

Application: 22-03-
Exhibit No.: _____
Date: March 4, 2022
Witness (es): Various

MARIN CLEAN ENERGY
TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN
EXHIBIT 3
APPENDICES



MARIN CLEAN ENERGY
TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN
EXHIBIT 3
APPENDICES

TABLE OF CONTENTS

Chapter	Title	Witness
Exhibit 3	Appendices	
Appendix A	Budget Filing Appendix	Alice Havenar-Daughton
		Quashaun Vallery
Appendix B	Supplemental Budget Narrative	Alice Havenar-Daughton
		Quashaun Vallery
Appendix C	Proposed Equity and Market Support Metrics	Quashaun Vallery
Appendix D	Budget Details by Program	Alice Havenar-Daughton
		Quashaun Vallery
Appendix E	MCE's 2024 – 2027 CEDARS Filing	Quashaun Vallery
	Dashboard Links and Confirmation Receipts	

MARIN CLEAN ENERGY
TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN
EXHIBIT 3
APPENDIX A
BUDGET FILING APPENDIX

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

Application of Marin Clean Energy for
Approval of 2024-2031 Energy Efficiency
Business Plan and 2024-2027 Energy
Efficiency Portfolio Plan

Application 22-03-____
(Filed March 4, 2022)

**NOTICE OF AVAILABILITY OF EXHIBIT 3, APPENDIX A FOR
APPLICATION OF MARIN CLEAN ENERGY FOR APPROVAL OF
2024-2031 ENERGY EFFICIENCY BUSINESS PLAN AND
2024-2027 ENERGY EFFICIENCY PORTFOLIO PLAN**

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March 4, 2022

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

Application of Marin Clean Energy for
Approval of 2024-2031 Energy Efficiency
Business Plan and 2024-2027 Energy
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Application 22-03-____
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**NOTICE OF AVAILABILITY OF EXHIBIT 3, APPENDIX A FOR
APPLICATION OF MARIN CLEAN ENERGY FOR APPROVAL OF
2024-2031 ENERGY EFFICIENCY BUSINESS PLAN AND
2024-2027 ENERGY EFFICIENCY PORTFOLIO PLAN**

Pursuant to Rule 1.9 of the California Public Utilities Commission Rules of Practice and Procedure, Marin Clean Energy (“MCE”) hereby provides Notice of Availability of Exhibit 3, Appendix A for the Application of Marin Clean Energy for Approval of 2024-2031 Energy Efficiency Business Plan and 2024-2027 Energy Efficiency Portfolio Plan.

MCE’s Appendix A: Budget Filing Appendix can be accessed on California Energy Data and Reporting System (CEDARS) website at the following link: <https://cedars.sound-data.com/filings/dashboard/MCE/2024/>. Available March 4, 2022.

MCE will not provide hard copies of the Application, testimony or supporting workpapers to parties at this time as service of hard copies of tendered documents are temporarily suspended by the COVID-19 Temporary Filing and Service Protocol for Formal Proceedings: <https://www.cpuc.ca.gov/COVID19practitioneralert/>.

Please direct any questions on how to access the above-listed documents to:

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Respectfully submitted,

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Dated: March 4, 2022

MARIN CLEAN ENERGY
TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN
EXHIBIT 3
APPENDIX B
SUPPLEMENTAL BUDGET NARRATIVE

MARIN CLEAN ENERGY
 TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN
 EXHIBIT 3
 APPENDIX B
 SUPPLEMENTAL BUDGET NARRATIVE

TABLE OF CONTENTS

I.	Description of In-house Energy Efficiency (EE) Organizational Structure & Associated Costs	B-1
A.	Narrative description of in-house departments/organizations supporting MCE’s EE portfolio	B-1
1.	Functions conducted by each department/organization	B-1
2.	Management structure and organization chart	B-1
3.	Staffing needs by department/organization	B-2
4.	Non-program functions currently performed by contractors	B-2
5.	Anticipated drivers of in-house cost changes by department/organization	B-2
6.	Explanation of method for forecasting costs	B-2
B.	Table showing MCE’s “Full-Time Equivalent” headcount by department/organization	B-3
C.	Table showing costs by functional area of management structure	B-3
D.	Table showing cost drivers across the EE organization	B-3
E.	Allocation of labor and operations and maintenance (O&M) costs	B-3
II.	Budget Tables Including Information Identified in the Scoping Memo	B-5
A.	Attachment-A, Question C.8	B-5
B.	Attachment-A, Question C.9	B-5
C.	Attachment-A, Question C.10	B-6
III.	Attachments	B-7
	Attachment A: MCE Organization Chart (as of October 2021)	
	Attachment B: Energy Efficiency Full Time Equivalent Headcount	
	Attachment C: Budget Detail by Sector	
	Attachment D: EE Portfolio Summary	

INDEX OF FIGURES AND TABLES

Table 1: Functions Conducted by Departments Supporting MCE's EE Portfolio	B-1
Table 2: MCE's Major Cost Drivers for PYs 2024-2027	B-3

I. Description of In-house Energy Efficiency (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 Attachment B.

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

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 Attachment A. These charts include the entire staff within each department even though only a subset of staffers within 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 organizational charts are provided in Attachment A. Additionally, MCE's staffing needs for program year (PY) 2020 and PY 2022-2027 are provided in the "Portfolio FTE" table in Attachment B. For the purposes of this exercise, a full-time employee (FTE) schedule refers to 2,080 hours worked in a year. In 2020, MCE employed 4.4 FTEs supporting MCE's EE portfolio. In 2022 and 2023, MCE forecasts having 6.5 FTEs supporting the EE portfolio due to the addition of a Customer Programs Manager and a Customer Programs Specialist. MCE anticipates hiring additional staff in 2024 but expects staffing needs to remain flat thereafter through 2027.

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 the hiring of new staff but should stay relatively steady from 2024 through 2027 after accounting for salary increases in each year.

6. Explanation of method for forecasting costs

The following framework guided MCE's annual spending budgets for energy efficiency (EE) programs: (1) portfolio policy drivers; (2) MCE agency goals; (3) assessment of activities and emerging opportunities; and (4) analysis of cost drivers, including staffing, implementation

contracts and incentive costs. A more detailed explanation of MCE’s forecast methodology can be found in Exhibit 2, Chapter 2 of MCE’s testimony.

B. Table showing MCE’s “Full-Time Equivalent” headcount by department/organization

MCE’s staffing needs for PY 2020 and PYs 2022 – 2027 are provided in the “Portfolio FTE” table in Attachment 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 in Attachment C below. These tables itemize expenses into labor and non-labor.

D. Table showing cost drivers across the EE organization

The primary cost drivers during PYs 2024-2027 compared to MCE’s 2020 actuals and 2022-2023 EE portfolio forecasts are hiring of new staff and expanded implementation contracts and incentives. The following table shows the major cost drivers by budget category.

Table 2: MCE's Major Cost Drivers for PYs 2024-2027

Cost Driver	2020 Actuals	2022 - 2023 Average Forecast	2024 – 2027 Average Forecast	Average Difference Between Periods
Admin	\$711,733	\$863,846	\$1,058,593	\$245,451
Marketing & Outreach	\$0	\$0	\$155,000	\$155,000
Implementer Contracts & Incentive	\$1,723,939	\$4,473,450	\$5,796,933	\$2,239,987
EM&V	\$25,622	\$161,438	\$312,869	\$151,431

E. Allocation of labor and operations and maintenance (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 MCE 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 MCE 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 MCE 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 provides the requested information in Attachment D, below. MCE’s forecasted energy savings targets and budgets goals were developed through an iterative bottoms-up process that involves coordination between MCE staff, implementers, and technical consultants. MCE considered service area demographics, COVID-19 impacts, and other EE policy objectives.

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 provides the requested information in Attachment D. MCE developed a staffing budget based on our projected staffing needs. The distribution of staffing costs across budget categories for PYs 2024-2027 is based on the proposed allocation in 2023¹ with some adjustments for areas in which we expect staff involvement to change.

¹ Per MCE Advice Letter 54-E, Marin Clean Energy’s 2022 and 2023 Annual Budget Advice Letter, from November 7, 2021.

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).”

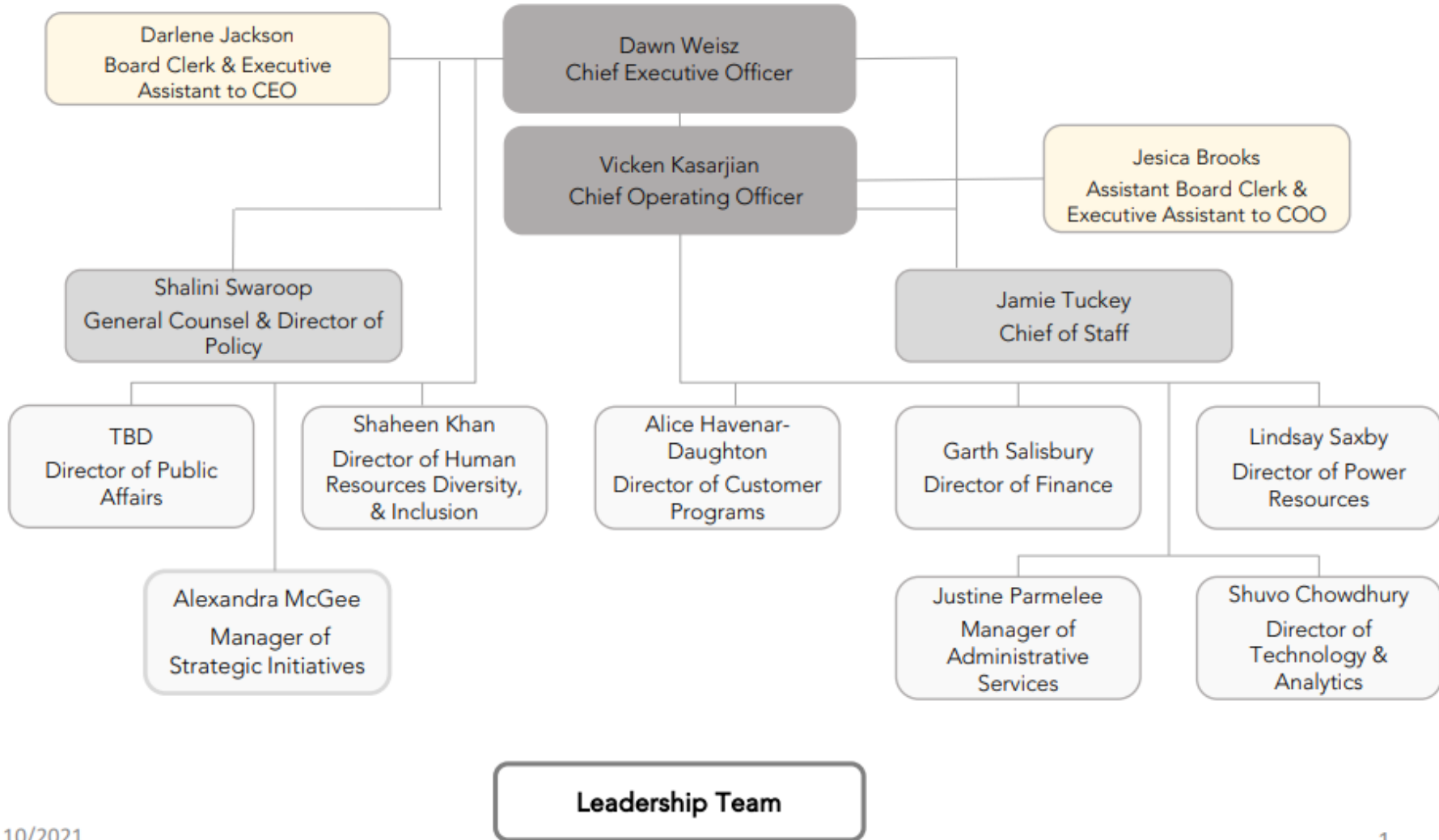
This question is not applicable to MCE.

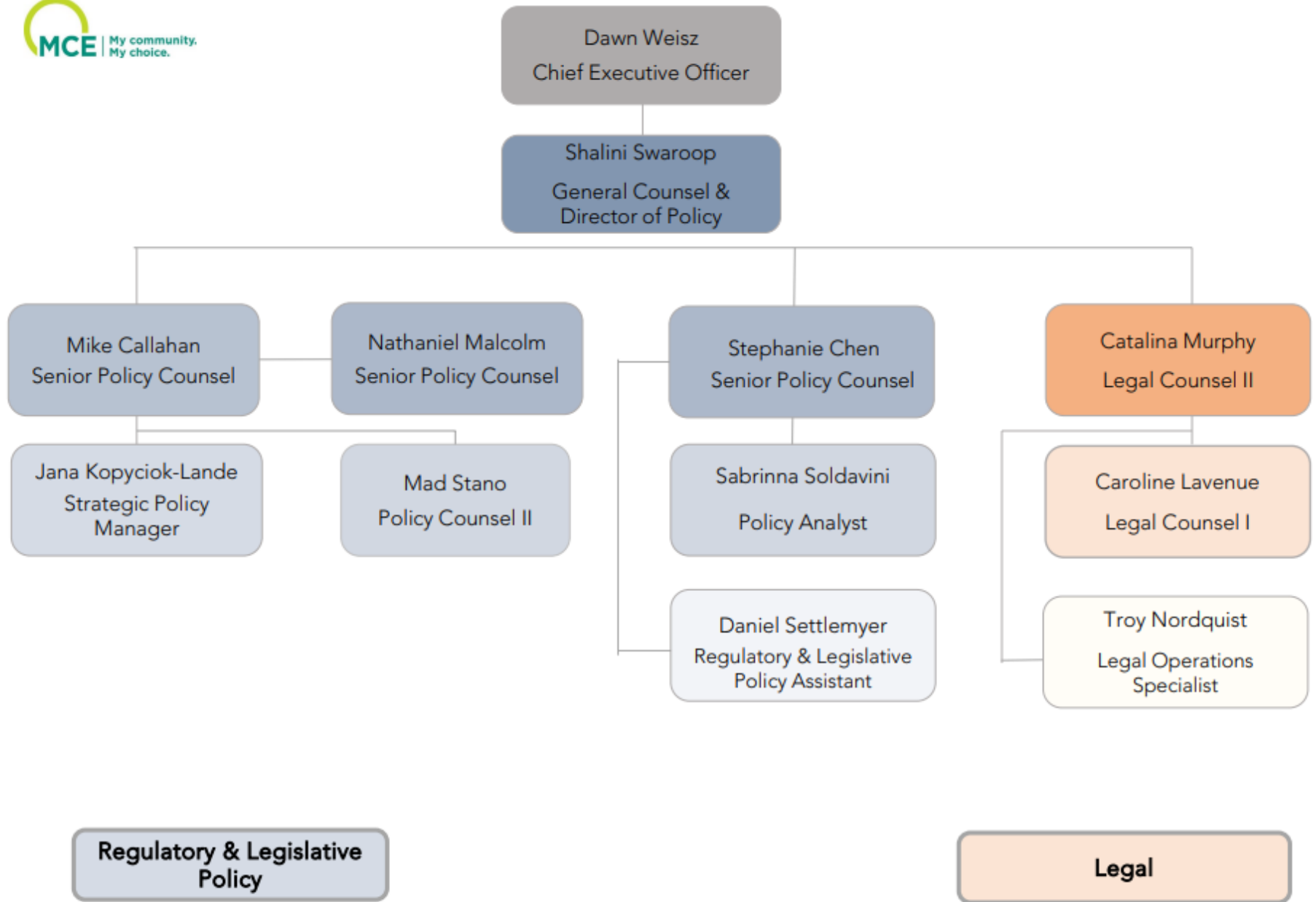
III. ATTACHMENTS

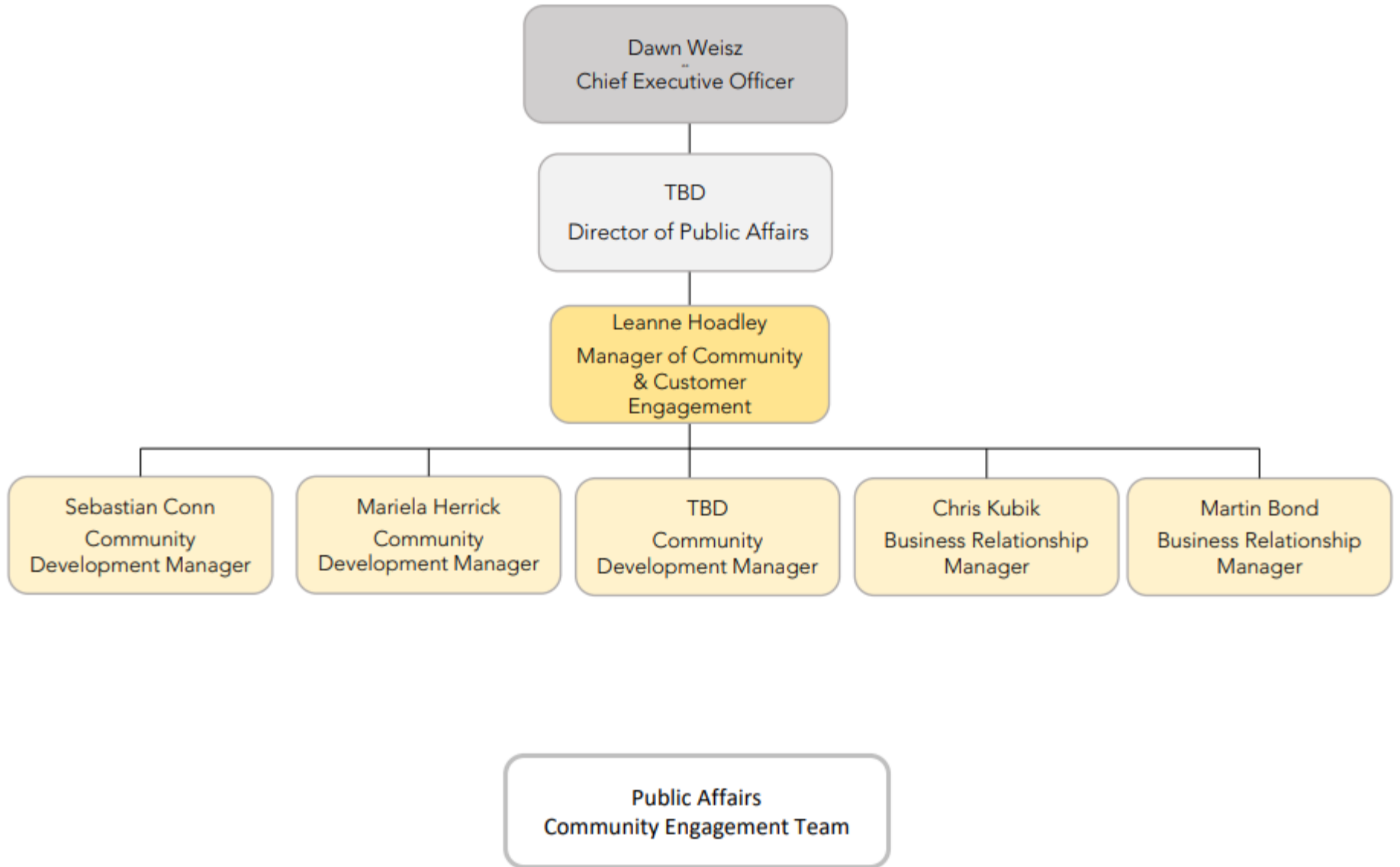
ATTACHMENT A
MCE ORGANIZATION CHART (AS OF OCTOBER 2021)

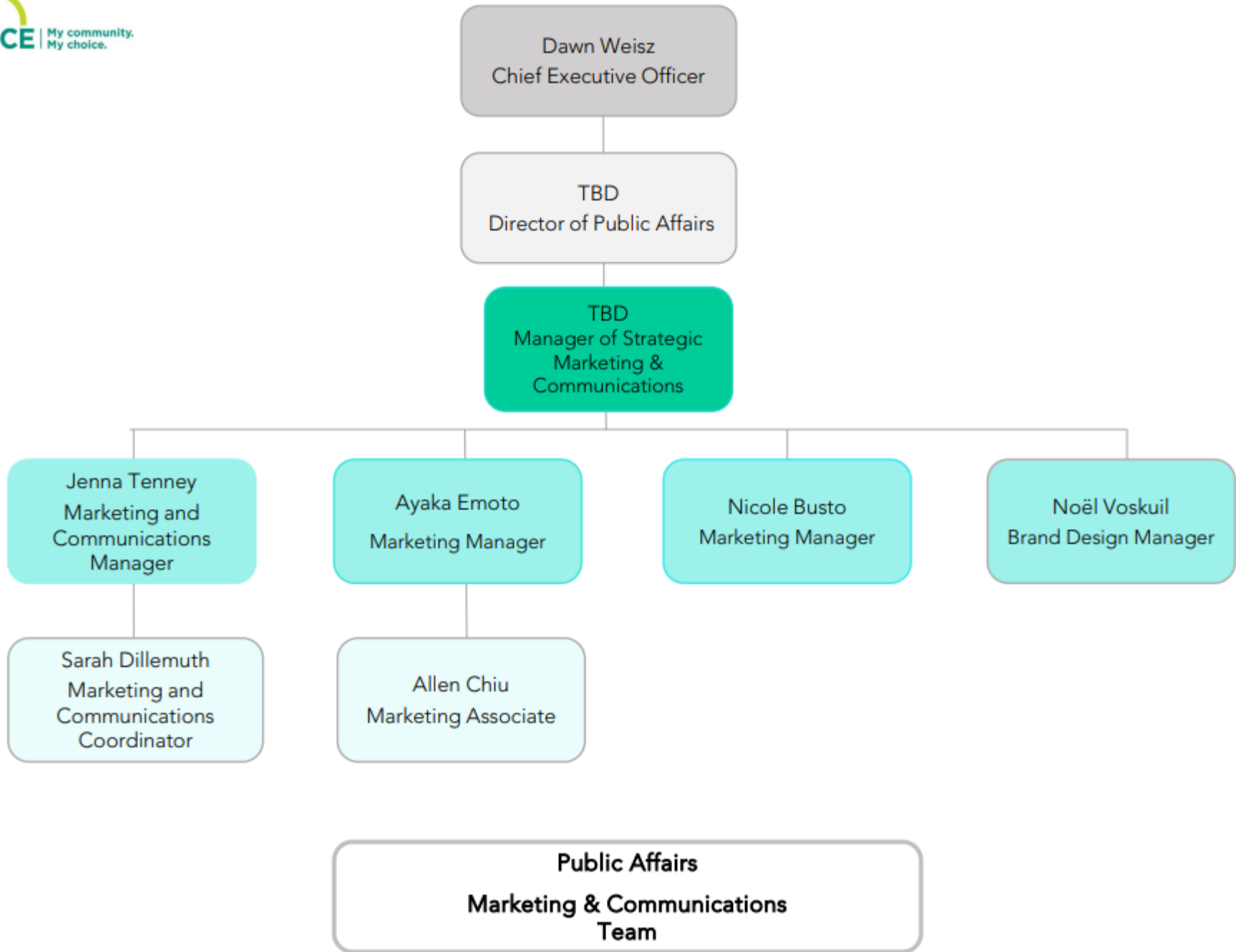
Board of Directors

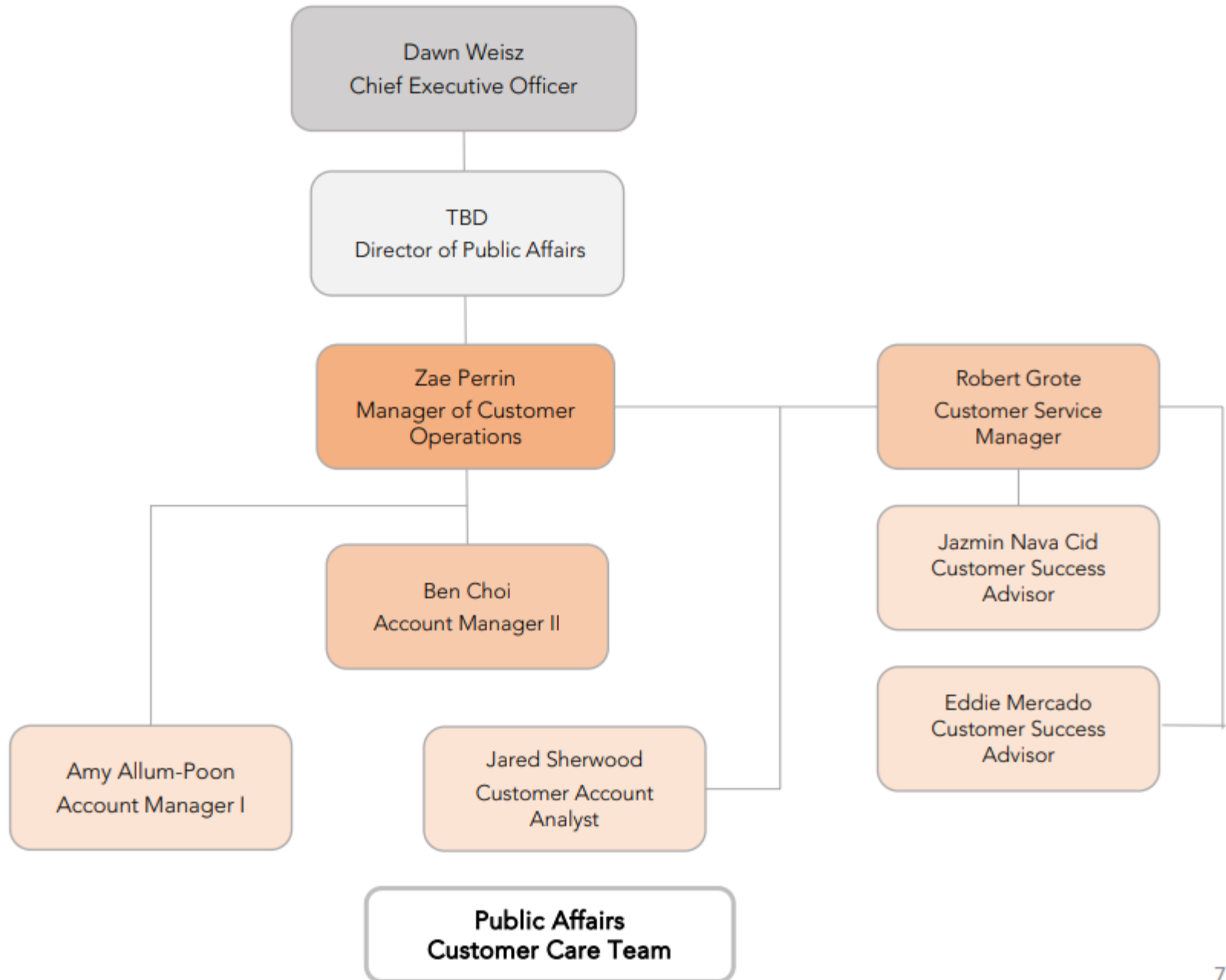
County of Marin · City of Richmond · City of Belvedere · City of Benicia · City of Concord · County of Contra Costa · Town of Corte Madera · Town of Danville · City of El Cerrito · Town of Fairfax · City of Lafayette · City of Larkspur · City of Martinez · City of Mill Valley · Town of Moraga · County of Napa · City of Novato · City of Oakley · City of Pinole · City of Pittsburg · Town of Ross · Town of San Anselmo · City of San Pablo · City of San Rafael · City of San Ramon · City of Sausalito · County of Solano · Town of Tiburon · City of Walnut Creek



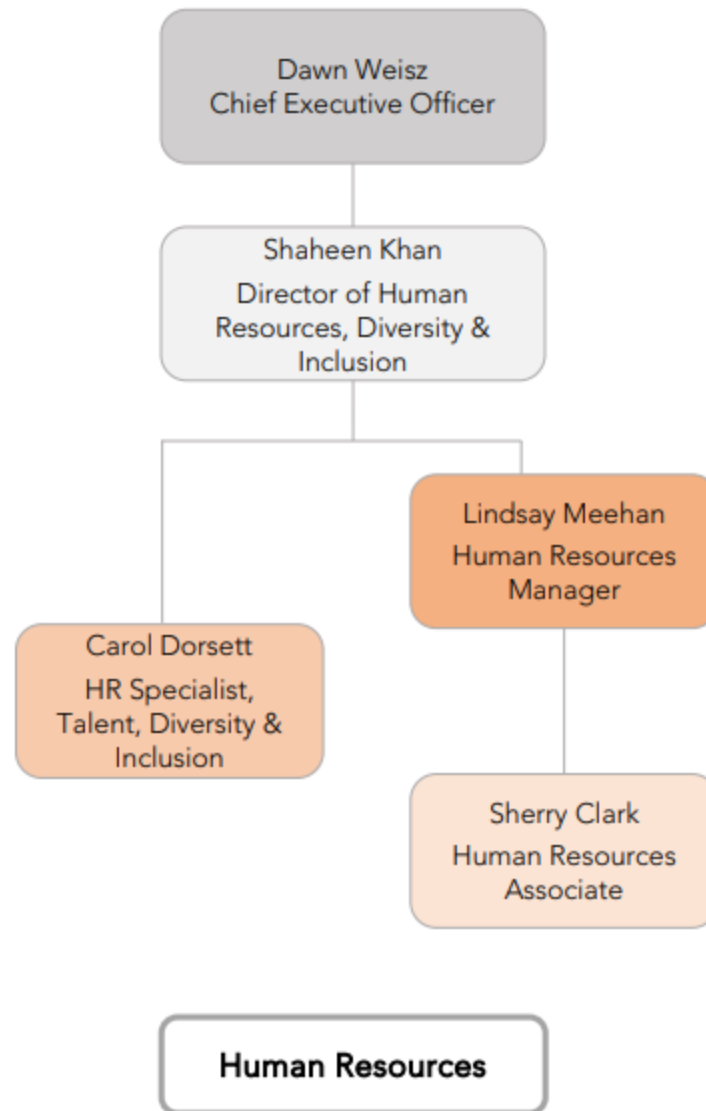


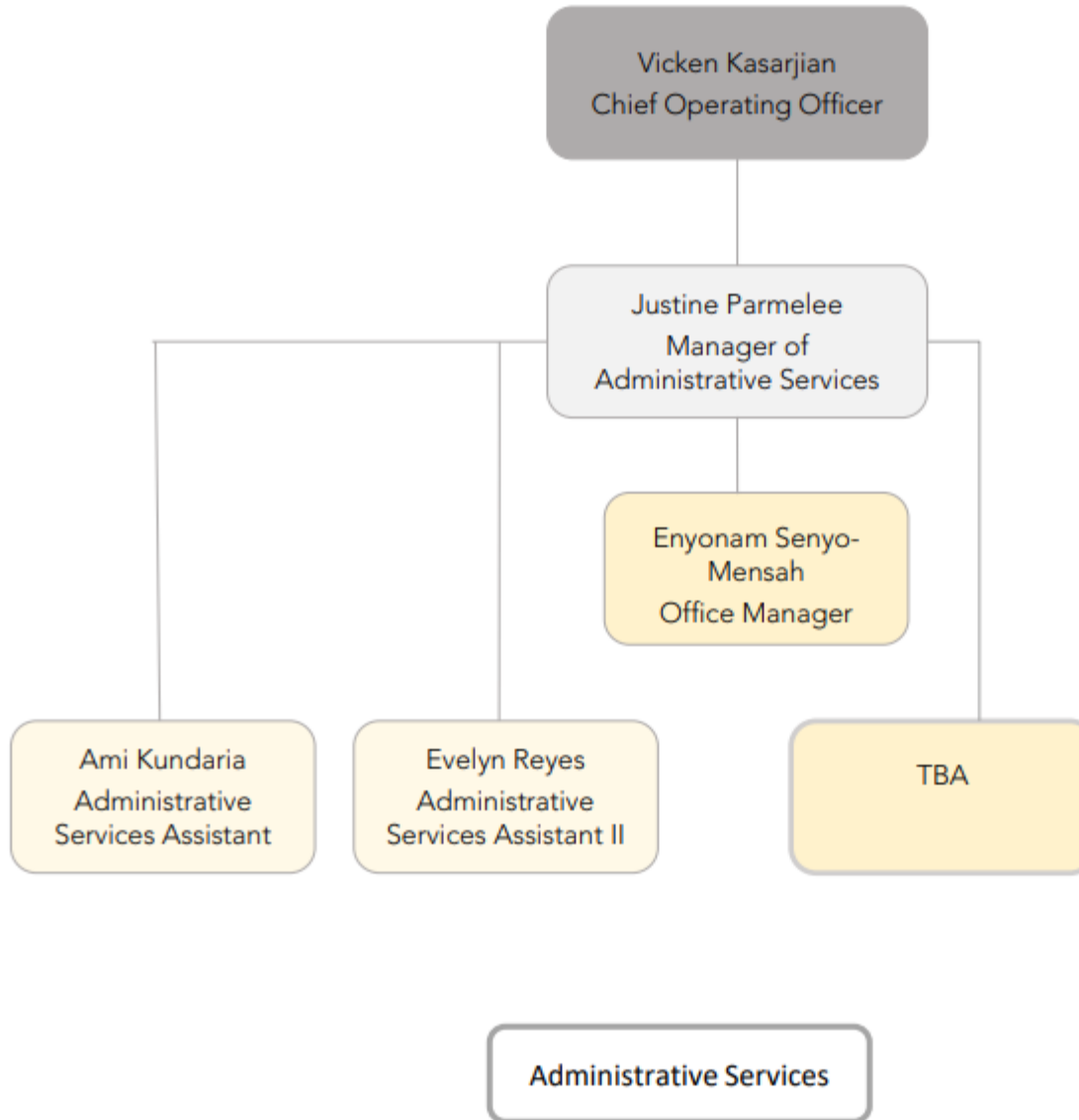


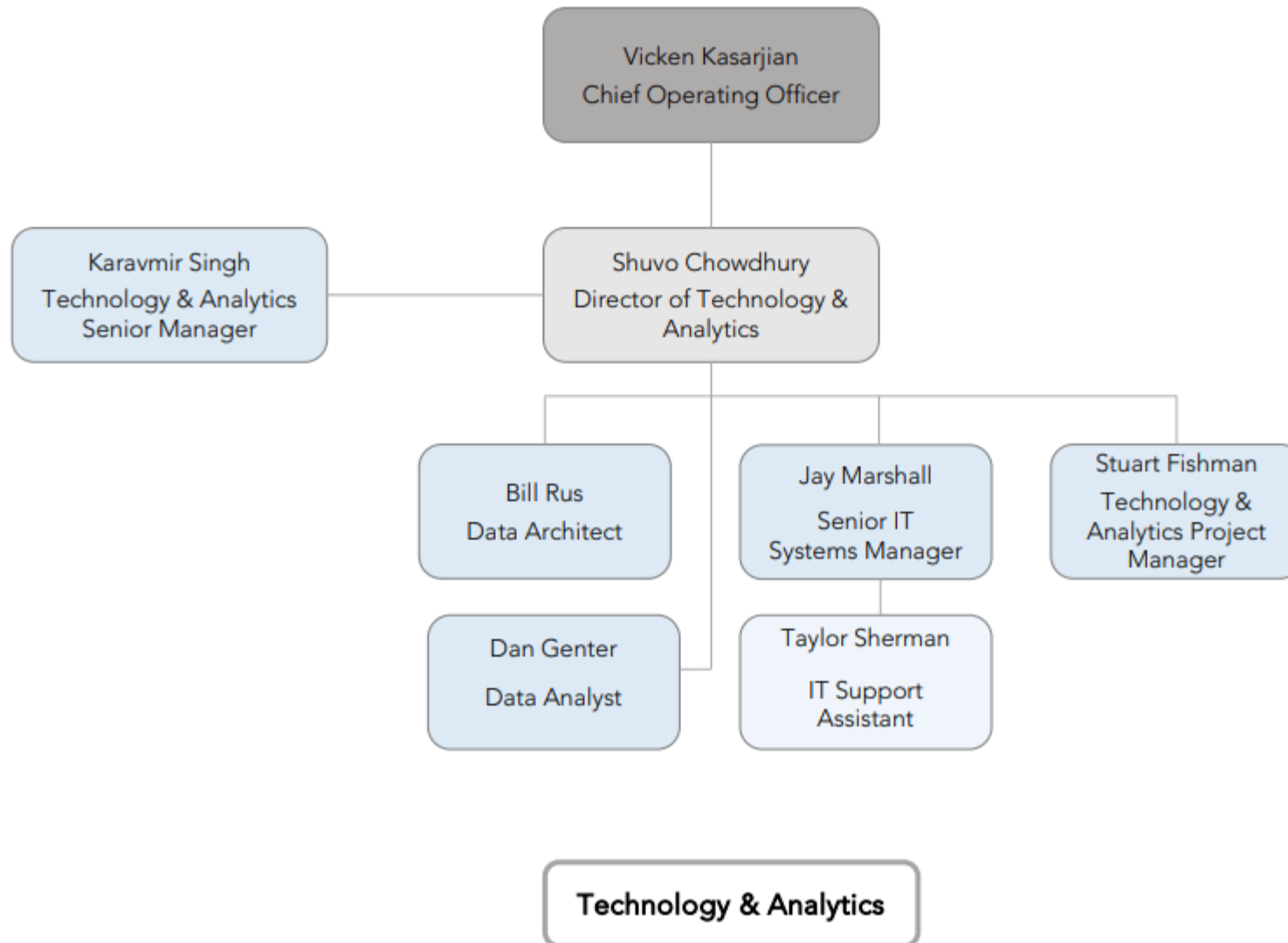


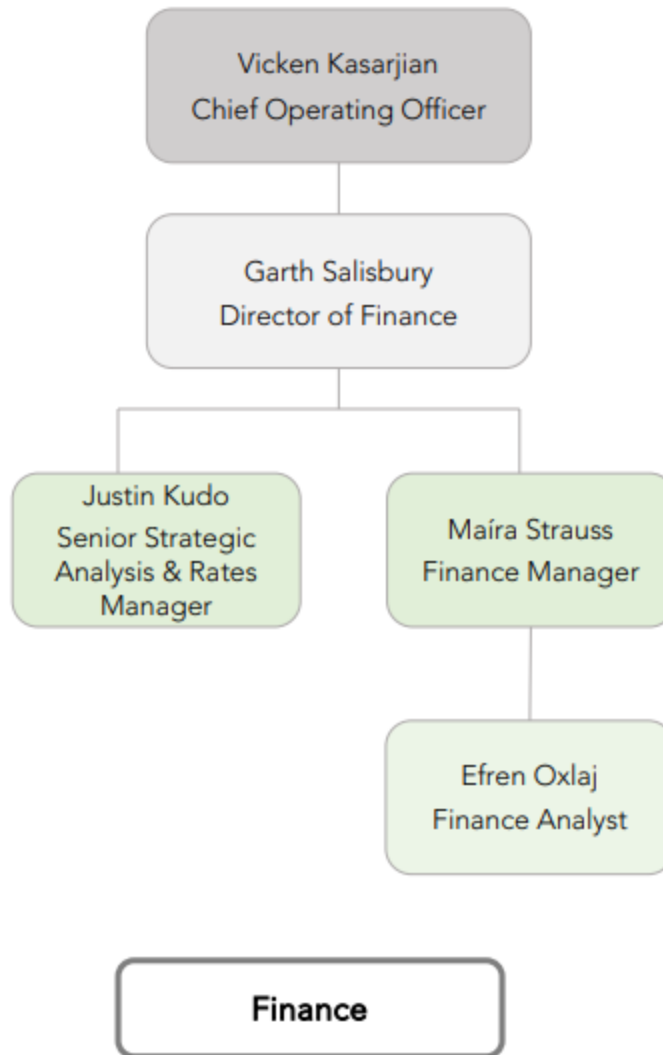


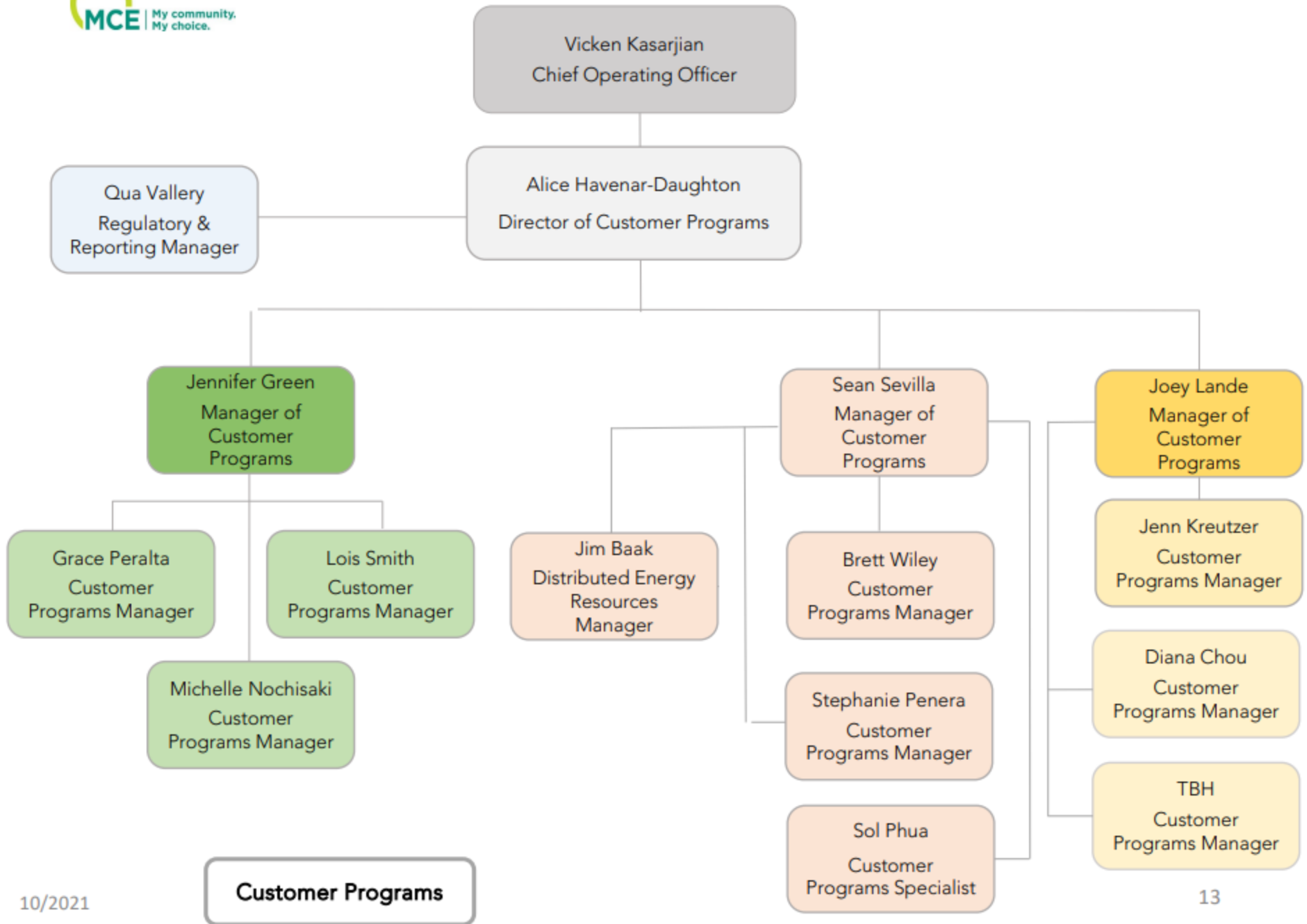


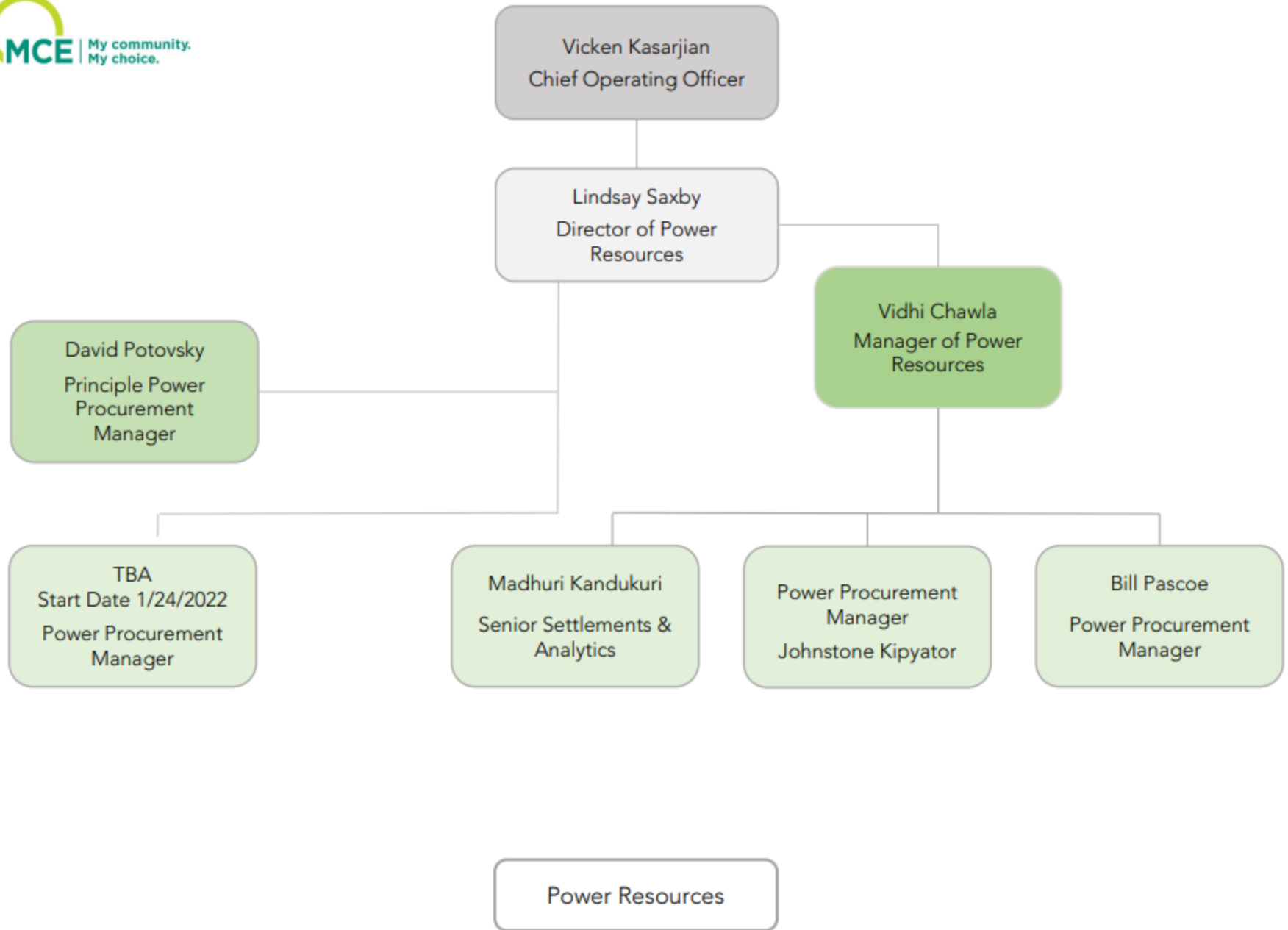












ATTACHMENT B
ENERGY EFFICIENCY FULL TIME EQUIVALENT HEADCOUNT

<u>Functional Group</u>	<u>2020 EE Portfolio FTE</u>	<u>2022 EE Portfolio FTE</u>	<u>2023 EE Portfolio FTE</u>	<u>2024 EE Portfolio FTE</u>	<u>2025 EE Portfolio FTE</u>	<u>2026 EE Portfolio FTE</u>	<u>2027 EE Portfolio FTE</u>
Policy, Strategy and Regulatory Reporting Compliance	1.0	1.1	1.1	1.0	1.0	1.0	1.0
Program Management	2.1	3.5	3.5	3.8	3.8	3.8	3.8
Engineering Services	-	-	-	-	-	-	-
Customer Application/Rebate/Incentive Processing	0.3	0.5	0.5	0.6	0.6	0.6	0.6
Customer Project Inspections	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Portfolio Analytics	0.3	0.3	0.3	0.8	0.8	0.8	0.8
EM&V	0.1	0.3	0.3	0.8	0.8	0.8	0.8
ME&O	0.5	0.8	0.8	0.9	0.9	0.9	0.9
Account Management/Sales	-	-	-	-	-	-	-
IT	-	-	-	-	-	-	-
Call Center	-	-	-	-	-	-	-
Total	4.5	6.5	6.5	8.0	8.0	8.0	8.0

ATTACHMENT C
BUDGET DETAIL BY SECTOR

Residential

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023EE Portfolio Budget	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 44,127.436	\$ 88,241.949	\$ 93,488.260	\$ 130,374.205	\$ 135,785.412	\$ 141,467.179	\$ 147,433.035
		Program Management	\$ 132,382.308	\$ 264,725.846	\$ 280,464.780	\$ 492,654.243	\$ 513,101.955	\$ 534,572.053	\$ 557,115.655
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 22,063.718	\$ 44,120.974	\$ 46,744.130	\$ 91,232.267	\$ 95,018.881	\$ 98,994.825	\$ 103,169.566
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ 22,063.718	\$ 44,120.974	\$ 46,744.130	\$ 91,232.267	\$ 95,018.881	\$ 98,994.825	\$ 103,169.566
		ME&O (Local)	\$ -	\$ -	\$ -	\$ 106,829.690	\$ 111,263.677	\$ 115,919.364	\$ 120,807.836
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Labor Total		\$ 220,637.180	\$ 441,209.743	\$ 467,441.301	\$ 912,322.672	\$ 950,188.805	\$ 989,948.245	\$ 1,031,695.658
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, DP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Program Implementation	\$ 480,301.722	\$ 1,326,177.034	\$ 1,405,023.182	\$ 3,795,355.692	\$ 3,895,635.133	\$ 3,890,052.794	\$ 3,974,722.128
	0.107079719	Policy, Strategy, and Regulatory Reporting Compliance	\$ 16,361.644	\$ 45,176.678	\$ 47,862.599	\$ 13,384.965	\$ 13,384.965	\$ 13,384.965	\$ 13,384.965
	0.785840562	Program Management	\$ 120,075.430	\$ 331,544.258	\$ 351,255.795	\$ 98,230.070	\$ 98,230.070	\$ 98,230.070	\$ 98,230.070
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	0.107079719	Customer Application/Rebate/Incentive Processing	\$ 16,361.644	\$ 45,176.678	\$ 47,862.599	\$ 13,384.965	\$ 13,384.965	\$ 13,384.965	\$ 13,384.965
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT (4)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Program	\$ 241,064.890	\$ 2,347,715.258	\$ 2,319,975.147	\$ 2,874,288.998	\$ 2,874,288.998	\$ 2,874,288.998	\$ 2,874,288.998
		Incentives--Third Party Program (as defined per D.16-08-019, DP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Non-Labor Total		\$ 874,165.330	\$ 4,095,789.907	\$ 4,171,979.323	\$ 6,794,644.691	\$ 6,894,924.131	\$ 6,889,341.793	\$ 6,974,011.126
Residential Total			\$ 1,094,802.510	\$ 4,536,999.650	\$ 4,639,420.624	\$ 7,706,967.362	\$ 7,845,112.936	\$ 7,879,290.038	\$ 8,005,706.784
	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	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget		
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 25,622,388	\$ 68,722,743	\$ 85,419,392	\$ 56,440,727	\$ 59,262,763	\$ 62,225,901	\$ 65,337,196		
		Program Management	\$ 76,867,164	\$ 206,168,229	\$ 256,258,175	\$ 169,322,180	\$ 177,788,289	\$ 186,677,703	\$ 196,011,588		
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		Customer Application/Rebate/Incentive Processing	\$ 12,811,194	\$ 34,361,372	\$ 42,709,696	\$ 28,220,363	\$ 29,631,381	\$ 31,112,951	\$ 32,668,598		
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		Portfolio Analytics	\$ 12,811,194	\$ 34,361,372	\$ 42,709,696	\$ 28,220,363	\$ 29,631,381	\$ 31,112,951	\$ 32,668,598		
		ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		IT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		Labor Total			\$ 128,111,940	\$ 343,613,715	\$ 427,096,958	\$ 282,203,633	\$ 296,313,815	\$ 311,129,505	\$ 326,685,981
		Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
			Local/Government Partnerships Contracts (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
			Other Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
			Program Implementation	\$ 432,102,458	\$ 1,833,290,772	\$ 2,278,700,984	\$ 5,333,642,759	\$ 5,427,806,066	\$ 5,423,228,270	\$ 5,527,298,943	
			Policy, Strategy, and Regulatory Reporting Compliance	\$ 10,429,449	\$ 44,249,256	\$ 54,999,908	\$ 13,384,965	\$ 13,384,965	\$ 13,384,965	\$ 13,384,965	
			Program Management	\$ 108,025,614	\$ 458,322,693	\$ 569,675,246	\$ 98,230,070	\$ 98,230,070	\$ 98,230,070	\$ 98,230,070	
			Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
			Customer Application/Rebate/Incentive Processing	\$ 10,429,449	\$ 44,249,256	\$ 54,999,908	\$ 13,384,965	\$ 13,384,965	\$ 13,384,965	\$ 13,384,965	
			Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
			Portfolio Analytics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
			ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
			Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
IT (4)	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Call Center	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Facilities	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Incentives--IPA-Implemented and Other Contracts Program Implementation Programs	\$ 326,407,070		\$ 4,078,265,264	\$ 4,087,055,264	\$ 2,207,181,684	\$ 2,207,181,684	\$ 2,207,181,684	\$ 2,207,181,684			
Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Non-Labor Total				\$ 887,394,040	\$ 6,458,377,241	\$ 7,045,431,311	\$ 7,665,824,443	\$ 7,759,987,750	\$ 7,755,409,953	\$ 7,859,480,626	
Commercial Total (5)				\$ 1,015,505,980	\$ 6,801,990,956	\$ 7,472,528,268	\$ 7,948,028,076	\$ 8,056,301,564	\$ 8,066,539,459	\$ 8,186,166,607	
	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	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 55,515.160	\$ 102,856.650	\$ 95,929.971	\$ 33,765.766	\$ 35,454.054	\$ 37,226.757	\$ 39,088.094
		Program Management	\$ 166,545.480	\$ 308,569.951	\$ 287,789.913	\$ 101,297.297	\$ 106,362.162	\$ 111,680.270	\$ 117,264.283
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 27,757.580	\$ 51,428.325	\$ 47,964.986	\$ 16,882.883	\$ 17,727.027	\$ 18,613.378	\$ 19,544.047
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ 27,757.580	\$ 51,428.325	\$ 47,964.986	\$ 16,882.883	\$ 17,727.027	\$ 18,613.378	\$ 19,544.047
		ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Labor Total		\$ 277,575.800	\$ 514,283.252	\$ 479,649.855	\$ 168,828.828	\$ 177,270.269	\$ 186,133.783	\$ 195,440.472
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Program Implementation	\$ 202,784.652	\$ 420,738.216	\$ 392,404.426	\$ 709,715.201	\$ 706,550.742	\$ 703,333.600	\$ 700,068.530
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 13,974.472	\$ 28,994.278	\$ 27,041.715	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979
		Program Management	\$ 50,696.163	\$ 105,184.554	\$ 98,101.106	\$ 58,938.042	\$ 58,938.042	\$ 58,938.042	\$ 58,938.042
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 13,974.472	\$ 28,994.278	\$ 27,041.715	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT (4)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 33,726.630	\$ 191,263.080	\$ 120,204.158	\$ 133,612.586	\$ 133,612.586	\$ 133,612.586	\$ 133,612.586
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Non-Labor Total		\$ 315,156.390	\$ 775,174.405	\$ 664,793.119	\$ 918,327.787	\$ 915,163.328	\$ 911,946.186	\$ 908,681.116
Industrial Total (5)			\$ 592,732.190	\$ 1,289,457.657	\$ 1,144,442.974	\$ 1,087,156.615	\$ 1,092,433.598	\$ 1,098,079.969	\$ 1,104,121.588
	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	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 17,081.578	\$ 85,993.665	\$ 87,931.928	\$ 23,379.786	\$ 24,548.775	\$ 25,776.214	\$ 27,065.025
		Program Management	\$ 51,244.734	\$ 257,980.995	\$ 263,795.784	\$ 70,139.358	\$ 73,646.326	\$ 77,328.643	\$ 81,195.075
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 8,540.789	\$ 42,996.833	\$ 43,965.964	\$ 11,689.893	\$ 12,274.388	\$ 12,888.107	\$ 13,532.512
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ 8,540.789	\$ 42,996.833	\$ 43,965.964	\$ 11,689.893	\$ 12,274.388	\$ 12,888.107	\$ 13,532.512
		ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Labor Total		\$ 85,407.890	\$ 429,968.326	\$ 439,659.640	\$ 116,898.931	\$ 122,743.877	\$ 128,881.071	\$ 135,325.124
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Program Implementation	\$ 95,827.058	\$ 168,632.582	\$ 172,433.493	\$ 412,583.487	\$ 412,600.029	\$ 412,734.629	\$ 413,001.396
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 5,155.914	\$ 9,073.169	\$ 9,277.674	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979
		Program Management	\$ 23,956.764	\$ 42,158.145	\$ 43,108.373	\$ 58,938.042	\$ 58,938.042	\$ 58,938.042	\$ 58,938.042
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 5,155.914	\$ 9,073.169	\$ 9,277.674	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979	\$ 8,030.979
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT (4)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 17,739.840	\$ 146,043.020	\$ 122,516.766	\$ 122,383.450	\$ 122,383.450	\$ 122,383.450	\$ 122,383.450
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Non-Labor Total		\$ 147,835.490	\$ 374,980.084	\$ 356,613.980	\$ 609,966.937	\$ 609,983.480	\$ 610,118.079	\$ 610,384.846
Agricultural Total (5)			\$ 233,243.380	\$ 804,948.410	\$ 796,273.621	\$ 726,865.868	\$ 732,727.357	\$ 738,999.150	\$ 745,709.970
	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	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
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 Implementer (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-implemented 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 (5)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	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	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Cross-Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -	\$ -	\$ 8,106.879	\$ 8,512.223	\$ 8,937.834	\$ 9,384.726
		Program Management	\$ -	\$ 141,407.270	\$ 154,416.740	\$ 154,030.698	\$ 161,732.233	\$ 169,818.845	\$ 178,309.787
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		ME&D (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Labor Total		\$ -	\$ 141,407.270	\$ 154,416.740	\$ 162,137.577	\$ 170,244.456	\$ 178,756.679	\$ 187,694.513
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, DP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Program Implementation	\$ 94,660.832	\$ 432,930.665	\$ 432,930.665	\$ 846,538.251	\$ 819,538.936	\$ 813,995.203	\$ 789,511.254
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -	\$ -	\$ 2,676.993	\$ 2,676.993	\$ 2,676.993	\$ 2,676.993
		Program Management	\$ 23,665.208	\$ 108,232.666	\$ 108,232.666	\$ 19,646.014	\$ 19,646.014	\$ 19,646.014	\$ 19,646.014
		Engineering services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -	\$ -	\$ 2,676.993	\$ 2,676.993	\$ 2,676.993	\$ 2,676.993
		Customer Project Inspections	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		ME&D (Local)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		IT (4)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		Incentives--Third Party Program (as defined per D.16-08-019, DP 10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Non-Labor Total		\$ 118,326.040	\$ 541,163.331	\$ 541,163.331	\$ 871,538.251	\$ 844,538.936	\$ 838,995.203	\$ 814,511.254
Cross-Cutting Total (5)			\$ 118,326.040	\$ 682,570.601	\$ 695,580.071	\$ 1,033,675.828	\$ 1,014,783.392	\$ 1,017,751.881	\$ 1,002,205.766
	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&D-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.								

ATTACHMENT D
EE PORTFOLIO SUMMARY

Portfolio Summary

Sector	2020 EE Portfolio Expenditures			2024 EE Portfolio Budget				2025 EE Portfolio Budget			
	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total
Residential	\$ 633,100	\$ 241,065	\$ 1,094,803	\$ 912,323	\$ 3,920,356	\$ 2,874,289	\$ 7,706,967	\$ 950,189	\$ 4,020,635	\$ 2,874,289	\$ 7,845,113
Commercial	\$ 560,987	\$ 326,407	\$ 1,015,506	\$ 282,204	\$ 5,458,643	\$ 2,207,182	\$ 7,948,028	\$ 296,314	\$ 5,552,806	\$ 2,207,182	\$ 8,056,302
Industrial	\$ 281,430	\$ 33,727	\$ 592,732	\$ 168,829	\$ 784,715	\$ 133,613	\$ 1,087,157	\$ 177,270	\$ 781,551	\$ 133,613	\$ 1,092,434
Agricultural	\$ 130,096	\$ 17,740	\$ 233,243	\$ 116,899	\$ 487,583	\$ 122,383	\$ 726,866	\$ 122,744	\$ 487,600	\$ 122,383	\$ 732,727
Public	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cross Cutting*	\$ 118,326	\$ -	\$ 118,326	\$ 162,138	\$ 871,538	\$ (0)	\$ 1,033,676	\$ 170,244	\$ 844,539	\$ (0)	\$ 1,014,783
Total Sector Budget	\$ 1,723,939	\$ 618,938	\$ 3,054,610	\$ 1,642,392	\$ 11,522,835	\$ 5,337,467	\$ 18,502,694	\$ 1,716,761	\$ 11,687,131	\$ 5,337,467	\$ 18,741,359
EM&V-PA	\$ 25,622	\$ -	\$ 25,622	\$ 61,676	\$ 246,703	\$ -	\$ 308,378	\$ 62,471	\$ 249,885	\$ -	\$ 312,356
EM&V-ED	\$ -	\$ -	\$ -	\$ -	\$ 462,567	\$ -	\$ 462,567	\$ -	\$ 468,534	\$ -	\$ 468,534
OBF - Loan Pool**	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PA Spending Budget Request (	\$ -	\$ -	\$ 3,080,232	\$ 1,704,067	\$ 12,232,105	\$ 5,337,467	\$ 19,273,639	\$ 1,779,232	\$ 12,405,550	\$ 5,337,467	\$ 19,522,249

Sector	2026 EE Portfolio Budget				2027 EE Portfolio Budget			
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total
Residential	\$ 989,948	\$ 4,015,053	\$ 2,874,289	\$ 7,879,290	\$ 1,031,696	\$ 4,099,722	\$ 2,874,289	\$ 8,005,707
Commercial	\$ 311,130	\$ 5,548,228	\$ 2,207,182	\$ 8,066,539	\$ 326,686	\$ 5,652,299	\$ 2,207,182	\$ 8,186,167
Industrial	\$ 186,134	\$ 778,334	\$ 133,613	\$ 1,098,080	\$ 195,440	\$ 775,069	\$ 133,613	\$ 1,104,122
Agricultural	\$ 128,881	\$ 487,735	\$ 122,383	\$ 738,999	\$ 135,325	\$ 488,001	\$ 122,383	\$ 745,710
Public	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cross Cutting*	\$ 178,757	\$ 838,995	\$ -	\$ 1,017,752	\$ 187,695	\$ 814,511	\$ -	\$ 1,002,206
Total Sector Budget	\$ 1,794,849	\$ 11,668,344	\$ 5,337,467	\$ 18,800,660	\$ 1,876,842	\$ 11,829,602	\$ 5,337,467	\$ 19,043,911
EM&V-PA	\$ 62,669	\$ 250,675	\$ -	\$ 313,344	\$ 63,480	\$ 253,919	\$ -	\$ 317,399
EM&V-ED	\$ -	\$ 470,017	\$ -	\$ 470,017	\$ -	\$ 476,098	\$ -	\$ 476,098
OBF - Loan Pool**	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PA Spending Budget Request (	\$ 1,857,518	\$ 12,389,036	\$ 5,337,467	\$ 19,584,021	\$ 1,940,321	\$ 12,559,619	\$ 5,337,467	\$ 19,837,407

Sector	2020 EE Portfolio Savings			2024 EE Portfolio Forecasted Savings			2025 EE Portfolio Forecasted Savings			2026 EE Portfolio Forecasted Savings			2027 EE Portfolio Forecasted Savings		
	KWH	KW	M THERMS	KWH	KW	M THERMS	KWH	KW	M THERMS	KWH	KW	M THERMS	KWH	KW	M THERMS
Residential	278,583	4	12,748.711	10,739,897	2,131	0.016	10,739,897	2,131	0.016	10,739,897	2,131	0.016	10,739,897	2,131	0.016
Commercial	1,746,234	98	78,761.702	10,880,730	1,028	0.298	10,880,730	1,028	0.298	10,880,730	1,028	0.298	10,880,730	1,028	0.298
Industrial	424,552	8	(632.016)	1,456,661	16	0.150	1,456,661	16	0.150	1,456,661	16	0.150	1,456,661	16	0.150
Agricultural	369,162	-	-	981,779	80	0.031	981,779	80	0.031	981,779	80	0.031	981,779	80	0.031
Public	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cross Cutting*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Sector Budget	2,818,530	110	90,878.397	24,059,067	3,255	0.495	24,059,067	3,255	0.495	24,059,067	3,255	0.495	24,059,067	3,255	0.495
EM&V-PA															
EM&V-ED															
OBF - Loan Pool**															
PA Spending Budget Request (	2,818,530	110	90,878	24,059,067	3,255	0.495	24,059,067	3,255	0.495	24,059,067	3,255	0.495	24,059,067	3,255	0.495

MARIN CLEAN ENERGY
TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN
EXHIBIT 3
APPENDIX C
PROPOSED EQUITY AND MARKET SUPPORT METRICS

MARIN CLEAN ENERGY
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APPENDIX C
PROPOSED EQUITY AND MARKET SUPPORT METRICS

TABLE OF CONTENTS

Single Family Home Energy Savings (HES) Proposed Equity Metrics and Indicators	C-1
Multifamily Energy Savings (MFES) Proposed Equity Metrics and Indicators	C-2
Commercial Equity Proposed Equity Metrics and Indicator	C-3
Workforce, Education and Training (WE&T) Proposed Market Support Metric and Indicators	C-4
Summary of all Proposed Equity and Market Support Metrics	C-5

Single Family Home Energy Savings (HES) Proposed Equity Metrics and Indicators

Metric/Indicator	Metric/Indicator #	Metric/Indicator Description
Metric	A1	Total # residential (SF or MF unit) equity-targeted households (HHs) served by the Equity programs
Indicator	A1.1	Single Family – equity market support (ex: education, information, training, technical support, etc.)
Indicator	A1.2	Single family – equity resource acquisition (ex: energy saving action, etc.)
Metric	A7	Total # of contractors/workers served by Equity Segment Programs
Indicator	A8	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs
Indicator	A9	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs
Metric	B1	Expected first-year bill savings in total \$ for equity-targeted program participants (metric)
Indicator	B2	GHG reductions (tons)_EquityAll
Indicator	B3	Total kWh savings_EquityAll
Indicator	B4	Total kW savings_EquityAll
Indicator	B5	Total Therm savings_EquityAll
Indicator	B6	Community engagement activities during program design and to identify community needs and solutions
Indicator	B7	Community engagement activities during program implementation
Indicator	B8	Community engagement activities during program assessment
Indicator	C1	Energy and climate benefits (monetized within TSB)
Indicator	C1.1	Health – “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other
Indicator	C1.2	Comfort - “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other
Indicator	C1.3	Safety -“non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: improved safety of appliances, other
Indicator	C1.4	Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of participants receiving this benefit” until we can monetize

Multifamily Energy Savings (MFES) Proposed Equity Metrics and Indicators

Metric/Indicator	Metric/Indicator #	Metric/Indicator Description
Metric	A1	Total # residential (SF or MF unit) equity-targeted households (HHs) served by the Equity programs
Indicator	A1.3	Multifamily – equity market support (ex: education, information, training, technical support, etc.)
Indicator	A1.4	Multifamily – equity resource acquisition (ex: energy saving action, etc.)
Metric	A2	Total # MF equity-targeted buildings served by the Equity programs
Indicator	A2.1	Equity - Market support (ex: education, information, training, technical support, etc.)
Indicator	A2.2	Equity - resource acquisition (ex: energy saving action, etc.)
Metric	A7	Total # of contractors/workers served by Equity Segment Programs
Indicator	A8	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs
Indicator	A9	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs
Metric	B1	Expected first-year bill savings in total \$ for equity-targeted program participants (metric)
Indicator	B2	GHG reductions (tons)_EquityAll
Indicator	B3	Total kWh savings_EquityAll
Indicator	B4	Total kW savings_EquityAll
Indicator	B5	Total Therm savings_EquityAll
Indicator	B6	Community engagement activities during program design and to identify community needs and solutions
Indicator	B7	Community engagement activities during program implementation
Indicator	B8	Community engagement activities during program assessment
Indicator	C1	Energy and climate benefits (monetized within TSB)
Indicator	C1.1	Health – “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other
Indicator	C1.2	Comfort - “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other
Indicator	C1.3	Safety -“non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: improved safety of appliances, other
Indicator	C1.4	Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of participants receiving this benefit” until we can monetize

Commercial Equity Proposed Equity Metrics and Indicator

Metric/Indicator	Metric/Indicator #	Metric/Indicator Description
Metric	A5	Total # small and medium business (SMB) equity-targeted participants served by the Equity programs
Indicator	A5.1	Equity - Market support (ex: education, information, training, technical support, etc.)
Indicator	A5.2	Equity - resource acquisition (ex: energy saving action, etc.)
Metric	A6	Total # of companies/non-profits served by the Equity Segment programs
Indicator	A6.1	Equity - Market support (ex: education, information, training, technical support, etc.)
Indicator	A6.2	Equity - resource acquisition (ex: energy saving action, etc.)
Metric	A7	Total # of contractors/workers served by Equity Segment Programs
Indicator	A8	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs
Indicator	A9	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs
Metric	B1	Expected first-year bill savings in total \$ for equity-targeted program participants (metric)
Indicator	B2	GHG reductions (tons)_EquityAll
Indicator	B3	Total kWh savings_EquityAll
Indicator	B4	Total kW savings_EquityAll
Indicator	B5	Total Therm savings_EquityAll
Indicator	B6	Community engagement activities during program design and to identify community needs and solutions
Indicator	B7	Community engagement activities during program implementation
Indicator	B8	Community engagement activities during program assessment
Indicator	C1	Energy and climate benefits (monetized within TSB)
Indicator	C1.1	Health – “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other
Indicator	C1.2	Comfort - “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other
Indicator	C1.3	Safety -“non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: improved safety of appliances, other
Indicator	C1.4	Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of participants receiving this benefit” until we can monetize

Workforce, Education and Training (WE&T) Proposed Market Support Metrics and Indicators

Metric/Indicator	Index #	Metric/Indicator Description
Metric	MS_1	Number and % increase/decrease of inquiries and/or requests for information on EE products and services through relevant MS programs
Metric	MS_2	Number and % increase/decrease of customers receiving information, education, or outreach on EE projects, products, and services through relevant MS programs
Metric	301	Number of collaborations by Business Plan sector to jointly develop or share training materials or resources.
Metric	302	Number of participants by sector
Metric	303	Percent of participation relative to eligible target population for curriculum
Metric	304	Percent of total WE&T training program participants that meet the definition of disadvantaged worker.
Metric	305	Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers
Metric	306	Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training
Metric	MS_8	Number of Contractors (that serve in PA service territory) with knowledge and trained by relevant MS programs to provide quality installations that optimize EE
Metric	MS_17	Number of EE customers/market actors reached through partner networks and partner communications channels
Metric	MS_18	Assessed value of the partnership by partners
Metric	MS_19	% of partners that have taken action supporting energy efficiency
Indicator	MS_20	Number of partners by type and purpose
Indicator	MS_21	Dollar value of non-ratepayer in kind funds/contributions utilized via partnerships
Metric	MS_29	Participant data, e.g. credit score, census tract income, CalEnviroScreen Scores of areas served, zip code

Summary of all Proposed Equity and Market Support Metrics

Program Name	Metric/Indicator	Index/Metric/Indicator #	Metric/Indicator Description
Single Family HES	Metric	A1	Total # residential (SF or MF unit) equity-targeted households (HHs) served by the Equity programs
Single Family HES	Indicator	A1.1	Single Family – equity market support (ex: education, information, training, technical support, etc.)
Single Family HES	Indicator	A1.2	Single family – equity resource acquisition (ex: energy saving action, etc.)
Single Family HES	Metric	A7	Total # of contractors/workers served by Equity Segment Programs
Single Family HES	Indicator	A8	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs
Single Family HES	Indicator	A9	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs
Single Family HES	Metric	B1	Expected first-year bill savings in total \$ for equity-targeted program participants (metric)
Single Family HES	Indicator	B2	GHG reductions (tons) _EquityAll
Single Family HES	Indicator	B3	Total kWh savings _EquityAll
Single Family HES	Indicator	B4	Total kW savings _EquityAll
Single Family HES	Indicator	B5	Total Therm savings _EquityAll
Single Family HES	Indicator	B6	Community engagement activities during program design and to identify community needs and solutions
Single Family HES	Indicator	B7	Community engagement activities during program implementation
Single Family HES	Indicator	B8	Community engagement activities during program assessment
Single Family HES	Indicator	C1	Energy and climate benefits (monetized within TSB)
Single Family HES	Indicator	C1.1	Health – “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other
Single Family HES	Indicator	C1.2	Comfort - “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other
Single Family HES	Indicator	C1.3	Safety -“non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: improved safety of appliances, other
Single Family HES	Indicator	C1.4	Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of participants receiving this benefit” until we can monetize
MFES	Metric	A1	Total # residential (SF or MF unit) equity-targeted households (HHs) served by the Equity programs
MFES	Indicator	A1.3	Multifamily – equity market support (ex: education, information, training, technical support, etc.)
MFES	Indicator	A1.4	Multifamily – equity resource acquisition (ex: energy saving action, etc.)
MFES	Metric	A2	Total # MF equity-targeted buildings served by the Equity programs
MFES	Indicator	A2.1	Equity - Market support (ex: education, information, training, technical support, etc.)
MFES	Indicator	A2.2	Equity - resource acquisition (ex: energy saving action, etc.)
MFES	Metric	A7	Total # of contractors/workers served by Equity Segment Programs
MFES	Indicator	A8	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs

			Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs
MFES	Indicator	A9	
MFES	Metric	B1	Expected first-year bill savings in total \$ for equity-targeted program participants (metric)
MFES	Indicator	B2	GHG reductions (tons) _EquityAll
MFES	Indicator	B3	Total kWh savings _EquityAll
MFES	Indicator	B4	Total kW savings _EquityAll
MFES	Indicator	B5	Total Therm savings _EquityAll
MFES	Indicator	B6	Community engagement activities during program design and to identify community needs and solutions
MFES	Indicator	B7	Community engagement activities during program implementation
MFES	Indicator	B8	Community engagement activities during program assessment
MFES	Indicator	C1	Energy and climate benefits (monetized within TSB)
			Health – “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other
MFES	Indicator	C1.1	Comfort - “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other
MFES	Indicator	C1.2	Safety -“non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: improved safety of appliances, other
MFES	Indicator	C1.3	Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of participants receiving this benefit” until we can monetize
MFES	Indicator	C1.4	
Com Equity	Metric	A5	Total # small and medium business (SMB) equity-targeted participants served by the Equity programs
Com Equity	Indicator	A5.1	Equity - Market support (ex: education, information, training, technical support, etc.)
Com Equity	Indicator	A5.2	Equity - resource acquisition (ex: energy saving action, etc.)
Com Equity	Metric	A6	Total # of companies/non-profits served by the Equity Segment programs
Com Equity	Indicator	A6.1	Equity - Market support (ex: education, information, training, technical support, etc.)
Com Equity	Indicator	A6.2	Equity - resource acquisition (ex: energy saving action, etc.)
Com Equity	Metric	A7	Total # of contractors/workers served by Equity Segment Programs
			Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs
Com Equity	Indicator	A8	
			Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs
Com Equity	Indicator	A9	
Com Equity	Metric	B1	Expected first-year bill savings in total \$ for equity-targeted program participants (metric)
Com Equity	Indicator	B2	GHG reductions (tons) _EquityAll
Com Equity	Indicator	B3	Total kWh savings _EquityAll
Com Equity	Indicator	B4	Total kW savings _EquityAll
Com Equity	Indicator	B5	Total Therm savings _EquityAll
Com Equity	Indicator	B6	Community engagement activities during program design and to identify community needs and solutions
Com Equity	Indicator	B7	Community engagement activities during program implementation
Com Equity	Indicator	B8	Community engagement activities during program assessment

Com Equity	Indicator	C1	Energy and climate benefits (monetized within TSB)
Com Equity	Indicator	C1.1	Health – “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other
Com Equity	Indicator	C1.2	Comfort - “non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other
Com Equity	Indicator	C1.3	Safety -“non-energy benefits” in “counts of participants receiving this benefit” until we can monetize. Reporting at least one of: improved safety of appliances, other
Com Equity	Indicator	C1.4	Economic or other “non-energy benefits” (as proposed by the PAs or program) in dollars or “counts of participants receiving this benefit” until we can monetize
WE&T	Metric	MS_1	Number and % increase/decrease of inquiries and/or requests for information on EE products and services through relevant MS programs
WE&T	Metric	MS_2	Number and % increase/decrease of customers receiving information, education, or outreach on EE projects, products, and services through relevant MS programs
WE&T	Metric		301 Number of collaborations by Business Plan sector to jointly develop or share training materials or resources.
WE&T	Metric		302 Number of participants by sector
WE&T	Metric		303 Percent of participation relative to eligible target population for curriculum
WE&T	Metric		304 Percent of total WE&T training program participants that meet the definition of disadvantaged worker.
WE&T	Metric		305 Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers
WE&T	Metric		306 Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training
WE&T	Metric	MS_8	Number of Contractors (that serve in PA service territory) with knowledge and trained by relevant MS programs to provide quality installations that optimize EE
WE&T	Metric	MS_17	Number of EE customers/market actors reached through partner networks and partner communications channels
WE&T	Metric	MS_18	Assessed value of the partnership by partners
WE&T	Metric	MS_19	% of partners that have taken action supporting energy efficiency
WE&T	Indicator	MS_20	Number of partners by type and purpose
WE&T	Indicator	MS_21	Dollar value of non-ratepayer in kind funds/contributions utilized via partnerships
WE&T	Metric	MS_29	Participant data, e.g. credit score, census tract income, CalEnviroScreen Scores of areas served, zip code

MARIN CLEAN ENERGY

EXHIBIT 3

TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN

APPENDIX D

BUDGET DETAILS BY PROGRAM

MCE Budget Details by Program

Year	ProgramID	Program Name	MCE Staffing	Admin	MCE Portfolio-		Direct Implementation	MCE Staffing	Non-PA 3rd Party	Total Direct		Marketing & Outreach	EM&V	Total
					Level Costs	Total Admin				Implementation	Implementation Non-Incentive			
2024	MCE01	MFES	\$ 82,665.74	\$ 25,000.00	\$ 107,665.74	\$ 60,177.75	\$ 82,665.74	\$ 326,935.32	\$ 409,601.06	\$ 5,000.00	\$ -	\$ -	\$ 582,445	
	MCE01c	MF SEM	\$ 89,037.42	\$ 25,000.00	\$ 114,037.42	\$ 82,443.75	\$ 89,037.42	\$ 474,057.67	\$ 563,095.08	\$ -	\$ -	\$ -	\$ 759,576	
	MCE01d	Res Marketplace	\$ 28,220.36	\$ 25,000.00	\$ 53,220.36	\$ 801,225.06	\$ 28,220.36	\$ 2,018,559.27	\$ 2,046,779.64	\$ -	\$ -	\$ -	\$ 2,901,225	
	MCE02a	Com Deemed	\$ 28,220.36	\$ 25,000.00	\$ 53,220.36	\$ 79,355.00	\$ 28,220.36	\$ 54,875.49	\$ 83,095.85	\$ -	\$ -	\$ -	\$ 215,671	
	MCE02b	Com Custom	\$ 28,220.36	\$ 25,000.00	\$ 53,220.36	\$ 518,113.90	\$ 28,220.36	\$ 410,349.94	\$ 438,570.30	\$ -	\$ -	\$ -	\$ 1,009,905	
	MCE02c	Com SEM	\$ 28,220.36	\$ 25,000.00	\$ 53,220.36	\$ 109,712.79	\$ 28,220.36	\$ 280,467.79	\$ 308,688.16	\$ -	\$ -	\$ -	\$ 471,621	
	MCE02d	Com Marketplace	\$ 28,220.36	\$ 25,000.00	\$ 53,220.36	\$ 1,500,000.00	\$ 28,220.36	\$ 3,643,628.91	\$ 3,671,849.28	\$ -	\$ -	\$ -	\$ 5,225,070	
	MCE07	SF HERS	\$ 63,531.37	\$ 25,000.00	\$ 88,531.37	\$ -	\$ 63,531.37	\$ 171,448.69	\$ 234,980.06	\$ -	\$ -	\$ -	\$ 323,511	
	MCE08	SF HES	\$ 115,206.44	\$ 25,000.00	\$ 140,206.44	\$ 1,930,442.44	\$ 115,206.44	\$ 804,354.75	\$ 919,561.19	\$ 150,000.00	\$ -	\$ -	\$ 3,140,210	
	MCE10a	Ind Deemed	\$ 28,138.14	\$ 25,000.00	\$ 53,138.14	\$ 19,502.00	\$ 28,138.14	\$ 166,832.49	\$ 194,970.63	\$ -	\$ -	\$ -	\$ 267,611	
	MCE10b	Ind Custom	\$ 28,138.14	\$ 25,000.00	\$ 53,138.14	\$ 52,801.32	\$ 28,138.14	\$ 87,323.16	\$ 115,461.29	\$ -	\$ -	\$ -	\$ 221,401	
	MCE10c	Ind SEM	\$ 28,138.14	\$ 25,000.00	\$ 53,138.14	\$ 61,309.27	\$ 28,138.14	\$ 455,559.55	\$ 483,697.69	\$ -	\$ -	\$ -	\$ 598,145	
	MCE11a	Ag Deemed	\$ 19,483.16	\$ 25,000.00	\$ 44,483.16	\$ 10,706.50	\$ 19,483.16	\$ 33,039.34	\$ 52,522.50	\$ -	\$ -	\$ -	\$ 107,712	
	MCE11b	Ag Custom	\$ 19,483.16	\$ 25,000.00	\$ 44,483.16	\$ 99,842.11	\$ 19,483.16	\$ 140,189.68	\$ 159,672.84	\$ -	\$ -	\$ -	\$ 303,998	
	MCE11c	Ag SEM	\$ 19,483.16	\$ 25,000.00	\$ 44,483.16	\$ 11,834.84	\$ 19,483.16	\$ 239,354.46	\$ 258,837.62	\$ -	\$ -	\$ -	\$ 315,156	
	MCE16	WE&T	\$ 81,068.79	\$ 25,000.00	\$ 106,068.79	\$ -	\$ 81,068.79	\$ 846,538.25	\$ 927,607.04	\$ -	\$ -	\$ -	\$ 1,033,676	
	MCE17	Com Equity	\$ 28,220.36	\$ 25,000.00	\$ 53,220.36	\$ -	\$ 28,220.36	\$ 944,320.63	\$ 972,540.99	\$ -	\$ -	\$ -	\$ 1,025,761	
	MCE97	CPUC EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 462,567.34	\$ 462,567	
MCE98	MCE EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 308,378.23	\$ 308,378		
2025	MCE01	MFES	\$ 86,799.03	\$ 25,000.00	\$ 111,799.03	\$ 60,177.75	\$ 86,799.03	\$ 364,328.83	\$ 451,127.86	\$ 5,000.00	\$ -	\$ -	\$ 628,105	
	MCE01c	MF SEM	\$ 93,489.29	\$ 25,000.00	\$ 118,489.29	\$ 82,443.75	\$ 93,489.29	\$ 474,027.75	\$ 567,517.04	\$ -	\$ -	\$ -	\$ 768,450	
	MCE01d	Res Marketplace	\$ 29,631.38	\$ 25,000.00	\$ 54,631.38	\$ 801,225.06	\$ 29,631.38	\$ 2,028,585.04	\$ 2,058,216.42	\$ -	\$ -	\$ -	\$ 2,914,073	
	MCE02a	Com Deemed	\$ 29,631.38	\$ 25,000.00	\$ 54,631.38	\$ 79,355.00	\$ 29,631.38	\$ 54,088.39	\$ 83,719.77	\$ -	\$ -	\$ -	\$ 217,706	
	MCE02b	Com Custom	\$ 29,631.38	\$ 25,000.00	\$ 54,631.38	\$ 518,113.90	\$ 29,631.38	\$ 409,562.86	\$ 439,194.24	\$ -	\$ -	\$ -	\$ 1,011,940	
	MCE02c	Com SEM	\$ 29,631.38	\$ 25,000.00	\$ 54,631.38	\$ 109,712.79	\$ 29,631.38	\$ 278,921.57	\$ 308,552.95	\$ -	\$ -	\$ -	\$ 472,897	
	MCE02d	Com Marketplace	\$ 29,631.38	\$ 25,000.00	\$ 54,631.38	\$ 1,500,000.00	\$ 29,631.38	\$ 3,764,989.16	\$ 3,794,620.54	\$ -	\$ -	\$ -	\$ 5,349,252	
	MCE07	SF HERS	\$ 66,707.94	\$ 25,000.00	\$ 91,707.94	\$ -	\$ 66,707.94	\$ 166,789.72	\$ 233,497.66	\$ -	\$ -	\$ -	\$ 325,206	
	MCE08	SF HES	\$ 120,966.76	\$ 25,000.00	\$ 145,966.76	\$ 1,930,442.44	\$ 120,966.76	\$ 861,903.80	\$ 982,870.56	\$ 150,000.00	\$ -	\$ -	\$ 3,209,280	
	MCE10a	Ind Deemed	\$ 29,545.04	\$ 25,000.00	\$ 54,545.04	\$ 19,502.00	\$ 29,545.04	\$ 165,777.67	\$ 195,322.72	\$ -	\$ -	\$ -	\$ 269,370	
	MCE10b	Ind Custom	\$ 29,545.04	\$ 25,000.00	\$ 54,545.04	\$ 52,801.32	\$ 29,545.04	\$ 86,268.34	\$ 115,813.38	\$ -	\$ -	\$ -	\$ 223,160	
	MCE10c	Ind SEM	\$ 29,545.04	\$ 25,000.00	\$ 54,545.04	\$ 61,309.27	\$ 29,545.04	\$ 454,504.73	\$ 484,049.78	\$ -	\$ -	\$ -	\$ 599,904	
	MCE11a	Ag Deemed	\$ 20,457.31	\$ 25,000.00	\$ 45,457.31	\$ 10,706.50	\$ 20,457.31	\$ 33,044.86	\$ 53,502.17	\$ -	\$ -	\$ -	\$ 109,666	
	MCE11b	Ag Custom	\$ 20,457.31	\$ 25,000.00	\$ 45,457.31	\$ 99,842.11	\$ 20,457.31	\$ 140,195.20	\$ 160,652.51	\$ -	\$ -	\$ -	\$ 305,952	
	MCE11c	Ag SEM	\$ 20,457.31	\$ 25,000.00	\$ 45,457.31	\$ 11,834.84	\$ 20,457.31	\$ 239,359.97	\$ 259,817.29	\$ -	\$ -	\$ -	\$ 317,109	
	MCE16	WE&T	\$ 85,122.23	\$ 25,000.00	\$ 110,122.23	\$ -	\$ 85,122.23	\$ 819,538.94	\$ 904,661.16	\$ -	\$ -	\$ -	\$ 1,014,783	
	MCE17	Com Equity	\$ 29,631.38	\$ 25,000.00	\$ 54,631.38	\$ -	\$ 29,631.38	\$ 920,244.09	\$ 949,875.47	\$ -	\$ -	\$ -	\$ 1,004,507	
	MCE97	CPUC EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 468,533.97	\$ 468,534	
MCE98	MCE EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 312,355.98	\$ 312,356		
2026	MCE01	MFES	\$ 91,138.98	\$ 25,000.00	\$ 116,138.98	\$ 60,177.75	\$ 91,138.98	\$ 376,421.62	\$ 467,560.60	\$ 5,000.00	\$ -	\$ -	\$ 648,877	
	MCE01c	MF SEM	\$ 98,163.75	\$ 25,000.00	\$ 123,163.75	\$ 82,443.75	\$ 98,163.75	\$ 474,173.81	\$ 572,337.57	\$ -	\$ -	\$ -	\$ 777,945	
	MCE01d	Res Marketplace	\$ 31,112.95	\$ 25,000.00	\$ 56,112.95	\$ 801,225.06	\$ 31,112.95	\$ 2,039,369.05	\$ 2,070,482.00	\$ -	\$ -	\$ -	\$ 2,927,820	
	MCE02a	Com Deemed	\$ 31,112.95	\$ 25,000.00	\$ 56,112.95	\$ 79,355.00	\$ 31,112.95	\$ 53,302.65	\$ 84,415.60	\$ -	\$ -	\$ -	\$ 219,884	
	MCE02b	Com Custom	\$ 31,112.95	\$ 25,000.00	\$ 56,112.95	\$ 518,113.90	\$ 31,112.95	\$ 408,777.12	\$ 439,890.07	\$ -	\$ -	\$ -	\$ 1,014,117	
	MCE02c	Com SEM	\$ 31,112.95	\$ 25,000.00	\$ 56,112.95	\$ 109,712.79	\$ 31,112.95	\$ 277,323.55	\$ 308,436.50	\$ -	\$ -	\$ -	\$ 474,262	
	MCE02d	Com Marketplace	\$ 31,112.95	\$ 25,000.00	\$ 56,112.95	\$ 1,500,000.00	\$ 31,112.95	\$ 3,760,102.92	\$ 3,791,215.87	\$ -	\$ -	\$ -	\$ 5,347,329	
	MCE07	SF HERS	\$ 70,043.34	\$ 25,000.00	\$ 95,043.34	\$ -	\$ 70,043.34	\$ 161,931.69	\$ 231,975.03	\$ -	\$ -	\$ -	\$ 327,018	
	MCE08	SF HES	\$ 127,015.10	\$ 25,000.00	\$ 152,015.10	\$ 1,930,442.44	\$ 127,015.10	\$ 838,156.63	\$ 965,171.73	\$ 150,000.00	\$ -	\$ -	\$ 3,197,629	
	MCE10a	Ind Deemed	\$ 31,022.30	\$ 25,000.00	\$ 56,022.30	\$ 19,502.00	\$ 31,022.30	\$ 164,705.29	\$ 195,727.59	\$ -	\$ -	\$ -	\$ 271,252	
	MCE10b	Ind Custom	\$ 31,022.30	\$ 25,000.00	\$ 56,022.30	\$ 52,801.32	\$ 31,022.30	\$ 85,195.96	\$ 116,218.25	\$ -	\$ -	\$ -	\$ 225,042	
	MCE10c	Ind SEM	\$ 31,022.30	\$ 25,000.00	\$ 56,022.30	\$ 61,309.27	\$ 31,022.30	\$ 453,432.35	\$ 484,454.65	\$ -	\$ -	\$ -	\$ 601,786	
	MCE11a	Ag Deemed	\$ 21,480.18	\$ 25,000.00	\$ 46,480.18	\$ 10,706.50	\$ 21,480.18	\$ 33,089.72	\$ 54,569.90	\$ -	\$ -	\$ -	\$ 111,757	
	MCE11b	Ag Custom	\$ 21,480.18	\$ 25,000.00	\$ 46,480.18	\$ 99,842.11	\$ 21,480.18	\$ 140,240.06	\$ 161,720.24	\$ -	\$ -	\$ -	\$ 308,043	
	MCE11c	Ag SEM	\$ 21,480.18	\$ 25,000.00	\$ 46,480.18	\$ 11,834.84	\$ 21,480.18	\$ 239,404.84	\$ 260,885.02	\$ -	\$ -	\$ -	\$ 319,200	
	MCE16	WE&T	\$ 89,378.34	\$ 25,000.00	\$ 114,378.34	\$ -	\$ 89,378.34	\$ 813,995.20	\$ 903,373.54	\$ -	\$ -	\$ -	\$ 1,017,752	
	MCE17	Com Equity	\$ 31,112.95	\$ 25,000.00	\$ 56,112.95	\$ -	\$ 31,112.95	\$ 923,722.03	\$ 954,834.98	\$ -	\$ -	\$ -	\$ 1,010,948	
	MCE97	CPUC EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 470,016.51	\$ 470,017	
MCE98	MCE EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 313,344.34	\$ 313,344		

2027	MCE01	MFES	\$ 95,695.93	\$ 25,000.00	\$ 120,695.93	\$ 60,177.75	\$ 95,695.93	\$ 378,312.13	\$ 474,008.06	\$ 5,000.00	\$ -	\$ 659,882
	MCE01c	MF SEM	\$ 103,071.94	\$ 25,000.00	\$ 128,071.94	\$ 82,443.75	\$ 103,071.94	\$ 474,517.08	\$ 577,589.02	\$ -	\$ -	\$ 788,105
	MCE01d	Res Marketplace	\$ 32,668.60	\$ 25,000.00	\$ 57,668.60	\$ 801,225.06	\$ 32,668.60	\$ 2,050,967.19	\$ 2,083,635.79	\$ -	\$ -	\$ 2,942,529
	MCE02a	Com Deemed	\$ 32,668.60	\$ 25,000.00	\$ 57,668.60	\$ 79,355.00	\$ 32,668.60	\$ 52,521.17	\$ 85,189.77	\$ -	\$ -	\$ 222,213
	MCE02b	Com Custom	\$ 32,668.60	\$ 25,000.00	\$ 57,668.60	\$ 518,113.90	\$ 32,668.60	\$ 407,995.64	\$ 440,664.24	\$ -	\$ -	\$ 1,016,447
	MCE02c	Com SEM	\$ 32,668.60	\$ 25,000.00	\$ 57,668.60	\$ 109,712.79	\$ 32,668.60	\$ 275,672.93	\$ 308,341.53	\$ -	\$ -	\$ 475,723
	MCE02d	Com Marketplace	\$ 32,668.60	\$ 25,000.00	\$ 57,668.60	\$ 1,500,000.00	\$ 32,668.60	\$ 3,878,544.66	\$ 3,911,213.26	\$ -	\$ -	\$ 5,468,882
	MCE07	SF HERS	\$ 73,545.51	\$ 25,000.00	\$ 98,545.51	\$ -	\$ 73,545.51	\$ 156,867.01	\$ 230,412.51	\$ -	\$ -	\$ 328,958
	MCE08	SF HES	\$ 133,365.85	\$ 25,000.00	\$ 158,365.85	\$ 1,930,442.44	\$ 133,365.85	\$ 914,058.72	\$ 1,047,424.57	\$ 150,000.00	\$ -	\$ 3,286,233
	MCE10a	Ind Deemed	\$ 32,573.41	\$ 25,000.00	\$ 57,573.41	\$ 19,502.00	\$ 32,573.41	\$ 163,616.93	\$ 196,190.35	\$ -	\$ -	\$ 273,266
	MCE10b	Ind Custom	\$ 32,573.41	\$ 25,000.00	\$ 57,573.41	\$ 52,801.32	\$ 32,573.41	\$ 84,107.60	\$ 116,681.02	\$ -	\$ -	\$ 227,056
	MCE10c	Ind SEM	\$ 32,573.41	\$ 25,000.00	\$ 57,573.41	\$ 61,309.27	\$ 32,573.41	\$ 452,343.99	\$ 484,917.41	\$ -	\$ -	\$ 603,800
	MCE11a	Ag Deemed	\$ 22,554.19	\$ 25,000.00	\$ 47,554.19	\$ 10,706.50	\$ 22,554.19	\$ 33,178.65	\$ 55,732.83	\$ -	\$ -	\$ 113,994
	MCE11b	Ag Custom	\$ 22,554.19	\$ 25,000.00	\$ 47,554.19	\$ 99,842.11	\$ 22,554.19	\$ 140,328.99	\$ 162,883.17	\$ -	\$ -	\$ 310,279
	MCE11c	Ag SEM	\$ 22,554.19	\$ 25,000.00	\$ 47,554.19	\$ 11,834.84	\$ 22,554.19	\$ 239,493.77	\$ 262,047.95	\$ -	\$ -	\$ 321,437
	MCE16	WE&T	\$ 93,847.26	\$ 25,000.00	\$ 118,847.26	\$ -	\$ 93,847.26	\$ 789,511.25	\$ 883,358.51	\$ -	\$ -	\$ 1,002,206
	MCE17	Com Equity	\$ 32,668.60	\$ 25,000.00	\$ 57,668.60	\$ -	\$ 32,668.60	\$ 912,564.54	\$ 945,233.13	\$ -	\$ -	\$ 1,002,902
	MCE97	CPUC EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 476,097.77	\$ 476,098
	MCE98	MCE EM&V	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 317,398.51	\$ 317,399

MARIN CLEAN ENERGY

TESTIMONY REGARDING 2024-2031 BUSINESS & PORTFOLIO PLAN

EXHIBIT 3

APPENDIX E

MCE'S 2024 – 2027 CEDARS FILING DASHBOARD LINKS AND

CONFIRMATION RECEIPTS

MCE's EE 2024 – 2027 CEDARS Filing Dashboard Links

2024 Filing Module: <https://cedars.sound-data.com/filings/dashboard/MCE/2024/>

2025 Filing Module: <https://cedars.sound-data.com/filings/dashboard/MCE/2025/>

2026 Filing Module: <https://cedars.sound-data.com/filings/dashboard/MCE/2026/>

2027 Filing Module: <https://cedars.sound-data.com/filings/dashboard/MCE/2027/>

MCE's EE 2024 – 2027 CEDARS Confirmation Receipts



Qua Vallery <qvallery@mcecleanenergy.org>

CEDARS 2024 budget filing submitted for MCE

1 message

cedars@sound-data.com <cedars@sound-data.com>

Wed, Mar 2, 2022 at 9:57 AM

To: qvallery@mcecleanenergy.org

CEDARS FILING SUBMISSION RECEIPT

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

PA: Marin Clean Energy (MCE)

Budget Filing Year: 2024

Submitted: 17:57:45 on 02 Mar 2022

By: Qua Vallery

Advice Letter Number: A.22-XX-XXX

*** Portfolio Budget Filing Summary ***

- TRC: 0.73
- PAC: 0.81
- TRC (no admin): 2.06
- PAC (no admin): 2.94
- RIM: 0.81
- Budget: \$19,273,639.32
- TotalSystemBenefit: \$15,540,846.37
- ElecBen: \$11,772,813.13
- GasBen: \$3,933,929.20
- OtherBen: \$0.00
- TRCCost: \$21,558,744.95
- PACCost: \$19,274,287.83

*** Programs Included in the Budget Filing ***

- MCE01: Multifamily Energy Savings
- MCE01c: Multifamily Strategic Energy Management
- MCE01d: Res Marketplace
- MCE02a: Commercial Deemed
- MCE02b: Commercial Custom
- MCE02c: Commercial Strategic Energy Management
- MCE02d: Commercial Marketplace
- MCE07: Single Family Home Energy Report
- MCE08: Single Family Home Energy Savings
- MCE10a: Industrial Deemed
- MCE10b: Industrial Custom
- MCE10c: Industrial Strategic Energy Management
- MCE10d: Industrial Normalized Metered Energy Consumption
- MCE11a: Agricultural Deemed
- MCE11b: Agricultural Custom
- MCE11c: Agricultural Strategic Energy Management
- MCE11d: Agricultural Normalized Metered Energy Consumption
- MCE16: Workforce Education and Training (WET)
- MCE17: Commercial Equity
- MCE97: CPUC EM&V

- MCE98: MCE EM&V

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CEDARS Administrator

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Qua Vallery <qvallery@mcecleanenergy.org>

CEDARS 2025 budget filing submitted for MCE

1 message

cedars@sound-data.com <cedars@sound-data.com>
To: qvallery@mcecleanenergy.org

Wed, Mar 2, 2022 at 10:02 AM

CEDARS FILING SUBMISSION RECEIPT

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

PA: Marin Clean Energy (MCE)

Budget Filing Year: 2025

Submitted: 18:02:16 on 02 Mar 2022

By: Qua Vallery

Advice Letter Number: A.22-03-XXXX

* Portfolio Budget Filing Summary *

- TRC: 0.75
- PAC: 0.84
- TRC (no admin): 2.15
- PAC (no admin): 3.07
- RIM: 0.84
- Budget: \$19,522,248.80
- TotalSystemBenefit: \$16,230,190.87
- ElecBen: \$12,248,946.62
- GasBen: \$4,155,575.81
- OtherBen: \$0.00
- TRCCost: \$21,815,126.96
- PACCost: \$19,531,332.91

* Programs Included in the Budget Filing *

- MCE01: Multifamily Energy Savings
- MCE01c: Multifamily Strategic Energy Management
- MCE01d: Res Marketplace
- MCE02a: Commercial Deemed
- MCE02b: Commercial Custom
- MCE02c: Commercial Strategic Energy Management
- MCE02d: Commercial Marketplace
- MCE07: Single Family Home Energy Report
- MCE08: Single Family Home Energy Savings
- MCE10a: Industrial Deemed
- MCE10b: Industrial Custom
- MCE10c: Industrial Strategic Energy Management
- MCE10d: Industrial Normalized Metered Energy Consumption
- MCE11a: Agricultural Deemed
- MCE11b: Agricultural Custom
- MCE11c: Agricultural Strategic Energy Management
- MCE11d: Agricultural Normalized Metered Energy Consumption
- MCE16: Workforce Education and Training (WET)
- MCE17: Commercial Equity
- MCE97: CPUC EM&V

- MCE98: MCE EM&V

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Qua Vallery <qvallery@mcecleanenergy.org>

CEDARS 2026 budget filing submitted for MCE

1 message

cedars@sound-data.com <cedars@sound-data.com>
To: qvallery@mcecleanenergy.org

Wed, Mar 2, 2022 at 10:07 AM

CEDARS FILING SUBMISSION RECEIPT

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

PA: Marin Clean Energy (MCE)

Budget Filing Year: 2026

Submitted: 18:07:37 on 02 Mar 2022

By: Qua Vallery

Advice Letter Number: A.22-03-XXXX

*** Portfolio Budget Filing Summary ***

- TRC: 0.79
- PAC: 0.88
- TRC (no admin): 2.28
- PAC (no admin): 3.23
- RIM: 0.88
- Budget: \$19,584,021.35
- TotalSystemBenefit: \$17,098,384.37
- ElecBen: \$12,895,422.76
- GasBen: \$4,387,296.98
- OtherBen: \$0.00
- TRCCost: \$21,821,745.74
- PACCost: \$19,603,109.27

*** Programs Included in the Budget Filing ***

- MCE01: Multifamily Energy Savings
- MCE01c: Multifamily Strategic Energy Management
- MCE01d: Res Marketplace
- MCE02a: Commercial Deemed
- MCE02b: Commercial Custom
- MCE02c: Commercial Strategic Energy Management
- MCE02d: Commercial Marketplace
- MCE07: Single Family Home Energy Report
- MCE08: Single Family Home Energy Savings
- MCE10a: Industrial Deemed
- MCE10b: Industrial Custom
- MCE10c: Industrial Strategic Energy Management
- MCE10d: Industrial Normalized Metered Energy Consumption
- MCE11a: Agricultural Deemed
- MCE11b: Agricultural Custom
- MCE11c: Agricultural Strategic Energy Management
- MCE11d: Agricultural Normalized Metered Energy Consumption
- MCE16: Workforce Education and Training (WET)
- MCE17: Commercial Equity
- MCE97: CPUC EM&V

- MCE98: MCE EM&V

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Qua Vallery <qvallery@mcecleanenergy.org>

CEDARS 2027 budget filing submitted for MCE

1 message

cedars@sound-data.com <cedars@sound-data.com>
To: qvallery@mcecleanenergy.org

Wed, Mar 2, 2022 at 10:11 AM

CEDARS FILING SUBMISSION RECEIPT

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

PA: Marin Clean Energy (MCE)

Budget Filing Year: 2027

Submitted: 18:11:28 on 02 Mar 2022

By: Qua Vallery

Advice Letter Number: A.22-03-XXXX

*** Portfolio Budget Filing Summary ***

- TRC: 0.83
- PAC: 0.92
- TRC (no admin): 2.42
- PAC (no admin): 3.39
- RIM: 0.92
- Budget: \$19,837,407.00
- TotalSystemBenefit: \$17,994,718.13
- ElecBen: \$13,571,669.80
- GasBen: \$4,617,382.10
- OtherBen: \$0.00
- TRCCost: \$22,026,229.01
- PACCost: \$19,866,493.31

*** Programs Included in the Budget Filing ***

- MCE01: Multifamily Energy Savings
- MCE01c: Multifamily Strategic Energy Management
- MCE01d: Res Marketplace
- MCE02a: Commercial Deemed
- MCE02b: Commercial Custom
- MCE02c: Commercial Strategic Energy Management
- MCE02d: Commercial Marketplace
- MCE07: Single Family Home Energy Report
- MCE08: Single Family Home Energy Savings
- MCE10a: Industrial Deemed
- MCE10b: Industrial Custom
- MCE10c: Industrial Strategic Energy Management
- MCE10d: Industrial Normalized Metered Energy Consumption
- MCE11a: Agricultural Deemed
- MCE11b: Agricultural Custom
- MCE11c: Agricultural Strategic Energy Management
- MCE11d: Agricultural Normalized Metered Energy Consumption
- MCE16: Workforce Education and Training (WET)
- MCE17: Commercial Equity
- MCE97: CPUC EM&V

- MCE98: MCE EM&V

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