

A.17-01-013, et al.
SDG&E 2018-2025 EE Rolling Portfolio Business Plan
ORA DATA REQUEST No. ORA-A1701013-SDGE002 Dated May 22, 2017
Question 1
Submitted: June 23, 2017

Organizational Structure

- 1) Provide copies of all monthly, quarterly, and annual management and accounting reports regarding your energy efficiency portfolio and programs used at management levels such as Vice President, Senior Director, Director, Manager, and Supervisor level for the years 2014 through 2017 (year-to- date).

SDG&E Response:

SDG&E provides the following documents in response to the request:

(1) Financial Management Reports (YYYY-MM MGMT Workbook RPT.xlsx): This report provides summary financial information to the EE management staff of the monthly expenditures, status of CPUC financial caps & targets, Direct Implementation financials and status of On-bill Financing loans.

(2) KPI Report (ORA DR KPI Report.xlsx): These are excerpts from reports sent to Sr. Management (including the Vice President) that track the status of various business indicators. The reports cover both “C&I” indicators of savings contributions from the Account Exec teams and “CP” indicators of overall EE savings. These reports were done from 2014 through 2016.

(3) Weekly Status Reports (CUSTOMER PROGRAM CONSOLIDATED STATUS REPORT MM_DD_YYYY): These reports provide detailed status of various EE operations. Note that because Customer Programs include non-EE activities, some of the status reports are not relevant to EE operations. These reports were started in January 2017.

(4) Internal Audit Report (2016 SDGE Energy Efficiency Direct Install Program.pdf): SDG&E provides a copy of its internal audit report conducted between the years 2014-2017. This report is reviewed at SDG&E’s senior management level, including but not limited to the Customer Programs Vice President.

These reports are in addition to the monthly, quarterly and annual reports that SDG&E submits to the CPUC and are available at <http://eestats.cpuc.ca.gov/>.