September 1, 2020

CA Public Utilities Commission
Energy Division
Attention: Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, CA 94102-3298

MCE Advice Letter 45-E

Re: Marin Clean Energy's 2021 Energy Efficiency Annual Budget Advice Letter

Pursuant to Decision ("D.") 15-10-028, *Decision Re Energy Efficiency Goals for 2016 and Beyond and Energy Efficiency Rolling Portfolio Mechanics*,[1] D.18-05-041, *Decision Addressing Energy Efficiency Business Plans*,[2] and guidance from the California Public Utilities Commission ("CPUC" or "Commission"), Marin Clean Energy ("MCE") hereby submits it Annual Budget Advice Letter ("ABAL") for Program Year ("PY") 2021 as MCE Advice Letter ("AL") 45-E.

Tier Designation:

This AL has a Tier 2 designation pursuant to Ordering Paragraph ("OP") 4 of D.15-10-028.

Effective Date:

Pursuant to G.O. 96-B, MCE requests that this Tier 2 AL become effective on October 1, 2020, which is 30 calendar days from the date of this filing.

Background

MCE has been administering energy efficiency ("EE") funds under California Public Utilities Code ("Code") Section 381.1(a)-(d) since 2013.[3] The Commission originally restricted MCE's EE programs to serving gaps in Investor Owned Utility ("IOU") programs and hard-to-reach markets.[4] At the time, the Commission acknowledged that these restrictions may cause MCE's portfolio to fail the Total Resource Cost ("TRC") test and thus did not initially impose a minimum cost effectiveness requirement on MCE.[5] In 2014, however, the Commission lifted the restrictions and imposed the same cost effectiveness requirements on community choice aggregators ("CCAs") as IOUs.[6]

---

[1] D.15-10-028, Ordering Paragraph ("OP") 4 at p.123.

[2] D.18-05-041, OP 37, 40, 41, 44 at p. 190ff.

[3] To date, MCE is the only community choice aggregator ("CCA") to have requested energy efficiency funding under Code Section 381.1(a)-(d).

[4] D.12-11-015 at pp.45-6.

[5] D.12-11-015 at p. 46.

[6] D.14-01-033 at p. 14; *see also* D.14-10-046 at p. 120.

On January 17, 2017, MCE filed a Business Plan with the Commission that requested authorization to expand MCE's EE portfolio to include additional sectors and programmatic offerings.[7] MCE proposed to offer programs in the following sectors: (1) Residential; (2) Commercial; (3) Industrial; (4) Agricultural; and (5) Workforce Education and Training ("WE&T"). On June 5, 2018, the Commission approved MCE's Business Plan in D.18-05-041.[8]

Purpose

The purpose of this AL is to request approval of MCE's proposed EE budget for PY 2021. This AL complies with D.15-10-028 and D.18-05-041, which requires MCE to file an ABAL by September 1, 2020. The ABAL provides information about MCE's approved EE portfolio, including

(1) Budgets;
(2) Energy savings;
(3) Cost effectiveness;
(4) Portfolio and program changes; and
(5) Metrics.

In addition to this information, MCE's 2021 ABAL includes the following attachments:

(1) Attachment 1: Marin Clean Energy Supplemental Budget Showing
(2) Attachment 2: Marin Clean Energy Program Changes Explanation Tables
(3) Attachment 3: Marin Clean Energy Budget and Savings True-up Tables
(4) Attachment 4: Marin Clean Energy CEDARS Filing Submission Receipt

Discussion

(1) Budgets

In D.18-05-041, the Commission approved annual and total funding levels for MCE's EE portfolio for PYs 2018-2025 for each of MCE's proposed sectors.[9] Even though the Commission approved annual and total budgets in the Business Plan Decision, the Commission directed PAs to use the ABAL as an opportunity to adjust their annual budgets "to reflect the 2018-2030 goals adopted in Decision 17-08-025 and the interim greenhouse gas adder adopted in Decision 17-08-022 and other relevant factors to provide a more accurate forecast of expected annual funding levels."[10] The revisions, however, "must not exceed the overall funding amount" authorized in D.18-05-041, which caps PAs' total spending for the period 2018-2025.[11]

---

[7] *See* Application of Marin Clean Energy for Approval of its Energy Efficiency Business Plan (Application ("A.") 17-01-017) filed January 17, 2017.

[8] D.18-05-041, OP 33 at p. 189.

[9] D.18-05-041 at p. 112. The Commission approved a total budget for MCE of $85,736,000 for PYs 2018-2025. This budget includes allocations for Evaluation Measurement and Verification ("EM &V").

[10] D.18-05-041, OP 43 at pp. 191-92.

[11] D.18-05-041, OP 43 at pp. 191-92.

MCE proposes a 2021 EE portfolio budget of $7.56 million. This budget is based on a bottoms-up savings forecast with portfolio modifications relative to MCE's 2020 portfolio and COVID-19 impacts.

Table 1 provides an overview of MCE's 2021 forecasted portfolio budget, savings, and cost-effectiveness. The net savings, TRC, and Program Administrator Cost ("PAC") forecast values exclude market effects.

Table 1: MCE Forecasted 2021 Budget, Cost-Effectiveness, and Savings (Net)

Sector	**Program Year Budget**	**kWh**	**kW**	**Therms (MM)**
Residential	$2,733,236	6,333,145	59	0.06
Commercial	$3,010,541	5,224,085	273	0.09
Industrial	$871,077	1,359,837	33	0.13
Agriculture	$468,195	863,147	112	0.01
Emerging Tech	$0	n/a	n/a	n/a
Public	$0	n/a	n/a	n/a
Codes and Standards	$0	n/a	n/a	n/a
WE&T	$361,481	n/a	n/a	n/a
Finance	$0	n/a	n/a	n/a
OBF Loan Pool	$0	n/a	n/a	n/a
Subtotal	**$7,444,530**	**13,780,213**	**477**	**0.30**
	MCE Savings Target per PY 2019 ABAL True-up	8,380,475	484	0.55
	% of Savings Target	164%	99%	54%
MCE EM&V	$119,112			
MCE Total 2021 Spending Budget[12]	**$7,563,643**			
Uncommitted and Unspent Carryover Balance[13]	$4,000,000			
MCE Total Budget Request[14]	**$3,563,643**			
Authorized PY Budget Cap (D.18-05-041)	$12,404,000			
Forecast 2021 TRC	**1.08**			
Forecast 2021 PAC	**1.17**			

MCE requests Pacific Gas and Electric Company ("PG&E") provide the 2021 budget request amount, split into electric and gas budgets, to MCE via quarterly transfers as calculated below.

[12] Total proposed program year budget spending, including uncommitted unspent carryover.

[13] The uncommitted and unspent carryover balance reflects the total unspent and uncommitted funds from all previous program years that will be used to offset the 2021 fund transfers. More detail on this number can be found in MCE's CEDARS filing. Because each ABAL is filed in Q3, this unspent uncommitted amount is an estimate for the year in which the ABAL is filed.

[14] The amount of funds to be collected (budget recovery) for the Program Year.

Additionally, MCE requests PG&E transfer a one-time payment of the 2021 EM&V budget of $119,112 to MCE by January 15, 2021.

Table 2: Fund Transfers from PG&E to MCE

Fuel Type		**Quarterly Transfer**
Total Electric Budget	$2,672,734	$668,183
Total Gas Budget[15]	$771,796	$192,949
Subtotal	**$3,444,530**	**$861,133**
EM&V	$119,112	**One-Time Transfer**
Total	**$3,563,643**	**$3,563,643**

In addition to forecasting expenditures for the upcoming PY, D.18-05-041 also requires PAs to provide information in their ABALs on budgets and expenditures for previous program years.[16] Tables 3 and 4 shows MCE's authorized budgets and actual expenditures for each program and sector for the two most recent years.

Table 3: Program Authorized Budgets and Actual Expenditures for Two Most Recent Years

		2018		**2019**	
Program ID	**Program Name**	**Authorized Budget**	**Actual Expenditures**	**Authorized Budget**	**Actual Expenditures**
MCE01	Multifamily	$728,686	$558,107	$1,074,957	$585,858
MCE02	Commercial	$816,745	$617,207	$1,185,725	$643,277
MCE03	Single Family Seasonal Savings	$232,250	$137,360	n/a	n/a
MCE04	Financing	$27,031	$18,524	n/a	n/a
MCE05	Multifamily Direct Install	n/a	n/a	$296,971	$158,936
MCE07	SF Comprehensive	n/a	n/a	$1,965,535	$295,218
MCE08	Single Family Direct Install	n/a	n/a	$419,501	$190,211
MCE10	Industrial	n/a	n/a	$690,423	$113,244
MCE11	Agricultural	n/a	n/a	$766,449	$93,617
MCE16	WE&T	n/a	n/a	$160,000	$0

[15] Pursuant to OP 36 of D.18-05-041, gas budgets will be transferred to MCE on a quarterly basis.

[16] D.18-05-041, at p. 125.

MCE98	EM&V	$30,029	$16,590	$111,143	$95,351
Portfolio Total	**Portfolio**	**$1,831,741**	**$1,347,788**	**$6,779,704**	**$2,262,703**

Table 4: Sector Authorized Budget and Actual Expenditures for Two Most Recent Years

	2018		2019	
Sector	**Authorized Budget**	**Actual Expenditures**	**Authorized Budget**	**Actual Expenditures**
Commercial	$838,745	$617,207	$1,185,725	$643,277
Cross-Cutting	$102,102	$35,114	$271,143	$95,351
Residential	$935,936	$695,467	$3,865,965	$1,317,213
Industrial	n/a	n/a	$690,423	$113,244
Agricultural	n/a	n/a	$766,449	$93,617
Portfolio Total	**$1,876,783**	**$1,347,788**	**$6,779,704**	**$2,262,703**

Table 5 shows MCE's authorized budgets and actual expenditures at the portfolio-level beginning with program year 2016.

Table 5: Rolling Portfolio Authorized Budgets and Actual Expenditures from 2016

Portfolio Year	Authorized Budget	Expenditures
2016	$1,586,347	$1,165,285
2017	$1,586,347	$1,403,313
2018	$1,876,783	$1,347,788
2019	$6,779,704	$2,262,703

Finally, Table 6 shows MCE's budget forecasts and annual budget caps for the relevant program year and each remaining year of the approved business plan period.[17]

Table 6: Budget Forecasts and Annual Budget Caps for 2021 and Remaining Years of Business Plan Period

Sector	2021	2022	2023	2024	2025	Total[18]
Residential	$2,733,236	$6,170,017	$6,170,017	$6,170,017	5,660,017	$30,941,731
Commercial	$3,010,541	$2,934,922	$2,934,922	$2,934,922	$3,251,922	$17,804,713
Industrial	$871,077	$1,269,596	$1,269,596	$1,260,596	$1,260,596	$8,316,550
Agriculture	$468,195	$1,181,259	$1,181,259	$1,181,259	$1,260,259	$6,053,310
WE&T	$361,481	$346,667	$346,667	$346,667	$346,667	$2,094,815
Finance	$0	$0	$0	$0	$0	$18,524
Subtotal	$7,444,530	11,902,460	$12,091,865	$11,902,460	$11,779,460	$65,229,642
EM&V	$119,113	$189,405	189,405	$189,405	$187,405	$1,0195,469

[17] The all-inclusive business plan budget forecasts, annual caps, and savings true-up tables is included as an attachment.

[18] Total represents actual expenditures through 2020 plus budget forecasts for the remainder of the business plan period.

Total Portfolio Program Year PA Budget	$7,563,643	$12,091,865	$12,091,865	$12,091,865	$11,966,865	$66,325,111[19]
Total Authorized Portfolio PY Budget Cap	$12,404,000	$10,998,000	$10,998,000	$10,998,000	$10,870,000	$85,736,000

(2) Energy Savings

D.18-05-041 stated that MCE's forecasted energy savings goals must meet or exceed the annual energy savings targets included in the business plan.[20] Subsequently, MCE submitted budget and energy savings true-up tables in the 2019 ABAL that more accurately reflect the planning assumptions and forecasts for each program year through the business plan period.[21] In D. 19-08-034, *Decision Adopting Energy Efficiency Goals for 2020-2030*, the Commission directed MCE that for each year that MCE requests EE funding authorization via an ABAL, MCE shall meet or exceed the annual savings forecasts presented in the true-up tables as submitted in MCE's PY 2019 ABAL (and subsequently approved in Energy Division's advice letter disposition).[22]

In table 7 below, MCE provides forecasted net energy savings and goals for each program for PY 2021.

Table 7: Program-Level Forecasted Net Energy Savings for 2021

Program	Program ID	Net kWh	Net kW	Net Therm
MF Comprehensive	MCE01	133,958	40	12,908
Commercial	MCE02	5,224,085	273	88,905
SF Comprehensive	MCE07	6,093,680	0	0
SF Direct Install	MCE08	105,507	19	51,318
Industrial	MCE10	1,359,837	33	129,523
Agricultural	MCE11	863,147	112	14,296
WE&T	MCE16	0	0	0
EM&V	MCE98	0	0	0
Total		**13,780,213**	**477**	**296,950**

Table 8 shows claimed energy savings of each program and the total portfolio beginning with 2016.

Table 8: Program-level claimed energy savings beginning with 2016

Year	Program	Program ID	Net kWh	Net kW	Net Therm
2016	MF Comprehensive	MCE01	254,444	24	8,112
2016	Commercial	MCE02	310,753	62	12

[19] Funding levels through 2025 do not exceed the overall funding amount authorized in D.18-05-041, which caps PAs' total spending for the period 2018-2025.

[20] D.18-05-041 at p.134.

[21] MCE Advice Letter 33-E pp.9-11

[22] D.19-08-034 at p.28.

2016	SF Seasonal Savings	MCE03	0	0	0
2016	Financing	MCE04	0	0	0
2017	MF Comprehensive	MCE01	134,084	16	7,541
2017	Commercial	MCE02	1,077,926	202	754
2017	SF Seasonal Savings	MCE03	50,233	5	26,526
2017	Financing	MCE04	0	0	0
2018	MF Comprehensive	MCE01	151,217	8	16,468
2018	Commercial	MCE02	823,364	126	-889
2018	SF Seasonal Savings	MCE03	185,010	19	54,801
2018	Financing	MCE04	0	0	0
2018	EM&V	MCE98	0	0	0
2019	MF Comprehensive	MCE 01	156,391	19	10,591
2019	Commercial	MCE02	1,005,902	211	-6,193
2019	SF Seasonal Savings	MCE03	344,212	0	112,363
2019	MF Direct Install	MCE05	41	0	4
2019	SF Comprehensive	MCE07	0	0	0
2019	SF Direct Install	MCE08	6,110	0	1,166
2019	Industrial	MCE10	0	0	0
2019	Agricultural	MCE11	0	0	0
2019	WE&T	MCE16	0	0	0
2019	EM&V	MCE98	0	0	0
		Total	**4,449,687**	**692**	**231,256**

Table 9 shows MCE's forecasted, claimed, and evaluated energy savings at the portfolio-level beginning with PY 2016. MCE's portfolio has not been evaluated since the beginning of the rolling portfolio.

Table 9: Portfolio-level forecasted, claimed, and evaluated savings beginning with 2016

	Forecasted			**Claimed**			**Percent of Goal Achieved**			**Evaluated**
Year	**Net kWh**	**Net kW**	**Net Therm**	**Net kWh**	**Net kW**	**Net Therm**	**Net kWh**	**Net kW**	**Net Therm**	
2016	n/a	n/a	n/a	565,198	87	8,124	n/a	n/a	n/a	n/a
2017	1,812,755	351	33,850	1,262,243	223	34,821	70	64	103	n/a
2018	1,846,948	349	70,289	1,159,591	153	70,381	63	44	100	n/a
2019	5,852,476	592	403,832	1,512,656	230	117,931	26	39	29	n/a

Pursuant to D.18-05-041, PAs also need to report on greenhouse gas ("GHG") savings forecasts and actuals since the beginning of the rolling portfolio.[23]

Table 10: GHG savings forecasts and actuals beginning with 2016

Year	**GHG Forecast and Goal (Metric Tons CO_2)**	**Actual GHG Savings (Metric Tons CO_2)**
2016	n/a	300

[23] Pursuant to D.18-05-041, at p. 127.

2017	919	750
2018	507	516
2019	3,071	1,417

(3) Cost-Effectiveness

Decision 18-05-041 provided guidance to Commission staff on how to evaluate PAs' ABALs, which included guidance on portfolio cost effectiveness. For PYs 2019-2022, PAs' portfolios must meet a forecasted TRC at or above 1.0. For PYs 2023-2025, PAs' portfolios must meet a forecasted TRC at or above 1.25. In the event a PA does not meet a TRC of 1.25 on a forecast basis for PYs 2019-2022, ABALs must contain additional discussion about how the PA intends to meet or exceed a 1.0 TRC on an evaluated basis.[24]

Tables 11, 12 and 13 show MCE's forecasted program-, sector-, and portfolio-level TRC, PAC, and RIM without market effects for PY 2021.

Table 11: Forecasted Program-Level TRC, PAC and RIM for PY 2021

	Program ID	**TRC**	**PAC**	**RIM**
Multifamily Comprehensive	MCE01	0.48	0.54	0.54
Commercial	MCE02	1.33	1.45	1.45
Single Family Comprehensive	MCE07	1.06	1.06	1.06
Single Family Direct Install	MCE08	0.31	0.31	0.31
Industrial	MCE10	1.86	2.27	2.27
Agricultural	MCE11	1.77	2.13	2.13
Workforce, Education and Training (WE&T)	MCE16	0.00	0.00	0.00
MCE EM&V	MCE98	0.00	0.00	0.00

Table 12: Forecasted Sector-Level TRC and PAC for PY 2021

Sector	**TRC**	**PAC**	**RIM**
Residential	0.53	0.54	0.54
Agricultural	1.77	2.13	2.13
Commercial	1.33	1.45	1.45
Industrial	1.86	2.27	2.27
WE&T	0.00	0.00	0.00

Table 13: Forecasted Portfolio TRC, PAC, and RIM for PY 2021

TRC	1.08
PAC	1.17
RIM	1.17

[24] D.18-05-041 at pp. 132-37.

Cost-Effectiveness Challenges

Forecasting a portfolio TRC of 1.25 is especially challenging for 2021. MCE identified a set of factors that resulted in a TRC forecast below 1.25 in 2021.

COVID-19 Impacts

The COVID-19 pandemic has impacted energy consumption and therefore energy savings potential. This impact varies significantly by customer sector, programs, and individual customers. Overall, residential energy consumption has increased while commercial energy consumption has decreased dramatically. This creates challenges forecasting and measures savings for normalized metered energy consumption ("NMEC") and pay-for-performance programs. It is also difficult to predict customers' willingness and motivation to participate in EE programs as the pandemic continues.

COVID-19 has created additional program planning work for PAs and implementers to assess the impacts on EE programs and to adjust delivery strategies to continue serving customers. MCE's response over the last 5 months includes (1) developing new models and methodologies to assess the impacts of COVID-19 on MCE's operations and programs; (2) working with implementers to assess impacts on their operations and program participants, and identifying new and innovative approaches to make programs accessible to customers; and (3) identifying EM&V impacts and modifications. These activities will continue beyond 2020.

Cost-Effectiveness Framework

The TRC test as currently implemented does not appropriately value energy efficiency. Non-energy costs, such as the net participant cost or costs from non-resource/ equity programs are included in the TRC while their non-energy benefits ("NEBs") are not considered. The asymmetry between costs and benefits shrinks the pool of available cost-effective savings to the point where it is difficult to both be cost effective and achieve aggressive energy savings goals.

Furthermore, pursuing a 1.25 TRC at a portfolio level requires making cuts to services that help our most disadvantaged customers, for example a multifamily EE program that serves affordable properties, or a residential direct install program that provides no cost upgrades to middle income customers who cannot afford to invest in EE.

Avoided Cost Calculator Updates

The timing and uncertainty of the avoided costs calculator ("ACC") updates do not allow PAs the opportunity to perform proper portfolio planning to ensure a cost-effective filing. The ACC updates were adopted on June 25, 2020 and subsequently incorporated into CEDARS production on July 16, 2020. At that point in time, MCE was already well into the portfolio planning process as a draft of the ABAL was due to CAEECC on July 27, 2020 for the ABAL presentation on August 5, 2020. Hence, MCE had to rely on the previous ACC version to forecast its portfolio for the 2021 program year and then had to re-evaluate portfolio cost-effectiveness once the updated ACC was released on July 16. This process not only creates double work for PAs, but also leads to significant uncertainty that undermines long-term planning abilities. It is usually difficult to predict the magnitude or direction of the annual ACC update, which until this year had significant

negative impacts on PAs' portfolios. Many programs require more than one year to plan, launch, develop a pipeline and see projects through to completion.

Workpaper Updates

2019 was a major workpaper update year as the IOUs transitioned their separate workpapers into statewide workpapers for the 2020 PY. For PAs that were not involved in the workpaper process (i.e., non-IOU PAs), it was exceedingly difficult to track workpaper updates and impact on programs. As of recently, MCE and PG&E have established a workpaper coordination process to make the process more transparent. However, work still remains to improve the workpaper submission, review, and approval process so that it is transparent to all PAs.

Strategies to Increase Cost-Effectiveness in 2021

While no one can predict the extent and impact of the COVID-19 pandemic at this point in time, we are continuing to adapt and are committed to serving our customers well during this uncertain time. MCE believes the following strategies will contribute to a strong portfolio performance in 2021.

Program Launches and Ramp Up

- MCE has launched and ramped up five new programs since Business Plan approval and expects to generate savings from those programs in 2020 and 2021. MCE's residential Single-Family Comprehensive Program, as well as the non-residential programs, are expected to deliver cost-effective savings to help offset some of the less cost-effective programs in MCE's portfolio.
- MCE is preparing to roll out EE programs to MCE's two newest communities - Pleasant Hill and Vallejo.

New Implementation Strategies

- The modifications to the former three-prong-test have paved a way for the inclusion of fuel substitution measures in EE portfolios. MCE is incorporating fuel substitution measures into its 2021 portfolio as a viable long-term strategy for California to meet its carbon reduction goal.
- Most custom and deemed EE programs focus on above code savings, using code and industry-standard practice ("ISP") as baselines to determine savings. By using NMEC, MCE can focus on increasing the energy efficiency of existing buildings in its commercial sector to unlock to-code savings that are often left stranded. Additionally, this population-level NMEC component will align EE procurement with the program's delivered net benefits, by incentivizing time-dependent savings, thoughtful measure selection, and customer targeting focused on load shape and demand profiles.
- MCE deployed Strategic Energy Management ("SEM") and Behavioral Retro commissioning, and Operational ("BROs") participation pathways in its EE programs. MCE designed these participation pathways to help large Industrial, Agricultural, and Commercial customers overcome the multiple barriers associated with cost-effective EE investments.
- MCE improved program coordination and referral systems with other partner programs to improve cost-effectiveness without limiting opportunities for customers.

AMI Analytics

- MCE is leveraging new AMI data flows and analytics tools to understand COVID-19 impacts. With AMI data available from across our service area, and an effective project "start" date (when shelter in place orders took effect), MCE now has insights into the highly variable load shape and demand impacts that COVID-19 has had on our non-residential customers - in aggregate and by sector. Insights from the COVID-19 analytics work will be applied to program implementation and planning.

Cost-Effectiveness Information for Previous Program Years

Tables 14, 15 and 16 show MCE's forecasted, claimed, and evaluated cost-effectiveness information at the program-, sector-, and portfolio-level for the most recent years. The cost-effectiveness of MCE's portfolio has not been evaluated since the beginning of the rolling portfolio, 2016.

Table 14: Program Claimed TRC and PAC for PYs 2018 and 2019

Year	Program	TRC Ratio	PAC Ratio
2018	Commercial	1.04	1.21
2018	Multifamily	0.12	0.67
2018	Single Family	0.80	0.80
2019	Commercial	0.48	0.49
2019	Multifamily	0.21	0.4
2019	Single Family	2.12	2.12
2019	Multifamily DI	0.00	0.00
2019	Single Family DI	0.09	0.09

Table 15: Sector Claimed TRC and PAC for PYs 2018 and 2019

Year	Sector	TRC	PAC
2018	Commercial	1.04	1.21
2018	Residential	0.15	0.69
2018	Cross-Cutting	0.00	0.00
2019	Commercial	0.48	0.49
2019	Residential	0.24	0.33
2019	Cross-Cutting	0.00	0.00
2019	Industrial	0.00	0.00
2019	Agricultural	0.00	0.00

Table 16: Forecasted, Claimed, and Evaluated TRC and PAC beginning with 2016

Year	Forecasted TRC[25]	Claimed TRC	Forecasted PAC	Claimed PAC	Evaluated TRC[26]	Evaluated PAC
2016	n/a	0.27	n/a	0.48	n/a	n/a
2017	0.91	0.65	1.01	0.96	n/a	n/a
2018	0.58	0.31	0.64	0.91	n/a	n/a

[25] Program Administrators did not file ABALs for program year 2016.

[26] MCE's portfolio cost-effectiveness has not been evaluated since the beginning of the rolling portfolio, 2016.

2019	1.04	0.27	1.18	0.33	n/a	n/a

(4) Proposed Portfolio and Program Changes

Contrary to previous years, MCE is not proposing any new programs for 2021. MCE describes below some of the program-level changes that will improve MCE's portfolio savings, cost effectiveness, and workforce quality standards in 2021.

Multifamily Direct Install Program

The Multifamily Direct Install program provides no-cost EE measures to eligible homeowners and tenants in multifamily dwellings in MCE's service area. This program targets (but is not limited to) customers in Disadvantaged Communities ("DACs") whose household income exceeds 200% of the Federal Poverty Guidelines ("FPG"). The targeted group's income exceeds the limit to receive services through programs like PG&E's Energy Savings Assistance Program ("ESA") and MCE's Low-Income Families and Tenants ("LIFT") Program,[27] yet customers are still income constrained (lower middle-income). While there is no income cap to participate in the program, the program targets renters in particular neighborhoods to ensure that lower middle-income customers are reached. The goal is to introduce this market sector to the concepts of energy efficiency, provide upgrades that reduce household energy consumption and encourage a pathway toward deeper energy retrofits offered through existing and emerging market rate programs and technologies. EE measures included low-flow showerheads (with and without thermostat), shower restriction valve, kitchen faucet aerators, and 11W screw-in LEDs. The program also offers a limited number of electric heat pump replacement for electric water heaters.

MCE will end this program in 2020 for several reasons. First, the program overlaps with MCE's existing Multifamily Comprehensive program and other Multifamily Direct Install programs already in the market. Secondly, the program is not cost effective as a result of low participation, limited deemed measure offerings due to workpapers expiring, and COVID-19 impacts.

Single Family Seasonal Savings Program

This program offered customers the opportunity to make their cooling and heating schedules more efficient through a series of small adjustments to scheduled temperatures by a software algorithm. Customers were offered the program on their thermostat and/or through a phone app and had to opt-in to participate.

MCE decided to end this program in 2019 after the ABAL was filed due to the fact that MCE was not able to secure an updated contract with the existing implementer.

Commercial Upgrade Program

The Commercial Upgrade Program targets commercial customers in MCE's service area. Its primary objectives are to facilitate the uptake of high-quality EE projects, and to improve the technical capability, pricing and program experience of both customers and the local contractor community. The program aims to achieve these objectives by supporting customers and contractors in the development of their projects – including equipment specification, incentives and technical assessments – but also by providing a number of participation pathways that

[27] Savings and costs associated with MCE's Low-Income Families and Tenants (LIFT) program are not included in the 2021 energy efficiency portfolio.

streamline the program experience and maximize customer benefit. The program is not restricted to a deemed measure list, or program-mandated business size or load requirements. Instead, the program is open to nearly any non-residential customer and provides varied participation pathways which include deemed, custom, NMEC and SEM. The program contracts with multiple implementation partners in the delivery of this program. Common measures include interior and exterior LED luminaires and lamps, networked lighting controls, connected thermostats, HVAC equipment, advanced rooftop controllers, ductless heat pumps, heat pump water heaters and other measures which may apply to customers in retail, office, and other non-residential building types.

MCE expects an expansion of the Commercial Upgrade Program in 2020 and 2021, primarily rooted in the development of population-level NMEC portfolios.

Single-Family Comprehensive Program

In May 2020, MCE launched a downstream program for selected eligible customers to receive Home Energy Reports ("HERs") at regular intervals to encourage energy- and money-saving behavioral changes. The program's treatment group will receive a series of HERs and, if enrolled in the digital platform, digital energy budget reports and alerts, as well as access to a web portal where they can learn about additional savings potential.

MCE is expanding the SF Comprehensive program to include behavioral messaging to an additional one hundred thousand customers in 2021.

Workforce, Education, and Training ("WE&T")

In May 2020, MCE's WE&T program was launched. The scope of work includes three elements: workforce engagement, MCE program-participating contractor engagement, and new workforce development. MCE and its program implementer will leverage existing relationships with industry groups to facilitate roundtable events that can increase the interest, and subsequent participation of residential contractor companies and their staff in high-performance building training. Outreach efforts will include participating contractors from disadvantaged communities and minority-focused groups to ensure diversity, equity, and inclusion. MCE will also leverage relationships with participating contractors and other vendors to gain insight into the barriers to electrification and high-performance building work. Furthermore, MCE aims to provide contractors who participate in MCE programs with the fundamental building performance knowledge they need to understand how to deliver maximum value and performance within their trade. MCE will provide participating contractors with field mentorships. Based on industry roundtables and field mentoring, MCE will establish a priority list of electrification topics for which there is an additional training need and will develop and deliver workshops for each of the identified topics.

Finally, MCE will prepare an internship program to provide job seekers home performance, energy efficiency, and safety with on-the-job training in their desired specialty. The internship component is expected launch in 2021.

(5) Metrics

Pursuant to D.18-05-041, MCE reported on sector-level metrics and their associated targets for program years 2018 and 2019 in its EE Annual Report submissions.[28] They can be found in spreadsheet form on the CPUC's data reporting website, Energy Efficiency Statistics ("EEStats").[29]

Conclusion

MCE respectfully requests that the Commission approve its 2021 EE portfolio budget of $7,563,643 effective as of January 2, 2021, for MCE's approved EE programs.

Notice

A copy of this AL is being served on the official Commission service lists for Application 17-01-013, *et al*. and Rulemaking 13-11-005.

For changes to these service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

Protests

Anyone wishing to protest this advice filing may do so by letter via U.S. Mail, facsimile, or electronically, any of which must be received no later than 20 days after the date of this advice filing. Protests should be mailed to:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Copies should also be mailed to the attention of the Director, Energy Division, Room 4004 (same address as above).

In addition, protests and all other correspondence regarding this AL should also be transmitted electronically to the attention of:

Jana Kopyciok-Lande
Senior Policy Analyst
MARIN CLEAN ENERGY
1125 Tamalpais Ave.
San Rafael, CA 94901
Phone: (415) 464-6044
Facsimile: (415) 459-8095

[28] See OP 9 of D.18-05-041.

[29] See MCE's 2018 and 2019 Annual Report Narrative and Excel at: https://eestats.cpuc.ca.gov/Views/Documents.aspx

jkopyciok-lande@mceCleanEnergy.org

Alice Havenar-Daughton
Director of Customer Programs
MARIN CLEAN ENERGY
1125 Tamalpais Ave.
San Rafael, CA 94901
Phone: (415) 464-6030
Facsimile: (415) 459-8095
ahavenar-daughton@mceCleanEnergy.org

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

Correspondence

For questions, please contact Jana Kopyciok-Lande at (415) 464-6044 or by electronic mail at jkopyciok-lande@mceCleanEnergy.org.

/s/ Jana Kopyciok-Lande

Jana Kopyciok-Lande
Senior Policy Analyst
MARIN CLEAN ENERGY

ATTACHMENTS

- Attachment 1: Marin Clean Energy Supplemental Budget Showing
- Attachment 2: Marin Clean Energy Program Changes Explanation Tables
- Attachment 3: Marin Clean Energy Budget and Savings True-up Tables
- Attachment 4: Marin Clean Energy CEDARS Filing Submission Receipt

cc: Service Lists: R.13-11-005; A17-01-013, *et al*.

California Public Utilities Commission

ADVICE LETTER SUMMARY

ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Marin Clean Energy

Utility type:
☑ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Jana Kopyciok-Lande
Phone #: 415-464-6044
E-mail: jkopyciok-lande@mcecleanenergy.org
E-mail Disposition Notice to: jkopyciok-lande@mcecleanenergy.org

EXPLANATION OF UTILITY TYPE
ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 45

Tier Designation: 2

Subject of AL: Marin Clean Energy's 2021 Energy Efficiency Annual Budget Advice Letter

Keywords (choose from CPUC listing): Energy Efficiency, Compliance

AL Type: ☐ Monthly ☐ Quarterly ☑ Annual ☐ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:
D.15-10-028 and D.18-05-041

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: N/A

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? ☐ Yes ☑ No

If yes, specification of confidential information: N/A
Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information: N/A

Resolution required? ☐ Yes ☑ No

Requested effective date: 10/1/20

No. of tariff sheets: 0

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed[1]: N/A

Pending advice letters that revise the same tariff sheets: N/A

[1]Discuss in AL if more space is needed.

Clear Form

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name: Jana Kopyciok-Lande
Title: Senior Policy Analyst
Utility Name: Marin Clean Energy
Address: 1125 Tamalpais Ave
City: San Rafael
State: California Zip: 94901
Telephone (xxx) xxx-xxxx: 415-464-6044
Facsimile (xxx) xxx-xxxx:
Email: jkopyciok-lande@mcecleanenergy.org

Name: Alice Havenar-Daughton
Title: Director of Customer Programs
Utility Name: Marin Clean Energy
Address: 1125 Tamalpais Ave
City: San Rafael
State: California Zip: 94901
Telephone (xxx) xxx-xxxx: 415-464-6030
Facsimile (xxx) xxx-xxxx: (415) 459-8095
Email: ahavenar-daughton@mcecleanenergy.org

Clear Form

ENERGY Advice Letter Keywords

Affiliate	Direct Access	Preliminary Statement
Agreements	Disconnect Service	Procurement
Agriculture	ECAC / Energy Cost Adjustment	Qualifying Facility
Avoided Cost	EOR / Enhanced Oil Recovery	Rebates
Balancing Account	Energy Charge	Refunds
Baseline	Energy Efficiency	Reliability
Bilingual	Establish Service	Re-MAT/Bio-MAT
Billings	Expand Service Area	Revenue Allocation
Bioenergy	Forms	Rule 21
Brokerage Fees	Franchise Fee / User Tax	Rules
CARE	G.O. 131-D	Section 851
CPUC Reimbursement Fee	GRC / General Rate Case	Self Generation
Capacity	Hazardous Waste	Service Area Map
Cogeneration	Increase Rates	Service Outage
Compliance	Interruptible Service	Solar
Conditions of Service	Interutility Transportation	Standby Service
Connection	LIEE / Low-Income Energy Efficiency	Storage
Conservation	LIRA / Low-Income Ratepayer Assistance	Street Lights
Consolidate Tariffs	Late Payment Charge	Surcharges
Contracts	Line Extensions	Tariffs
Core	Memorandum Account	Taxes
Credit	Metered Energy Efficiency	Text Changes
Curtailable Service	Metering	Transformer
Customer Charge	Mobile Home Parks	Transition Cost
Customer Owned Generation	Name Change	Transmission Lines
Decrease Rates	Non-Core	Transportation Electrification
Demand Charge	Non-firm Service Contracts	Transportation Rates
Demand Side Fund	Nuclear	Undergrounding
Demand Side Management	Oil Pipelines	Voltage Discount
Demand Side Response	PBR / Performance Based Ratemaking	Wind Power
Deposits	Portfolio	Withdrawal of Service
Depreciation	Power Lines	

Clear Form

Attachment 1: Marin Clean Energy Supplemental Budget Showing

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

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

1. Functions conducted by each department/organization

MCE provides the following table to summarize the functions conducted by each in-house department based on the functional groups defined in the "Functions Definitions" in Appendix B.

Table 1: Functions Conducted by Departments Supporting MCE's EE Portfolio[1]

Function	Customer Programs	Regulatory and Legislative Policy & Legal *	Technology & Analytics	Public Affairs *
Policy, Strategy, and Regulatory Reporting Compliance	x	x		
Program management	x			
Engineering Services				
Customer Application/Rebate and Incentive Processing	x			
Inspections				
Portfolio Analytics	x			
EM&V	x			
ME&O	x			x
Account Management / Sales				x
IT			x	
Call Center				
Incentives				

* These departments do not recover costs from the energy efficiency program budget.

2. Management structure and organization chart

MCE provides organizational charts for each department supporting the energy efficiency portfolio in Appendix A. These charts include the entire staff within

[1] These departments do not recover costs from the energy efficiency program budget.

each department even though only a subset of each team provides support to the energy efficiency portfolio. The management structure is represented on these organizational charts.

3. Staffing needs by department/organization

MCE's org charts are provided in Appendix A. MCE hired one Manager of Customer Programs in 2019 to support the energy efficiency portfolio. MCE does not anticipate hiring additional Customer Programs staff to support energy efficiency programs beyond what is provided in the organization chart. The staffing needs for the Customer Programs department and other departments at MCE may change in the future. Staff changes to other departments are unlikely to be driven by the need to support energy efficiency functions. As a result, MCE doesn't project long term growth in those departments related to supporting the energy efficiency portfolio.

4. Non-program functions currently performed by contractors

MCE currently works with contractors to support program reporting and measurement and verification (M&V).

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

MCE's in-house costs largely consist of staffing costs and since there are no further staffing changes planned for 2021, in-house cost should stay relatively steady.

6. Explanation of method for forecasting costs

MCE's Customer Program team developed a bottom-up budget and savings forecast using portfolio costs from 2019 and 2020. Additionally, over the last five months, MCE tracked and assessed COVID-19 impacts on program operations to inform costs and savings forecasted in the 2021 Annual Budget Advice Letter ("ABAL").

B. Table showing MCE's "Full-Time Equivalent" headcount by department/organization

MCE provides this table in Appendix B.

C. Table showing costs by functional area of management structure

MCE provides this table in the: (1) Residential Budget Detail; (2) Commercial Budget Detail; (3) Industrial Budget Detail; (4) Agricultural Budget Detail; (5) and Cross-Cutting Budget Detail of Appendix C.

D. Table showing cost drivers across the EE organization

MCE's 2021 budget request is 9% higher than its 2020 authorized budget. However, MCE expects to underspend its 2020 budget due to the COVID-19 pandemic.

E. Allocation of labor and O&M costs

MCE staff complete timesheets on which they designate the number of hours spent on EE activities. For employees who work on both EE and non-EE work, labor costs are billed proportionally based on hours recorded on staff timesheets for each activity.

The costs for the time spent on EE activities are reimbursed from the EE Programs Account. This account draws on the awarded energy efficiency budget. Costs from other departments that support MCE's EE portfolio are not reimbursed from the EE Programs Account. Those departments are fully supported from the General Operating Account (funded by generation service revenues).

Labor costs charged to EE are fully loaded. Benefit-related expenses for MCE employees who bill time to the EE program are paid from the EE Programs Account proportionate to the amount of time they spend on EE Programs. These costs are incorporated into the "fully-burdened" cost MCE charges to the EE reimbursable account as aforementioned.

Non-labor resources that support EE and non-EE activities are paid for entirely using non-EE funds from the General Operating Account (funded by generation services revenues). The only non-labor resources that are paid for with EE funds are those that exclusively support EE.

All O&M costs are paid for with non-EE funds from the General Operating Account (funded by generation service revenues), unless they exclusively support EE, in which case they are paid for using EE funds.

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."

MCE's Customer Program team developed a bottom-up budget and savings forecast using portfolio costs from 2019 and 2020. Additionally, over the last five months, MCE tracked and assessed COVID-19 impacts on program operations to inform costs and savings forecasted in the 2021 Annual Budget Advice Letter ("ABAL").

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."

MCE has provided the request information in Appendix E. MCE developed a staffing budget based on our projected staffing needs. The distribution of staffing costs across budget categories for 2021 is based on the allocation in 2019 with some adjustments for areas in which we expect staff involvement to increase. The allocation of staffing costs for 2019 is based on staff estimations for the requested budget categories.

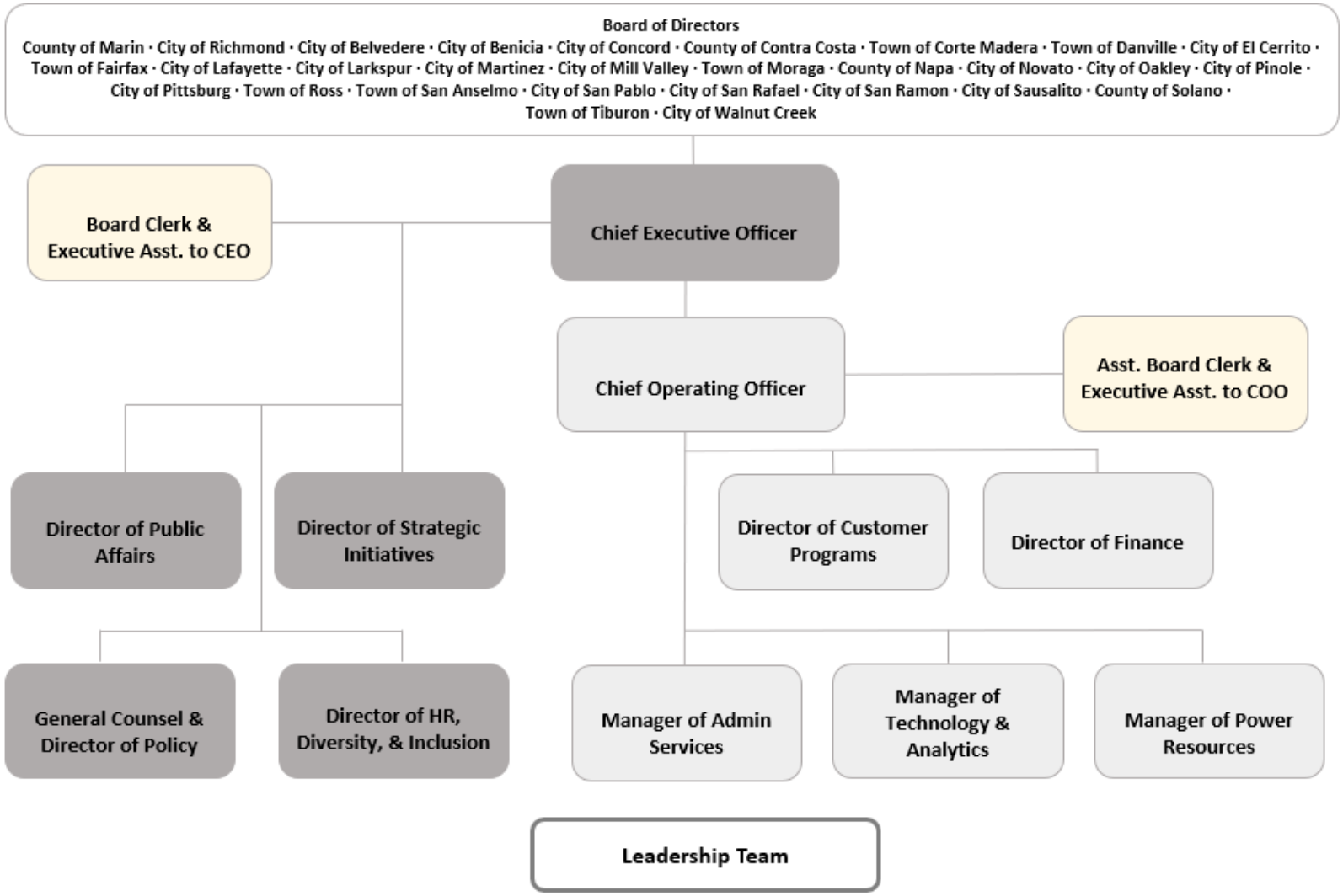
C. Attachment-A, Question C.10

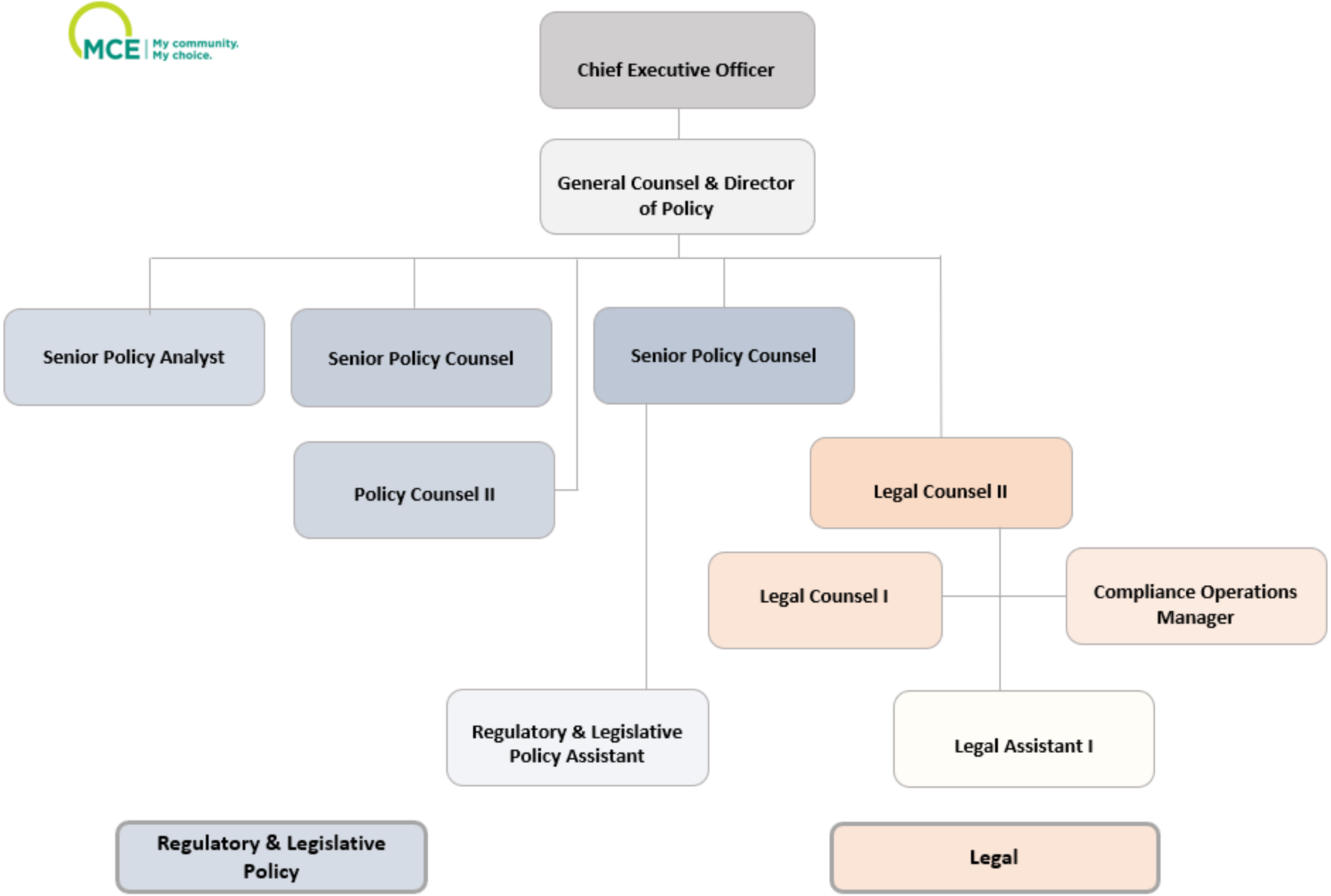
"Present a table akin to PG&E's Figure 1.9 (Portfolio Overview, p 37) or SDG&E's Figure 1.10 (p. 23) that not only shows anticipated solicitation schedule of "statewide programs" by calendar year and quarter, but also expected solicitation schedule of local third-party solicitations, by sector, and program 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)."

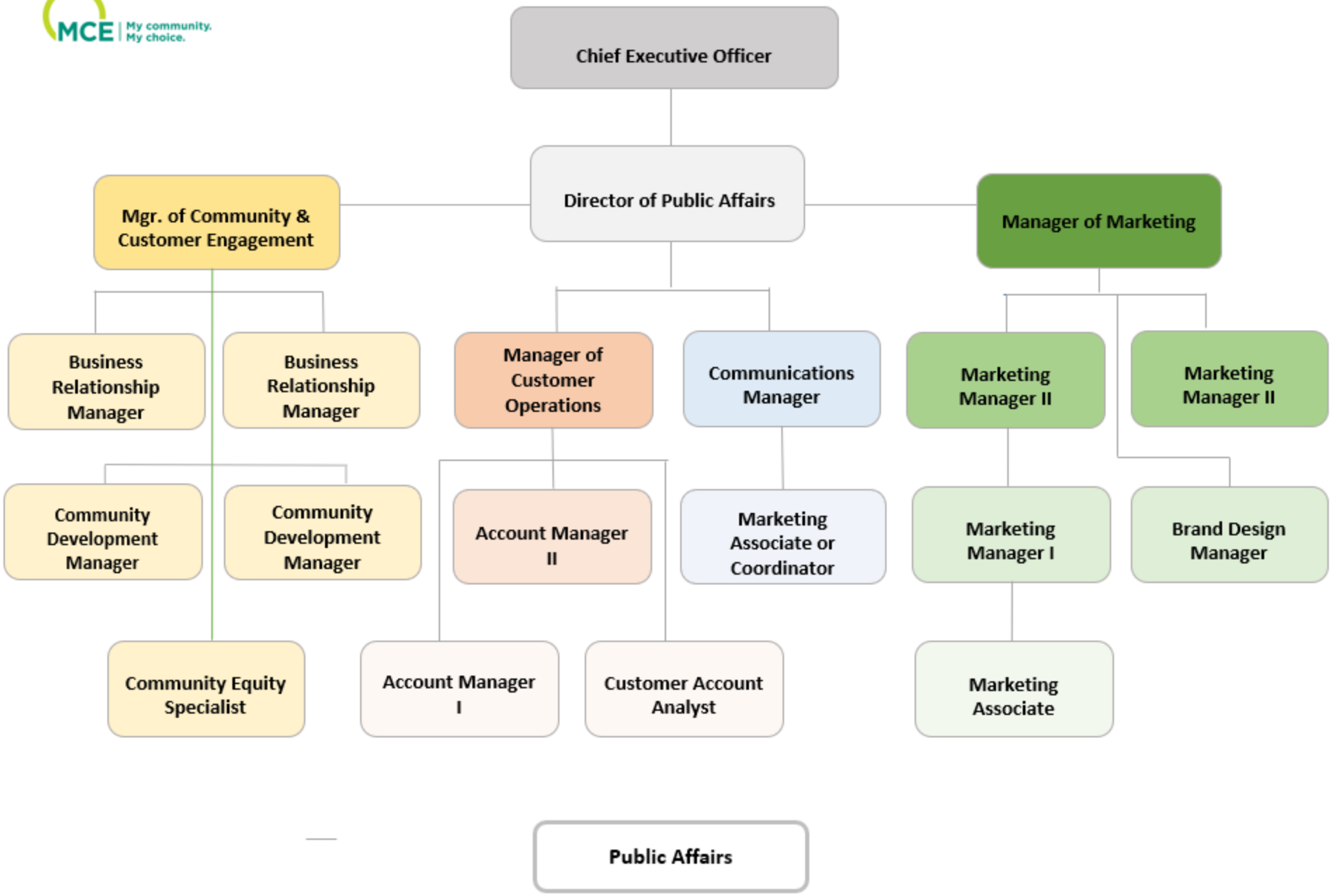
This question is not applicable to MCE.

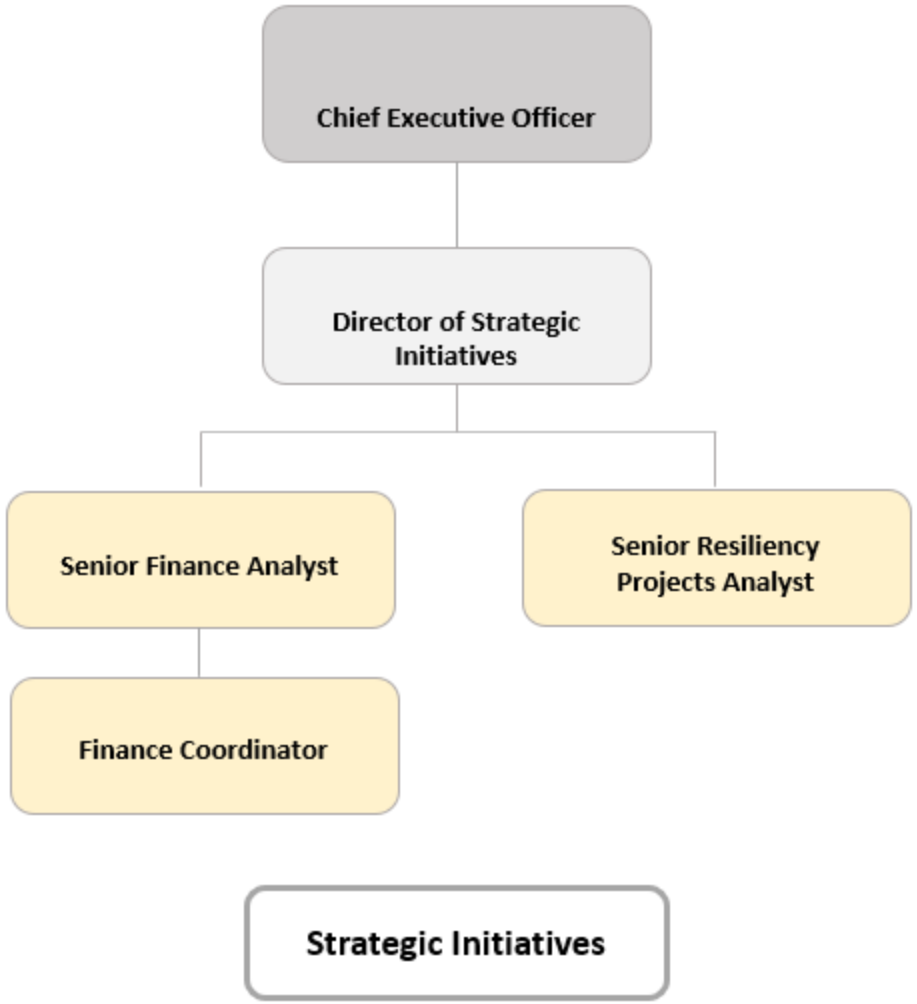
III. Appendices

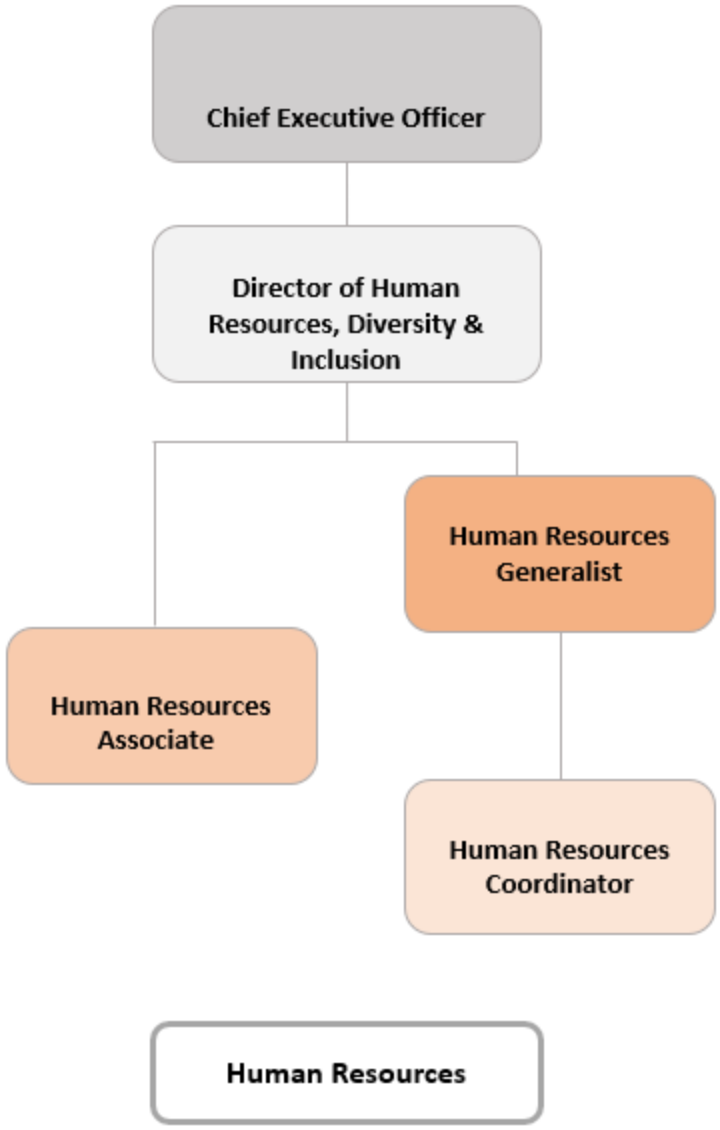
Appendix A: Supporting Information – Request I. A.

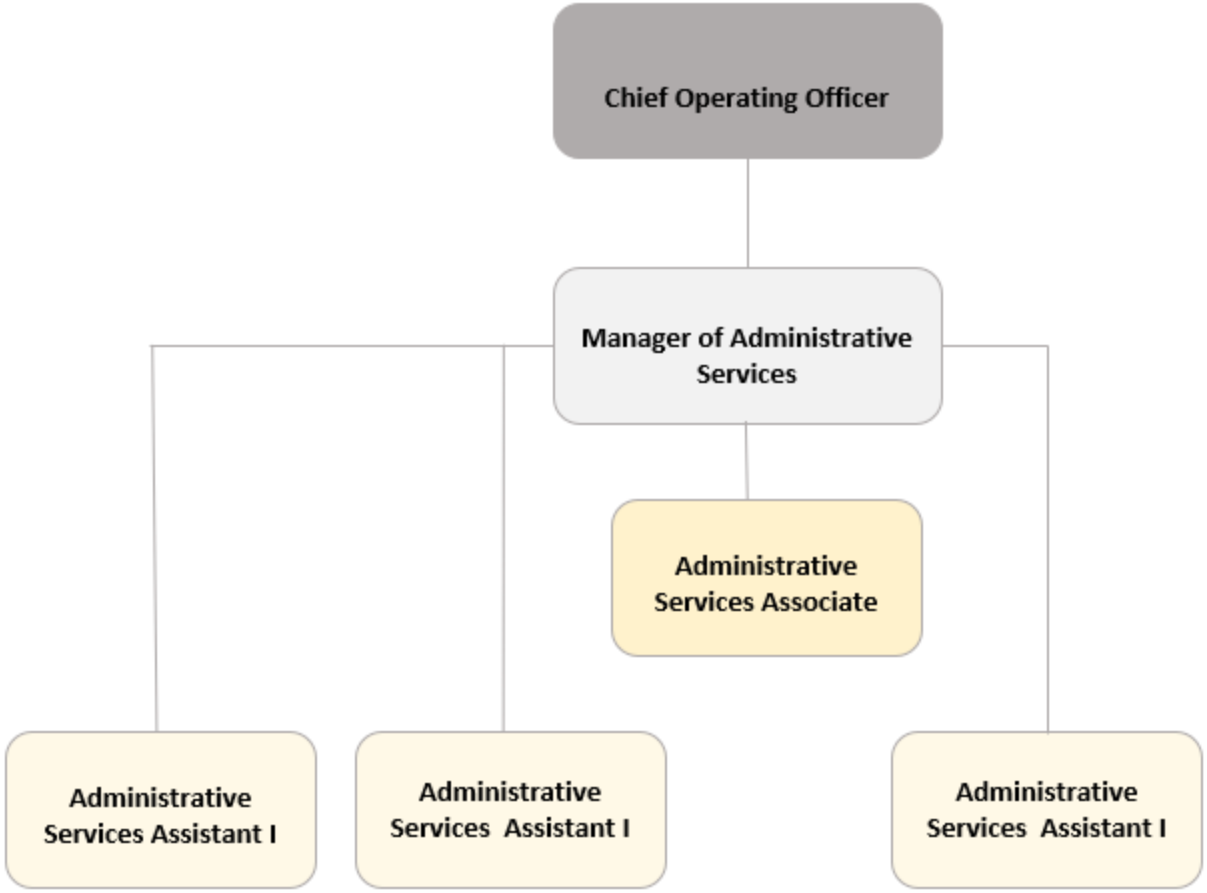


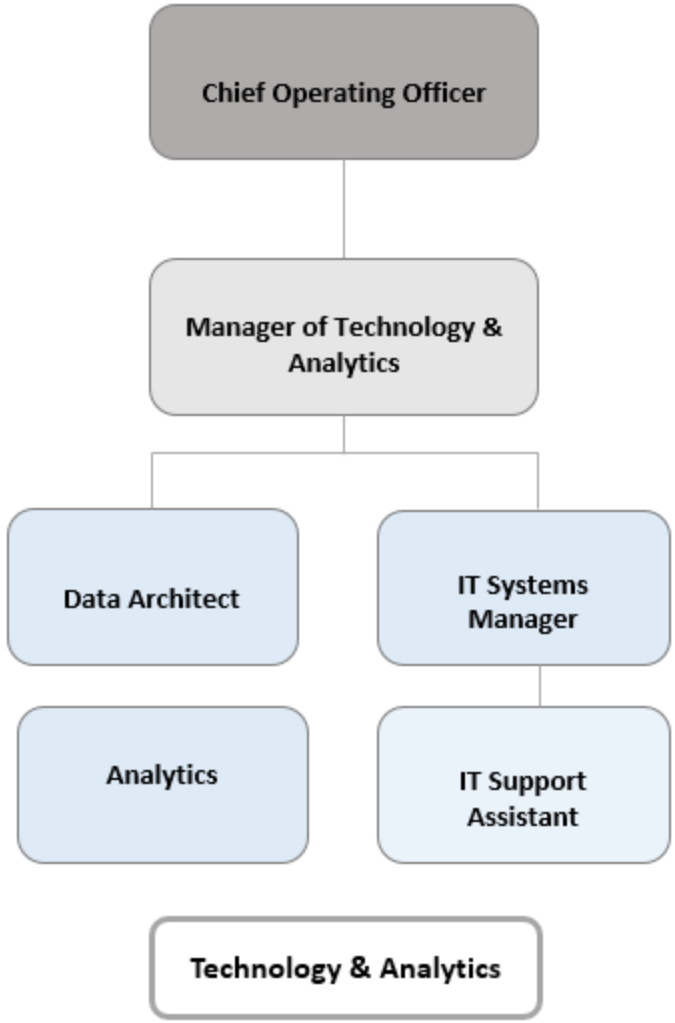

Chief Executive Officer
General Counsel & Director of Policy
Senior Policy Analyst
Senior Policy Counsel
Senior Policy Counsel
Policy Counsel II
Legal Counsel II
Legal Counsel I
Compliance Operations Manager
Regulatory & Legislative Policy Assistant
Legal Assistant I
Regulatory & Legislative Policy
Legal

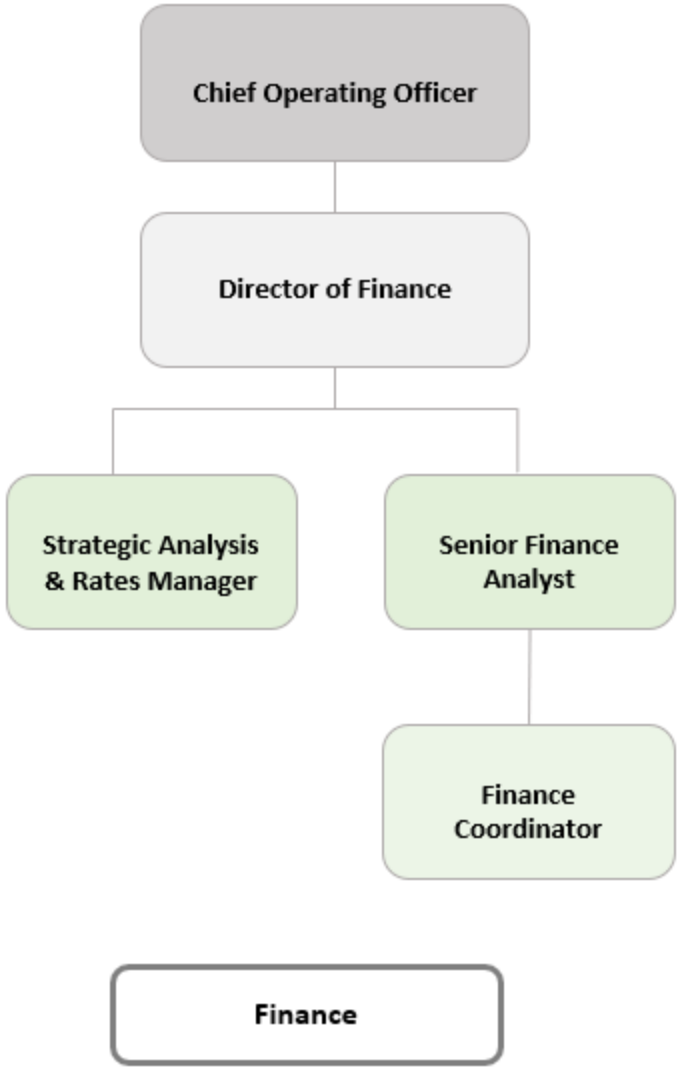

Chief Executive Officer
Director of Public Affairs
Mgr. of Community & Customer Engagement
Manager of Marketing
Business Relationship Manager
Business Relationship Manager
Manager of Customer Operations
Communications Manager
Marketing Manager II
Marketing Manager II
Community Development Manager
Community Development Manager
Account Manager II
Marketing Associate or Coordinator
Marketing Manager I
Brand Design Manager
Community Equity Specialist
Account Manager I
Customer Account Analyst
Marketing Associate
Public Affairs

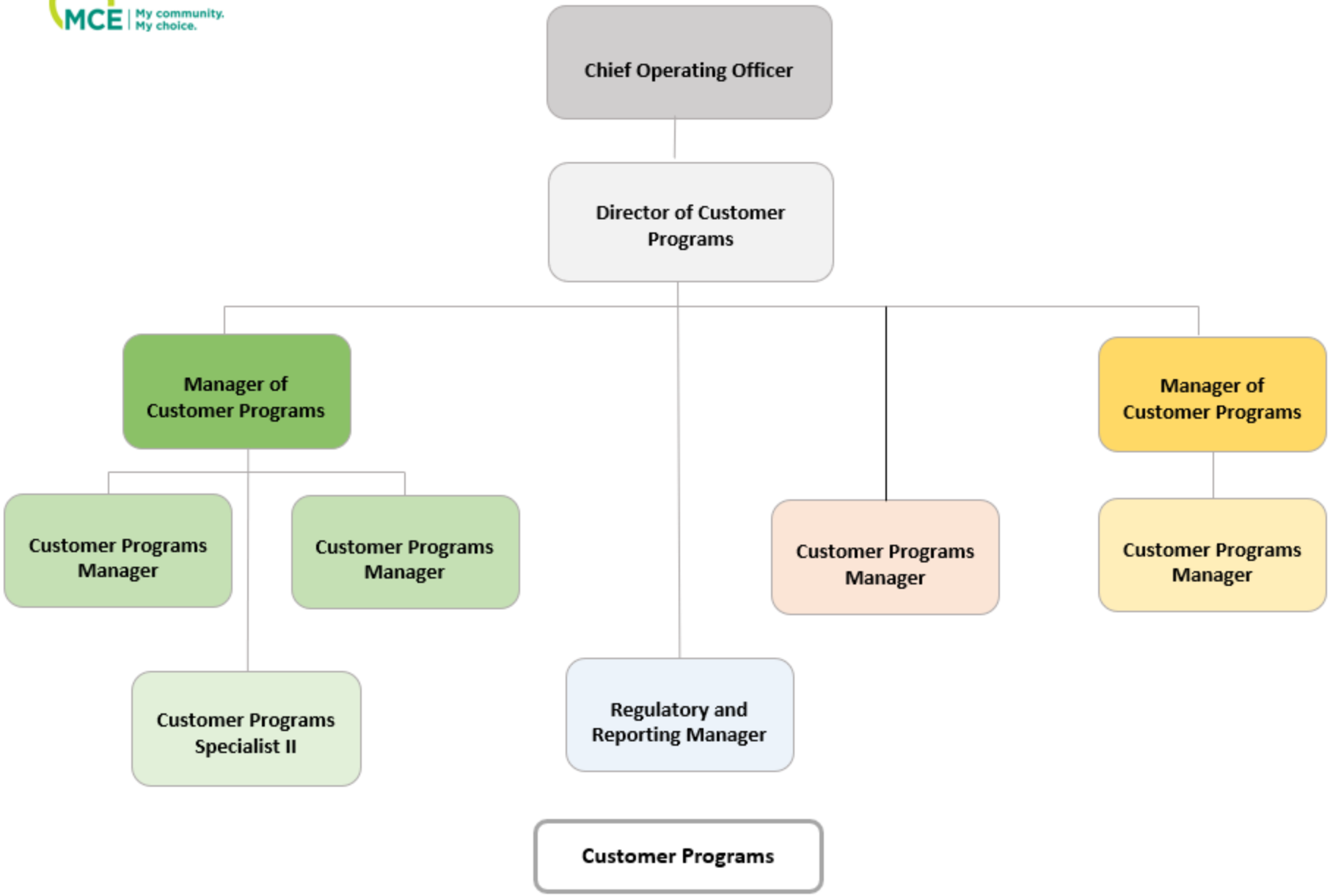

Chief Executive Officer
Director of Strategic Initiatives
Senior Finance Analyst
Senior Resiliency Projects Analyst
Finance Coordinator
Strategic Initiatives

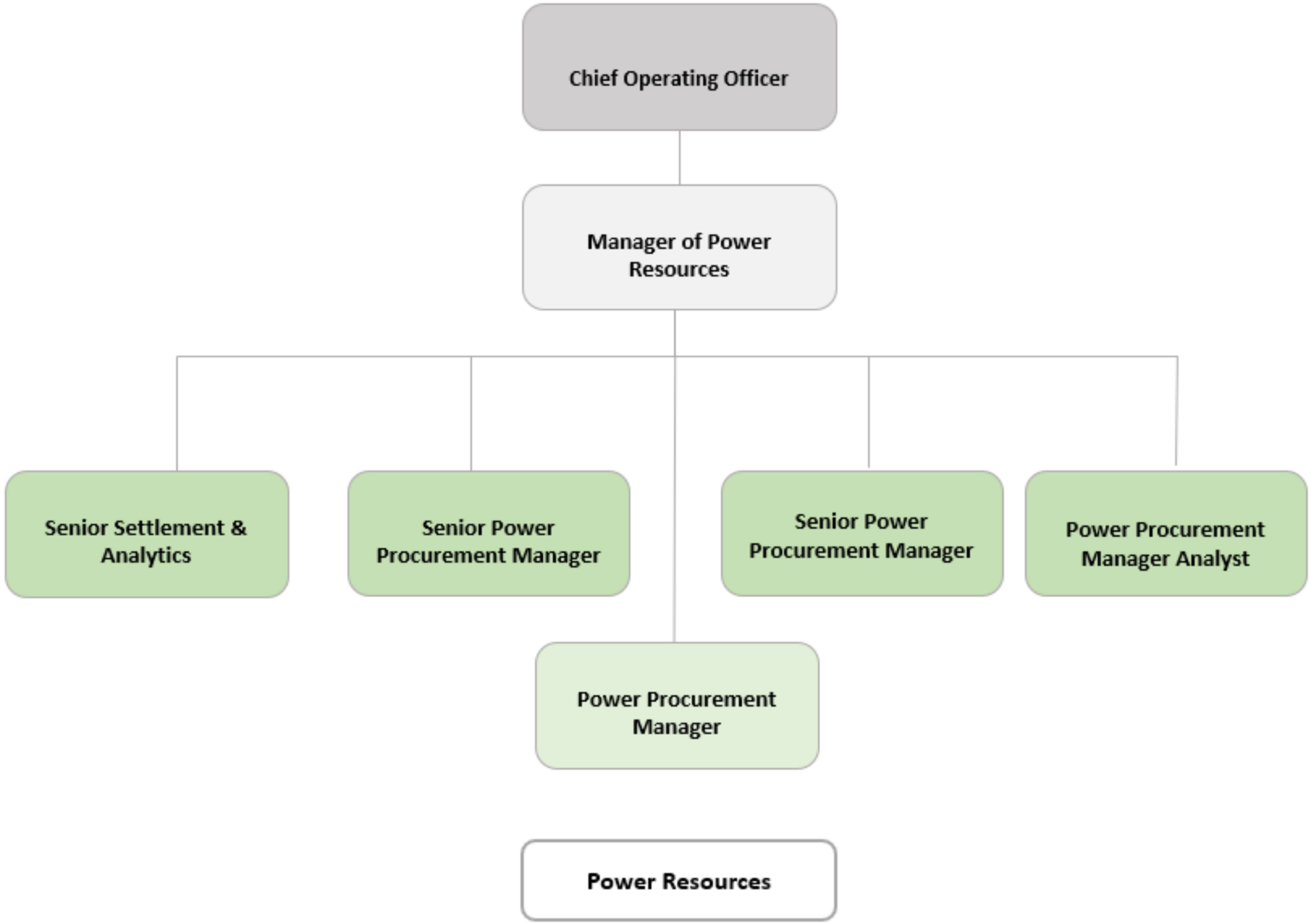

Chief Executive Officer
Director of Human Resources, Diversity & Inclusion
Human Resources Generalist
Human Resources Associate
Human Resources Coordinator
Human Resources


Chief Operating Officer
Manager of Administrative Services
Administrative Services Associate
Administrative Services Assistant I
Administrative Services Assistant I
Administrative Services Assistant I
Administrative Services


Chief Operating Officer
Manager of Technology & Analytics
Data Architect
IT Systems Manager
Analytics
IT Support Assistant
Technology & Analytics


Chief Operating Officer
Director of Finance
Strategic Analysis & Rates Manager
Senior Finance Analyst
Finance Coordinator
Finance


Chief Operating Officer
Director of Customer Programs
Manager of Customer Programs
Manager of Customer Programs
Customer Programs Manager
Customer Programs Manager
Customer Programs Manager
Customer Programs Manager
Customer Programs Specialist II
Regulatory and Reporting Manager
Customer Programs


Chief Operating Officer
Manager of Power Resources
Senior Settlement & Analytics
Senior Power Procurement Manager
Senior Power Procurement Manager
Power Procurement Manager Analyst
Power Procurement Manager
Power Resources

Appendix B: Supporting Information – Request I.B.

Functional Group	2018 EE Portfolio FTE	2020 EE Portfolio FTE
Policy, Strategy and Regulatory Reporting Compliance	1.09	1.53
Program Management	1.73	2.43
Engineering Services	-	-
Customer Application/Rebate/Incentive Processing	0.12	0.18
Customer Project Inspections	0.12	0.18
Portfolio Analytics	0.17	0.26
EM&V	0.11	0.14
ME&O	0.25	0.35
Account Management/Sales	-	-
IT	-	-
Call Center	-	-
Total	**3.59**	**5.07**

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes **p**olicy, 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	
		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 MCE 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	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	

	technical reviews and design assistance	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 LTPP 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	

Appendix C: Supporting Information – Request I.C.

Residential

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 0.062	$ 0.080
		Program Management	$ 0.185	$ 0.241
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.031	$ 0.040
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ 0.031	$ 0.040
		ME&O (Local)	$ -	$ -
		Account Management / Sales	$ -	$ -
		IT	$ -	$ -
		Call Center	$ -	$ -
	Labor Total		$ 0.308	$ 0.401
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	$ -	$ -
		Other Contracts	$ -	$ -
		Program Implementation	$ 0.498	$ 0.930
		Policy, Strategy, and Regulatory Reporting Compliance	$ 0.040	$ 0.075
		Program Management	$ 0.125	$ 0.233
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.040	$ 0.075
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ -	$ -
		ME&O (Local)	$ 0.001	$ 0.001
		Account Management / Sales	$ -	$ -
		IT (4)	$ -	$ -
		Call Center	$ -	$ -
		Facilities	$ -	$ -
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Prog	$ 0.305	$ 1.018
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -
	Non-Labor Total		$ 1.009	$ 2.332
Residential Total			$ 1.317	$ 2.733
	Other (collected through GRC) (2)	Labor Overheads		

Notes:	(1) Labor costs are already loaded with (state loaders covered by EE)
	(2) These costs are collected through GRC D.16-06-054
	(3) LGP contracts that directly support the sector is included/not included in this item
	(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

Commercial

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 0.019	$ 0.044
		Program Management	$ 0.057	$ 0.132
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.009	$ 0.022
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ 0.009	$ 0.022
		ME&O (Local)	$ -	$ -
		Account Management / Sales	$ -	$ -
		IT	$ -	$ -
		Call Center	$ -	$ -
	Labor Total		$ 0.095	$ 0.221
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	$ -	$ -
		Other Contracts	$ -	$ -
		Program Implementation	$ 0.236	$ 0.960
		Policy, Strategy, and Regulatory Reporting Compliance	$ 0.010	$ 0.040
		Program Management	$ 0.059	$ 0.240
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.010	$ 0.040
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ -	$ -
		ME&O (Local)	$ 0.000	$ 0.001
		Account Management / Sales	$ -	$ -
		IT (4)	$ -	$ -
		Call Center	$ -	$ -
		Facilities	$ -	$ -
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs	$ 0.234	$ 1.510
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -
	Non-Labor Total		$ 0.549	$ 2.790
Commercial Total (5)			$ 0.643	$ 3.011
	Other (collected through GRC) (2)	Labor Overheads		

Notes:

(1) Labor costs are already loaded with (state loaders covered by EE)

(2) These costs are collected through GRC D.16-06-054

(3) LGP contracts that directly support the sector is included/not included in this item

(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

(5) Under the previous program categories the following programs were classified as Cross Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM. These are included in Table 16 Cross Cutting. These three programs are now classified as Commercial with the elimination of Cross Cutting programs.

Industrial

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 0.011	$ 0.065
		Program Management	$ 0.033	$ 0.195
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.006	$ 0.033
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ 0.006	$ 0.033
		ME&O (Local)	$ -	$ -
		Account Management / Sales	$ -	$ -
		IT	$ -	$ -
		Call Center	$ -	$ -
	Labor Total		$ 0.055	$ 0.326
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	$ -	$ -
		Other Contracts	$ -	$ -
		Program Implementation	$ 0.040	$ 0.239
		Policy, Strategy, and Regulatory Reporting Compliance	$ 0.004	$ 0.022
		Program Management	$ 0.010	$ 0.060
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.004	$ 0.022
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ -	$ -
		ME&O (Local)	$ 0.000	$ 0.000
		Account Management / Sales	$ -	$ -
		IT (4)	$ -	$ -
		Call Center	$ -	$ -
		Facilities	$ -	$ -
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs	$ -	$ 0.201
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -
	Non-Labor Total		$ 0.058	$ 0.546
Industrial Total			$ 0.113	$ 0.871
	Other (collected through GRC) (2)	Labor Overheads		

Notes:	(1) Labor costs are already loaded with (state loaders covered by EE)
	(2) These costs are collected through GRC D.16-06-054
	(3) LGP contracts that directly support the sector is included/not included in this item
	(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

Agricultural

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 0.012	$ 0.038
		Program Management	$ 0.037	$ 0.115
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.006	$ 0.019
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ 0.006	$ 0.019
		ME&O (Local)	$ -	$ -
		Account Management / Sales	$ -	$ -
		IT	$ -	$ -
		Call Center	$ -	$ -
	Labor Total		$ 0.061	$ 0.191
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	$ -	$ -
		Other Contracts	$ -	$ -
		Program Implementation	$ 0.021	$ 0.067
		Policy, Strategy, and Regulatory Reporting Compliance	$ 0.003	$ 0.009
		Program Management	$ 0.005	$ 0.017
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 0.003	$ 0.009
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ -	$ -
		ME&O (Local)	$ 0.000	$ 0.000
		Account Management / Sales	$ -	$ -
		IT (4)	$ -	$ -
		Call Center	$ -	$ -
		Facilities	$ -	$ -
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs	$ -	$ 0.175
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -
	Non-Labor Total		$ 0.033	$ 0.277
Agricultural Total			$ 0.094	$ 0.468
	Other (collected through GRC) (2)	Labor Overheads		

Notes:

(1) Labor costs are already loaded with (state loaders covered by EE)

(2) These costs are collected through GRC D.16-06-054

(3) LGP contracts that directly support the sector is included/not included in this item

(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

Public Sector

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Public Sector	Labor(1)	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 (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Program Implementation		
		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 (4)		
		Call Center		
		Facilities		
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs		
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)		
	Non-Labor Total			
Public Sector Total				
	Other (collected through GRC) (2)	Labor Overheads		

Notes:	(1) Labor costs are already loaded with (state loaders covered by EE)
	(2) These costs are collected through GRC D.16-06-054
	(3) LGP contracts that directly support the sector is included/not included in this item
	(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

Cross Cutting

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Cross Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ -	$ -
		Program Management	$ -	$ 0.072
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ -	$ -
		ME&O (Local)	$ -	$ -
		Account Management / Sales	$ -	$ -
		IT	$ -	$ -
		Call Center	$ -	$ -
	Labor Total		$ -	$ 0.072
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	$ -	$ -
		Other Contracts	$ -	$ -
		Program Implementation	$ -	$ 0.231
		Policy, Strategy, and Regulatory Reporting Compliance	$ -	$ -
		Program Management	$ -	$ 0.058
		Engineering services	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -
		Customer Project Inspections	$ -	$ -
		Portfolio Analytics	$ -	$ -
		ME&O (Local)	$ -	$ -
		Account Management / Sales	$ -	$ -
		IT(4)	$ -	$ -
		Call Center	$ -	$ -
		Facilities	$ -	$ -
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Prograı	$ -	$ -
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -
	Non-Labor Total		$ -	$ 0.289
Cross Cutting Total (5)			$ -	$ 0.361
	Other (collected through GRC) (2)	Labor Overheads		

Notes:

(1) Labor costs are already loaded with (state loaders covered by EE)

(2) These costs are collected through GRC D.16-06-054

(3) LGP contracts that directly support the sector is included/not included in this item

(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

(5) Under the previous program categories the following programs were classified as Cross Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM.
These are included in Table 16 Cross Cutting.
These three programs are now classified as Commercial with the elimination of Cross Cutting programs.

Appendix D: Supporting Information – Response to Scoping Memo, Attachment A, Question C.8.

Energy Savings Targets and Expenditures by Sector

	2019 EE Portfolio Expenditures ($Million)				2021 EE Portfolio Budget ($Million)				2019 EE Portfolio Savings			2021 EE Portfolio Forecasted Savings		
Sector	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	MMTHERMS	KWH	KW	MMTHERMS
Residential	$ 0.31	$ 0.70	$ 0.31	$ 1.32	$ 0.40	$ 1.31	$ 1.02	$ 2.73	506,753	19	124,124	6,333,145	59	0.06
Commercial	$ 0.09	$ 0.31	$ 0.23	$ 0.64	$ 0.22	$ 1.28	$ 1.51	$ 3.01	1,005,902	211	(6,193)	5,224,085	273	0.09
Agricultural	$ 0.06	$ 0.03	$ -	$ 0.09	$ 0.19	$ 0.10	$ 0.18	$ 0.47	-	-	-	863,147	112	0.01
Industrial	$ 0.06	$ 0.06	$ -	$ 0.11	$ 0.33	$ 0.34	$ 0.20	$ 0.87	-	-	-	1,359,837	33	0.13
Public (GP)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	-	-	-	-	-
Cross Cutting*	$ -	$ -	$ -	$ -	$ 0.07	$ 0.29	$ -	$ 0.36	-	-	-	-	-	-
Total Sector Budget	$ 0.52	$ 1.11	$ 0.54	$ 2.17	$ 1.21	$ 3.33	$ 2.90	$ 7.44	1,512,656	230	117,931	13,780,213	477	0.30
EM&V-PA	$ -	$ -	$ -	$ 0.10		$ -	$ -	$ 0.12	-	-	-	-	-	-
EM&V-ED	$ -	$ -	$ -	$ -		$ -	$ -	0.43	-	-	-	-	-	-
OBF - Loan Pool**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	-	-	-	-	-
EE Total***	0.52	1.11	0.54	2.26	1.21	3.33	2.90	8.00	1,512,656	230	117,931	13,780,213	477	0.30
* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, OBF admin and 365 IDEA for 2018 only.														
** For SDG&E and SCG the loan pool is not part of the authorized EE portoflio budget and is collected and tracked trhough a separate balancing account.														
***Rounding Differences														

Appendix E: Supporting Information – Response to Scoping Memo, Attachment A, Question C.9.

Energy Efficiency In-House Budget by Sector and Cross-Cutting

	2019 EE Portfolio Expenditures ($Million)				2021 EE Portfolio Budget ($Million)			
Sector	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total
Residential	$ 0.31	$ 0.70	$ 0.31	$ 1.32	$ 0.40	$ 1.31	$ 1.02	$ 2.73
Commercial	$ 0.09	$ 0.31	$ 0.23	$ 0.64	$ 0.22	$ 1.28	$ 1.51	$ 3.01
Agricultural	$ 0.06	$ 0.03	$ -	$ 0.09	$ 0.19	$ 0.10	$ 0.18	$ 0.47
Industrial	$ 0.06	$ 0.06	$ -	$ 0.11	$ 0.33	$ 0.34	$ 0.20	$ 0.87
Public (GP)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Cross Cutting*	$ -	$ -	$ -	$ -	$ 0.07	$ 0.29	$ -	$ 0.36
Total Sector Budget	$ 0.52	$ 1.11	$ 0.54	$ 2.17	$ 1.21	$ 3.33	$ 2.90	$ 7.44
EM&V-PA	$ -	$ -	$ -	$ 0.10		$ -	$ -	$ 0.12
EM&V-ED	$ -	$ -	$ -	$ -		$ -	$ -	0.43
OBF - Loan Pool**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
EE Total***	0.52	1.11	0.54	2.26	1.21	3.33	2.90	8.00

Attachment 2: Marin Clean Energy Program Changes Explanation Tables

2021 Program Level Explanations

PA justification	Third party implementer or Core	Statewide or Local	**Programs to be closed with the disposition of 2021 ABAL**	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
MCE decided to end this program in 2019 after the ABAL was filed due to the fact that MCE was not able to secure an updated contract with the existing implementer. Although MCE has a 2020 budget allocated to this program, there will be no expenditures.	x		MCE03 - Single Family Seasonal Savings	-100%	2.12	n/a	This program was not included in MCE's 2021 ABAL	$ -	$ 101,845	2016	12/31/2019	n/a

PA justification	Third party implementer or Core	Statewide	**Programs to be closed upon completion of commitments**	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
MCE will end this program in 2020 for several reasons. First, the program overlaps with MCE's existing Multifamily Comprehensive program and other Multifamily Direct Install programs already in the market. Secondly, the program is not cost effective as a result low participation, limited deemed measure offerings due to workpapers expiring, and COVID-19 impacts.	x		MCE05 - Multifamily Direct Install	-100%	0.00	MCE will continue to offer this program until Decemeber 2020 to honor program committments. MCE will provide the claimed TRC in next year's ABAL. As of 2020Q1, this program has a TRC of 0.07.	This program was not included in MCE's 2021 ABAL	$ -	$ 391,064	2019	12/31/2020	n/a

PA justification	Third party implementer or Core	Statewide	**Programs with reduced budgets (>40% budget decrease), to continue in 2021**	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
2019 and 2020 were program ramp up years for the Agricultural and Industrial Resource (AIR) program. Additionally, MCE has deployed cost savings strategies while maintaining a cost-effective forecast.	x		MCE10 - Industrial	-59%	0.00	0.00 as of 2020Q1	1.17	$ 871,077	$ 2,125,484	2019	n/a	n/a
2019 and 2020 were program ramp up years for the Agricultural and Industrial Resource (AIR) program. Additionally, MCE has deployed cost savings strategies while maintaining a cost-effective forecast.	x		MCE11 - Agricultural	-32%	0.00	0.00 as of 2020Q1	1.12	$ 468,195	$ 687,463	2019	n/a	n/a

PA justification	Third party implementer or Core	Statewide	**Programs with enhanced budgets (>40% budget increase)**	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004.
MCE expects an expansion of the Commercial Upgrade Program in 2021, primarily rooted in the development of population-level NMEC portfolios and expected completion of large commercial SEM projects enrolled in 2019 and 2020. Lastly, MCE is adding a new implementer.	x		MCE02 - Commercial	104%	0.48	0.32 as of 2020 Q1	1.33	$ 3,010,541	$ 1,477,001	2016	n/a	n/a
With the discontinued Multifamily Direct Install program and new direct install measures available to implement in 2021, MCE is doubling down on it SF Residential Direct Install program.	x		MCE08 - Single Family Direct Install	124%	0.09	0.19 as of 2020Q1	0.31	$ 1,577,832	$ 704,976	2019	n/a	n/a

PA justification	Third party implementer or Core	Statewide	**Programs that are new in 2021**	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	MM/YY program to start	MM/YY Program is due to sunset; and flag as "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004
			MCE is not proposing any new programs for 2021.					$ -	$ -			

Attachment 3: Marin Clean Energy Budget and Savings True-up Tables

Annual Rolling Portfolio Budget Forecast - True-up

Sector	2018**	2019	2020	2021	2022	2023	2024	2025	Total
Residential	$ 558,107	$ 1,317,213	$ 2,163,109	$ 2,733,236	$ 6,170,017	$ 6,170,017	$ 6,170,017	$ 5,660,017	$ 30,941,731
Commercial	$ 617,207	$ 643,277	$ 1,477,001	$ 3,010,541	$ 2,934,922	$ 2,934,922	$ 2,934,922	$ 3,251,922	$ 17,804,713
Industrial	$ 137,360	$ 113,244	$ 2,125,484	$ 871,077	$ 1,269,596	$ 1,269,596	$ 1,269,596	$ 1,260,596	$ 8,316,550
Agriculture	$ -	$ 93,618	$ 687,463	$ 468,195	$ 1,181,259	$ 1,181,259	$ 1,181,259	$ 1,260,259	$ 6,053,310
Emerging Tech	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Public	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Codes and Standards	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
WE&T	$ -	$ -	$ 346,667	$ 361,481	$ 346,667	$ 346,667	$ 346,667	$ 346,667	$ 2,094,815
Finance	$ 18,524	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 18,524
OBF Loan Pool	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Subtotal	$ 1,331,198	$ 2,167,352	$ 6,799,724	$ 7,444,530	$ 11,902,460	$ 11,902,460	$ 11,902,460	$ 11,779,460	$ 65,229,642
EM&V	$ 16,590	$ 95,351	$ 108,795	$ 119,113	$ 189,405	$ 189,405	$ 189,405	$ 187,405	$ 1,095,469
Total Portfolio Program Year PA Budget	$ 1,347,788	$ 2,262,703	$ 6,908,519	$ 7,563,643	$ 12,091,865	$ 12,091,865	$ 12,091,865	$ 11,966,865	$ 66,325,111
Total Authorized Portfolio PY Budget Cap	$ 8,532,000	$ 8,532,000	$ 12,404,000	$ 12,404,000	$ 10,998,000	$ 10,998,000	$ 10,998,000	$ 10,870,000	$ 85,736,000

***2018 - 2019 are actual expenditures. 2020 - 2025 are forecasted expenditures.**

**** "Reset" 2018 budget at or below 2018 annual budget approved in Business plan Decision. "True-up" years 2019-2025.**

	Annual Rolling Portfolio Savings Forecast - True-up (kWh)							
Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	336,227	506,753	2,850,292	2,850,292	2,797,634	2,797,634	2,797,634	2,797,634
Commercial	823,364	1,005,902	3,641,084	3,641,084	4,246,583	4,246,583	4,246,583	4,246,583
Industrial	n/a	-	1,179,161	1,179,161	1,864,651	1,864,651	1,864,651	1,864,651
Agriculture	n/a	-	709,938	709,938	659,030	659,030	659,030	659,030
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Actual Portfolio Savings	1,161,609	1,514,674	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	1,846,947	1,846,947	8,380,475	8,380,475	9,567,898	9,567,898	9,567,898	9,567,898
CPUC Goal*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
% of Goal*	63%	82%	n/a	n/a	n/a	n/a	n/a	n/a

***2018 - 2019 are actual savings. 2020 - 2025 are forecasted savings.**

Annual Rolling Portfolio Savings Forecast - True-up (kW)

Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	27	19	246	246	236	236	236	236
Commercial	126	211	116	116	81	81	81	81
Industrial	n/a	-	38	38	59	59	59	59
Agriculture	n/a	-	84	84	78	78	78	78
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Actual Portfolio Savings	153	230	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	349	696	484	484	454	454	454	454
CPUC Goal*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
% of Goal*	44%	33%	n/a	n/a	n/a	n/a	n/a	n/a

***2018 - 2019 are actual savings. 2020 - 2025 are forecasted savings.**

Annual Rolling Portfolio Savings Forecast - True-up (therms)

Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	0.07	0.12	0.41	0.41	0.45	0.45	0.45	0.45
Commercial	(0.00)	(0.00)	0.01	0.01	0.01	0.01	0.01	0.01
Industrial	n/a	-	0.12	0.12	0.14	0.14	0.14	0.14
Agriculture	n/a	-	0.01	0.01	0.01	0.01	0.01	0.01
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Actual Portfolio Savings	0.07	0.12	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	0.10	0.40	0.55	0.55	0.61	0.61	0.61	0.61
CPUC Goal*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
% of Goal*	70%	30%	n/a	n/a	n/a	n/a	n/a	n/a

***2018 - 2019 are actual savings. 2020 - 2025 are forecasted savings.**

Attachment 4: Marin Clean Energy CEDARS Filing Submission Receipt

CEDARS FILING SUBMISSION RECEIPT

The MCE portfolio filing has been submitted and is now under review. A summary of the filing is provided below.

PA: Marin Clean Energy (MCE)

Filing Year: 2021

Submitted: 19:23:11 on 31 Aug 2020

By: Qua Vallery

Advice Letter Number: 45-E

* Portfolio Filing Summary *

- TRC: 1.0799
- PAC: 1.1675
- TRC (no admin): 2.5791
- PAC (no admin): 3.1424
- RIM: 1.1675
- Budget: $7,563,642.69

* Programs Included in the Filing *

- MCE01: Multi-Family
- MCE02: Commercial Upgrade
- MCE07: Single Family Comprehensive
- MCE08: Single Family Direct Install Standalone
- MCE10: Industrial
- MCE11: Agricultural
- MCE16: Workforce Education and Training (WET)
- MCE98: MCE EM&V;