C.102, and VII.C.103.¹

This supplemental response also includes Exhibits A and B, which include supplemental budget information that, as part of the “meet and confer” process between the program administrations, ORA and TURN, the program administrators agreed to provide.

Exhibit A: The Exhibit contains the following Tables

Portfolio Summary: provides the total portfolio 2016 expenditures and savings by sector, 2018 forecasted budgets and savings.

Function Definitions: provides descriptions to support the Functional Group activities used in the detailed sector tables.

Portfolio Staffing: provides the 2016 and 2018 forecasted full time equivalent (FTE) counts.

Residential Budget Detail: provides 2016 expenditure and 2018 budgets organized by the Functional Groups and Labor/Non-Labor dollars. A similar separate table is prepared for all other sectors: Commercial, Industrial, Agricultural, Public Sector and Cross-cutting.

Exhibit B: The Exhibit provides responses to additional questions that provide additional budget-related details.

I. QUESTIONS APPLICABLE TO ALL PROSPECTIVE PROGRAM ADMINISTRATORS (PAS)

C. Proposed budgets (Assigned to all program areas as noted in email)

8. Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable / facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness.

SDG&E Response:

¹ “Email Ruling Granting Motion for Extension of Time,” May 15, 2017, Ordering Paragraph 2, which states, Business Plan Proponents shall file and serve a document, no later than June 12, 2017, that contains responses to Questions I.C.9, I.C.14 and I.C.15; and SDG&E-specific questions VII.C. 101.d, VII.C.102, and VII.C.103 in the Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges dated April 14, 2017. The first paragraph of the document shall state that the Administrative Law Judges granted an extension of time to file and serve these responses.”

SDG&E provides the energy savings targets and expenditures by sector in Exhibit A. The data presented in the various tables in the exhibit are all estimates for the following reasons (in addition to specific footnotes in the various tables):

(1) Program costs and budgets are based on the Commission’s approved cost categories (i.e., Administrative, Marketing, Direct Implementation-Non-Incentives, and Incentives)—not according to the functional categories requested by ORA and TURN. Cost categories and functional group activities may not match perfectly.

(2) 2018 Full-Time Equivalents (FTE)s are also estimates at this time. Final staffing needs will depend on approval of Statewide programs lead administrator assignments and IOU support required for managing and supporting various third party programs (e.g., engineering support for work papers, account executive customer contact and support, local program ME&O, etc.). As these programs mature over time, staffing requirements will continue to change.

9. Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.

SDG&E Response:

SDG&E provides the specified information in Exhibit A.

14. What are the statewide aggregate budgets for each statewide program?

SDG&E Response:

The following table presents the aggregated statewide program budgets.

Aggregate Budgets for Statewide Programs

Statewide Program*	Proposed Lead	2018 Budget (\$M)**	2019 Budget (\$M)**	2020 Budget (\$M)**
State Government Partnerships	PG&E	\$ 4.74	\$ 4.78	\$ 4.81
Codes and Standards Advocacy	PG&E	\$ 11.95	\$ 12.06	\$ 12.13
WE&T Connections	PG&E	\$ 4.08	\$ 4.09	\$ 4.10
WE&T Career & Workforce Readiness (downstream pilot)	PG&E	\$ 1.67	\$ 1.67	\$ 1.67
Indoor Agriculture (downstream pilot)	PG&E	TBD	TBD	TBD
Emerging Technologies: Electric	SCE	\$ 14.52	\$ 14.75	\$ 14.90
Lighting	SCE	\$ 16.82	\$ 13.35	\$ 13.37
Savings by Design	SCE	\$ 22.89	\$ 23.30	\$ 23.59
Government Institutional Partnerships	SCE	\$ 15.63	\$ 15.47	\$ 15.22
Water/Wastewater Pumping (downstream pilot)	SCE	\$ 5.25	\$ 5.26	\$ 5.28
Residential New Construction	SCG	\$ 13.37	\$ 19.11	\$ 9.41
Emerging Technologies: Gas	SCG	\$ 2.66	\$ 2.69	\$ 2.72
Food Service Point-of-Sale	SCG	\$ 5.42	\$ 5.66	\$ 5.78
Commercial Midstream Water Heaters	SCG	\$ 2.62	\$ 2.69	\$ 2.72
Commercial Upstream HVAC	SDG&E	\$ 30.29	\$ 30.98	\$ 31.44
Residential Upstream HVAC	SDG&E	\$ 1.86	\$ 1.98	\$ 2.06
Residential PLA***	SDG&E	\$ 27.97	\$ 29.47	\$ 23.11
Residential HVAC QI/QM (downstream pilot)	SDG&E	\$ 6.85	\$ 7.32	\$ 7.86

Notes

*Statewide budgets may be adjusted before and after the solicitation process based on portfolio needs and proposals received.

** Estimated statewide budgets reflect fully loaded program costs, not contract amounts that will be included in solicitations.

***PG&E's contribution does not include the Retail Products Platform (RPP) pilot.

VII. QUESTIONS APPLICABLE TO SAN DIEGO GAS & ELECTRIC COMPANY (SDG&E)

C. Statewide Administration - Budget Transparency and Administrative Efficiency

101. What is SDG&E's administrative strategy? SDG&E (at page 20 of business plan) states that as program administrators their goal will be to maximize cost-effectiveness, streamline business practices and "Partner with manufacturers and retailers."

SDG&E Response:

As stated in SDG&E's Business Plan Exhibit 2², SDG&E is a lean, efficient administrator. Although there are several factors that work against cost-effectiveness (e.g., limited Industrial Sector and a relatively small portfolio - \$116.5M), SDG&E has been able to create a portfolio with a TRC greater than 1.5, as well as creating a competitive lifecycle cost for energy efficiency measures. Building upon this platform for success, SDG&E's statewide lead assignments are based on its vision for the future of the statewide program offerings.

d. How many full time equivalents (FTEs) does SDG&E anticipate will be needed to administer each Statewide program? Will this change over time?

Please see the FTE counts in Exhibit B.

Changes in FTEs over time are impacted by the discussions described in SDG&E's response in Exhibit B, Question 3.

102. Does SDG&E expect that administrative costs will vary over time (e.g., higher during solicitation)? On what basis are administrative costs expected to change?

SDG&E Response:

Please see response in Exhibit B, Question 3.

D. Budget and Cost-Effectiveness

103. SDG&E does not plan to change the size of staffing, but is moving from less than 30 percent outsourcing to 60 percent outsourcing without expanding budget. Explain how SDG&E intends to achieve the increased outsourcing target without increasing its staff size.

² A.17-01-014 available at https://www.sdge.com/sites/default/files/regulatory/SDGE%20EE%20BP%20Application%20FINAL%20with%20BP_2.PDF.

SDG&E Response: (previously responded to in SDG&E's May 15, 2017 Filing)

SDG&E is already using current vacancies to position our staff for the future model where SDG&E will play a larger role as program administrator and a smaller role as program implementer. Additionally, SDG&E has a successful practice of bringing on contracted specialists to support larger resource requirements.

Exhibit A

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
PORTFOLIO SUMMARY

Sector	2016 EE Portfolio Expenditures (\$Million)			2018 EE Portfolio Budget (\$Million)			2016 EE Portfolio Savings (4)			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	2.3	14.1	18.2	34.6	2.3	13.1	29.97	45.4	79,913,423	40,348	841	158,431,301	18,843	1,500
Commercial	4.2	16.9	39.3	60.4	5.4	16.0	21.89	43.3	95,705,463	19,871	1,126	132,865,235	25,689	1,700
Agricultural	0.2	0.0	0.4	0.6	0.4	0.3	0.26	0.9	247,402	50	92	432,864	108	134
Industrial	0.6	0.7	2.9	4.2	1.2	1.3	0.98	3.5	3,232,923	627	47	6,691,858	1,203	63
Public (GP)	0.9	3.3	7.7	11.9	1.2	3.2	4.28	8.6	18,403,499	3,819	243	25,643,925	3,876	1,042
Cross Cutting (1)	3.6	10.1	0.1	13.7	4.6	13.1	-	17.7	144,811,596	28,098	998	171,772,148	33,536	1,622
Total Sector Budget	11.74	45.13	68.54	125.42	15.19	46.87	57.38	119.44	342,314,306	92,813	3,347	495,837,332	83,255	6,061
EM&V-PA	0.5	0.2		0.7	0.5	0.8		1.3						
EM&V-ED (2)		0.1		0.1		3.4		3.4						
OBF - Loan Pool (3)				26.0				26.0						
REN														
CCA														
EE Total	12.25	45.40	68.54	126.19	15.70	51.02	57.38	124.10	342,314,306	92,813	3,347	495,837,332	83,255	6,061

(1) Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training and Financing.

(2) EM&V split between IOU and ED is 27.5%/72.5%. EM&V ED has not billed for 2016 EM&V activities and are not reflected in the expenditures. However, SDG&E commits ED EM&V budgets until released by ED.

(3) SDG&E's EM&V budget is embedded in its administration sector budgets (see Business Plan Fig B.2). The total EM&V budget is \$4.658 million.

(4) Savings do not include Energy Savings Assistance Program savings (2016 values = 3,446,807 kWh, 405 KW & 998 Mtherms)

Mtherms=1000 therms

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
PORTFOLIO STAFFING

Functional Group	2016 EE Portfolio FTE	2018 EE Portfolio FTE
Policy, Strategy, and Regulatory Reporting Compliance	12.7	12.7
Program Management	58.6	57.6
Engineering Services	10.1	9.1
Customer Application/Rebate/Incentive Processing	16.1	16.1
Customer Project Inspections	4.6	4.6
Portfolio Analytics		
EM&V	4.1	3.1
ME&O	9.1	9.1
Account Management / Sales	11.0	11.0
IT	4.3	4.3
Call Center	1.5	1.5
Total	132.1	129.0

These values are estimated and are based on SDG&E's best judgement given the amount of time provided to determine. Note: SDG&E calculated only productive hours since the Vacation & Sick Leave (V&S) is covered separately but will be represented in the fully loaded value of the various FTEs.

SDG&E calculated an FTE as follows:

The productive hours would not include:

- (1) vacation (2.5 weeks = 100 hours)
- (2) holidays/floaters (14 days = 112 hours); and/or
- (3) sick leave (10 days = 80 hours)

Therefore, the annual hours for an FTE would be approximately 1788 (2080 – 292) or 149 hours a month.

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
RESIDENTIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance (4)		
		2 Program Management	\$ 1.35	\$ 1.34
		3 Engineering services	\$ 0.16	\$ 0.16
		4 Customer Application/Rebate/Incentive Processing	\$ 0.21	\$ 0.21
		5 Customer Project Inspections	\$ 0.10	\$ 0.10
		6 Portfolio Analytics		
		7 ME&O (Local)	\$ 0.22	\$ 0.22
		8 Account Management / Sales	\$ 0.14	\$ 0.14
		9 IT	\$ 0.11	\$ 0.11
		10 Call Center	\$ 0.06	\$ 0.06
	Labor Total		\$ 2.34	\$ 2.33
	Non-Labor	Third-Party Implementers Contracts	\$ 3.45	\$ 3.22
		2 Local/Government Partnerships Contracts (3)		
		Other Contracts		
		3 Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.00	\$ 0.00
		4 Program Management	\$ 10.35	\$ 9.69
		5 Engineering services	\$ 0.03	\$ 0.03
		6 Customer Application/Rebate/Incentive Processing		
		7 Customer Project Inspections		
		8 Portfolio Analytics		
		9 ME&O (Local)	\$ 0.02	\$ 0.02
		10 Account Management / Sales	\$ 0.00	\$ 0.0014
		11 IT	\$ 0.17	\$ 0.16
		12 Call Center		
		13 Facilities (4)		
		14 Incentives--Core Programs	\$ 16.05	\$ 12.87
		15 Incentives--Third Party Program	\$ 2.17	\$ 17.11
	Non-Labor Total		\$ 32.23	\$ 43.09
Residential Total	Other (collected through GRC) (2)	Labor Overheads	\$ 1.00	\$ 2.19

Notes:

- (1) Labor costs are include V&S and Payroll Taxes
- (2) These P&B costs are authorized in SDG&E 2016 GRC D.16-06-054.
- (3) L&P contracts that directly support the sector is included/not included in this item
- (4) Since SDG&E treats these functions as "EE Overhead" rather than allocating the costs across sectors, they are included in the Cross-cutting sector tab.

SAN DIEGO GAS & ELECTRIC COMPANY
 EXHIBIT A
 COMMERCIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance (4)		
		Program Management	\$ 2.00	\$ 2.57
		Engineering services	\$ 0.86	\$ 1.11
		Customer Application/Rebate/Incentive Processing	\$ 0.79	\$ 1.02
		Customer Project Inspections	\$ 0.22	\$ 0.28
		Portfolio Analytics		
		ME&O (Local)	\$ 0.01	\$ 0.02
		Account Management / Sales	\$ 0.28	\$ 0.36
		IT	\$ 0.02	\$ 0.02
		Call Center	\$ 0.04	\$ 0.05
	Labor Total		\$ 4.21	\$ 5.42
	Non-Labor	Third-Party Implementers Contracts	\$ 14.62	\$ 13.76
		Local/Government Partnerships Contracts (3)	\$ 1.00	\$ 0.94
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management	\$ 0.91	\$ 0.86
		Engineering services	\$ 0.20	\$ 0.19
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales	\$ 0.01	\$ 0.01
		IT	\$ 0.20	\$ 0.19
		Call Center		
		Facilities (4)		
		Incentives--Core Programs	\$ 36.87	\$ 17.32
		Incentives--Third Party Program	\$ 2.42	\$ 4.57
	Non-Labor Total		\$ 56.24	\$ 37.84
Commercial Total	Other (collected through GRC) (2)	Labor Overheads	\$ 60.44	\$ 43.26
			\$ 1.79	\$ 3.93

- Notes:
- (1) Labor costs include V&S and Payroll Taxes
 - (2) These P&B costs are authorized in SDG&E 2016 GRC D.16-06-054.
 - (3) LGP contracts that directly support the sector is included/not included in this item
 - (4) Since SDG&E treats these functions as "EE Overhead" rather than allocating the costs across sectors, they are included in the Cross-cutting sector tab.

SAN DIEGO GAS & ELECTRIC COMPANY
 EXHIBIT A
 AGRICULTURAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance (4)		
		Program Management	\$ 0.086	\$ 0.193
		Engineering services	\$ 0.030	\$ 0.067
		Customer Application/Rebate/Incentive Processing	\$ 0.012	\$ 0.026
		Customer Project Inspections	\$ 0.011	\$ 0.025
		Portfolio Analytics		
		ME&O (Local)	\$ 0.002	\$ 0.006
		Account Management / Sales	\$ 0.033	\$ 0.074
		IT	\$ 0.000	\$ 0.001
		Call Center		
	Labor Total		\$ 0.17	\$ 0.39
	Non-Labor	Third-Party Implementers Contracts		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management	\$ 0.04	\$ 0.24
		Engineering services	\$ 0.00	\$ 0.01
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales	\$ 0.0002	\$ 0.0016
		IT	\$ 0.00	\$ 0.02
		Call Center		
		Facilities (4)		
		Incentives--Core Programs	\$ 0.41	\$ 0.26
		Incentives--Third Party Program	\$	\$ -
	Non-Labor Total		\$ 0.45	\$ 0.53
Agricultural Total			0.63	0.92
	Other (collected through GRC) (2)	Labor Overheads	\$ 0.08	\$ 0.17

- Notes:
- (1) Labor costs include V&S and Payroll Taxes
 - (2) These P&B costs are authorized in SDG&E 2016 GRC D.16-06-054.
 - (3) LGP contracts that directly support the sector is included/not included in this item
 - (4) Since SDG&E treats these functions as "EE Overhead" rather than allocating the costs across sectors, they are included in the Cross-cutting sector tab.

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
INDUSTRIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance (4)		
		Program Management	\$ 0.284	\$ 0.544
		Engineering services	\$ 0.284	\$ 0.542
		Customer Application/Rebate/Incentive Processing	\$ 0.024	\$ 0.046
		Customer Project Inspections	\$ 0.025	\$ 0.047
		Portfolio Analytics		
		ME&O (Local)	\$ 0.003	\$ 0.005
		Account Management / Sales	\$ 0.015	\$ 0.029
		IT	\$ 0.000	\$ 0.001
		Call Center		
	Labor Total		\$ 0.63	\$ 1.21
	Non-Labor	Third-Party Implementers Contracts	\$ 0.32	\$ 0.65
		Local/Government Partnerships Contracts (3)	\$ 0.19	
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management	\$ 0.19	\$ 0.51
		Engineering services	\$ 0.04	\$ 0.12
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales	\$ 0.0012	\$ 0.0014
		IT	\$ 0.04	\$ 0.01
		Call Center		
		Facilities (4)		
		Incentives--Core Programs	\$ 2.87	\$ 0.98
		Incentives--Third Party Program	\$	\$ -
	Non-Labor Total		\$ 3.65	\$ 2.28
Industrial Total	Other (collected through GRC) (2)	Labor Overheads	\$ 4.29	\$ 3.49
			\$ 0.27	\$ 0.60

Notes:
(1) Labor costs include V&S and Payroll Taxes
(2) These P&B costs are authorized in SDG&E 2016 GRC D.16-06-054.
(3) LGP contracts that directly support the sector is included/not included in this item
(4) Since SDG&E treats these functions as "EE Overhead" rather than allocating the costs across sectors, they are included in the Cross-cutting sector tab.

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
PUBLIC SECTOR BUDGET DETAIL

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance (4)		
		Program Management	\$ 0.441	\$ 0.598
		Engineering services	\$ 0.192	\$ 0.261
		Customer Application/Rebate/Incentive Processing	\$ 0.162	\$ 0.219
		Customer Project Inspections	\$ 0.048	\$ 0.065
		Portfolio Analytics		
		ME&O (Local)	\$ 0.004	\$ 0.005
		Account Management / Sales	\$ 0.021	\$ 0.028
		IT	\$ 0.002	\$ 0.003
		Call Center	\$ 0.005	\$ 0.007
	Labor Total		\$ 0.87	\$ 1.19
	Non-Labor	Third-Party Implementers Contracts	\$ 2.80	\$ 2.71
		Local/Government Partnerships Contracts (3)	\$ 0.19	\$ 0.18
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management	\$ 0.19	\$ 0.19
		Engineering services	\$ 0.04	\$ 0.04
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales	\$ 0.0012	\$ 0.0011
		IT	\$ 0.04	\$ 0.04
		Call Center		
		Facilities (4)		
		Incentives--Core Programs	\$ 7.23	\$ 4.28
		Incentives--Third Party Program	\$ 0.46	\$ -
	Non-Labor Total		\$ 10.96	\$ 7.44
Public Sector Total	Other (collected through GRC) (2)	Labor Overheads	\$ 11.83	\$ 8.62
			\$ 0.37	\$ 0.82

Notes:

- (1) Labor costs include V&S and Payroll Taxes
- (2) These P&B costs are authorized in SDG&E 2016 GRC D.16-06-054.
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) Since SDG&E treats these functions as "EE Overhead" rather than allocating the costs across sectors, they are included in the Cross-cutting sector tab.

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
CROSS-CUTTING BUDGET DETAIL

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Cross Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance (4)	\$ 0.96	\$ 1.26
		Program Management	\$ 1.512	\$ 1.973
		Engineering services	\$ 0.009	\$ 0.012
		Customer Application/Rebate/Incentive Processing	\$ 0.089	\$ 0.116
		Customer Project Inspections		
		Portfolio Analytics	\$ 0.318	\$ 0.415
		ME&O (Local)	\$ 0.427	\$ 0.557
		Account Management / Sales		
		IT	\$ 0.239	\$ 0.313
		Call Center	\$ 0.005	\$ 0.007
	Labor Total		\$ 3.56	\$ 4.65
	Non-Labor	Third-Party Implementers Contracts	\$ 0.13	\$ 0.15
		Local/Government Partnerships Contracts (3)	\$ 2.78	\$ 3.30
		Other Contracts		
		Policy, Strategy, and Regulatory Reporting Compliance	\$	\$ 1.57
		Program Management	\$ 3.60	\$ 4.29
		Engineering services	\$ 0.13	\$ 0.16
		Customer Application/Rebate/Incentive Processing	\$ 0.24	\$ 0.29
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)	\$ 2.39	\$ 2.84
		Account Management / Sales	\$ 0.0453	\$ 0.0538
		IT	\$ 0.07	\$ 0.09
		Call Center		
		Facilities (4)	\$ 0.29	\$ 0.34
		Incentives--Core Programs	\$ 0.06	
		Incentives--Third Party Program		
Cross Cutting Total	Non-Labor Total		\$ 9.74	\$ 13.07
	Other (collected through GRC) (2)		\$ 13.30	\$ 17.72
		Labor Overheads	\$ 1.52	\$ 3.33

Notes:

- (1) Labor costs are include V&S and Payroll Taxes
- (2) These P&B costs are authorized in SDG&E 2016 GRC D.16-06-054.
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) Since SDG&E treats these functions as "EE Overhead" rather than allocating the costs across sectors, they are included in the Cross-cutting sector tab.

SAN DIEGO GAS & ELECTRIC COMPANY
EXHIBIT A
FUNCTION DEFINITIONS

Aggregated Category	Definition	Functional Category
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and regulatory support	Planning & Compliance Company Regulatory Support
Program Management	Includes labor, contracts, admin costs for program design, program implementation, product and channel management for all sectors	Program Management & Delivery Product Management Channel Management
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project technical reviews and design assistance	Contract Management Custom project support 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
EM&V	EM&V expenditures	EM&V Studies
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	EM&V Forecasting Marketing Customer insights
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 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

Exhibit B

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EXHIBIT B

Approved Meet & Confer Document by Program Administrators, Office of Ratepayers and The Utility Reform Network

I. DESCRIPTION OF IN-HOUSE EE ORGANIZATIONAL STRUCTURE & ASSOCIATED COSTS

A. Narrative description of in-house departments/organizations supporting the PA's EE portfolio

1. Functions conducted by each department/organization

SDG&E Response:

Please refer to the definition of functions in the attached Exhibit A – Function Definitions tab and Exhibit C – 2016 Organization Chart.

- 1) SDG&E's Customer Programs department manages EE, Energy Savings Assistance (ESA), Demand Response and other non-EE customer programs. Managerial Areas under Customer Programs:
 - a) Program Operations: manages all customer programs.
 - i) Residential programs: manages all residential programs, including EE and ESA programs.
 - ii) Nonresidential EE programs: manages all EE nonresidential programs.
 - iii) Third Party Programs: manages all solicitations and EE third program management.
 - iv) Customer Programs Support: manages processing, quality control (inspections) and systems support.
 - v) Energy Innovation Center (EIC): manages WE&T programs and education-related EE program initiatives in addition to managing SDG&E's EIC facility.
 - vi) Program Managers: includes Water Energy Nexus (WEN) and Integrated Demand Side Management (IDSMS) programs and initiatives.
 - b) Business Analysis: manages finances and expenditures, including financial reporting, for the department.
 - c) Engineering Services: manages the engineering functions that support the programs (e.g., work papers, customer ex ante review process) and Emerging Technologies program management.
 - d) Policy & Strategy: manages Customer Programs policy and strategy issues, including CPUC, CEC, legislative EE-related issues; EM&V and other reporting and data request processes.

- e) New Products & Services: manages development and management of potential customer-facing products and services, including Marketplace.
- 2) Business Services: manages all business customer services, including the promotion and support of EE programs and projects.
- 3) Residential Services: in addition to their non-EE functions (e.g., Call Center), residential marketing was managed in this department.
- 4) Marketing Research and Analysis: oversees the company's various marketing initiatives, research and analysis. It supports the EE Marketing Education & Outreach (ME&O) efforts. It may provide support for various customer surveys to support EE programs.

Although an organization chart is not included, the IT department provides support for EE as required as it relates to EE systems support.

Additional departments that support EE but do not bill to EE (not exhaustive) are Accounting (including Accounts Payable), Human Resources, Regulatory Case Management, and Supply Management. These activities are covered through SDG&E's GRC.

2. Management structure and org chart

SDG&E Response:

See Exhibit C for the 2016 EE Management organization chart.

3. Staffing needs by department/organization, including current and forecast for 2018, as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.

SDG&E Response:

SDG&E provided discussions that are responsive to this question in its May 15, 2017 San Diego Gas & Electric Company's Responses to Supplemental Questions,¹ Attachment A, Questions 3 and 4.

In addition, SDG&E provided a relevant response to ORA Data Request No. 1, Question 22. Please see Exhibit D.

4. Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.

SDG&E Response:

¹ Please note that this pleading was re-filed and re-served on June 7, 2017; however, May 15, 2017 is the effective filing date.

SDG&E contracts with various consultants who provide a variety of EE support services, including, but not limited to, engineering, reporting, portfolio analytics and forecasting, IT, rebate processing support, marketing, EM&V (e.g., process evaluations, customer surveys, etc.), and EE employee development.

SDG&E provided discussions that are responsive to this question in its May 15, 2017 San Diego Gas & Electric Company's Responses to Supplemental Questions, Attachment A, Questions 3 and 4.

In addition, SDG&E provided a relevant response to the March 15, 2017 ORA Data Request No. 1, Question 22. Please see Exhibit D.

5. Anticipated drivers of in-house cost changes by department/organization

SDG&E Response:

SDG&E provided discussions that are responsive to this question in its May 15, 2017 San Diego Gas & Electric Company's Responses to Supplemental Questions, Attachment A, Questions 3 and 4.

In addition, SDG&E provided a relevant response to the March 15, 2017 ORA Data Request No. 1, Question 22. Please see Exhibit D.

6. Explanation of method for forecasting costs

SDG&E Response:

SDG&E provided a discussion of its budget methodology in its Business Plan Appendix B.

In addition, SDG&E provided a relevant response to the March 15, 2017 ORA Data Request No. 1, Question 27. Please see Exhibit E. Attachments discussed in Exhibit E are available on the CAEECC website at <https://www.caeecc.org/sdge-resp-to-ora-1-data-req>.

B. Table showing PA EE "Full Time Equivalent" headcount by department/organization

7. TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. We would be looking for 2016 or 2017 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we'd want at least 2018.

Note, if PAs' FTE needs change, these changes can be made without reporting or seeking CPUC approval

**TABLE 6-3(a)
EP HEADCOUNT
NUMBER OF PLANNED POSITIONS**

Line No.	Description	2014 Positions	2015 Forecast	2016 Forecast	2017 Forecast
1	EP Administrative Office	4	4	4	4
2	Energy Supply Management (ESM)	126	131	131	134
3	Renewable Energy (RE)	38	40	40	41
4	Energy Policy, Planning and Analysis (EPPA)	46	46	46	46
5	Value Based Reliability (VBR)	10	12	12	12
6	Energy Contract Management and Settlements (ECMS)	79	80	80	80
7	Energy Compliance and Reporting (ECR)	18	18	18	18
8	Total	321	331	331	335

(a) See WP Table 6-7, Exhibit (PG&E-5).

SDG&E Response:

Please refer to Exhibit A – Portfolio Headcount (FTE) tab. This table provides the full-time equivalents (FTEs) for 2016 and 2018. SDG&E calculated only productive hours, since the Vacation & Sick Leave (V&S) is covered separately but will be represented in the fully loaded value of the various FTEs. SDG&E calculated an FTE as follows:

The productive hours would not include:

- (1) vacation (2.5 weeks = 100 hours);
- (2) holidays/floaters (14 days = 112 hours); and/or
- (3) sick leave (10 days = 80 hours).

Therefore, the annual hours for an FTE would be approximately 1788 (2080 – 292) or 149 hours a month.

C. Table showing costs by functional area of management structure

8. Expenses broken out into labor, non-labor O&M (with contract labor identified) (* Note, in case of conflict, excel budget template will control.)

SDG&E Response:

Please refer to Exhibit A – Portfolio Summary tab.

9. Identify any capital costs

SDG&E Response:

SDG&E did not identify any capital costs in its forecast.

D. Table showing cost drivers across the EE organization

10. TURN and ORA like this example, taken from testimony PG&E’s 2017 GRC addressing its Energy Procurement department.

While this example pertains to departmental cost increases, in our case, cost increases or decreases would be attributed to major cost drivers.

**TABLE 6-2(a)
EP COST INCREASE
2015-2017 EXPENSE BY COST DRIVER**

Line No.	Description	Increase in Thousands of \$	Percent of Total Increase
1	Escalation	3,597	57
2	Portfolio Complexity	1,136	18
3	Regulatory Mandates	1,192	19
4	Process Improvements	400	6
5	Total	6,324	100

(a) See WP Table 6-6, Exhibit (PG&E-5).

SDG&E Response:

SDG&E does not have data comparable to the data illustrated in the sample table above. However, SDG&E provided qualitative discussions responsive to this question in its May 15, 2017 San Diego Gas & Electric Company’s Responses to Supplemental Questions, Attachment A, Questions 3 and 4.

In addition, SDG&E provided a relevant response to the March 15, 2017 ORA Data Request No. 1, Question 22. Please see Exhibit D.

E. Explanation of allocation of labor and O&M costs between EE-functions and GRC-functions or other non-EE functions

11. When an employee spends less than 100% of her/his time on EE, how are costs tracked and recovered (e.g., on a pro rata basis between EE rates and GRC rates; when time exceeds a certain threshold, all to EE; etc.).

SDG&E Response:

SDG&E tracks each employee’s time through cost centers and internal orders. For its EE programs, SDG&E has an extensive set of internal orders and cost centers to track programs and cost categories (Administration, Marketing, Direct Implementation). Similarly, non-EE GRC work hours are charged to appropriate cost center and internal orders.

All labor hours, which are tracked in SDG&E's My Time system, are approved on a bi-weekly basis by the employees' respective supervisors. Costs recorded in EE internal orders are tracked in the various EE balancing accounts for appropriate cost recovery.

12. Describe the method used to determine the proportion charged to EE balancing accounts for all employees who also do non-EE work.

SDG&E Response:

Each employee works with their respective supervisor to determine the appropriate hours or percentage of their time to be charged to various activities. This time allocation is reviewed periodically by the supervisor with their respective employees. Reorganizations are triggers for review of time allocations.

13. Identify the EE functions that are most likely to be performed by employees who also do non-EE work (e.g. Customer Account Representatives?)

SDG&E Response:

Please refer to the definition of functions in Exhibit A – Function Definitions tab and Exhibit C – 2016 Organization Chart.

- 1) SDG&E's Customer Programs department manages EE, Energy Savings Assistance (ESA), Demand Response and other non-EE customer programs. Managerial Areas under Customer Programs:
 - a) Program Operations: manages all customer programs.
 - i) Residential programs: manages all residential programs, including EE and ESA programs.
 - ii) Nonresidential EE programs: manages all EE nonresidential programs.
 - iii) Third Party Programs: manages all solicitations and EE third program management.
 - iv) Customer Programs Support: manages processing, quality control (inspections) and systems support.
 - v) Energy Innovation Center (EIC): manages WE&T programs and education-related EE program initiatives in addition to managing SDG&E's EIC facility.
 - vi) Program Managers: includes Water Energy Nexus (WEN) and Integrated Demand Side Management (IDSM) programs and initiatives.
 - b) Business Analysis: manages finances and expenditures, including financial reporting, for the department.
 - c) Engineering Services: manages the engineering functions that support the programs (e.g., work papers, customer ex ante review process) and Emerging Technologies program management.

- d) Policy & Strategy: manages Customer Programs policy and strategy issues, including CPUC, CEC, legislative EE-related issues; EM&V and other reporting and data request processes.
 - e) New Products & Services: manages development and management of potential customer-facing products and services, including Marketplace.
- 2) Business Services: manages all business customer services, including the promotion and support of EE programs and projects.
 - 3) Residential Services: in addition to their non-EE-r functions, e.g., Call Center, residential marketing was managed in this department.
 - 4) Marketing Research and Analysis: oversees the company's various marketing initiatives, research and analysis. It supports the EE Marketing Education & Outreach (ME&O) efforts. It may provide support for various customer surveys to support EE programs.

Although an organization chart is not included, the IT department provides support for EE as required as it relates to EE systems support.

Additional departments that support EE but do not bill to EE (not exhaustive) are Accounting (including Accounts Payable), Human Resources, Regulatory Case Management, and Supply Management. These activities are covered through SDG&E's GRC.

14. Are labor costs charged to EE fully loaded?

SDG&E Response:

No, SDG&E only charges vacation and sick leave and payroll taxes loaders to EE for EE FTEs. Pensions & Benefits (P&B) are part of GRC.

15. How are burden benefit-related administrative and general (A&G) expenses for employees who work on EE programs recovered (EE rates or GRC rates)? **PG&E allocates these costs to EE pursuant to a settlement agreement with MCE and TURN, which was adopted in D.14-08-032.

SDG&E Response:

Please refer to response to Question 14 above.

16. When EE and non-EE activities are supported by the same non-labor resources, how are the costs of those resources or systems allocated to EE and non-EE activities?

SDG&E Response:

SDG&E charges and recovers non-labor costs as described in response to Question 11 above.

17. Identify the EE O&M costs that are most likely to be spread to non-EE functions as well as EE, if any

SDG&E Response:

Not applicable.

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

A. Attachment-A, Question C.8

“Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable / facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness.”

18. TURN and ORA invite the PAs to propose a common table format for this information. We don’t have anything specific in mind. Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.8 Table.

SDG&E Response:

Please refer to Exhibit A – Portfolio Summary tab.

B. Attachment-A, Question C.9

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

19. TURN and ORA invite the PAs to propose a common table format for this information. We don’t have anything specific in mind.

SDG&E Response:

Please refer to Exhibit A – Residential Budget Detail tab and similar tables for all other sectors: Commercial, Industrial, Agricultural, Public Sector and Cross-cutting.

20. Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

SDG&E Response:

SDG&E provided discussions that are responsive to this question in its May 15, 2017 San Diego Gas & Electric Company's Responses to Supplemental Questions, Attachment A, Questions 3 and 4.

In addition, SDG&E provided a relevant response to ORA Data Request No. 1, Question 22. Please see Exhibit D.

C. Attachment-A, Question C.10

“Present a table akin to PG&E's Figure 1.9 (Portfolio Overview, p 37) or SDG&E's Figure 1.10 (p. 23) that not only shows anticipated solicitation schedule of “statewide programs” by calendar year and quarter, but also expected solicitation schedule of local third-party solicitations, by sector, and program area (latter to extent known, and/or by intervention strategy if that is more applicable). For both tables, and for each program entry on the calendar, give an approximate size of budget likely to be available for each solicitation (can be a range).”

21. TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind. Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.10 Table.

SDG&E Response:

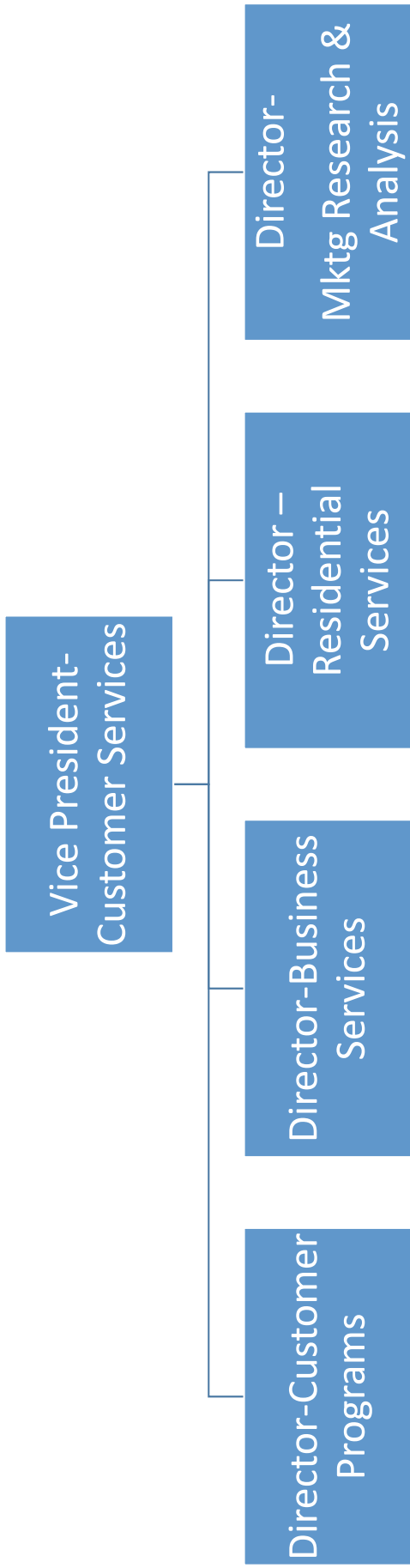
Please refer to SDG&E's May 15, 2017 San Diego Gas & Electric Company's Responses to Supplemental Questions, Exhibit C. The statewide consolidated solicitation schedule for statewide programs is attached hereto as Exhibit F.

Exhibit C

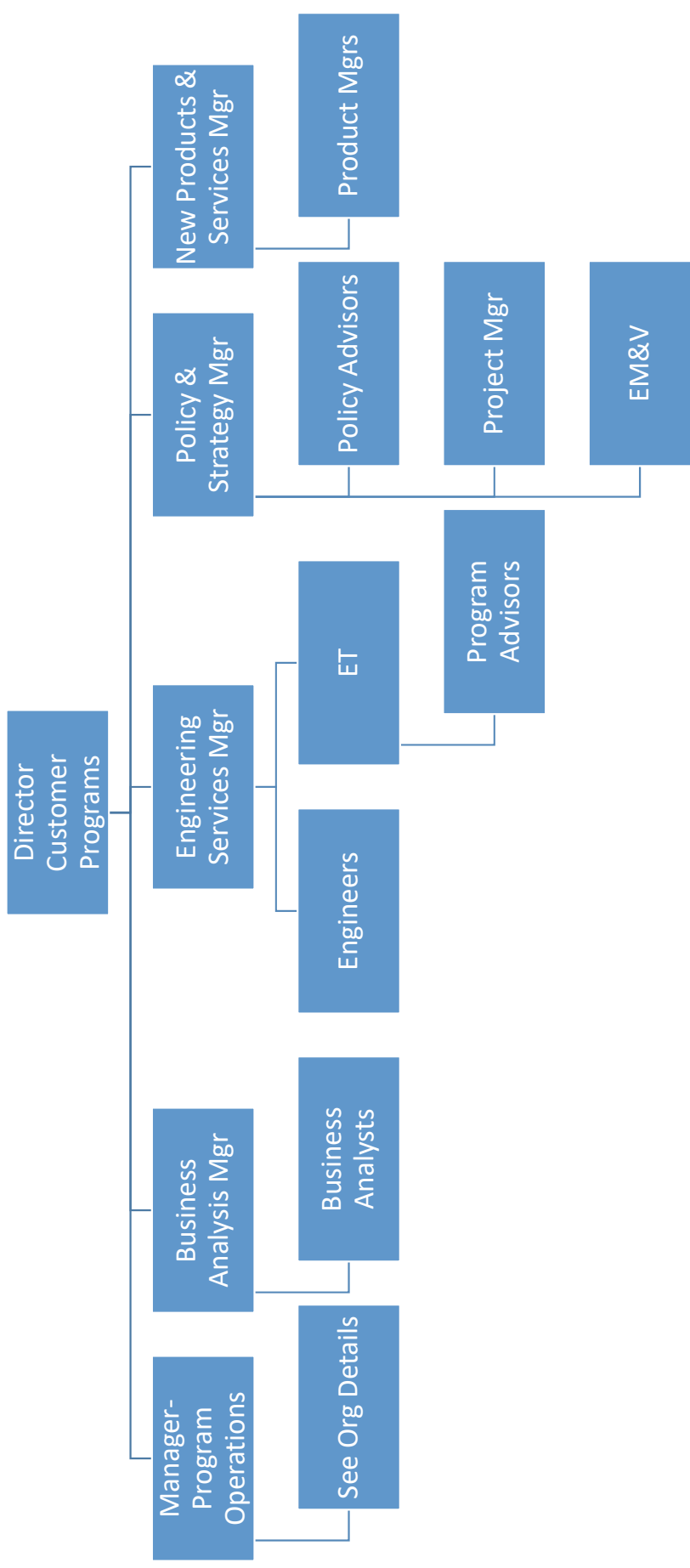
San Diego Gas & Electric Company
Energy Efficiency Program Management
Exhibit C

2016

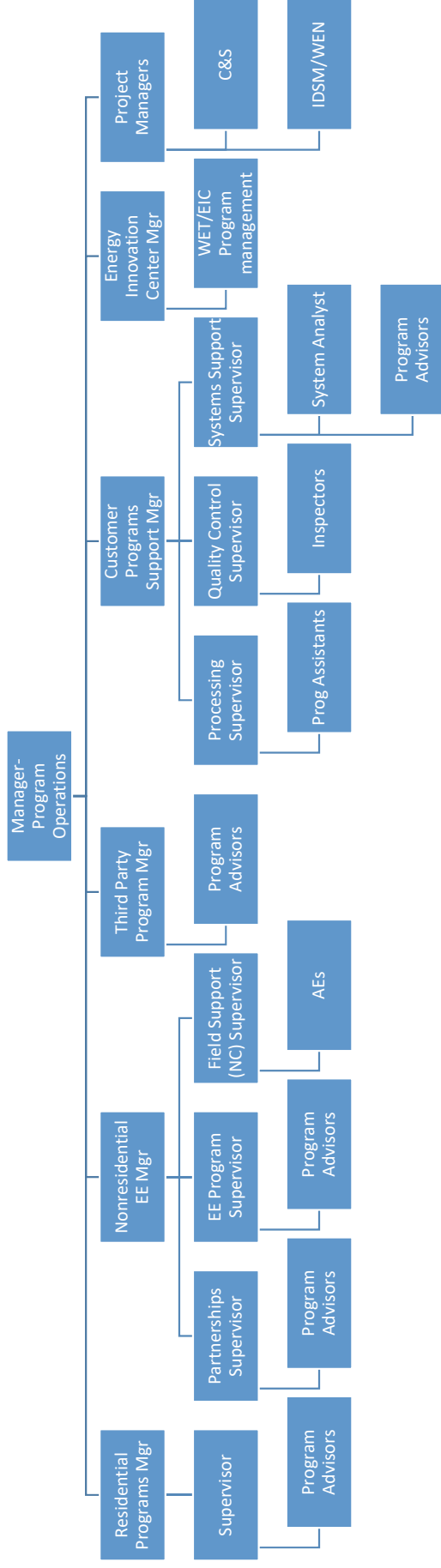
Customer Services—Energy Efficiency



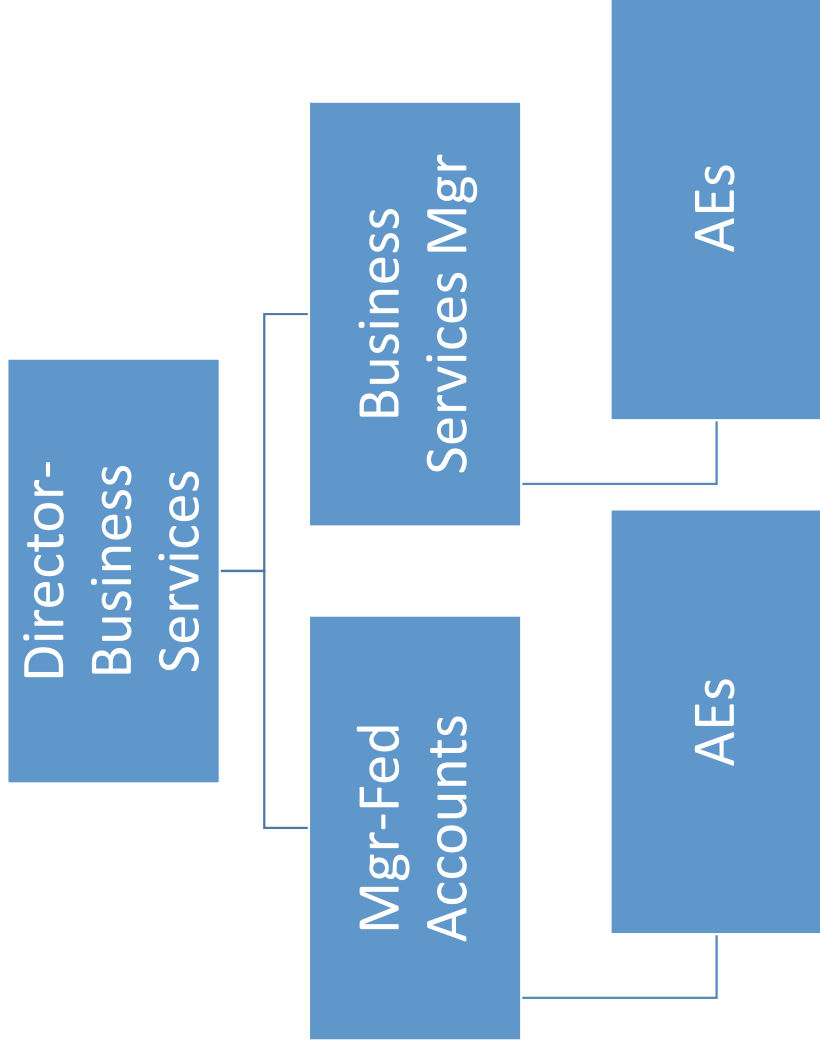
Customer Programs



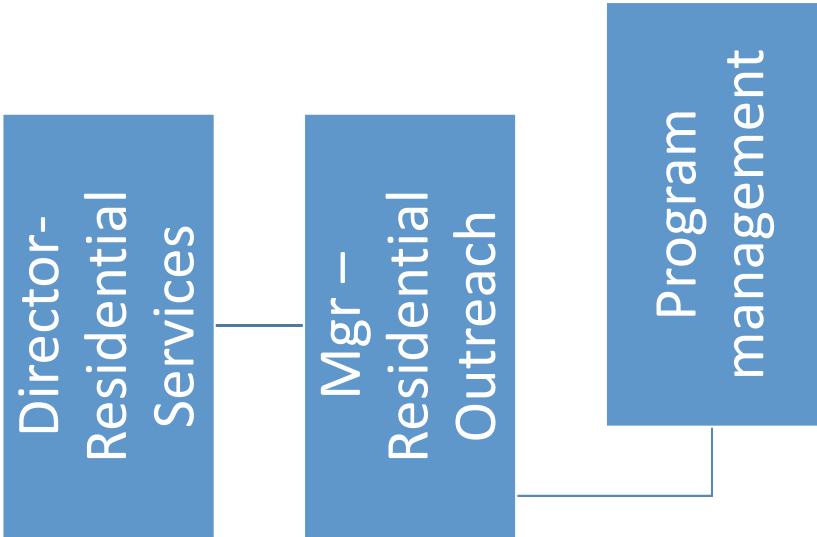
Customer Operations



Business Services



Residential Services



Marketing Research & Analytics

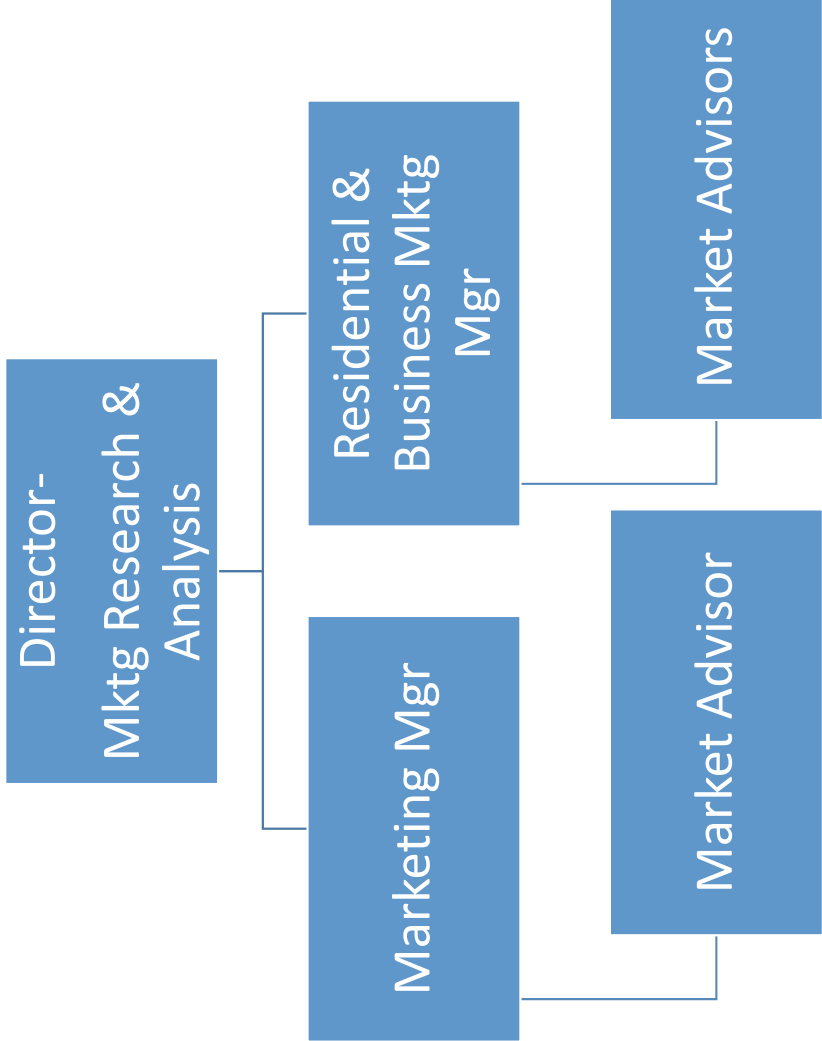


Exhibit D

A.17-01-013, et al.
SDG&E 2018-2025 EE Rolling Portfolio Business Plan
ORA DATA REQUEST No. ORA-A1701013-SDGE001 Dated March 1, 2017
Question 22

Submitted: March 22, 2017

Portfolio Budget

22. How did you forecast your portfolio budget? Please provide all models, documents, and analysis that informed your budget forecast.

SDG&E Response:

SDG&E's commitment was to hold budgets firm for the length of the Business Plan as much as possible. SDG&E performed a high-level, top-down analysis identifying large items that impacted budget to validate that this was possible. Below are the results:

	Year										
	2017	2018	2019	2020	2021	2022	2023	2024	2025		
Total Portfolio Budget	116,456,000	115,892,198	116,142,198	116,417,198	115,517,198	115,487,198	114,957,573	114,965,842	114,949,524		
Residential Platform costs		900,000	900,000	900,000	825,000	825,000	825,000	825,000	825,000		
Platform Efficiencies (Reduced Operational costs)					-300,000	-300,000	-300,000	-300,000	-300,000		
Additional mailing and outreach efforts for Customer Education		50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000		
Home Energy Management Systems					150,000	157,500	165,375	173,644	182,326		
Incremental data analytics for residential platform		150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000		
Promote high efficiency multifamily buildings				75,000	50,000	25,000	25,000	25,000			
Engage realtors to promote energy efficiency				50,000	50,000	50,000	25,000	25,000	25,000		
Incremental direct install services				250,000	250,000	250,000	250,000	250,000	250,000		
Incremental costs for SW PLA implementation		630,000	630,000	630,000	630,000	630,000	630,000	630,000	630,000		
Incremental costs for SW HVAC administration		125,000	125,000	125,000	125,000	125,000	125,000	125,000	125,000		
Efficiencies gained - SW lighting		-1,282,802	-1,282,802	-1,282,802	-1,282,802	-1,282,802	-1,282,802	-1,282,802	-1,282,802		

A.17-01-013, et al.
SDG&E 2018-2025 EE Rolling Portfolio Business Plan
ORA DATA REQUEST No. ORA-A1701013-SDGE001 Dated March 1, 2017
Question 22

Submitted: March 22, 2017

	Year	2017	2018	2019	2020	2021	2022	2023	2024	2025
Commercial	Efficiencies gained - SW California Advanced Homes		-1,400,000	-900,000	-900,000	-900,000	-900,000	-1,400,000	-1,400,000	-1,400,000
	Reduced vendor cost for mail-in survey				-50,000	-75,000	-75,000	-75,000	-75,000	-75,000
	Platform Initial Costs/Platform Enhancements and Support		1,000,000	1,000,000	1,000,000	400,000	400,000	400,000	400,000	400,000
	Reduced FTE Count and operational costs			-150,000	-150,000	-150,000	-150,000	-150,000	-150,000	-150,000
	Platform Outreach		200,000	100,000	50,000	25,000	12,500			
	Additional Cost to Administer SW HVAC		125,000	125,000	125,000	125,000	125,000	125,000	125,000	125,000
	Reduced Cost for not Administering SBD		-690,000	-690,000	-690,000	-690,000	-690,000	-690,000	-690,000	-690,000
	Reduced Cost for not Administering IP's									
	Reduced Cost for not Administering Finance		-106,000	-106,000	-106,000	-106,000	-106,000	-106,000	-106,000	-106,000
	Outreach		25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000
Public	Reduced Cost for not Administering IP's		-290,000	-290,000	-290,000	-290,000	-290,000	-290,000	-290,000	-290,000

*Note: This analysis was not incorporated into the budget proposal in the Business Plan.

Exhibit E

A.17-01-013, et al.
SDG&E 2018-2025 EE Rolling Portfolio Business Plan
ORA DATA REQUEST No. ORA-A1701013-SDGE001 Dated March 1, 2017
Question 27
Submitted: March 23, 2017

Administrative Costs

27. How did you forecast your administrative costs? Please provide any models, documents and analysis used.

SDG&E Response:

- (1) SDG&E's administrative costs are based on its 2017 EE portfolio costs. The Excel workbook "27-SDGE 2017 EE ADMIN BUDGET DETAIL.XLSX" provides the assumptions for each program including labor and non-labor costs. Note that data in Worksheet "2017 Admin Budget Detail" Columns I and J are confidential as identified in Confidentiality Declaration ORA DR-01 Q27.pdf.
- (2) Workbook "SDGE 2017 PORTFOLIO BUDGET ASSUMPTIONS.XLSX" provides additional data and analysis to support the 2017 portfolio budget and assumptions that were used for the 2018 Business Plan. The following explains the individual worksheets.
 - a. Summary: provides the summary information by budget category and calculates the caps and targets by budget category.
 - b. FTE Loader Calc: provides the distribution of labor following indirect labor costs by cost category.
 - c. FTE Loader Calc WP: provides the 2012 SDGE General Rate Case assumptions to support the indirect labor charges required by the Commission to be included in the calculation of administration costs.
 - d. 2017 Budget & Savings: provides various pivot tables of the "2017 Forecast Raw Data" to summarize budgets and FTE counts.
 - e. 2017 IDSM DRP: provides summary budget detail for the IDSM DRP components of the IDSM programs.
 - f. 2017 Forecast Raw Data: provides various budget category and savings details at the program level.
 - g. D.15-01-023: provides the Year 0 (2015) approved budget for the Rolling Portfolio and the approved EE goals.
- (3) SDGE BUSINESS PLAN FORECAST METHODOLOGY.DOCX: provides discussion on how SDG&E used the 2017 EE planning assumptions and the modifications/updates it made for the 2018 BP and is the companion document to the Excel file "SDGE 2018 Budget and Savings Methodology.xlsx."
- (4) SDGE 2018 BUDGET AND SAVINGS METHODOLOGY.XLSX: provides the data for the 2018 BP budgets and savings calculations.

Exhibit F

SOLICITATION SCHEDULE FOR STATEWIDE PROGRAMS
EXHIBIT F

Statewide	Program	Sector	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
SCE	Savings by Design	Commercial				Start		End	Launch								
SCE	Lighting (1)	Multiple				Start		End	Launch								
SDG&E	Upstream-Midstream Commercial HVAC	Commercial				Start			End		Launch						
SDG&E	Upstream-Midstream Residential HVAC	Residential				Start			End		Launch						
SDG&E	Plug Load and Appliances	Residential				Start		End	Launch								
PG&E	Indoor Air	Agriculture				Start		End	Launch								
PG&E	Title 24 Building Codes Advocacy	Codes and Standards				Start	End	Launch									
PG&E	Career Connections	Workforce Education and Training				Start		End	Start	Launch		End	Launch				
PG&E	Career & Workforce Readiness	Workforce Education and Training				Start		End	Start	Launch							
SoCalGas	Gas Emerging Technologies	Emerging Technologies															
SoCalGas	Food Service Point-of-Sale	Commercial					Start	Start	Start	Launch							
SoCalGas	Midstream Commercial Water Heating	Commercial					Start	Start	Start	Launch							
SoCalGas	Residential New Construction	Residential					Start	Start	Start	Launch							
SCE	Government & Institutional Partnerships	Public								End	Launch						
SCE	Water Infrastructure & System Efficiency	Public								End	Launch						
SCE	Electric Emerging Technologies	Emerging Technologies								End	Launch						
PG&E	State of California Partnership	Public Sector								End	Launch						
SDG&E	Residential HVAC QI/QM	Residential								Launch							
PG&E	Title 20 Appliance Standards	Codes and Standards								Start				End	Launch		

REQUEST FOR PROPOSALS (RFP)
REQUEST FOR QUOTATIONS (RFQ)
PROGRAM LAUNCH

Sources

- SCE: Attachment A Responses to Scoping Memo, Table 2, pp. 12-13.
- SDG&E: Attachment A Responses to Scoping Memo, Exhibit C
- SCG: Attachment A Responses to Scoping Memo, Attachment X
- PG&E: Attachment A Responses to Scoping Memo, Attachment 4

Notes

- (1) Includes Primary Lighting, Lighting Innovation, and Lighting Market Transformation