Application: 22-03-xxx
(CPUC #940)
Exhibit #: 3
Date: March 4, 2022
Witness(es): Lujuana Medina

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK

SOCALREN'S RESPONSES, PURSUANT TO ENERGY DIVISION TEMPLATE

ENERGY EFFICIENCY 2024-2031 PORTFOLIO PLAN

PREPARED TESTIMONY

EXHIBIT 3

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
ENERGY EFFICIENCY 2024-2031 PORTFOLIO PLAN
PREPARED TESTIMONY

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SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
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SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
ENERGY EFFICIENCY 2024-2031 PORTFOLIO PLAN
PREPARED TESTIMONY

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Pa Name: #REF!
Budget Ye #REF!

Spending Budget Comparison

	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
Tab 3 - PA Spending Budget Request (PA Program and EM&V) (same as row above. used	$ 43,383,761	$ 54,895,359	$59,112,203	$ 68,706,028	$ 76,748,020	#########	$92,864,832	$102,151,616
Tab 4 - PA Spending Budget Request (PA Program and EM&V)	$ 43,383,761	$ 54,895,359	$59,112,203	$ 68,706,028	$ 76,748,020	#########	$92,864,832	$102,151,616
Tab 7 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 42,733,761	$ 54,175,359	$58,302,203	$ 67,906,028	$ 3,960,128	$ 4,356,141	$ 4,791,482	$ 5,270,931
Tab 8 - PA Spending Budget Request (PA Program and EM&V)	$ 40,843,704	$ 51,757,865	$55,779,374	$ 64,743,533				
Tab 9 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 43,383,761	$ 54,895,359	$59,112,203	$ 68,706,028				
Difference	ERROR	ERROR	ERROR	ERROR	ERROR	ERROR	ERROR	ERROR

Revenue Requirement or Cost Recovery Comparison

	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
Tab 4 - PA Revenue Requirement Request	$ 43,383,761	$ 54,895,359	$59,112,203	$ 68,706,028	$ 76,748,020	#########	$92,864,832	$102,151,616
Tab 7 - PA Revenue Requirement Request (Cost Recovery)	$ 42,733,761	$ 54,175,359	$58,302,203	$ 67,906,028	$ 3,960,128	$ 4,356,141	$ 4,791,482	$ 5,270,931
Difference	650,000.00	720,000.00	810,000.00	800,000.00	72,787,892.41	#########	##########	##########

Program Budget by Cost Category

	#REF!				#REF!				#REF!				#REF!				#REF!				#REF!				#REF!				#REF!			
	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive	Admin	Mktg	DINI	DI Incentive
Tab 4 - Program Budgets	$ 2,540,057	$ 2,061,085	$23,883,462	$ 13,156,732	$ 3,137,494	$ 2,596,334	$26,256,991	$ 20,701,199	$ 3,332,829	$ 2,800,978	########	########	########	########	########	########																
Tab 8 - Caps & Targets	$ -	$ 2,061,085	$23,883,462	$ 13,156,732	$ -	$ 2,596,334	$26,256,991	$ 20,701,199	$ -	$ 2,800,978	########	########	$ -	########	########	########																
Difference	2,540,057.00	-	-	-	3,137,494.00	-	-	-	3,332,829.00	-	-	-	########	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tab 9 - Incentives Column, EE Total				$ 13,156,732				$ 20,701,199				########				########																
Difference				-				-				-				-				-				-				-				-

Portfolio Budget Total vs Budget by Function Summary Total

	#REF!										
	Residential	Commercial	Industrial	Agricultural	Public	Emerging Tech	Codes & Standards	WE&T	Finance	Cross Cutting	OBF Loan Pool
Tab 7 - PA Portfolio Budget by Function	$10,958,319.00	$ 5,395,854.00	$ -	##########	##########	$ -	$ -	##########	##########	##########	$ -
Tab 9 - PA Portfolio Budget by Function	$10,958,319.00	$ 5,395,854.00	$ -	##########	##########					##########	$ -
Difference	-	-	-	-	-					(650,000.00)	-

	#REF!										
	Residential	Commercial	Industrial	Agricultural	Public	Emerging Tech	Codes & Standards	WE&T	Finance	Cross Cutting	OBF Loan Pool
Tab 7 - PA Portfolio Budget by Function	$11,925,713.00	$ 8,303,254.00	$ -	##########	##########	$ -	$ -	##########	##########	##########	$ -
Tab 9 - PA Portfolio Budget by Function	$11,925,713.00	$ 8,303,254.00	$ -	##########	##########					##########	$ -
Difference	-	-	-	-	-					(720,000.00)	-

	#REF!										
	Residential	Commercial	Industrial	Agricultural	Public	Emerging Tech	Codes & Standards	WE&T	Finance	Cross Cutting	OBF Loan Pool
Tab 7 - PA Portfolio Budget by Function	$12,865,769	$6,481,349	$0	$6,551,046	$25,999,268	$0	$0	$2,820,000	$1,216,000	$4,036,000	$0
Tab 9 - PA Portfolio Budget by Function	$12,865,769.00	$ 6,481,349.00	$ -	##########	##########					##########	$ -
Difference	-	-	-	-	-					(810,000.00)	-

	#REF!										
	Residential	Commercial	Industrial	Agricultural	Public	Emerging Tech	Codes & Standards	WE&T	Finance	Cross Cutting	OBF Loan Pool
Tab 7 - PA Portfolio Budget by Function	$13,680,026	$10,614,944	$0	$7,482,292	$29,191,429	$0	$0	$2,880,000	$1,300,000	##########	$0
Tab 9 - PA Portfolio Budget by Function	$13,680,026.00	$10,614,944.00	$ -	##########	##########					##########	$ -
Difference	-	-	-	-	-					(800,000.00)	-

Pa Name: #REF!
Budget Ye #REF!
Table 3.1 - PA 2024-2031 Funding Source Summary

	Spending Budget Request	Electric	% Electric	Gas	% Gas
2024	42,733,761	36,182,098	84.7%	6,551,663	15.3%
2025	54,175,359	46,429,776	85.7%	7,745,583	14.3%
2026	58,302,203	49,784,093	85.4%	8,518,110	14.6%
2027	67,906,028	58,532,348	86.2%	9,373,680	13.8%
2028	3,960,128	3,410,960	86.1%	549,168	13.9%
2029	4,356,141	3,752,056	86.1%	604,085	13.9%
2030	4,791,482	4,127,025	86.1%	664,457	13.9%
2031	5,270,931	4,539,989	86.1%	730,942	13.9%
Total	**241,496,033**	**206,758,344**		**34,737,689**	

	PA Revenue Requirement	Electric	% Electric	Gas	% Gas
2024	42,733,761	36,182,098	84.7%	6,551,663	15.3%
2025	54,175,359	46,429,776	85.7%	7,745,583	14.3%
2026	58,302,203	49,784,093	85.4%	8,518,110	14.6%
2027	67,906,028	58,532,348	86.2%	9,373,680	13.8%
2028	3,960,128	3,410,960	86.1%	549,168	13.9%
2029	4,356,141	3,752,056	86.1%	604,085	13.9%
2030	4,791,482	4,127,025	86.1%	664,457	13.9%
2031	5,270,931	4,539,989	86.1%	730,942	13.9%
Total	**241,496,033**	**206,758,344**		**34,737,689**	

	PA (IOU+CCAs+RENs)	Electric	% Electric	Gas	% Gas
2024	42,733,761	36,182,098	84.7%	6,551,663	15.3%
2025	54,175,359	46,429,776	85.7%	7,745,583	14.3%
2026	58,302,203	49,784,093	85.4%	8,518,110	14.6%
2027	67,906,028	58,532,348	86.2%	9,373,680	13.8%
2028	3,960,128	3,410,960	86.1%	549,168	13.9%
2029	4,356,141	3,752,056	86.1%	604,085	13.9%
2030	4,791,482	4,127,025	86.1%	664,457	13.9%
2031	5,270,931	4,539,989	86.1%	730,942	13.9%
Total	**241,496,033**	**206,758,344**		**34,737,689**	

8 Year Funding Sources - RENs/CCAs

	PG&E		SDG&E		SCE	SCG
Year	Electric $	Gas $	Electric $	Gas $	Electric $	Gas $
2024					36,732,445	6,651,317
2025					47,046,835	7,848,524
2026					50,475,743	8,636,453
2027					59,221,915	9,484,111
2028					66,105,047	10,642,973
2029					72,715,552	11,707,271
2030					79,986,834	12,877,998
2031					87,985,818	14,165,798
Total	-		-		**500,270,190**	**82,014,445**

Pa Name: #REF!
Budget Year: #REF!

Table 3 - Budget and Cost Recovery by Funding Source

Table 3a - PA Spending Budget Request by Funding Source

	Source is Table 4				Source is Table 7			
PA EE Programs and EM&V	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**	**2031**
Annual PA Spending Budget Request (Program and EM&V total)	$ 43.383.761	$ 54.895.359	$ 59.112.203	$ 68.706.028	$ 76.748.020	$ 84.422.822	$ 92.864.832	$ 102.151.616
PA Spending Budget Request (PA Program and EM&V) (same as row above, used for reference)	**$ 43.383.761**	**$ 54.895.359**	**$ 59.112.203**	**$ 68.706.028**	**$ 76.748.020**	**$ 84.422.822**	**$ 92.864.832**	**$ 102.151.616**

Table 3b - Budget by Funding Source

Portfolio Budget (Before Carryover)	2024 Budget	2024 %Allocation	2025 Budget	2025 %Allocation	2026 Budget	2026 %Allocation	2027 Budget	2027 %Allocation	2028 Budget	2028 %Allocation	2029 Budget	2029 %Allocation	2030 Budget	2030 %Allocation	2031 Budget	20317 %Allocation
Electric Procurement EE Funds	$ 36.732.444	85%	$ 47.046.835	86%	$ 50.475.749	85%	$ 59.221.916	86%	$ 66.105.047	86%	$ 72.715.552	86%	$ 79.986.834	86%	$ 87.985.818	86%
Gas PPP Surcharge Funds	$ 6.651.317	15%	$ 7.848.524	14%	$ 8.636.454	15%	$ 9.484.112	14%	$ 10.642.973	14%	$ 11.707.271	14%	$ 12.877.998	14%	$ 14.165.798	14%
Total Funds	**$ 43.383.761**		**$ 54.895.359**		**$ 59.112.203**		**$ 68.706.028**		**$ 76.748.020**		**$ 84.422.822**		**$ 92.864.832**		**$ 102.151.616**	

Table 3c - Revenue Requirement for Cost Recovery by Funding Source

Authorized Funding in Rates (including Unspent/Uncommitted Funds)	2024 Revenue	2024 %Allocation	2025 Revenue	2025 %Allocation	2026 Revenue	2026 %Allocation	2027 Revenue	2027 %Allocation	2028 Revenue	2028 %Allocation	2029 Revenue	2029 %Allocation	2030 Revenue	2030 %Allocation	2031 Revenue	2031 %Allocation
Electric Procurement EE Funds	$ 36.732.444	85%	$ 47.046.835	86%	$ 50.475.749	85%	$ 59.221.916	86%	$ 66.105.047	86%	$ 72.715.552	86%	$ 79.986.834	86%	$ 87.985.818	86%
Gas PPP Surcharge Funds	$ 6.651.317	15%	$ 7.848.524	14%	$ 8.636.454	15%	$ 9.484.112	14%	$ 10.642.973	14%	$ 11.707.271	14%	$ 12.877.998	14%	$ 14.165.798	14%
Total Funds	**$ 43.383.761**		**$ 54.895.359**		**$ 59.112.203**		**$ 68.706.028**		**$ 76.748.020**		**$ 84.422.822**		**$ 92.864.832**		**$ 102.151.616**	

Table 3d - Unspent/Uncommitted Carryover Funds (in positive $ amounts)

	2024			2025			2026			2027			2028			2029			2030			2031		
Program Unspent/Uncommitted Funds	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Pre-2020	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2020	$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2021	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2022				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Total	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -

	2024			2025			2026			2027			2028			2029			2030			2031			
EM&V Unspent/Uncommitted Funds	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	
Pre-2020	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -		
2020	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
2021	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
2022				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
Total	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-

	2024			2025			2026			2027			2028			2029			2030			2031			
Total Unspent/Uncommitted Funds	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	
Pre-2020	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
2020	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
2021	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
2022				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-
Total	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$	-

Notes on Table 3d

Any actual uncommitted/unspent funds for 2023 will be trued-up in the IOU's respective electric and gas PPP annual rates advice letter for 2023.

Table 3e - Total Requested Recovery 2024-2027 Portfolio Budgets - Demand Response & Energy Efficiency [1,2]

	2024				2025				2026				2027			
	Demand Response	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**		
	Electric Demand Response Funds	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**
Program Funds - PA [4]	$ -	$ 34.706.810	$ 6.284.526	$ 40.991.336	$ -	$ 44.541.452	$ 7.430.566	$ 51.972.018	$ -	$ 48.208.989	$ 7.720.443	$ 55.929.432	$ -	$ 56.155.631	$ 8.993.060	$ 65.148.691
Program Funds - REN [5]		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$
Program Funds - CCA [5]		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$
EM&V [3]		$ 1.475.288	$ 267.137	$ 1.742.425		$ 1.888.324	$ 315.017	$ 2.203.341		$ 2.026.103	$ 346.668	$ 2.372.771		$ 2.376.717	$ 380.620	$ 2.757.337
Budget Total	**$ -**	**$ 36.182.098**	**$ 6.551.663**	**$ 42.733.761**	**$ -**	**$ 46.429.776**	**$ 7.745.583**	**$ 54.175.359**	**$ -**	**$ 50.235.092**	**$ 8.067.111**	**$ 58.302.203**	**$ -**	**$ 58.532.348**	**$ 9.373.680**	**$ 67.906.028**

	2028				2029				2030				2031				
	Demand Response	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**			
	Electric Demand Response Funds	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	
Program Funds - PA [4]	$ -	$ 757.967	$ 122.033	$ 880.000	$ -	$ 833,763	$ 134,237	$ 968,000	$ -	$ 917,139	$ 147,661	$ 1,064,800	$ -	$ 1,008,854	$ 162,426	$ 1,171,280	
Program Funds - REN [5]		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$	-
Program Funds - CCA [5]		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$		$ -	$ -	$	-
EM&V [3]		$ 2.652.994	$ 427.134	$ 3.080.128		$ 2.918.293	$ 469.848	$3.388.141		$ 3.209.886	$ 516.796	$3.726.682		$ 3.531.135	$ 568.516	$4.099.651	
Budget Total	**$ -**	**$ 3.410.960**	**$ 549.168**	**$ 3.960.128**	**$ -**	**$ 3.752.056**	**$ 604.085**	**$4.356.141**	**$ -**	**$ 4.127.025**	**$ 664.457**	**$4.791.482**	**$ -**	**$ 4.539.989**	**$ 730.942**	**$5.270.931**	

Notes:

1 Authorized budget excludes reductions from past unspent funds, carryover and is consistent with funding approved in D. 09-09-047, D. 12-11-015, D.14-10-046 and D.15-10-028, D.18-05-041 and D.21-01-004.
2 REN and CCA information provided by all RENS and CCAs and is consistent with their respective ABALs.
3 This represent total IOU+CCA+REN EM&V
4 Program Funds represents the total program budget, excluding EM&V.
5 only the IOU completes this line and should be consistent table 7.

PA Name:
Budget Year:

Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	Target Exempt	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds [1]	2021 Authorized Budget	2021 Forecasted Unspent/ Uncommitted Funds as of 9/30/2021	2021 Budget Spent as of 9/30/2021	2022 Proposed Budget	2023 Proposed Budget
		EM&V (PA & ED Budgets) Total [3]										
		EM&V - PA	[redacted]									
		EM&V - ED										
		EM&V TOTAL								$ 201,865	$ 285,153	$ 270,966
		PA Program and EM&V Total					$ -	$ 20,629,000	$ -	$ 13,291,644	$ 25,171,232	$ 23,918,937
		PA Spending Budget Request (PA Program and EM&V)										
		Financing Pilot Programs										
		Financing Pilot Programs Total					$ -	$ -	$ -	$ -	$ -	$ -
		MCEO & ESA										
		MFA(?)										

2024

Program Name	Administrative	Marketing/ Outreach	Direct Implementation Non-Incentive	Incentive/ Rebate	2024 PA Spending Budget Request	Percent Change from Prior Year	PA Pre-2024 Uncommitted and Unspent Carryover Balance	2024 PA Revenue Requirement Request (Cost Recovery)	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
EM&V TOTAL	[redacted]				$ 1,742,425	543%	$ -	$ 1,742,425	[redacted]									
PA Program and EM&V Total	$ 2,540,057	$ 2,061,085	$ 23,883,462	$ 13,156,732	$ 43,383,761	81%	$ -	$ 43,383,761	23,777,067.32	9,043.47	405,362.77	3,716.81	2,371.37	226,405,631.20	3,250,650.76	46,105.05	19,016.31	-
Financing Pilot Programs Total	$ -	$ -	$ -	$ -	$ -		$ -	$ -	-	-	-	-	-	-	-	-	-	-

2025

Program Name	Administrative	Marketing/ Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2025 PA Spending Budget Request	Percent Change from Prior Year	PA Pre-2024 Uncommitted and Unspent Carryover Balance	2025 PA Revenue Requirement Request (Cost Recovery)	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
EM&V TOTAL	[redacted]				$ 2,203,341	26%	$ -	$ 2,203,341	[redacted]									
PA Program and EM&V Total	$ 3,137,494	$ 2,596,334	$ 26,256,991	$ 20,701,199	$ 54,895,359	27%	$ -	$ 54,895,359	43,203,603.39	18,256.56	516,142.96	7,146.67	3,019.44	422,277,061.09	4,048,091.50	83,289.26	23,681.34	-
Financing Pilot Programs Total	$ -	$ -	$ -	$ -	$ -		$ -	$ -	-	-	-	-	-	-	-	-	-	-

2026

Program Name	Administrative	Marketing/ Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2026 PA Spending Budget Request	Percent Change from Prior Year	PA Pre-2024 Uncommitted and Unspent Carryover Balance	2026 PA Revenue Requirement Request (Cost Recovery)	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
EM&V TOTAL	[redacted]				$ 2,372,771	8%	$ -	$ 2,372,771	[redacted]									
PA Program and EM&V Total	$ 3,332,829	$ 2,800,978	$ 28,831,606	$ 21,774,019	$ 59,112,203	8%	$ -	$ 59,112,203	56,924,085.88	27,775.71	709,038.30	9,524.70	4,147.87	490,661,156.76	5,032,552.70	93,378.50	29,440.43	-
Financing Pilot Programs Total	$ -	$ -	$ -	$ -	$ -		$ -	$ -	-	-	-	-	-	-	-	-	-	-

2027

Program Name	Administrative	Marketing/ Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2027 PA Spending Budget Request	Percent Change from Prior Year	PA Pre-2024 Uncommitted and Unspent Carryover Balance	2027 PA Revenue Requirement Request (Cost Recovery)	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
EM&V TOTAL	[redacted]				$ 2,757,337	16%	$ -	$ 2,757,337	[redacted]									
PA Program and EM&V Total	$ 3,962,495	$ 3,305,132	$ 32,015,415	$ 26,665,649	$ 68,706,028	16%	$ -	$ 68,706,028	64,651,278.13	30,995.48	709,946.50	11,838.89	4,153.19	967,181,484.43	5,449,803.79	116,353.23	31,881.35	-
Financing Pilot Programs Total	$ -	$ -	$ -	$ -	$ -		$ -	$ -	-	-	-	-	-	-	-	-	-	-

pent. Carryover Details

Discontinued Program #	Sector Name	Portfolio Segment	2027 PA Spending Budget Request	2023 Baseline Percentage Change	2028 PA Spending Budget Request	First Year Net KWH	First Year Net KW	First Year Net Therms (MM)	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
					2028										
	Residential	Resource Acquisition	$ 13.680.026	13.4%	$ 15.514.838	11.288.919.00	1.202.00	499.363.00	2.794.00	2.921.00	103.330.252.00	4.563.706.00	25.832.00	26.698.00	-
	Commercial	Resource Acquisition	$ -	#DIV/0!	$ -	-	-	-	-	-	-	-	-	-	-
	Industrial	Resource Acquisition	$ -	#DIV/0!	$ -	-	-	-	-	-	-	-	-	-	-
	Agricultural	Resource Acquisition	$ 2.903.261	13.6%	$ 3.298.714	24.406.284.00	25.126.00	-	4.278.00	-	220.727.335.00	-	41.046.00	-	-
	Emerging Tech	Resource Acquisition	$ -	#DIV/0!	$ -										-
	Public	Resource Acquisition	$ 7.379.952	10.6%	$ 8.165.725	19.532.644.00	2.403.00	143.936.00	3.367.00	842.00	202.171.914.00	730.838.00	45.380.00	4.275.00	-
	WE&T	Resource Acquisition	$ -	#DIV/0!	$ -										-
	Finance	Resource Acquisition	$ -	#DIV/0!	$ -										-
	OBF Loan Pool	Resource Acquisition	$ -	#DIV/0!	$ -										-
	Residential	Market Support	$ -	#DIV/0!	$ -										
	Commercial	Market Support	$ 1.300.000	10.0%	$ 1.430.000										
	Industrial	Market Support	$ -	#DIV/0!	$ -										
	Agricultural	Market Support	$ 800.000	10.0%	$ 880.000	-	-	-	-	-	-	-	-	-	-
	Emerging Tech	Market Support	$ -	#DIV/0!	$ -										
	Public	Market Support	$ 14.478.113	10.5%	$ 16.000.694	6.463.410.58	3.423.82	-	1.078.74	-	32.317.052.92	-	5.350.41	-	-
	WE&T	Market Support	$ 2.880.000	10.0%	$ 3.168.000										
	Finance	Market Support	$ 650.000	10.0%	$ 715.000										
	OBF Loan Pool	Market Support	$ -	#DIV/0!	$ -										
	Residential	Equity	$ -	#DIV/0!											
	Commercial	Equity	$ 9.314.944	11.0%	$ 10.342.586	1.691.417.97	85.85	68.61	273.26	0.40	17.575.303.78	(2.569.55)	2.809.31	(15.03)	-
	Industrial	Equity	$ -	#DIV/0!											
	Agricultural	Equity	$ 3.779.031	14.5%	$ 4.328.438	2.067.530.62	729.14	130.077.47	362.44	760.95	24.510.640.71	650.387.35	4.723.55	3.804.77	-
	Emerging Tech	Equity	$ -	#DIV/0!											
	Public	Equity	$ 7.333.364	12.2%	$ 8.228.897	5.666.200.46	1.125.91	7.495.78	919.68	43.85	23.267.133.77	52.422.23	3.548.55	306.67	-
	WE&T	Equity	$ -	#DIV/0!											
	Finance	Equity	$ 650.000	10.0%	$ 715.000	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	Equity	$ -	#DIV/0!											
	Codes & Standards	Codes & Standards	$ 800.000	10.0%	$ 880.000										
	PA PROGRAM TOTAL				**$ 73,667,892**	**71,116,406.63**	**34,095.72**	**780,940.86**	**13,073.12**	**4,568.20**	**623,899,632.19**	**5,994,784.03**	**128,689.82**	**35,069.40**	**-**
	EM&V (PA & ED Portions) Total [5]														
	EM&V - PA		$ 765.137		$ 854.744										
	EM&V - ED		$ 1.992.200		$ 2.225.384										
	EM&V TOTAL		**$ 2,757,337**		**$ 3,080,128**										
	PA Spending Budget Request (PA Program and EM&V Total)				**$ 76,748,020**	**71,116,406.63**	**34,095.72**	**780,940.86**	**13,073.12**	**4,568.20**	**623,899,632.19**	**5,994,784.03**	**128,689.82**	**35,069.40**	**-**
	CEC AB 841 Program Budget--IOU PA only														
	Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget														
	IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance														
	CEC AB 841 Total														
	PA Spending Budget Request (PA Program and EM&V + CEC AB 841)				**$ 76.748.020**	**71.116.406.63**	**34.095.72**	**780.940.86**	**13.073.12**	**4.568.20**	**623.899.632.19**	**5.994.784.03**	**128.689.82**	**35.069.40**	**-**
	Financing Pilot Programs														
	Financing Pilot Programs Total				**$ -**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
	ME&O & ESA														
	ME&O[1]														
	ESA2														

Sector Name	Portfolio Segment	2029 PA Spending Budget Request	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
		2029										
Residential	Resource Acquisition	$ 17.066.322	12.417.810.44	1.321.86	549.299.45	3.196.09	3.213.40	113.663.277.01	5.020.076.64	28.742.15	29.367.45	-
Commercial	Resource Acquisition	$ -										
Industrial	Resource Acquisition	$ -										
Agricultural	Resource Acquisition	$ 3.628.586	26.846.912.26	27.638.13	-	4.800.23	-	242.800.068.90	-	45.785.39	-	-
Emerging Tech	Resource Acquisition	$ -										
Public	Resource Acquisition	$ 8.982.297	21.485.908.25	2.643.34	158.329.76	3.798.91	926.23	222.389.105.91	803.921.92	50.744.07	4.702.94	-
WE&T	Resource Acquisition	$ -										
Finance	Resource Acquisition	$ -										
OBF Loan Pool	Resource Acquisition	$ -										
Residential	Market Support	$ -										
Commercial	Market Support	$ 1.573.000	-	-	-	-	-	-	-	-	-	-
Industrial	Market Support	$ -										
Agricultural	Market Support	$ 968.000	-	-	-	-	-	-	-	-	-	-
Emerging Tech	Market Support	$ -										
Public	Market Support	$ 17.600.764	7.109.751.64	3.766.20	-	1.212.21	-	35.548.758.21	-	5.941.62	-	-
WE&T	Market Support	$ 3.484.800	-	-	-	-	-	-	-	-	-	-
Finance	Market Support	$ 786.500	-	-	-	-	-	-	-	-	-	-
OBF Loan Pool	Market Support	$ -										
Residential	Equity	$ -										
Commercial	Equity	$ 11.376.844	1.860.559.77	94.43	75.47	303.27	0.44	19.332.834.16	(2.826.51)	3.103.76	(16.54)	-
Industrial	Equity	$ -										
Agricultural	Equity	$ 4.761.282	2.274.283.68	802.06	143.085.22	406.64	837.05	26.961.704.78	715.426.09	5.275.16	4.185.24	-
Emerging Tech	Equity	$ -										
Public	Equity	$ 9.051.787	6.232.820.50	1.238.50	8.245.36	1.027.45	48.24	25.593.847.15	57.664.45	3.863.06	337.34	-
WE&T	Equity	$ -										
Finance	Equity	$ 786.500	-	-	-	-	-	-	-	-	-	-
OBF Loan Pool	Equity	$ -										
Codes & Standards	Codes & Standards	$ 968.000	-	-	-	-	-	-	-	-	-	-
PA PROGRAM TOTAL		**$ 81,034,681**	**78,228,046.54**	**37,504.53**	**859,035.26**	**14,744.81**	**5,025.36**	**686,289,596.13**	**6,594,262.59**	**143,455.21**	**38,576.44**	**-**
EM&V (PA & ED Portions) Total [5]												
EM&V - PA		$ 940.218										
EM&V - ED		$ 2.447.923										
EM&V TOTAL		**$ 3,388,141**										
PA Spending Budget Request (PA Program and EM&V Total)		**$ 84,422,822**	**78,228,046.54**	**37,504.53**	**859,035.26**	**14,744.81**	**5,025.36**	**686,289,596.13**	**6,594,262.59**	**143,455.21**	**38,576.44**	**-**
CEC AB 841 Program Budget--IOU PA only												
Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget												
IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance												
CEC AB 841 Total												
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)		**$ 84.422.822**	**78.228.046.54**	**37.504.53**	**859.035.26**	**14.744.81**	**5.025.36**	**686.289.596.13**	**6.594.262.59**	**143.455.21**	**38.576.44**	**-**
Financing Pilot Programs												
Financing Pilot Programs Total		**$ -**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
ME&O & ESA												
ME&O[1]												
ESA2												

Sector Name	Portfolio Segment	2030 PA Spending Budget Request	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
		2030										
Residential	Resource Acquisition	$ 18.772.954	13.659.591.48	1.454.04	604.229.40	3.077.09	3.534.74	125.029.604.72	5.522.084.31	31.916.41	32.304.19	-
Commercial	Resource Acquisition	$ -										
Industrial	Resource Acquisition	$ -										
Agricultural	Resource Acquisition	$ 3.991.444	29.531.603.48	30.401.95	-	4.798.89	-	267.080.075.77	-	51.087.09	-	-
Emerging Tech	Resource Acquisition	$ -										
Public	Resource Acquisition	$ 9.880.526	23.634.499.07	2.907.68	174.162.74	3.736.61	1.018.85	244.628.016.51	884.314.11	56.726.67	5.173.24	-
WE&T	Resource Acquisition	$ -										
Finance	Resource Acquisition	$ -										
OBF Loan Pool	Resource Acquisition	$ -										
Residential	Market Support	$ -										
Commercial	Market Support	$ 1.730.300										
Industrial	Market Support	$ -										
Agricultural	Market Support	$ 1.064.800										
Emerging Tech	Market Support	$ -										
Public	Market Support	$ 19.360.840	7.820.726.81	4.142.82	-	1.207.52	-	39.103.634.04	-	6.603.04	-	-
WE&T	Market Support	$ 3.833.280										
Finance	Market Support	$ 865.150										
OBF Loan Pool	Market Support	$ -										
Residential	Equity	$ 5.237.410	2.501.712.05	882.26	157.393.74	406.53	920.75	29.657.875.26	786.968.69	5.892.02	4.603.77	-
Commercial	Equity	$ 12.514.529	2.046.615.74	103.88	83.01	281.16	0.49	21.266.117.57	(3.109.16)	3.431.90	(18.19)	-
Industrial	Equity	$ -										
Agricultural	Equity	$ -										
Emerging Tech	Equity	$ -										
Public	Equity	$ 9.956.966	6.856.102.56	1.362.35	9.069.90	988.36	53.06	28.153.231.87	63.430.90	4.215.79	371.07	-
WE&T	Equity	$ -										
Finance	Equity	$ 865.150	-	-	-	-	-	-	-	-	-	-
OBF Loan Pool	Equity	$ -										
Codes & Standards	Codes & Standards	$ 1.064.800										
PA PROGRAM TOTAL		**$ 89,138,150**	**86,050,851.19**	**41,254.98**	**944,938.79**	**14,496.15**	**5,527.89**	**754,918,555.73**	**7,253,688.85**	**159,872.91**	**42,434.08**	**-**
EM&V (PA & ED Portions) Total [5]												
EM&V - PA		$ 1.033.967										
EM&V - ED		$ 2.692.715										
EM&V TOTAL		**$ 3,726,682**										
PA Spending Budget Request (PA Program and EM&V Total)		**$ 92,864,832**	**86,050,851.19**	**41,254.98**	**944,938.79**	**14,496.15**	**5,527.89**	**754,918,555.73**	**7,253,688.85**	**159,872.91**	**42,434.08**	**-**
CEC AB 841 Program Budget--IOU PA only												
Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget												
IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance												
CEC AB 841 Total												
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)		**$ 92.864.832**	**86.050.851.19**	**41.254.98**	**944.938.79**	**14.496.15**	**5.527.89**	**754.918.555.73**	**7.253.688.85**	**159.872.91**	**42.434.08**	**-**
Financing Pilot Programs												
Financing Pilot Programs Total		**$ -**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
ME&O & ESA												
ME&O[1]												
ESA2												

Sector Name	Portfolio Segment	2031 PA Spending Budget Request	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
		2031										
Residential	Resource Acquisition	$ 20.650.250	15.025.550.63	1.599.45	664.652.34	3.584.61	3.888.22	137.532.565.20	6.074.292.74	36.002.69	35.534.61	-
Commercial	Resource Acquisition	$ -										
Industrial	Resource Acquisition	$ -										
Agricultural	Resource Acquisition	$ 4.390.589	32.484.763.83	33.442.14	-	5.613.37	-	293.788.083.34	-	57.662.33	-	-
Emerging Tech	Resource Acquisition	$ -										
Public	Resource Acquisition	$ 10.868.579	25.997.948.98	3.198.45	191.579.01	4.420.94	1.120.74	269.090.818.15	972.745.52	64.062.11	5.690.56	-
WE&T	Resource Acquisition	$ -										
Finance	Resource Acquisition	$ -										
OBF Loan Pool	Resource Acquisition	$ -										
Residential	Market Support	$ -										
Commercial	Market Support	$ 1.903.330										
Industrial	Market Support	$ -										
Agricultural	Market Support	$ 1.171.280										
Emerging Tech	Market Support	$ -										
Public	Market Support	$ 21.296.924	8.602.799.49	4.557.10	-	1.424.62	-	43.013.997.44	-	7.512.82	-	-
WE&T	Market Support	$ 4.216.608										
Finance	Market Support	$ 951.665										
OBF Loan Pool	Market Support	$ -										
Residential	Equity	$ -										
Commercial	Equity	$ 13.765.982	2.251.277.32	114.26	91.32	318.57	0.53	23.392.729.33	(3.420.08)	3.860.25	(20.01)	-
Industrial	Equity	$ -										
Agricultural	Equity	$ 5.761.151	2.751.883.25	970.49	173.133.11	475.53	1.012.83	32.623.662.79	865.665.56	6.628.09	5.064.14	-
Emerging Tech	Equity	$ -										
Public	Equity	$ 10.952.662	7.541.712.81	1.498.59	9.976.89	1.142.24	58.36	30.968.555.05	69.773.99	4.786.81	408.18	-
WE&T	Equity	$ -										
Finance	Equity	$ 951.665										
OBF Loan Pool	Equity	$ -										
Codes & Standards	Codes & Standards	$ 1.171.280										
PA PROGRAM TOTAL		**$ 98,051,965**	**94,655,936.31**	**45,380.48**	**1,039,432.67**	**16,979.88**	**6,080.68**	**830,410,411.30**	**7,979,057.73**	**180,515.10**	**46,677.49**	**-**
EM&V (PA & ED Portions) Total [5]												
EM&V - PA		$ 1.137.664										
EM&V - ED		$ 2.961.987										
EM&V TOTAL		**$ 4,099,651**										
PA Spending Budget Request (PA Program and EM&V Total)		**$ 102,151,616**	**94,655,936.31**	**45,380.48**	**1,039,432.67**	**16,979.88**	**6,080.68**	**830,410,411.30**	**7,979,057.73**	**180,515.10**	**46,677.49**	**-**
CEC AB 841 Program Budget--IOU PA only												
Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget												
IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance												
CEC AB 841 Total												
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)		**$ 102.151.616**	**94.655.936.31**	**45.380.48**	**1.039.432.67**	**16.979.88**	**6.080.68**	**830.410.411.30**	**7.979.057.73**	**180.515.10**	**46.677.49**	**-**
Financing Pilot Programs												
Financing Pilot Programs Total		**$ -**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
ME&O & ESA												
ME&O[1]												
ESA2												

s needed. e.g.. relevant advice letter references. decision references and any other needed explanations.)
budget for 2021 per AL 3498-E/3835-G.
g Administrative cost is per AL 3451-E-A/2818-G.
percentage allocation is 70% for 2022 and 60% for 2023. For SDG&E that base for calculation is $116-80.
on-EE budgeted overheads.
costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it does not include REN or CCAs EM&V budget.
on of inputting by program or by total

Pr. Name:
Student Team:
Table 4.3– 2026 and Beyond Program Changes

Select
Select
Select

Connect to sheets in Row 8 - do not connect, add rows as needed!

Table 4.3.1 - Programs to be closed with the disposition of 2024-2031 ID Application

PA Justification	Third Party Implementer or Core	Statewide or Local	Programs to be closed with the disposition of 2024-2031 ID Application	Program ID	% change	2021 (Q3) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2024 Filed TRC	2025 Filed TRB	2021 Budget	2022 Budget	2023 Budget	Year Program Started	For existing third-party implemented programs, MM/YY Program was due to sunset prior to PY 2024 and Beyond Application planning and new IP contracting	For existing third-party implemented programs, MM/YY Program is extended to aca result of PY 2024 and Beyond Application planning and timing for new IP contract/ ramp up
ID encompassing WX&T program is being split into 5 new, stand-alone	Core	Local	Time-Differentiated Energy Pricing	CPA-AMP-TPP	-7.00%	0.00	0.00	0.00	0.00	0.00	$ -	$ 600,000	$ 600,000	2024	N/A	N/A

Table 4.3.2 - Programs to be closed upon completion of commitments

PA Justification	Third Party Implementer or Core	Statewide or Local	Programs to be Closed with the Disposition of 2024-2031 Application	Program ID	% change	2020 Claimed TRC	2021 (Q3) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2024 Filed TRB	2021 Budget	2022 Budget	2023 Budget	Year Program Started	For existing third-party implemented programs, MM/YY Program was due to sunset prior to PY 2024 and Beyond Application planning and new IP contracting ramp up

Table 4.3.3 - Programs with reduced budgets (>50% budget decrease), to continue in 2024 and beyond

PA Justification	Third party implementer or Core	Statewide	Programs with reduced budgets (>50% budget decrease)	Program ID	% change	2020 Claimed TRC	2021 (Q3) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2022 Filed TRB	2023 Filed TRB	2021 Budget	2022 Budget	2023 Budget	Year program started	For existing third-party implemented programs, MM/YY Program was due to sunset prior to PY 2024 and Beyond Application planning and new IP contracting ramp up.	For existing third-party implemented programs, MM/YY Program is extended to aca result of PY 2024 - and beyond planning and timing for new IP contract/ ramp up. Note: "NEW IP" program if program is result of "IP initiation process per 0138010004.
For all assets funding within Public sector to different approaches, and	Core	Local	Time-Differentiated Communities Time-based Energy Resources Program	CPA-PUBL-TDC	-75%	0.00	0.00	0.00	0.00	0.00	0.00	$ -	$ 2,975,000	$ 2,975,000	2024	N/A	N/A

Table 4.3.4 - Programs with enhanced budgets (>50% budget increase)

PA Justification	Third party implementer or Core	Statewide	Programs with enhanced budgets (>50% budget increase)	Program ID	% change	2023 Filed budget	2023 Filed TRB	2023 Filed TRC	2023 Filed TRB	2023 Filed TRB	2023 Budget	Year program started	For existing third-party implemented programs, MM/YY Program was due to sunset prior to PY 2024-2031 Application planning and new IP contracting	For existing third-party implemented programs, MM/YY Program is extended to aca result of PY 2024-2031 Application planning and timing for new IP contract/ ramp up. Note: "NEW IP" program if program is result of "IP initiation process per 0138010004.
Enhanced funding following ramp-up period and to cover growth of	Core	Local	Equities	CPA-REE-EQ		0.00	$ 1,126,500	0.00	0.00	$ 938,500	$ 938,500	$ 1,400,000	2024	2025		N/A

Table 4.3.5 - Programs that are new in 2024 and Beyond

PA Justification	Third party implementer or Core	Statewide	Programs that are new in 2024 or beyond	Program ID	Start year Filed TRB	Start year Filed TRC	Start Year Budget	MM/YY program to start	MM/YY Program is due to sunset, or flag as "NEW IP" program if program is result of IP initiation process per 0138010004
Innovative program that drives compliance beyond current standards of			Codes and Standards Compliance Enhancement Program	CPA-CSP-21	-	0.00	$ 650,000.00	01/24	N/A
DAC-HTR program that serves a sector where resources have been			Roof HTR Senior/Small 1B	CPA-ADR-02	574.407	0.16	$ -	01/24	N/A
DAC-HTR program that serves a sector where resources have been			Small Commercial (< 50 ton) Install Program	CPA-CRM-05	113.724	0.06	$ 1,500,000.00	01/24	N/A
Gap fill (eg currently no program that targets small tobacco) and			Small Dealer Energy Efficiency Kaizlo Program	CPA-CRM-03	128.672	0.05	$ 750,000.00	01/24	N/A
DAC-low program and service a sector where resources have been reduced from IOU programs; will help to ensure that EE projects continue to this underserved sub-sector (small commercial)			Roof HTR Public Agency Direct Install	CPA-PUBL-05	139.9604	0.13	$ 1,000,000.00	01/24	N/A
Gap fill (eg and innovative program that serves an underserved			Underserved Schools Strategic Energy Management	CPA-PUBL-09	113.251	0.13	$ 750,000.00	01/24	N/A
Gap fill (eg program that leverages a fast practic model existin/d by			Agricultural Project Delivery Program	CPA-ADR-03	-	0.00	$ 400,000.00	01/24	N/A
Gap fill (eg program that serves to be a catalyst for new/still within the			Commercial Green Business Network	CPA-CRM-01	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg and DAC-HTR program that serves a sector where resources			Small & Medium Business Energy Advisor (SMBEA)	CPA-CRM-04	-	0.00	$ 1,000,000.00	01/24	N/A
Gap fill (eg and DAC-HTR program that serves a sector where resources			Roof HTR Senior/Joint Property Assistance Program	CPA-ADR-01	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg local government partnerships that serve underserved			Energy Resiliency Action Plan	CPA-PUBL-06	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg local government program that provides resources as			Regional Partner Pilots	CPA-PUBL-07	-	0.00	$ 500,000.00	01/24	N/A
Existing subprogram that has the growth to permit pipeline and			E-Contractor Academy	CPA-MKT-06	-	0.00	$ 500,000.00	01/24	N/A
Existing subprogram that has the growth to permit pipeline and			AHR Partners	CPA-MKT-04	-	0.00	$ 500,000.00	01/24	N/A
Existing sub-program that has growth to permit pipeline and enrollment			Green Path Express	CPA-MKT-05	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg program that provides resources to train new construction			WX&T Opportunity HUB	CPA-MKT-01	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg program that provides WX&T strategies for Agricultural			Agricultural WX&T	CPA-MKT-03	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg program that serves a sector where resources have been			Agricultural Retrofit	CPA-ADR-03	1.1424 TRC	0.73	$ 500,000.00	01/24	N/A
Gap fill (eg program that targets a currently underserved sub-segment in its			Water Infrastructure Program	CPA-PUBL-08.0	-	0.00	$ 500,000.00	01/24	N/A
Gap fill (eg program that provide an innovative EE market intervention			Water & Wastewater Strategic Energy Management	CPA-PUBL-08	999.176	0.73	$ 2,750,000.00	01/24	N/A
Gap fill (eg program that serves to meet an underserved segment and			Small HTR Multifamily (Direct Install)	CPA-RES-03	127.613	0.06	$ 600,000.00	01/24	N/A

Table 4.3.6 - Programs with Third Market Products that Sunset in 2032-2037

PA Justification	Third party implementer or Core	Statewide	Programs with Third Party Contracts that Sunset in 2032-2037	Program ID	Sunset Date	Estimated Expenditure	Identify code and terms and/or limits	School year contracted	Estimated Length

Pa Name:	#REF!
Budget Year:	#REF!

Table 5 - Committed Energy Efficiency Program Funding - Funds Not Yet Spent as of 9/31/2021

Committed funds but not yet spent Category **	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2017 to date EM&V Funds			$0
2017 to date Program Funds - Utility			$0
2017 to date Program Funds - REN			$0
2017 to date Program Funds - CCA			$0
2018 to date EM&V Funds			$0
2018 to date Program Funds - Utility			$0
2018 to date Program Funds - REN			$0
2018 to date Program Funds - CCA			$0
2019 to date EM&V Funds			$0
2019 to date Program Funds - Utility			$0
2019 to date Program Funds - REN			$0
2019 to date Program Funds - CCA			$0
2020 to date EM&V Funds			$0
2020 to date Program Funds - Utility			$0
2020 to date Program Funds - REN	$515,505	$128,876	$644,381
2020 to date Program Funds - CCA			$0
2021 to date EM&V Funds			$0
2021 to date Program Funds - Utility			$0
2021 to date Program Funds - REN	$1,977,168	$494,292	$2,471,460
2021 to date Program Funds - CCA			$0

** For Non-IOU PAs: complete on the EM&V and REN/CCA; provide information to your IOU partner for the IOUs share of the commitment.
For IOU PA: Input IOU EM&V and IOU commitments. Incorporate REN/CCA information into the table. IOU Tab 5 will provide full picture of all committed funds for the IOU/CCA/REN combined portfolios.

Pa Name: BREF!
Budget Year: 2024-2027
Table 6 - Statewide Programs (Identical For All IOUs)

(Col D)*IOU 'Electric Proportional Share' from INPUT TABLE) + (Col E)*IOU 'Gas Proportional Share' from INPUT TABLE)

	Statewide Program*	Program Segement	Lead IOU	2021 Program Contract Budget (Total for all IOUs)**	2022 Program Contract Budget (Total for all IOUs)**	2023 Program Contract Budget (Total for all IOUs)**	2024 Program Contract Budget (Total for all IOUs)**	2025 Program Contract Budget (Total for all IOUs)**	2026 Program Contract Budget (Total for all IOUs)**	2027 Program Contract Budget (Total for all IOUs)**	Initial (Expected or Actual) Contract Execution Date (mm/yyyy)***	Expected Contract End Date (MM/YYYY)	Expect to Extend/Renew, or Rebid contract?	Percent Electric	Col D	Col E	Col F	Col G	Total Contract Expenditures 2018-2021 **				Total IOU Administrative Expenditures 2018-2021*				2022 IOU Administrative Budget*				2023 IOU Administrative Budget*				2024 IOU Administrative Budget*				2025 IOU Administrative Budget*				2026 IOU Administrative Budget*				2027 IOU Administrative Budget*			
															Combined (Electric & Gas) Proportional Contribution to Contract Cost per Load-Share (Either as reflected in co-funding agreement, or expected in co-funding agreement. Funding share may be within +/-20% of Target per formula in row 1 above)																													
															PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG
	Workforce education, and training: Career and workforce readiness		PG&E																																								
	Res New Construction																																										
	Nonres New Construction																																										
	Codes and Standards Advocacy																																										
	Institutional Partnerships, DGS & Dept of Corrections																																										
	WE&T K-12 Connections																																										
	Water/wastewater pumping		SCE																																									
	Lighting (Upstream)																																										
	ETP, electric																																										
	Institutional Partnerships, UC/CSU/CCC																																										
	ETP, gas		SCG																																								
	Food Service POS																																										
	Midstream Comm Water Heating																																										
	Res HVAC O/OM																																										
	Plug Load and Appliance		SDG&E																																									
	Upstream HVAC (Comm + Res)																																											
	Total			$ -	$ -	$ -	$ -	$ -	$ -	$ -									$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -

*Modify rows as needed to reflect consolidation or division of a program category per solicitation approach or contracts. Ultimately there should be one line per executed 3P contract.
The contract budeet or signed contract amount **for a given year accounts for the anticioated launch date of the proram. **Proram contract budeets reflect third oartv imolementation contract values and expenditures.** Estimated values for vear end 2021.
* Administrative budeets for statewide proarams are IOU soecific and are filed under seoarate proaram IDs. Thev include all non-contract proaram expenditures which cover coordination. supoort and manaement. Estimate for vear end 2021. This does not include anv contract imolementation cost.
***Launch date assumes that the signed contracts filed via AL are approved by ED in 90-days. where applicable.
BP Decision (D.18-05-041): OP 23. The 25 percent requirement for statewide funding articulated in D.16-08-019 shall be calculated as a proportion of the utility program administrator's total portfolio budget, including evaluation, measurement, and verification funding, but excluding funding allocated to other program administrators for other (non-statewide) programs. The percentage requirement for statewide program funding for the Southern California Gas Company shall be reduced to 15 percent, but remain 25 percent for the other utility program administrators consistent with D.16-08-019.

INPUT TABLE: DO NOT MODIFY				
IOU	Percent PPP Electric	Percent PPP Gas	Electric Proportional Share	Gas Proportional Share
PG&E	80%	20%	44.4%	50.4%
SDG&E	90%	10%	15.5%	7.8%
SCE	100%	0%	40.1%	0.0%
SoCalGas	0%	100%	0.0%	41.8%

ADVICE LETTER 3268-E-A/2701-G-A
(San Diego Gas & Electric Company - U902 M)
ADVICE LETTER 5346-G-A
(Southern California Gas Company - U904 G)
ADVICE LETTER 3861-E-A
(Southern California Edison Company - U338 E)
ADVICE LETTER 5373-E-A/4009-G-A
(Pacific Gas & Electric Company – U39 M)

Pa Name: #REF!
Budget Ye #REF!
Table 7.1 - PA 2024-2031 Budget Savings By Segment

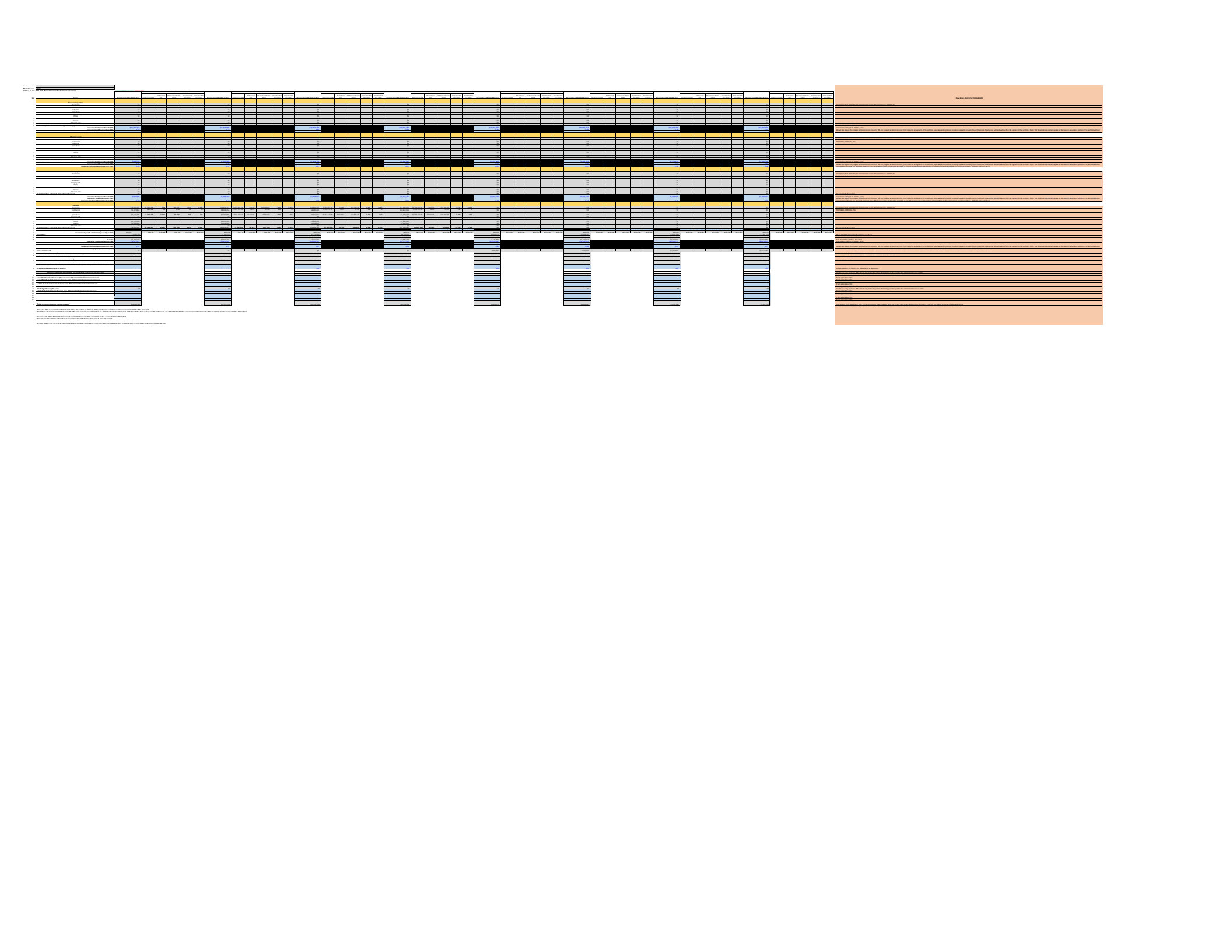
	Segment	Requested Budget	TSB	TRC	PAC	kWh	kW	Therms	First Year Net Elec CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
2024	Resource Acquisition	-	12,594,764	0	1	-	-	-	-	-	185,486,081	3,047,964	39,556	17,831	-
	Market Support	-	999,572	0	0	-	-	-	-	-	24,687,689	-	3,948	-	-
	Equity	-	802,935	0	0	-	-	-	-	-	16,231,862	202,686	2,601	1,186	-
	Codes & Standards	-													
	EM&V	1,742,425													
	TOTAL Portfolio	**1,742,425**	**14,397,271**	**0.24**	**0.35**	**-**	**-**	**-**	**-**	**-**	**226,405,631**	**3,250,651**	**46,105**	**19,016**	**-**
2025	Resource Acquisition	-	21,594,895	1	1	-	-	-	-	-	352,389,214	3,639,563	71,751	21,291	-
	Market Support	-	1,281,806	0	0	-	-	-	-	-	29,574,964	-	4,749	-	-
	Equity	-	1,958,784	0	0	-	-	-	-	-	40,312,883	408,529	6,789	2,390	-
	Codes & Standards	-													
	EM&V	2,203,341													
	TOTAL Portfolio	**2,203,341**	**24,835,485**	**0.32**	**0.48**	**-**	**-**	**-**	**-**	**-**	**422,277,061**	**4,048,091**	**83,289**	**23,681**	**-**
2026	Resource Acquisition	-	26,303,184	1	1	-	-	-	-	-	411,722,587	4,431,811	80,263	25,926	-
	Market Support	-	1,338,244	0	0	-	-	-	-	-	29,463,927	-	4,784	-	-
	Equity	-	2,646,615	0	0	-	-	-	-	-	49,474,642	600,742	8,331	3,514	-
	Codes & Standards	-													
	EM&V	2,372,771													
	TOTAL Portfolio	**2,372,771**	**30,288,042**	**0.35**	**0.54**	**-**	**-**	**-**	**-**	**-**	**490,661,157**	**5,032,553**	**93,379**	**29,440**	**-**
2027	Resource Acquisition	-	34,546,150	1	1	-	-	-	-	-	478,390,456	4,813,222	101,529	28,157	-
	Market Support	-	1,388,591	0	0	-	-	-	-	-	29,379,139	-	4,846	-	-
	Equity	-	3,237,761	0	0	-	-	-	-	-	59,411,889	636,582	9,978	3,724	-
	Codes & Standards	-													
	EM&V	2,757,337													
	TOTAL Portfolio	**2,757,337**	**39,172,503**	**0.39**	**0.60**	**-**	**-**	**-**	**-**	**-**	**567,181,484**	**5,449,804**	**116,353**	**31,881**	**-**
2028	Resource Acquisition	-	41,002,071	1	2	-	-	-	-	-	526,229,501	5,294,544	112,258	30,973	-
	Market Support	-	1,644,762	0	0	-	-	-	-	-	32,317,053	-	5,350	-	-
	Equity	-	3,848,127	0	0	-	-	-	-	-	65,353,078	700,240	11,081	4,096	-
	Codes & Standards	880,000													
	EM&V	3,080,128													
	TOTAL Portfolio	**3,960,128**	**46,494,960**	**0.40**	**0.63**	**-**	**-**	**-**	**-**	**-**	**623,899,632**	**5,994,784**	**128,690**	**35,069**	**-**
2029	Resource Acquisition	-	47,091,957	1	2	-	-	-	-	-	578,852,452	5,823,999	125,272	34,070	-
	Market Support	-	1,886,207	0	0	-	-	-	-	-	35,548,758	-	5,942	-	-
	Equity	-	4,404,120	0	0	-	-	-	-	-	71,888,386	770,264	12,242	4,506	-
	Codes & Standards	968,000													
	EM&V	3,388,141													
	TOTAL Portfolio	**4,356,141**	**53,382,284**	**0.42**	**0.66**	**-**	**-**	**-**	**-**	**-**	**686,289,596**	**6,594,263**	**143,455**	**38,576**	**-**
2030	Resource Acquisition	-	53,910,769	1	2	-	-	-	-	-	636,737,697	6,406,398	139,730	37,477	-
	Market Support	-	2,146,516	0	0	-	-	-	-	-	39,103,634	-	6,603	-	-
	Equity	-	5,003,465	0	0	-	-	-	-	-	79,077,225	847,290	13,540	4,957	-
	Codes & Standards	1,064,800													
	EM&V	3,726,682													
	TOTAL Portfolio	**4,791,482**	**61,060,751**	**0.44**	**0.69**	**-**	**-**	**-**	**-**	**-**	**754,918,556**	**7,253,689**	**159,873**	**42,434**	**-**
2031	Resource Acquisition	-	61,831,076	1	2	-	-	-	-	-	700,411,467	7,047,038	157,727	41,225	-
	Market Support	-	2,453,276	0	0	-	-	-	-	-	43,013,997	-	7,513	-	-
	Equity	-	5,707,124	0	0	-	-	-	-	-	86,984,947	932,019	15,275	5,452	-
	Codes & Standards	1,171,280													
	EM&V	4,099,651													
	TOTAL Portfolio	**5,270,931**	**69,991,476**	**0.46**	**0.71**	**-**	**-**	**-**	**-**	**-**	**830,410,411**	**7,979,058**	**180,515**	**46,677**	**-**
8-Yr Total		**27,454,556**	**339,622,772**	**0.39**	**0.61**	**-**	**-**	**-**	**-**	**-**	**4,602,043,529**	**45,602,892**	**951,659**	**266,777**	**-**

2024-2027 Total	Resource Acquisition	-	95,038,993	0.64	1.45	-	-	-	-	-	1,427,988,338	15,932,560	293,100	93,205	-
	Market Support	-	5,008,212	0.06	0.07	-	-	-	-	-	113,105,718	-	18,326	-	-
	Equity	-	8,646,095	0.15	0.16	-	-	-	-	-	165,431,277	1,848,539	27,700	10,814	-
	Codes & Standards	-													
	EM&V	9,075,874													
	TOTAL Portfolio	**9,075,874**	**108,693,300**	**0.39**	**0.61**	**-**	**-**	**-**	**-**	**-**	**1,706,525,333**	**17,781,099**	**339,126**	**104,019**	**-**
		QC ok	QC ok	BAD	BAD	QC ok	QC ok	QC ok	QC ok	QC ok	QC ok	QC ok	QC ok	QC ok	QC ok

Pa Name: #REF!
Budget Year: #REF!
Table 7.2 - PA 2024-2031 Budget Savings By Sector

	Sector	Requested Budget	TSB	TRC	PAC	kWh	kW	Therms (MM)	First Year Net Elec	First Year Net Gas	Lifecycle Net KWH	Lifecycle Net	Lifecycle Net	Lifecycle Net Gas	Lifecycle Net CO2e
2024	Residential	10,958,319	$6,871,306	0.46	0.63	5,271,599	545	278,021	1,024	1,626	48,187,417	2,608,960	11,216	15,262	-
	Commercial	5,395,854	$ 173,244	0.03	0.03	485,096	59	(130)	60	(1)	4,914,019	(3,047)	747	(18)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	2,679,779	$2,433,217	0.55	0.91	4,499,368	4,541	36,954	656	216	57,827,894	184,769	10,192	1,081	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	18,367,384	$4,919,503	0.17	0.27	13,521,005	3,899	90,519	1,977	530	115,476,302	459,968	23,950	2,691	-
	WE&T	2,590,000	$ -	0.00	0	-	-	-	-	-	-	-	-	-	-
	Finance	1,000,000	$ -	0.00	0	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	-	$ -	0.00	0	-	-	-	-	-	-	-	-	-	-
	EM&V	1,742,425													
	TOTAL Portfolio	**42,733,761**	**14,397,271**	**0.24**	**0.35**	**23,777,067**	**9,043**	**405,363**	**3,717**	**2,371**	**226,405,631**	**3,250,651**	**46,105**	**19,016**	**-**
2025	Residential	11,925,713	$8,741,469	0.52	0.73	6,258,891	673	331,109	1,381	1,937	57,348,865	3,112,644	13,725	18,209	-
	Commercial	8,303,254	$ 498,506	0.05	0.06	1,216,352	99	42	173	0	13,520,449	(1,557)	2,105	(9)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	5,293,889	$6,686,498	0.66	1.26	12,047,732	12,014	73,908	1,931	432	155,369,749	369,538	28,083	2,162	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	22,579,162	$8,909,013	0.23	0.39	23,680,628	5,471	111,085	3,661	650	196,037,997	567,467	39,377	3,320	-
	WE&T	2,710,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	1,160,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	2,203,341													
	TOTAL Portfolio	**54,175,359**	**24,835,485**	**0.31**	**0.47**	**43,203,603**	**18,257**	**516,143**	**7,147**	**3,019**	**422,277,061**	**4,048,091**	**83,289**	**23,681**	**-**
2026	Residential	12,865,769	$9,674,352	0.54	0.75	6,783,855	744	356,203	1,561	2,084	60,221,427	3,246,887	14,636	18,994	-
	Commercial	6,481,349	$ 527,028	0.07	0.08	1,298,576	69	52	187	0	13,555,327	(1,947)	2,135	(11)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	6,551,046	$9,117,756	0.66	1.39	20,752,349	20,236	110,861	3,401	649	196,127,156	554,307	35,882	3,243	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	25,995,268	##########	0.25	0.42	28,089,305	6,727	241,922	4,376	1,415	220,757,247	1,233,305	40,725	7,215	-
	WE&T	2,820,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	1,216,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	2,372,771													
	TOTAL Portfolio	**58,302,203**	**30,288,042**	**0.35**	**0.53**	**56,924,086**	**27,776**	**709,038**	**9,525**	**4,148**	**490,661,157**	**5,032,553**	**93,379**	**29,440**	**-**
2027	Residential	13,680,026	##########	0.67	1.16	10,262,653	1,092	453,966	2,525	2,656	93,936,593	4,148,824	23,292	24,271	-
	Commercial	10,614,944	$ 643,163	0.06	0.06	1,537,653	78	62	248	0	15,977,549	(2,336)	2,549	(14)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	7,482,292	##########	0.69	1.45	24,067,104	23,504	118,252	4,200	692	222,943,615	591,261	41,490	3,459	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	29,191,429	##########	0.26	0.40	28,783,868	6,321	137,665	4,866	805	234,323,728	712,055	49,023	4,166	-
	WE&T	2,880,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	1,300,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	2,757,337													
	TOTAL Portfolio	**67,906,028**	**39,172,503**	**0.39**	**0.59**	**64,651,278**	**30,995**	**709,946**	**11,839**	**4,153**	**567,181,484**	**5,449,804**	**116,353**	**31,881**	**-**
2028	Residential	-	##########	0.70	1.21	-	-	-	-	-	103,330,252	4,563,706	25,832	26,698	-
	Commercial	-	$ 762,633	0.06	0.06	-	-	-	-	-	17,575,304	(2,570)	2,809	(15)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	-	##########	0.71	1.51	-	-	-	-	-	245,237,976	650,387	45,770	3,805	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	-	##########	0.27	0.43	-	-	-	-	-	257,756,101	783,260	54,279	4,582	-
	WE&T	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	880,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	3,080,128													
	TOTAL Portfolio	**3,960,128**	**46,494,960**	**0.40**	**0.63**	**-**	**-**	**-**	**-**	**-**	**623,899,632**	**5,994,784**	**128,690**	**35,069**	**-**
2029	Residential	-	##########	0.72	1.26	-	-	-	-	-	113,663,277	5,020,077	28,742	29,367	-
	Commercial	-	$ 870,575	0.06	0.07	-	-	-	-	-	19,332,834	(2,827)	3,104	(17)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	-	##########	0.74	1.59	-	-	-	-	-	269,761,774	715,426	51,061	4,185	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	-	##########	0.28	0.45	-	-	-	-	-	283,531,711	861,586	60,549	5,040	-
	WE&T	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Finance	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	968,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	3,388,141													
	TOTAL Portfolio	**4,356,141**	**53,382,284**	**0.42**	**0.66**	**-**	**-**	**-**	**-**	**-**	**686,289,596**	**6,594,263**	**143,455**	**38,576**	**-**
2030	Residential	-	##########	0.75	1.31	-	-	-	-	-	154,687,480	6,309,053	37,808	36,908	-
	Commercial	-	$ 986,377	0.06	0.07	-	-	-	-	-	21,266,118	(3,109)	3,432	(18)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	-	##########	0.78	1.66	-	-	-	-	-	267,080,076	-	51,087	-	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	-	##########	0.30	0.47	-	-	-	-	-	311,884,882	947,745	67,545	5,544	-
	WE&T	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	1,064,800	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	3,726,682													
	TOTAL Portfolio	**4,791,482**	**61,060,751**	**0.44**	**0.69**	**-**	**-**	**-**	**-**	**-**	**754,918,556**	**7,253,689**	**159,873**	**42,434**	**-**
2031	Residential	-	##########	0.78	1.35	-	-	-	-	-	137,532,565	6,074,293	36,003	35,535	-
	Commercial	-	$ 1,123,006	0.07	0.07	-	-	-	-	-	23,392,729	(3,420)	3,860	(20)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	-	##########	0.81	1.73	-	-	-	-	-	326,411,746	865,666	64,290	5,064	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	-	##########	0.31	0.49	-	-	-	-	-	343,073,371	1,042,520	76,362	6,099	-
	WE&T	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	1,171,280	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	4,099,651													
	TOTAL Portfolio	**5,270,931**	**69,991,476**	**0.46**	**0.71**	**-**	**-**	**-**	**-**	**-**	**830,410,411**	**7,979,058**	**180,515**	**46,677**	**-**
8-Yr Total		**241,496,033**	##########	**0.39**	**0.61**	**188,556,035**	**86,071**	**2,340,491**	**32,227**	**13,692**	**4,602,043,529**	**45,602,892**	**951,659**	**266,777**	**-**

2024-2027 Total	Residential	49,429,827	##########	0.56	0.83	28,576,998	3,054	1,419,299	6,491	8,303	259,694,302	13,117,315	62,870	76,736	-
	Commercial	30,795,401	$ 1,841,941	0.05	0.06	4,537,676	305	25	668	0	47,967,344	(8,887)	7,535	(52)	-
	Industrial	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Agricultural	22,007,006	##########	0.66	1.32	61,366,554	60,295	339,975	10,188	1,989	632,268,414	1,699,876	115,647	9,944	-
	Emerging Tech	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Public	96,133,243	##########	0.24	0.40	94,074,806	22,418	581,191	14,880	3,400	766,595,275	2,972,795	153,074	17,391	-
	WE&T	11,000,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	Finance	4,676,000	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	OBF Loan Pool	-	$ -	N/A	N/A	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	-	$ -	0.00	0.00	-	-	-	-	-	-	-	-	-	-
	EM&V	9,075,874													
	TOTAL Portfolio	**223,117,351**	##########	**0.34**	**0.61**	**188,556,035**	**86,071**	**2,340,491**	**32,227**	**13,692**	**1,706,525,333**	**17,781,099**	**339,126**	**104,019**	**-**
		QC ok	QC ok	BAD	BAD	QC ok	QC ok	QC ok	BAD	QC ok	QC ok	QC ok	QC ok	QC ok	QC ok



Pa Name: SBEFI
Budget Year: 2024-2027
Table 8 - Caps & Targets

Line	Budget Category	2024 Energy Efficiency Cap And Target Expenditure Projections						2025 Energy Efficiency Cap And Target Expenditure Projections						2026 Energy Efficiency Cap And Target Expenditure Projections						2027 Energy Efficiency Cap And Target Expenditure Projections					
		Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
		Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs [2] (Local SW, CEC & AB 841)	Total Portfolio	Percent of Budget [8]	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs [2] (including SW)	Total Portfolio	Percent of Budget [8]	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs [2] (including SW)	Total Portfolio	Percent of Budget [8]	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs [2] (including SW)	Total Portfolio	Percent of Budget [8]	Cap %	Target %
1	**Administrative Costs**																								
2	PA [1]	$ -		$ -	0.0%	10.0%		$ -		$ -	0.0%	10.0%		$ -		$ -	0.0%	10.0%		$ -		$ -	0.0%	10.0%	
3	Non-PA Third Party & Partnership [2]	$ -	$ -	$ -	0.0%		10.0%	$ -	$ -	$ -	0.0%		10.0%	$ -	$ -	$ -	0.0%		10.0%	$ -	$ -	$ -	0.0%		10.0%
4	PA & Non-PA Target Exempt Programs [3]	$ -	$ -	$ -				$ -	$ -	$ -				$ -	$ -	$ -				$ -	$ -	$ -			
5	**Marketing and Outreach Costs [4]**																								
6	Marketing & Outreach	$ -	$ 2,061,085	$ 2,061,085	5.0%		6.0%	$ -	$ 2,596,334	$ 2,596,334	6.4%		6.0%	$ -	$ 2,800,978	$ 2,800,978	6.9%		6.0%	$ -	$ 3,305,132	$ 3,305,132	8.1%		6.0%
7	Statewide Marketing & Outreach [5]	$ -		$ -				$ -		$ -				$ -		$ -				$ -		$ -			
8	**Direct Implementation Costs**																								
9	Direct Implementation (Incentives and Rebates)	$ -	$ 13,156,732	$ 13,156,732				$ -	$ 20,701,199	$ 20,701,199				$ -	$ 21,774,019	$ 21,774,019				$ -	$ 26,665,649	$ 26,665,649			
10	Direct Implementation (Non Incentives and Non Rebates)	$ -	$ 5,399,233	$ 5,399,233	13.2%		20.0%	$ -	$ 5,591,272	$ 5,591,272	13.7%		20.0%	$ -	$ 6,431,795	$ 6,431,795	15.7%		20.0%	$ -	$ 7,218,881	$ 7,218,881	17.7%		20.0%
11	Direct Implementation Target Exempt Programs (Non Incentives and Non Rebates) [3]	$ -	$ 18,484,229	$ 18,484,229				$ -	$ 20,665,719	$ 20,665,719				$ -	$ 22,399,811	$ 22,399,811				$ -	$ 24,796,534	$ 24,796,534			
12	**EM&V Costs (PA and Energy Division) [4,7]**	$ 1,742,425		$ 1,742,425	4.3%	4.0%		$ 2,203,341		$ 2,203,341	4.3%	4.0%		$ 2,372,771		$ 2,372,771	4.3%	4.0%		$ 2,757,337		$ 2,757,337	4.3%	4.0%	
12a	EM&V - PA	$ 483,785		$ 483,785				$ 611,603		$ 611,603				$ 658,767		$ 658,767				$ 765,137		$ 765,137			
12b	EM&V - ED	$ 1,258,640		$ 1,258,640				$ 1,591,738		$ 1,591,738				$ 1,714,004		$ 1,714,004				$ 1,992,200		$ 1,992,200			
13	**Total Portfolio Budget (includes PA Program and EM&V Budget + SW ME&O) [8]**	**$ 1,742,425**	**$ 39,101,279**	**$ 40,843,704**				**$ 2,203,341**	**$ 49,554,524**	**$ 51,757,865**				**$ 2,372,771**	**$ 53,406,603**	**$ 55,779,374**				**$ 2,757,337**	**$ 61,986,196**	**$ 64,743,533**			
14	**PA Spending Budget Request (PA Program and EM&V) [9]**			$ 40,843,704						$ 51,757,865						$ 55,779,374						$ 64,743,533			
15	**Total Third-Party Implementer Contracts + CEC AB 841 (as defined per D.16-08-019, OP 10) [10, 11]**		$ 39,101,279		95.7%		60.0%		$ 49,554,524		95.7%		60.0%		$ 53,406,603		95.7%		60.0%		$ 61,986,196		95.7%		60.0%

Notes:
1. 10% cap requirement based on D. 09-09-047 is set for IOU only.
2. New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition. .
3. Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).

4. Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
5. Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter 4098-G/5544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
6. For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED = $0 .
7. The EM&V percentage is based on PA's total portfolio budget of $X, which excludes SWME&O, RENs, CCAs and CEC AB 841. This is the Total in line 13, minus SWME&O in line 7.
8. As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 92, this total includes SW ME&O and excludes REN and CCA budgets and is the denominator used to calculate the IOU PA Admin, Marketing, and Direct Implementation Non-Incentives percentages.
9. IOU PA's 2021 Proposed Budget of $X excludes SWME&O budget of $Y .
10. IOU PA's percentage for Third-Party Implementer Contracts uses $X as its denominator, which is IOU PA Subtotal including EM&V, but excluding SWME&O, REN, and CCA. This is the Total in line 13 15, minus SWME&O in line 7.
11. IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.

Pa Name: #REF!
Budget Year: #REF!

FUNCTION DEFINITIONS

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and	Planning &	DSM Goal Planning; lead legislative review/positioning; policy support on reg proceedings; portfolio optimization;
		Company Regulatory	Case management for EE proceedings
Program management	Includes labor, contracts, admin costs for program design, program implementation, product and channel	Program Management	Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs;
		Product Management	Manage end-to-end new products and services (P&S) intake, evaluation, and launch process; develop and
		Channel Management	
		Contract Management	Budget forecasting, spend tracking, invoice processing, and contract management with vendors and suppliers;
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project technical reviews and design assistance	Custom project support	Management of Emerging Products projects; Customized reviews; LCR/RFO support; Ex-ante review management; Technical policy support; Technical assessments; Workpapers; Tool development; End use subject matter expertise
		Deemed workpapers	
		Project management	
Customer Application/Rebate and Incentive Processing	Costs associated with application management and rebate and incentive processing (deemed and custom)	Rebate & Application Processing	
Inspections	Costs associated with project inspections	Inspections	
Portfolio Analytics	Includes analytics support, including internal performance reporting and external reporting	Data analytics	Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients ; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support ; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance
EM&V	EM&V expenditures	EM&V Studies	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTPP and IEPR; market potential study; integration w/ procurement planning; CPUC Demand Analysis
ME&O	Costs associated with utility EE marketing; no statewide; focus	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content &
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer
Account Management / Sales	Costs associated with account	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	

Pa Name: #REF!
Budget Year: #REF!

PORTFOLIO SUMMARY

	2021 EE Portfolio Expenditures (Expected)				2024 EE Portfolio Budget				2025 EE Portfolio Budget				2026 EE Portfolio Budget				2027 EE Portfolio Budget				2021 EE Portfolio Savings (Expected)			2024 EE Portfolio Forecasted Savings			2025 EE Portfolio Forecasted Savings			2026 EE Portfolio Forecasted Savings			2027 EE Portfolio Forecasted Savings		
Sector	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl.	Incentives	Total	Labor	Non-Labor (excl.	Incentives	Total	Labor	Non-Labor (excl.	Incentives	Total	KWH	KW	MTHERMS	KWH	KW	MTHERMS	KWH	KW	MTHERMS	KWH	KW	MTHERMS	KWH	KW	MTHERMS
Residential	$ 994,071.0000	$ 3,450,401.0000	############	$ 8,760,472	$ 180,966	$ 3,004,253	$7,773,100.000	$ 10,958,319	$ 196,942	$ 3,269,466	$ 8,459,305	$ 11,925,713	$ 212,466	$ 3,527,187	$ 9,126,116	$ 12,865,769	$ 225,912	$ 3,750,417	$ 9,703,697	$ 13,680,026	4,100,000		175,000	5,271,599	545	278,021	6,258,891	673	331,109	6,783,855	744	356,203	########	1,092	453,966
Commercial	$ -	$ -	$ -	$ -	$ 527,085	$ 2,828,672	$2,040,097.000	$ 5,395,854	$ 622,323	$ 3,008,390	$ 4,672,541	$ 8,303,254	$ 438,540	$ 2,570,153	$ 3,472,656	$ 6,481,349	$ 814,509	$ 3,717,621	$ 6,082,814	$ 10,614,944				485,096	58	(120)	1,216,352	99	42	1,298,576	69	52	1,537,653	78	62
Industrial	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -														
Agricultural	$ -	$ -	$ -	$ -	$ 267,977	$ 1,102,980	$1,308,822.000	$ 2,679,779	$ 529,389	$ 1,819,257	$ 2,945,243	$ 5,293,889	$ 655,104	$ 2,171,096	$ 3,724,846	$ 6,551,046	$ 748,229	$ 2,429,906	$ 4,304,157	$ 7,482,292				4,499,368	4,541	36,954	########	12,014	73,908	20,752,349	20,236	110,861	########	23,504	118,252
Public	############	$ 9,406,950.0000	$ -	$ 11,225,467	$ 1,243,629	$ 15,089,042	$2,034,713.000	$ 18,367,384	$ 1,467,241	$ 16,487,811	$ 4,624,110	$ 22,579,162	$ 1,685,318	$ 18,859,540	$ 5,450,401	$ 25,995,268	$ 1,823,545	$ 20,792,903	$ 6,574,981	$ 29,191,429	1,450,000			13,521,005	3,899	90,519	########	5,471	111,085	28,089,305	6,727	241,922	########	6,321	137,665
Cross Cutting*	$ 258,805.0000	$ 1,041,327.0000		$ 1,300,132	$ 320,400	$ 3,919,600	$ -	$ 4,240,000	$ 321,600	$ 4,268,400	$ -	$ 4,590,000	$ 341,400	$ 4,504,600	$ -	$ 4,846,000	$ 350,300	$ 4,629,700	$ -	$ 4,980,000				-	-	-	-	-	-	-	-	-	-	-	-
Total Sector Budget	$ 3,071,393	$ 13,898,678	$ 4,316,000	$ 21,286,071	$ 2,540,057	$ 25,944,547	############	$ 41,641,336	$ 3,137,495	$ 28,853,324	$ 20,701,199	$ 52,692,018	$ 3,332,828	$ 31,632,585	$ 21,774,019	$ 56,739,432	$ 3,962,495	$ 35,320,547	$ 26,665,649	$ 65,948,691	5,550,000	-	175,000	23,777,067	9,043	405,363	########	18,257	516,143	56,924,086	27,776	709,038	########	30,995	709,946
EM&V-PA		$ 247,257		$ 247,257	$ -	$ 483,785	$ -	$ 483,785	$ -	$ 611,603	$ -	$ 611,603	$ -	$ 658,767	$ -	$ 658,767	$ -	$ 765,137	$ -	$ 765,137														
EM&V-ED				$ -	$ -	$ 1,258,640	$ -	$ 1,258,640	$ -	$ 1,591,738	$ -	$ 1,591,738	$ -	$ 1,714,004	$ -	$ 1,714,004	$ -	$ 1,992,200	$ -	$ 1,992,200														
DBF - Loan Pool**				$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -														
PA Spending Budget Request (PA	$ 3,071,393	$ 14,145,935	$ 4,316,000	$ 21,533,328	$ 2,540,057	$ 27,686,972	$ 13,156,732	$ 43,383,761	$ 3,137,495	$ 31,056,665	$ 20,701,199	$ 54,895,359	$ 3,332,828	$ 34,005,356	$ 21,774,019	$ 59,112,203	$ 3,962,495	$ 38,077,884	$ 26,665,649	$ 68,706,028	5,550,000.00	-	175,000.00	23,777,067	9,043	405,363	########	18,257	516,143	56,924,086	27,776	709,038	########	30,995	709,946

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Finance.
** For SDG&E and SCG the loan pool is not part of the authorized EE portfolio budget and is collected and tracked through a separate balancing account.

Pa Name: #REF!
Budget Year: 2024-2027

PORTFOLIO STAFFING

Functional Group	2021 EE Portfolio FTE	2022 EE Portfolio FTE	2023 EE Portfolio FTE	2024 EE	2025 EE	2026 EE	2027 EE
Policy, Strategy, and Regulatory Reporting Compliance	1.0	1.0	1.0	1.3	1.5	1.5	1.5
Program Management	3.0	3.0	3.0	3.5	4.0	4.0	4.0
Engineering Services	-	-	-	-	-	-	-
Customer Application/Rebate/Incentive Processing	0.5	0.5	0.5	0.8	1.0	1.0	1.0
Customer Project Inspections	-	-	-	-	-	-	-
Portfolio Analytics (1)	0.5	0.5	0.5	0.8	1.0	1.0	1.0
EM&V	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ME&O (Local)	0.3	0.3	0.3	0.5	0.8	0.8	0.8
Account Management / Sales	0.1	0.1	0.1	0.3	0.3	0.3	0.3
IT	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Call Center	-	-	-	-	-	-	-
Total	6.5	6.5	6.5	8.1	9.7	9.7	9.7

Notes:
(1) SDG&E does not have a Portfolio Analytics group. Each group performs their own analytics.
(2) FTE is equal to productive labor of 1788 hour per year.

Sector	Cost Element	Functional Group	2021 EE Portfolio	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	$ 154,081.005	$ 143,425.000	$ 140,584.000	$ 28,049.730	$ 30,526.010	$ 32,932.230	$ 35,016.360
		Program Management	$ 462,342.422	$ 430,277.000	$ 421,752.000	$ 84,167.290	$ 91,597.720	$ 98,817.940	$ 105,071.660
		Engineering services	$ -	$-		$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 77,040.503	$ 71,713.000	$ 70,292.000	$ 14,024.870	$ 15,263.010	$ 16,466.120	$ 17,508.180
		Customer Project Inspections	$ -	$-	$-	$ -	$ -	$ -	$ -
		Portfolio Analytics	$ 231,220.915	$ 215,139.000	$ 210,876.000	$ 42,092.690	$ 45,808.710	$ 49,419.590	$ 52,547.130
		ME&O (Local)	$ 38,569.955	$ 35,856.000	$ 35,146.000	$ 7,021.480	$ 7,641.350	$ 8,243.680	$ 8,765.390
		Account Management / Sales	$ 15,408.101	$ 14,343.000	$ 14,058.000	$ 2,804.970	$ 3,052.600	$ 3,293.220	$ 3,501.640
		IT	$ 15,408.101	$ 14,343.000	$ 14,059.000	$ 2,804.970	$ 3,052.600	$ 3,293.220	$ 3,501.640
		Call Center							
	Labor Total		**$ 994,071.000**	**$ 925,096.000**	**$ 906,767.000**	**$ 180,966.000**	**$ 196,942.000**	**$ 212,466.000**	**$ 225,912.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation	$ 3,450,401.000	$ 3,156,198.000	$ 3,174,498.000	$ 3,004,253.000	$ 3,269,467.000	$ 3,527,185.000	$ 3,750,417.000
		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	$ 4,316,000.000	$ 6,164,706.000	$ 5,264,706.000	$ 7,773,100.000	$ 8,459,305.000	$ 9,126,116.000	$ 9,703,697.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		**$ 7,766,401.000**	**$ 9,320,904.000**	**$ 8,439,204.000**	**$ 10,777,353.000**	**$ 11,728,772.000**	**$ 12,653,301.000**	**$ 13,454,114.000**
Residential Total			**$ 8,760,472.000**	**$ 10,246,000.000**	**$ 9,345,971.000**	**$ 10,958,319.000**	**$ 11,925,714.000**	**$ 12,865,767.000**	**$ 13,680,026.000**
	Other (collected through GRC) (2)	Labor Overheads							
			$ -			$ -	$ 1.00	$ (2.00)	$ -

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".

Pa Name: #REF!
Budget Year: 2024-2027
COMMERCIAL BUDGET DETAIL

						527085	622323	438540	814509
Sector	Cost Element	Functional Group	2021 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				$ 81,698.180	$ 96,460.070	$ 67,973.700	$ 126,248.900
		Program Management				$ 245,147.230	$ 289,442.420	$ 203,964.950	$ 378,828.140
		Engineering services				$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing				$ 40,849.090	$ 48,230.030	$ 33,986.850	$ 63,124.450
		Customer Project Inspections				$ -	$ -	$ -	$ -
		Portfolio Analytics				$ 122,599.960	$ 144,752.330	$ 102,004.400	$ 189,454.790
		ME&O (Local)				$ 20,450.900	$ 24,146.130	$ 17,015.360	$ 31,602.940
		Account Management / Sales				$ 8,169.820	$ 9,646.010	$ 6,797.370	$ 12,624.890
		IT				$ 8,169.820	$ 9,646.010	$ 6,797.370	$ 12,624.890
		Call Center							
	Labor Total		**$ -**	**$ -**	**$ -**	**$ 527,085.000**	**$ 622,323.000**	**$ 438,540.000**	**$ 814,509.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation				$ 2,828,672.000	$ 3,008,389.000	$ 2,570,152.000	$ 3,717,620.000
		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				$ 2,040,097.000	$ 4,672,541.000	$ 3,472,656.000	$ 6,082,814.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		**$ -**	**$ -**	**$ -**	**$ 4,868,769.000**	**$ 7,680,930.000**	**$ 6,042,808.000**	**$ 9,800,434.000**
Commercial Total (5)			**$ -**	**$ -**	**$ -**	**$ 5,395,854.000**	**$ 8,303,253.000**	**$ 6,481,348.000**	**$ 10,614,943.000**
	Other (collected through GRC) (2)	Labor Overheads							
			$ -			$ -	$ (1.00)	$ (1.00)	$ (1.00)

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.

C. → Table showing costs by functional area of management structure¶

Pa Name: #REF!
Budget Year: 2024-2027
INDUSTRIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2021 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							
		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		$ -	$ -	$ -	$ -	$ -	$ -	$ -
Industrial Total (5)			$ -	$ -	$ -	$ -	$ -	$ -	$ -
	Other (collected through GRC) (2)	Labor Overheads							
			$ -			$ -	$ -	$ -	$ -

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

Pa Name: #REF!
Budget Year: 2024-2027
AGRICULTURAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2021 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				$ 41,536.440	$ 82,055.300	$ 101,541.120	$ 115,975.500
		Program Management				$ 124,636.100	$ 246,218.820	$ 304,688.870	$ 348,001.310
		Engineering services				$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing				$ 20,768.220	$ 41,027.650	$ 50,770.560	$ 57,987.730
		Customer Project Inspections				$ -	$ -	$ -	$ -
		Portfolio Analytics				$ 62,331.450	$ 123,135.880	$ 152,377.190	$ 174,038.070
		ME&O (Local)				$ 10,397.510	$ 20,540.290	$ 25,418.040	$ 29,031.290
		Account Management / Sales				$ 4,153.640	$ 8,205.530	$ 10,154.110	$ 11,597.550
		IT				$ 4,153.640	$ 8,205.530	$ 10,154.110	$ 11,597.550
		Call Center							
	Labor Total		$ -	$ -	$ -	**$ 267,977.000**	**$ 529,389.000**	**$ 655,104.000**	**$ 748,229.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation				$ 1,102,980.000	$ 1,819,257.000	$ 2,171,094.000	$ 2,429,905.000
		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				$ 1,308,822.000	$ 2,945,243.000	$ 3,724,846.000	$ 4,304,157.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		$ -	$ -	$ -	**$ 2,411,802.000**	**$ 4,764,500.000**	**$ 5,895,940.000**	**$ 6,734,062.000**
Agricultural Total (5)			$ -	$ -	$ -	**$ 2,679,779.000**	**$ 5,293,889.000**	**$ 6,551,044.000**	**$ 7,482,291.000**
	Other (collected through GRC) (2)	Labor Overheads							
			$ -			$ -	$ -	$ (2.00)	$ (1.00)

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".

C. → Table·showing·costs·by·functional·area·of·management·structure¶

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Pa Name: #REF!
Budget Year: 2024-2027
PUBLIC SECTOR BUDGET DETAIL

Sector	Cost Element	Functional Group	2021 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio	2025 EE Portfolio	2026 EE Portfolio	2027 EE Portfolio
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 281,870.140	$ 206,824.000	$ 201,581.000	$ 192,762.500	$ 227,422.360	$ 261,224.290	$ 282,649.480
		Program Management	$ 845,792.260	$ 620,469.000	$ 604,745.000	$ 578,411.830	$ 682,413.790	$ 783,841.400	$ 848,130.780
		Engineering services	$ -	$-	$-	$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 140,935.070	$ 103,411.000	$ 100,791.000	$ 96,381.250	$ 113,711.180	$ 130,612.150	$ 141,324.740
		Customer Project Inspections	$ -			$ -	$ -	$ -	$ -
		Portfolio Analytics	$ 422,987.050	$ 310,234.000	$ 302,372.000	$ 289,268.110	$ 341,280.260	$ 392,004.960	$ 424,156.570
		ME&O (Local)	$ 70,558.460	$ 51,706.000	$ 50,395.000	$ 48,252.810	$ 56,928.930	$ 65,390.340	$ 70,753.550
		Account Management / Sales	$ 28,187.010	$ 20,682.000	$ 20,158.000	$ 19,276.250	$ 22,742.240	$ 26,122.430	$ 28,264.940
		IT	$ 28,187.010	$ 20,682.000	$ 20,158.000	$ 19,276.250	$ 22,742.240	$ 26,122.430	$ 28,264.940
		Call Center							
	Labor Total		**$ 1,818,517.000**	**$ 1,334,008.000**	**$ 1,300,200.000**	**$ 1,243,629.000**	**$ 1,467,241.000**	**$ 1,685,318.000**	**$ 1,823,545.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation	$ 9,406,950.000	$ 11,171,071.000	$ 10,566,800.000	$ 15,089,042.000	$ 16,487,810.000	$ 18,859,549.000	$ 20,792,905.000
		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		$ 835,000.000	$ 1,135,000.000	$ 2,034,713.000	$ 4,624,110.000	$ 5,450,401.000	$ 6,574,981.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		**$ 9,406,950.000**	**$ 12,006,071.000**	**$ 11,701,800.000**	**$ 17,123,755.000**	**$ 21,111,920.000**	**$ 24,309,950.000**	**$ 27,367,886.000**
Public Sector Total (5)			**$ 11,225,467.000**	**$ 13,340,079.000**	**$ 13,002,000.000**	**$ 18,367,384.000**	**$ 22,579,161.000**	**$ 25,995,268.000**	**$ 29,191,431.000**
	Other (collected through GRC) (2)	Labor Overheads							
			$ -			$ -	$ (1.00)	$ -	$ 2.00

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".

C. → Table·showing·costs·by·functional·area·of·management·structure¶

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Pa Name: #REF!
Budget Year: 2024-2027
CROSS -CUTTING BUDGET DETAIL

Sector	Cost Element	Functional Group	2021 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget	2024 EE Portfolio	2025 EE Portfolio	2026 EE Portfolio	2027 EE Portfolio
Cross-Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 40,114.780	$ 20,155.000	$ 20,155.000	$ 49,662.000	$ 49,848.000	$ 52,917.000	$ 54,296.500
		Program Management	$ 120,370.210	$ 60,465.000	$ 60,465.000	$ 149,018.040	$ 149,576.160	$ 158,785.140	$ 162,924.530
		Engineering services	$ -	$-	$-	$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 20,057.390	$ 10,078.000	$ 10,078.000	$ 24,831.000	$ 24,924.000	$ 26,458.500	$ 27,148.250
		Customer Project Inspections	$ -			$ -	$ -	$ -	$ -
		Portfolio Analytics	$ 60,198.040	$ 30,233.000	$ 30,233.000	$ 74,525.040	$ 74,804.160	$ 79,409.640	$ 81,479.780
		ME&O (Local)	$ 10,041.630	$ 5,039.000	$ 5,039.000	$ 12,431.520	$ 12,478.080	$ 13,246.320	$ 13,591.640
		Account Management / Sales	$ 4,011.480	$ 2,015.000	$ 2,015.000	$ 4,966.200	$ 4,984.800	$ 5,291.700	$ 5,429.650
		IT	$ 4,011.480	$ 2,015.000	$ 2,015.000	$ 4,966.200	$ 4,984.800	$ 5,291.700	$ 5,429.650
		Call Center							
	Labor Total		**$ 258,805.010**	**$ 130,000.000**	**$ 130,000.000**	**$ 320,400.000**	**$ 321,600.000**	**$ 341,400.000**	**$ 350,300.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation	$ 1,041,326.990	$ 1,170,000.000	$ 1,170,000.000	$ 3,919,600.000	$ 4,268,400.000	$ 4,504,600.000	$ 4,629,700.000
		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		**$ 1,041,326.990**	**$ 1,170,000.000**	**$ 1,170,000.000**	**$ 3,919,600.000**	**$ 4,268,400.000**	**$ 4,504,600.000**	**$ 4,629,700.000**
Cross-Cutting Total (5)			**$ 1,300,132.000**	**$ 1,300,000.000**	**$ 1,300,000.000**	**$ 4,240,000.000**	**$ 4,590,000.000**	**$ 4,846,000.000**	**$ 4,980,000.000**
	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.

C. → Table showing costs by functional area of management structure¶

Target 2027	Methodology	Key Definitions	Proxy Explanation
11,839			
44,760			
30,995			
90,132,221			
64,651,278			
1,010,818			
709,946			
N/A			
N/A			
794,375,898			
567,181,484			
7,453,625			
5,449,804			
15,203			
10,789			
37,726,219			
27,785,481			
479,645			
283,754			
N/A			
N/A			
329,195,471			
239,002,019			
3,546,492			
2,493,020			
11,003			HTR status not verified at time of report
7,245			HTR status not verified at time of report
14,169,408			HTR status not verified at time of report
9,610,335			HTR status not verified at time of report
147,061			HTR status not verified at time of report
89,331			HTR status not verified at time of report
N/A			HTR status not verified at time of report
N/A			HTR status not verified at time of report
132,114,176			HTR status not verified at time of report
88,962,348			HTR status not verified at time of report
1,071,671			HTR status not verified at time of report
764,445			HTR status not verified at time of report
2,102			
1			
73			
3,249			
1			
142			
28	Baseline savings tie to 2016 Annual Report. Targets are aligned with CPUC adopted	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
24	Baseline savings tie to 2016 Annual Report. Targets are aligned with CPUC adopted	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
2,175,198	Baseline savings tie to 2016 Annual Report. Targets are aligned with CPUC adopted	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
1,821,755	Baseline savings tie to 2016 Annual Report. Targets are aligned with CPUC adopted	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
130,090	Baseline savings tie to 2016 Annual Report. Targets are aligned with CPUC adopted	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
77,832	Baseline savings tie to 2016 Annual Report. Targets are aligned with CPUC adopted	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
N/A		Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
N/A	2016 achievements align with savings reported in 2016 Annual Report. PG&E estimated lifecycle savings targets based on 2016 achievements (baseline) and	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
10,806,169	2016 achievements align with savings reported in 2016 Annual Report. PG&E estimated lifecycle savings targets based on 2016 achievements (baseline) and	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
9,125,374	2016 achievements align with savings reported in 2016 Annual Report. PG&E estimated lifecycle savings targets based on 2016 achievements (baseline) and	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
618,614	2016 achievements align with savings reported in 2016 Annual Report. PG&E estimated lifecycle savings targets based on 2016 achievements (baseline) and	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
361,176	2016 achievements align with savings reported in 2016 Annual Report. PG&E estimated lifecycle savings targets based on 2016 achievements (baseline) and	Single family savings are based on dwelling type, and includes 83% of the savings from Residential Energy Advisor based	
2,127		Includes CO2 but not NOX and PM10 as these are not GHG equivalents.	
N/A	Numerator: Total downstream savings claimed Denominator: Total number of downstream participants (unique premise and account		
851	Numerator: Total downstream savings claimed Denominator: Total number of downstream participants (unique premise and account		
34	Numerator: Total downstream savings claimed Denominator: Total number of downstream participants (unique premise and account		
-	Midstream methodology --NOT FEASIBLE****Numerator: Total midstream savings	Since it is currently unclear how to define midstream "participants," PAs and ED agreed to report only the numerator for	
-	Midstream methodology --NOT FEASIBLE****Numerator: Total midstream savings	Since it is currently unclear how to define midstream "participants," PAs and ED agreed to report only the numerator for	
-	Midstream methodology --NOT FEASIBLE****Numerator: Total midstream savings	Since it is currently unclear how to define midstream "participants," PAs and ED agreed to report only the numerator for	
-	Numerator: net lifecycle savings from Home Energy Reports	1) Currently, the only opt-out program is the Home Energy Report using social norming through neighborhood	
-	Numerator: net lifecycle savings from Home Energy Reports	1) Currently, the only opt-out program is the Home Energy Report using social norming through neighborhood	
-	Numerator: net lifecycle savings from Home Energy Reports	1) Currently, the only opt-out program is the Home Energy Report using social norming through neighborhood	
-	Upstream methodology-- NOT FEASIBLE---Numerator: Total upstream savings	Since it is unclear how to define upstream "participants," PAs and ED agreed to report only the numerator for this metric	
-	Upstream methodology-- NOT FEASIBLE---Numerator: Total upstream savings	Since it is unclear how to define upstream "participants," PAs and ED agreed to report only the numerator for this metric	
-	Upstream methodology-- NOT FEASIBLE---Numerator: Total upstream savings	Since it is unclear how to define upstream "participants," PAs and ED agreed to report only the numerator for this metric	
TBD	Numerator: Number of downstream SF participants (unique account and premise IDs)		
TBD	Denominator: Total number of SF customers in DACs (unique account and premise		
TBD	Numerator: Number of SF HTR participants (unique account and premise IDs)		
99,486	Benefits)/Lifecycle Net kWh or (PAC Cost x Gas Benefits/Total Benefits)/Lifecycle Net therm or (PAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW respectively The adopted avoided cost methodology does not provide information to provide a		
1	PAC cost per kWh or per therm or per kW is (PAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kWh or (PAC Cost x Gas Benefits/Total Benefits)/Lifecycle Net		
31	PAC cost per kWh or per therm or per kW is (PAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kWh or (PAC Cost x Gas Benefits/Total Benefits)/Lifecycle Net		
100,896	Benefits)/Lifecycle Net kWh or (TRC Cost x Gas Benefits/Total Benefits)/Lifecycle Net therm or (TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW The adopted avoided cost methodology does not provide information to provide a		
1	TRC cost per kWh or per therm or per kW is (TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kWh or (TRC Cost x Gas Benefits/Total Benefits)/Lifecycle Net		
23	TRC cost per kWh or per therm or per kW is (TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kWh or (TRC Cost x Gas Benefits/Total Benefits)/Lifecycle Net		
	Numerator: Total SF energy use from PG&E database (gas + electric)		
1,084			
866			
7,643,088			
5,908,629			
356,235			
172,045			
N/A			The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
N/A			The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
76,610,543			
59,367,853			
3,599,078			
2,651,353			
12			
11			
252,207			
205,253			
94,276			
77,174			
N/A			The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
N/A			The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
2,188,873			
1,696,224			
805,057			
643,900			
225			
197			
3,530,903			
2,873,543			
38,819			
31,778			
N/A			
N/A			
30,644,217			
23,747,161			
331,494			
265,135			
2,110		Includes CO2 but not NOX and PM10 as these are not GHG equivalents.	
N/A	Numerator: Total savings claimed for MF retrofit projects.	focused on projects. "Energy savings" = Lifecycle NET savings Based on conversations with ED and the other PAs, PG&E agrees to assume that project = property for this filing	
566,690	Numerator: Total savings claimed for MF retrofit projects.	focused on projects. "Energy savings" = Lifecycle NET savings Based on conversations with ED and the other PAs, PG&E agrees to assume that project = property for this filing	The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
26,202	Numerator: Total savings claimed for MF retrofit projects.	focused on projects. "Energy savings" = Lifecycle NET savings Based on conversations with ED and the other PAs, PG&E agrees to assume that project = property for this filing	
N/A	Numerator - Total savings claimed for MF retrofit projects.	focused on projects. "Energy savings" = Lifecycle NET savings Based on conversations with ED and the other PAs, PG&E agrees to assume that project = property for this filing	
566,690	Numerator - Total savings claimed for MF retrofit projects.	focused on projects. "Energy savings" = Lifecycle NET savings Based on conversations with ED and the other PAs, PG&E agrees to assume that project = property for this filing	The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
26,202	Numerator: Total savings claimed for MF retrofit projects.	focused on projects. "Energy savings" = Lifecycle NET savings Based on conversations with ED and the other PAs, PG&E agrees to assume that project = property for this filing	
N/A	Numerator: Total MF savings Denominator: Total number of unique MF premise and account IDs of participants	Includes savings attributed to MF customers for Home Energy Reports, as this metric refers to overall MF savings per	
3	Numerator: Total MF savings Denominator: Total number of unique MF premise and account IDs of participants	Includes savings attributed to MF customers for Home Energy Reports, as this metric refers to overall MF savings per	The lifecycle value for kW is not an output of the CET, so the values presented here were calculated outside of CEDARs, using
0	Numerator: Total MF savings Denominator: Total number of unique MF premise and account IDs of participants	Includes savings attributed to MF customers for Home Energy Reports, as this metric refers to overall MF savings per	
1%	Numerator: Number of downstream MF projects.	Participation is defined as the first instance of participation. SoCalREN assumes project = participating property for this	Total number of multi-family units (in buildings with five (5) or more units) in
1%	Numerator: Number of downstream participating MF units (unique account and premise IDs)		Total number of multi-family properties (in buildings with five (5) or more units) in
3%	Numerator: Square footage of participating MF customers (unique account and premise IDs)		SqFt Per IE tracking database / Total sq. ft. of all multifamily properties (in buildings five (5) or more units) in SCE/SoCalGas
0%	Numerator: Number of participants in disadvantaged communities (unique account and premise IDs) Denominator: Total number of unique account and premise IDs in disadvantaged		Property = Participant / Total number of all multi-family properties (in buildings with five (5) or more units) in SCE/SoCalGas
1%	Numerator: Number of HTR MF participants (unique account and premise IDs)		Property Owner = Participant; SCE projects flagged as HTR by SoCalGas / Number of hard-to-reach benchmarked properties (in buildings with five (5) or more units) in SCE/SoCalGas territory in all counties.
-	Numerator: Total number of multifamily properties benchmarked		# benchmarked per ENERGY STAR Portfolio Manager / Eligible population (MFm properties) in SCG/SCE territory from
-	Numerator: Total number of multifamily properties benchmarked		# HTR benchmarked Per ENERGY STAR Portfolio Manager / Number of hard-to-reach benchmarked properties (in buildings with five (5) or more units) in
10,580			
1			
30			
19,830			
3			
56			
	multi-family properties (in buildings with 5 or more units) in joint SCE/SoCalGas		most recent available at time of
	Therms converted to BTU + kWh converted to BTU/ Total sq. ft. of multi-family		
96			
59			
2,390,972			
1,537,653			
104			
62			
N/A			
N/A			
24,145,977			
15,977,549			
(3,893)			
(2,336)			
N/A			
N/A			
N/A			
N/A			
-			
-			
N/A			
N/A			
N/A			
N/A			
-			
-			
248			
NA	Average total 1st year savings delivered per project divided by a		
NA	Average total 1st year savings delivered per project divided by average annual total		
NA	Average total 1st year savings delivered per project divided by average annual total		
NA	P1 Methodology: Numerator: Number of downstream participating (service accounts)	Participation is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if	Denominator based on SCE 2016 baseline referencing BBAL submission baseline
0.29%	P1 Methodology: Numerator: Number of downstream participating (service accounts)	Participation is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if	Denominator based on SCE 2016 baseline referencing BBAL submission baseline
0.02%	P1 Methodology: Numerator: Number of downstream participating (service accounts)	Participation is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if	Denominator based on SCE 2016 baseline referencing BBAL submission baseline
0.09%	Numerator: square footage of participating service commercial customers. The average for a small customer is 4,616 sq. ft. and for a medium customer is 21,788 sq.ft. This is multiplied by the number of participants.	Average square footage of commercial customer < 10,000 sq.ft. based on 2018 Commercial Building Energy Consumption Survey. Average square footage of a commercial customer in the Western US with square footage between 10,000 and 50,000 sq.ft. based on 2018 Commercial Building Energy Consumption Survey. Participation is defined as	Denominator based on SCE 2016 baseline referencing BBAL submission baseline
0.40%	Numerator: Number of commercial HTR participants (unique account and premise ID) Denominator: Total number of HTR commercial customers (unique account and		Denominator based on SCE 2016 baseline referencing BBAL submission baseline
N/A			Denominator based on SCE 2016 baseline referencing BBAL submission baseline
N/A			Denominator based on SCE 2016 baseline referencing BBAL submission baseline
N/A			Denominator based on SCE 2016 baseline referencing BBAL submission baseline
N/A			Denominator based on SCE 2016 baseline referencing BBAL submission baseline
N/A	Manager Denominator: total number of commercial HTR customers (unique account and premise ID)	HTR customers defined based on D.18-05-041.	Denominator based on SCE 2016 baseline referencing BBAL submission baseline
136,012			
7			

Pa Name: PA27
Budget Year: 2026-2027
Equity Segment Metrics

Items highlighted in yellow will be recommended by SoCalREN to be indicators due to the nature of the data being collected

THIS SET OF METRICS AND INDICATORS ARE BASED ON RECOMMENDATIONS BY CAEECC WORKING GROUPS. THEY HAVE NOT BEEN APPROVED BY THE CPUC. FINAL REPORT CAN BE FOUND AT: https://www.caeecc.org/equity-policy-working-group-meeting

UniRow	PA	Scenario2	Metric/	Metric/Indicator	Metric/Indicator Description	Metric/Indicator	Unit of Measure	Portfolio	Metric/Indicator	Metric/Indicator	Proxy	Notes	Threat	Metric/Indicator	Proxy Metric/Indicator	Proxy Metric/Indicator	Notes	All Comments	All notes as stated, existing					
~~Equity_0~~	~~SoCalREN~~	Equity	Metric	A0	~~Total # residential (1) or (2) unit multi-family household (hhs) served by the Equity programs~~	~~Households (HH)~~	~~Residential (RES)~~	Equity-All Tarnet Participants						# of Units that receive equity-targeted households: ICT to fill out										
Equity_2	SoCalREN	Equity	Indicator	A1.1	Single Family – equity market support (ex: education, information, training, technical support, etc.)	Households (HH)	Residential (RSF)	MI Target Participants																
Equity_3	SoCalREN	Equity	Indicator	A1.2	Single Family – equity resource acquisition (ex: energy saving action, etc.)	Households (HH)	Residential (RSF)	MI Target Participants																
Equity_4	SoCalREN	Equity	Indicator	A1.3	Multifamily – equity market support (ex: education, information, training, technical support, etc.)	Households (HH)	Residential Sector – Multi-family (MMF)	MI Target Participants										Be sure MF buildine definition (i.e. # of units) is consistent with BP metrics						
Equity_5	SoCalREN	Equity	Indicator	A1.4	Multifamily – equity resource acquisition (ex: energy saving action, etc.)	Households (HH)	Residential Sector – Multi-family (MMF)	MI Target Participants										Be sure MF buildine definition (i.e. # of units) is consistent with BP metrics						
~~Equity_6~~	~~SoCalREN~~	~~Equity~~	~~Metric~~	~~A0~~	~~Total # of equity-targeted buildings served by the Equity programs~~	~~Buildings~~	~~Residential Sector – Multi-family (MMF)~~	~~Equity-All Tarnet Participants~~	# of buildings	equity-targeted				# of buildings that ra	equity-targeted MF buildings: ICT to fill out			Be sure MF buildine definition (i.e. # of units) is consistent with BP metrics						
Equity_7	SoCalREN	Equity	Indicator	A2.1	Equity – resource acquisition (ex: energy saving action, etc.) technical support, etc.)	Buildings	Residential Sector – Multi-family (MMF)	MI Target Participants										Be sure MF buildine definition (i.e. # of units) is consistent with BP metrics						
Equity_8	SoCalREN	Equity	Indicator	A2.2	Equity – resource acquisition (ex: energy saving action, etc.)	Buildings	Residential Sector – Multi-family (MMF)	MI Target Participants										Be sure MF buildine definition (i.e. # of units) is consistent with BP metrics						
Equity_9	SoCalREN	Equity	Metric	A3	Total # Ag or Ind. equity-targeted customers served by the Equity programs	Customers	Industrial (I) and Aericultural (A)	Equity-All Tarnet Participants	# of Customers	equity-targeted				# of customers that a	equity-targeted households: Lincus to fill out if THERE ARE EQUITY AG PROGRAMS/Customers: individual service accounts									
Equity_10	SoCalREN	Equity	Indicator	A3.1	Ag – equity market support (ex: education, information, training, technical support, etc.)	Customers	Aericultural (A)	MI Target Participants																
Equity_11	SoCalREN	Equity	Indicator	A3.3	Ag – equity resource acquisition (ex: energy saving action, etc.)	Customers	Aericultural (A)	MI Target Participants																
Equity_12	SoCalREN	Equity	Indicator	A3.3	Ind – equity market support (ex: education, information, training, technical support, etc.)	Customers	Industrial (I)	MI Target Participants																
Equity_13	SoCalREN	Equity	Indicator	A3.4	Ind – equity resource acquisition (ex: energy saving action, etc.)	Customers	Industrial (I)	MI Target Participants																
Equity_14	SoCalREN	Equity	Metric	A4	Total # equity-targeted public facilities and equipment or community projects served by the Equity programs	Projects	Public Sector (P)	Equity-All Tarnet Participants	Count of	Equity-targeted				Count of facilities and	equity-targeted public facilities, equipment and community projects: located within a public agency classified as a Hard-to-reach through SoCalREN's proposed definition.									
Equity_15	SoCalREN	Equity	Indicator	A4.1	Equity - Market support (ex: education, information, training, technical support, etc.)	Projects	Public Sector (P)	MI Target Participants																
Equity_16	SoCalREN	Equity	Indicator	A4.2	Equity – resource acquisition (ex: energy saving action, etc.)	Projects	Public Sector (P)	MI Target Participants																
Equity_17	SoCalREN	Equity	Metric	A5	Total # small and medium business (SMB) equity-targeted participants served by the Equity programs	Businesses	Commercial Sector (C)	Equity-All Tarnet Participants	Count of MTB					Count of MTB small and medium businesses that receive one or more services from				Is distinction between Small and Medium business needed?						
Equity_18	SoCalREN	Equity	Indicator	A5.1	Equity - Market support (ex: education, information, training, technical support, etc.)	Businesses	Commercial Sector (C)	MI Target Participants																
Equity_19	SoCalREN	Equity	Indicator	A5.2	Equity – resource acquisition (ex: energy saving action, etc.)	Businesses	Commercial Sector (C)	MI Target Participants																
Equity_20	SoCalREN	Equity	Metric	A6	Total # of companies/non-profits served by the Equity Segment programs	Businesses	Commercial Sector (C)	Equity-All Tarnet Participants	Count of					Count of companies/non-profits that receive one or more services from SoCalREN commercial programs										
Equity_21	SoCalREN	Equity	Indicator	A6.1	Equity - Market support (ex: education, information, training, technical support, etc.)	Businesses	Commercial Sector (C)	MI Target Participants																
Equity_22	SoCalREN	Equity	Indicator	A6.2	Equity – resource acquisition (ex: energy saving action, etc.)	Businesses	Commercial Sector (C)	MI Target Participants																
Equity_23	SoCalREN	Equity	Metric	A7	Total # of contractors/workers served by Equity Segment Programs	Contractors/Workers	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants	Count of					Count of contractors or workers that receive one or more services from SoCalREN com	Would we just want the number of workers or would we want it by sector and/or by type of work (construction. consultine. admin. trainers. etc?									
Equity_24	SoCalREN	Equity	Indicator	A8	Total # Indicator for all (and % (metric for PAs with no relevant (and restrictions) of contractors and/or workers that	Contractors/Workers	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_25	SoCalREN	Equity	Indicator	A9	Total # Indicator for all (and % (metric for PAs with no relevant (and restrictions) of contractors (hrs. and/or jobs. (ex:	Contractors	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_26	SoCalREN	Equity	Metric	B1	Expected first-year kW savings in total $ for equity-targeted program participants (metric)	Dollars	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants	Using blended					Using blended rates ($0.26/kWh and $1.24 /therm) I. multiply the rate by the projected	Per the Equity WG report. the methodology and how fuel-switchine will be handled still needs to be clarified									
Equity_27	SoCalREN	Equity	Indicator	B2	GHG reductions (tons) - Equity All	Lifecycle GHG reductions (tons) - Net	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_28	SoCalREN	Equity	Indicator	B2.1	GHG reductions (tons) EquityDAC	Lifecycle GHG reductions (tons) - Net	Portfolio Level (PL)– All Sectors	Equity-DAC Participants																
Equity_29	SoCalREN	Equity	Indicator	B2.2	GHG reductions (tons) EquityHTR	Lifecycle GHG reductions (tons) - Net	Portfolio Level (PL)– All Sectors	Equity-HTR Participants																
Equity_30	SoCalREN	Equity	Indicator	B2.3	GHG reductions (tons) EquityUnderserved	Lifecycle GHG reductions (tons) - Net	Portfolio Level (PL)– All Sectors	Equity-Underserved Participants																
Equity_31	SoCalREN	Equity	Indicator	B3	Total kWh savings EquityAll	Lifecycle ex-ante kWh net	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_32	SoCalREN	Equity	Indicator	B3.1	Total kWh savings EquityDAC	Lifecycle ex-ante kWh net	Portfolio Level (PL)– All Sectors	Equity-DAC Participants																
Equity_33	SoCalREN	Equity	Indicator	B3.2	Total kWh savings EquityHTR	Lifecycle ex-ante kWh net	Portfolio Level (PL)– All Sectors	Equity-HTR Participants																
Equity_34	SoCalREN	Equity	Indicator	B3.3	Total kWh savings EquityUnderserved	Lifecycle ex-ante kWh net	Portfolio Level (PL)– All Sectors	Equity-Underserved Participants																
Equity_35	SoCalREN	Equity	Indicator	B4	Total kW savings EquityAll	Lifecycle ex-ante kW net	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_36	SoCalREN	Equity	Indicator	B4.1	Total kW savings EquityDAC	Lifecycle ex-ante kW net	Portfolio Level (PL)– All Sectors	Equity-DAC Participants																
Equity_37	SoCalREN	Equity	Indicator	B4.2	Total kW savings EquityHTR	Lifecycle ex-ante kW net	Portfolio Level (PL)– All Sectors	Equity-HTR Participants																
Equity_38	SoCalREN	Equity	Indicator	B4.3	Total kW savings EquityUnderserved	Lifecycle ex-ante kW net	Portfolio Level (PL)– All Sectors	Equity-Underserved Participants																
Equity_39	SoCalREN	Equity	Indicator	B5	Total Therm savings EquityAll	Lifecycle ex-ante Therm net	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_40	SoCalREN	Equity	Indicator	B5.1	Total Therm savings EquityDAC	Lifecycle ex-ante Therm net	Portfolio Level (PL)– All Sectors	Equity-DAC Participants																
Equity_41	SoCalREN	Equity	Indicator	B5.2	Total Therm savings EquityHTR	Lifecycle ex-ante Therm net	Portfolio Level (PL)– All Sectors	Equity-HTR Participants																
Equity_42	SoCalREN	Equity	Indicator	B5.3	Total Therm savings EquityUnderserved	Lifecycle ex-ante Therm net	Portfolio Level (PL)– All Sectors	Equity-Underserved Participants																
Equity_43	SoCalREN	Equity	Indicator	B6	Community engagement activities during program design and to identify community needs and solutions	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_44	SoCalREN	Equity	Indicator	B7	Community engagement activities during program implementation	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_45	SoCalREN	Equity	Indicator	B8	Community engagement activities during program assessment	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_46	SoCalREN	Equity	Indicator	C1	Energy and climate benefits (monetized public TRC)	Dollars	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_47	SoCalREN	Equity	Indicator	C1.1	Identify – "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at be	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_48	SoCalREN	Equity	Indicator	C1.2	Comfort - "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at l	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_49	SoCalREN	Equity	Indicator	C1.3	Safety - "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at be	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																
Equity_50	SoCalREN	Equity	Indicator	C1.4	Economic or other "non-energy benefits" (as proposed by the PAs or program) in dollars or "counts of participants rec	Counts	Portfolio Level (PL)– All Sectors	Equity-All Tarnet Participants																

Lifecycle ex-ante kWh net
Lifecycle ex-ante kWh net in Disadvantaged Communities
Lifecycle ex-ante kWh net in Hard-to-Reach Markets

Lifecycle ex-ante kW net
Lifecycle ex-ante kW net in Disadvantaged Communities
Lifecycle ex-ante kW net in Hard-to-Reach Markets

Lifecycle ex-ante Therm net
Lifecycle ex-ante Therm net in Disadvantaged Communities
Lifecycle ex-ante Therm net in Hard-to-Reach Markets

Pa Name: #REF!
Budget Year: 2024-2027
Market Support Seement Metrics

Items highlighted in yellow will be recommended by SoCalREN to be indicators due to the nature of the data being collected

THIS SET OF METRICS AND INDICATORS ARE BASED ON RECOMMENDATIONS BY CAEECC WORKING GROUPS. THEY HAVE NOT BEEN APPROVED BY THE CPUC. FINAL REPORT CAN BE FOUND AT: https://www.caeecc.org/market-support-metrics-wg

Index #	PA	Segment	Indicator	ator #	Metric/Indicator Description	Units of Measure	Sector	Participant	Results	Results	Target 2024	Target	Target	Target	Methodology	Key Definitions	Proxy Explanation	Notes	ED Comments
MS 1	SoCalREN	Market Sup	Metric		**Number and % increase/decrease of inquiries and/or requests for information on EE products and services**	**Percent/Count**	Public, WE&T, Commercial	Public agencies,							Year over year comparison of any	Customer: program			Specificity, Granularity of sector
MS 2	SoCalREN	Market Sup	Metric		**Number and % increase/decrease of customers receiving information, education, or outreach on EE projects,**	**Percent/Count**	Public, WE&T, Commercial	Public agencies,							Year over year comparison of any	Customer: program		Individual customers may receive	Specificity, Granularity of sector
MS 3	SoCalREN	Market Sup	Metric		% of customer samole aware of EE product/service (awareness)	Percent		IOU Customers							Survey				Granularity, population/participant, methodology
MS 4	SoCalREN	Market Sup	Metric		% of customer sample that is knowledgeable of EE product/service's benefits (knowledge)	Percent		IOU Customers							Survey				Granularity, population/participant, methodology
MS 5	SoCalREN	Market Sup	Metric		% of customer sample that is interested in obtaining an EE product/service (attitude)	Percent		IOU Customers							Survey				Granularity, population/participant, methodology
MS 6	SoCalREN	Market Sup	Metric		% of customer sample that has taken action towards obtaining EE product/service (behavior a)	Percent		IOU Customers							Survey				Granularity, population/participant, methodology
MS 7	SoCalREN	Market Sup	Metric		% of customers that have obtained EE products/services (behavior b)	Percent		IOU Customers							Survey				Granularity, population/participant, methodology
301	SoCalREN	Workforce	Metric	WET-1	Number of collaborations by Business Plan sector to jointly develop or share training materials or resources.	Count	WET								Copy from common metrics				Reportability
302	SoCalREN	Workforce	Metric	WET-2	Number of participants by sector	Count	WET								Copy from common metrics				Reportability
303	SoCalREN	Workforce	Metric	WET-2	Percent of participation relative to eligible target population for curriculum	Percentage	WET								Copy from common metrics				Reportability
304	SoCalREN	Workforce	Metric	WET-3	Percent of total WE&T training program participants that meet the definition of disadvantaged worker.	Percentage	WET								Copy from common metrics				Reportability
305	SoCalREN	Workforce	Metric	WET-3	Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways	Percentage	WET								Copy from common metrics				Reportability
306	SoCalREN	Workforce	Metric	WET-3i	Number Career & Workforce Readiness (CWR) participants who have been employed for 12 months after	Count	WET								Copy from common metrics				Reportability
MS 8	SoCalREN	Market Sup	Metric		**Number of Contractors (that serve in PA service territory) with knowledge and trained by relevant MS**	Count	WET	Contractor							Count of contractors that received				Reportability
MS 9	SoCalREN	Market Sup	Metric		% of market actors aware of energy efficient products and/or services that can be supplied to customers (awar	Percent		Market Actors							Survey				Methodology
MS 10	SoCalREN	Market Sup	Metric		% of market actors knowledgeable of energy efficient products and/or services that can be supplied to custome	Percent		Market Actors							Survey				Methodology
MS 11	SoCalREN	Market Sup	Metric		% of market actors that are interested in supplying energy efficient products and/or services to customers (attit	Percent		Market Actors							Survey				Methodology
MS 12	SoCalREN	Market Sup	Metric		% of market actors that have supplied energy efficient products and/or services to customers (behavior)	Percent		Market Actors							Survey				Methodology
MS 13	SoCalREN	Market Sup	Metric		% of market actors aware of what is required to perform/ensure quality installation of energy efficient products	Percent		Market Actors							Survey				Methodology
MS 14	SoCalREN	Market Sup	Metric		% of market actors knowledgeable of how to perform to perform/ensure quality installation of energy efficient	Percent		Market Actors							Survey				Methodology
MS 15	SoCalREN	Market Sup	Metric		% of market actors that are interested in performing/ensuring quality installation of energy efficient products a	Percent		Market Actors							Survey				Methodology
MS 16	SoCalREN	Market Sup	Metric		% of market actors that have performed/ensured quality installation of energy efficient products and/or service	Percent		Market Actors							Survey				Methodology
MS 17	SoCalREN	Market Sup	Metric		~~Number of EE customers/market actors reached through partner networks and partner communications chann~~	~~Count~~													Specificity
MS 18	SoCalREN	Market Sup	Metric		~~Assessed value of the partnership by partners~~	~~Unknown~~													Unit of Measurement
MS 19	SoCalREN	Market Sup	Metric		% of partners that have taken action supporting energy efficiency	Percent	Public, WET, Commercial	Program partner							Percentage of Alliance Committee	SoCalREN Regional Partner:			Reportability
MS 20	SoCalREN	Market Sup	Indicator		Number of partners by type and purpose	Count													Reportability
MS 21	SoCalREN	Market Sup	Indicator		Dollar value of non-ratepayer in kind funds/contributions utilized via partnerships	Dollars													
314	SoCalREN	Emergina T	Metric	ETP-T1	Number of partners by type and purpose	Count	Public. Crosscutting.	Program partner							Count of partners categorized by	Partner: group that has is			
315	SoCalREN	Emerging T	Metric	ETP-T2	Dollar value of non-ratepayer in kind funds/contributions utilized via partnerships	Dollars	Public, Crosscutting,	Program partner							Total dollar value of non-ratepayer				
316	SoCalREN	Emerging T	Metric	ETP-T3	Savings of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gros	Lifecycle net Therms													
317	SoCalREN	Emerging T	Metric	ETP-T4	~~Number of new, validated technologies recommended to Cal+~~	~~Count~~													
318	SoCalREN	Emerging T	Metric	ETP-T5a	Number of market support projects (outside of ETP) that validate the technical performance, market and marke	Count													
319	SoCalREN	Emerging T	Metric	ETP-T5b	Cost effectiveness of a technology prior to market support programs relative to cost effectiveness of a technolo	CE													
320	SoCalREN	Emerging T	Metric	ETP-T5c	Percent market penetration of emerging/under-utilized or existing EE products or services	Percent/Count													
MS 22	SoCalREN	Market Sup	Metric		Percent market participant aware of emerging/under-utilized or existing EE products or services	Percent													Granularity of product/technology
MS 23	SoCalREN	Market Sup	Metric		Aggregated confidence level in performance verification by product, project, and service (for relevant programs	Percent													Granularity of sector
MS 24	SoCalREN	Market Sup	Metric		Number of providers for performance verification services	Count													Granularity of sector
MS 25	SoCalREN	Market Sup	Metric		~~Participant data, e.g. credit score, census tract income, CalEnviroScreen Scores of areas served, zip code~~	~~Misc~~													Granularity of sector
MS 26	SoCalREN	Market Sup	Metric		Comparisons between market-rate capital vs. capital accessed via EE programs, e.g. interest rate, monthly	Misc	Public, Financing,	Public agencies,							Avg % interest rate reduction realized				Granularity of sector
MS 27	SoCalREN	Market Sup	Metric		Total projects completed/measures installed and dollar value of consolidated projects[1]	Count	Public, Commercial	Public agencies,							- Total count of projects construction	Project: as defined by program			Granularity of product/technology
MS 28	SoCalREN	Market Sup	Indicator		Number of providers for performance verification services	Count													Granularity of sector
MS_29	SoCalREN	Market Sup	Metric		Ratio of ratepayer funds allocated to private capital leveraged[2]	Ratio	Public	Public agencies, business owners							Numerator: total project ratepayer incentives and financing utilized for projects Demoninator: total construction costs of projects	Project: as defined by program			Specificity, Units of Measurement, Reporting
MS_30	SoCalREN	Market Sup	Metric		Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products).	Dollars	Public, Crosscutting, Commercial	Public agencies, contractors, business owners							Total value of the program services received by customer measured within the calendar year				Specificity, Units of Measurement, Reporting
MS 31	SoCalREN	Market Sup	Metric		% of market participants aware of capital access opportunities for investments in energy efficient projects, proc	Percent													Specificity
MS 32	SoCalREN	Market Sup	Metric		% of market participants knowledgeable about capital access opportunities for investments in energy efficient p	Percent													Granularity
MS 33	SoCalREN	Market Sup	Metric		% of market participants interested in leveraging capital access opportunities for investments in energy efficien	Percent													Granularity of product/technology
MS 34	SoCalREN	Market Sup	Metric		% of market participants that were unable to take action due to access to capital or affordability of energy effici	Percent		Market Participants						Survey					Methodology
MS_35	SoCalREN	Market Sup	Metric		% of market participants knowledgeable about capital access opportunities for investments in energy efficient projects, products, and/or services (knowledge)	Percent		Market Participants						Survey					Methodology
MS_36	SoCalREN	Market Sup	Metric		% of market participants interested in leveraging capital access opportunities for investments in energy efficient projects, products, and/or services (attitude)	Percent		Market Participants						Survey					Methodology
MS_37	SoCalREN	Market Sup	Metric		% of market participants that were unable to take action due to access to capital or affordability of energy efficient projects, products, or services (behavior)	Percent		Market Participants						Survey					Methodology

Segment	Metric	2024 Target	2025 Target	2026 Target	2027 Target
Resource Acquisition	kWh Claimed	###########	###########	###########	###########
Resource Acquisition	kW Claimed	8,699.62	17,726.02	26,729.72	29,231.02
Resource Acquisition	Therms Claimed	365,450.00	436,084.02	590,807.09	584,817.53
Resource Acquisition	GHGs from Claimed Savings	5,569.91	9,031.71	12,707.69	13,850.61
Resource Acquisition	kWh Channeled	###########	8,353,437.00	3,376,426.00	8,243,051.00
Resource Acquisition	kW Channeled	1,473.53	835.34	337.64	824.31
Resource Acquisition	Therms Channeled	20,000.00	25,000.00	30,000.00	35,000.00
Resource Acquisition	GHGs from Channeled Savings	3,135.15	1,849.73	853.10	1,880.04
Market Support	Total Covered Participants	455.00	513.00	594.00	690.00
Market Support	Total Covered Projects	590.00	660.00	780.00	900.00
Market Support	Count of projects where a loan	3.00	3.00	3.00	4.00
Market Support	Total $ leveraged	126,695.58	140,369.67	141,331.61	210,924.40
Market Support	Source of external (non-IOU) fir	2.64	2.92	2.94	4.39
Market Support	# projects where external (non-	10.00	16.00	25.00	38.00
Market Support	Total $ leveraged	100,000.00	160,000.00	250,000.00	380,000.00
Market Support	Source of external (non-IOU) fir	10.00	16.00	25.00	38.00
Equity	Count of Ag Customers that enr	50.00	60.00	80.00	100.00
Equity	# of participating properties - D	40.61	52.31	60.92	104.82
Equity	# of participating properties - R	117.06	149.57	174.49	202.69
Equity	# of tenant units served - DAC	8,121.51	10,461.15	12,183.76	20,963.43
Equity	# of tenant units served - Rural/	2,926.43	3,739.32	4,362.30	5,067.30
Equity	Count of SMBs that enroll in a S	16.24	20.92	24.37	41.93
Equity	# partners and type of partner;	12.00	12.00	12.00	14.00
Equity	Small and WMDVBE contractors	100.00	100.00	100.00	100.00
Equity	Small and WMDVBE contractors	25.00	25.00	25.00	25.00
Equity	# of partnerships	4.00	4.00	4.00	4.00
Equity	# of participating contractors in	1.00	1.00	2.00	2.00
Equity	# of participating buildings in HT	21.00	42.00	63.00	84.00
Equity	Total incentive payments - DAC	1,772,506.15	2,285,375.30	2,653,480.66	4,335,860.84
Equity	Total incentive payments - Rura	948,750.00	1,212,292.00	1,423,125.00	1,633,958.00
Equity	Total project costs - DAC	2,954,176.92	3,808,958.83	4,422,467.77	7,226,434.73
Equity	Total project costs - Rural/HTR	948,750.00	1,212,292.00	1,423,125.00	1,633,958.00
Equity	GHG reduced from equity targe	35.40	45.20	52.80	61.00
Equity	kWh (net) reduced from equity	35,641.44	45,541.87	53,129.19	61,715.55
Equity	kW (net) reduced from equity ta	12.89	16.48	19.35	22.23
Equity	Therms (net) reduced from equ	1,903.54	2,432.34	2,859.45	3,274.34
Equity	Underserved Public agency char	8,800,000.00	9,600,000.00	###########	###########
Equity	Underserved Public agency char	1,011.81	1,120.14	1,223.06	1,203.32
Equity	Underserved Public agency char	42,971.60	51,990.00	105,841.60	66,340.40
Equity	Underserved Public agency char	2,036.78	2,249.03	2,616.68	2,489.55
Equity	Estimated annual bill savings by	3,400.00	3,400.00	3,400.00	3,700.00
Equity	Estimated annual bill savings by	200.00	200.00	200.00	180.00
Codes & Standards	# of jurisdictions receiving C&S	7.00	15.00	20.00	30.00
Codes & Standards	% of increased code compliance	0.15	0.15	0.15	0.15
Codes & Standards	# of local governments using So	3.00	15.00	25.00	35.00
Codes & Standards	# of local governments adopting	2.00	4.00	6.00	8.00

Core Value	Segment	Portfolio-level Value Metric	Measurement	Methodology	Detailed Measurement	2024	2025	2026	2027	2028-2031	Additional Notes
Delivering Energy & Climate Impacts	Resource Acquisition	Energy and GHG reductions (claimable by SoCalREN) due to SoCalREN's innovative or gap filling program offerings	GHG reductions - as well as kWh/therms/kW - claimed by SoCalREN	kWh, kW, therm, GHG (metric tons) savings inclusive of SoCalREN resource program claimed savings only. Installed net 1st year Savings.	kWh savings	21,595,747	38,744,208	53,868,239	56,082,961	256,312,435	
					kW savings	8,700	17,726	26,730	29,231	133,338	
					therm savings	365,450	436,084	590,807	584,818	2,985,552	
					GHGs emissions avoided (metric tons)	5,570	9,032	12,708	13,851	64,931	
		Channeled (not claimable by SoCalREN) energy and GHG reductions	GHG reductions - as well as kWh/therms/kW - from projects supported by SoCalREN	kWh, kW, therm, GHG savings (metric tons) installed **excluding** SoCalREN resource program savings. Installed gross 1st year Savings.	kWh savings	14,735,252.00	8,353,437.00	3,376,426.00	8,243,051.00	32,972,204.00	
					kW savings	1,473.53	835.34	337.64	824.31	3,297.22	
					therm savings	20,000.00	25,000.00	30,000.00	35,000.00	140,000.00	
					GHGs emissions avoided	3,135.15	1,849.73	853.10	1,880.04	7,520.15	
Build Energy Competency & Economic Resilience	Market Support	Increased demand for energy efficient products or services among SoCalREN targeted groups	Cumulative # Ag Customers that receive energy coaching through SoCalREN	Count of unique Ag Customers that receive direct energy education services from Agricltural SoCalREN programs		125	150	200	250	1000	
			Cumulative # SMBs that receive energy coaching through SoCalREN	Count of unique SMBs that receive direct energy education services from Commercial SoCalREN programs		170	180	190	200	800	
			Total number of contractors mentored - territory-wide			15	18	19	30	34	
			# contractors trained through Level 1 (ALL and by diversity category), ave. training hours per participant, knowledge gain (from survey effort)	Knowledge gain would come from Level 1 survey effort completed by implementer.		100	100	100	100	400	
			# receiving skill certificates by type of certificate	• Industry-recognized skill certificates with East LA CC and high school/college credit • SOLIDWORKS Associate Certification • BPI Certifications/MF Energy Audit skills or other certification		25	35	45	60	200	
			# of interns/internships; survey of interns to understand knowledge or competencies gained Career plans for transitional adults in Green Path Careers (from earlier outcome); Youth who express interest in future green career # of job placements; survey	This is a newer effort. Data was not reviewed but would be reviewed in 2022 WE&T process evaluation.		20	30	40	50	175	
					Total Covered Particiants	**455**	**513**	**594**	**690**	**2609**	
			# Ag Customer projects delivered for energy savings	Count of Ag Customer EE projects completed		250	300	400	500	2000	
			# SMB projects delivered for energy savings	Count of SMB EE projects completed		340	360	380	400	1600	
					Total Covered Projects	**590**	**660**	**780**	**900**	**3600**	
		Access to capital for green energy and energy saving projects	# projects where external (non-IOU) financing was leveraged by MF properties due to support by SoCalREN	Count of projects where a loan was used; Cumulative value of loans in dollars		3	3	3	4	19	
					Total $ leveraged	$126,696	$140,370	$141,332	$210,924	$893,264	
					Source of external (non-IOU) financing - Private	3	3	3	4	19	
					# projects where external (non-IOU) financing was leveraged by SoCalREN	10	16	25	38	145	
					Total $ leveraged	$100,000	$160,000	$250,000	$380,000	$1,450,000	
					Source of external (non-IOU) financing - State	10	16	25	38	145	
Expand Access to EE Benefits	Equity	Equity-targeted populations served by SoCalREN programs	Total # HTR Ag Customers participating in SoCalREN programs	Count of Ag Customers that enroll in a SoCalREN Agricultural program that are categorized as HTR		50	60	80	100	400	
			DAC, HTR and underserved MF are served		# of participating properties - DAC	41	52	61	105	511	
					# of participating properties - Rural/HTR	117	150	174	203	917	
					# of tenant units served - DAC	8,122	10,461	12,184	20,963	102,171	
					# of tenant units served - Rural/HTR	2,926	3,739	4,362	5,067	22,933	
			Total # HTR SMBs participating in SoCalREN programs	Count of SMBs that enroll in a SoCalREN Commercial program that are categorized as HTR		16	21	24	42	204	
			*Partnerships expand access for Small or WMDVBE (or contractors/ future workers classified as disadvantaged)	# partners and type of partner; description of benefits		12	12	12	14	50	
		Inclusion of diverse workers in EE workforce	Small and WMDVBE contractors are trained through workshops, classes, or customized mentoring		# trained; # mentored	100	100	100	100	400	
					# receive new certifications as a result of SoCalREN support. These are "agency" certifications based on ownership structure. For example, contractors have to prepare financial docs for DVBE certification.	25	25	25	25	100	
		Energy savings in equity-targeted populations	* Regional Partners engage MF DAC/HTR/underserved		# of partnerships	4	4	4	4	4	
					# of participating contractors in HTR (rural) or underserved areas made aware of the program due to partner's marketing	1	1	2	2	4	
					# of participating buildings in HTR (rural) or underserved areas made aware of the program due to the partner's marketing	21	42	63	84	210	
			*Projects expand into rural or other areas in region that were not previously served (i.e., underserved)		Total incentive payments - DAC	$1,772,506	$2,285,375	$2,653,481	$4,335,861	$21,131,931	
					Total incentive payments - Rural/HTR	$948,750	$1,212,292	$1,423,125	$1,633,958	$5,348,352	
					Total project costs - DAC	$2,954,177	$3,808,959	$4,422,468	$7,226,435	$35,219,885	
					Total project costs - Rural/HTR	$948,750	$1,212,292	$1,423,125	$1,633,958	$5,348,352	
			DAC/HTR owners, as well as DAC tenants, save energy and reduce GHG		GHG reduced from equity targeted areas	35	45	53	61	276	
					kWh (net) reduced from equity targeted areas	35,641	45,542	53,129	61,716	279,302	
					kW (net) reduced from equity targeted areas	13	16	19	22	101	
					Therms (net) reduced from equity targeted areas	1,904	2,432	2,859	3,274	14,818	
			Public agencies in DAC or underserved areas save energy and reduce GHG	kWh, kW, therm, GHG savings supported **excluding** SoCalREN resource program savings. Gross 1st year Savings.	kWh savings	8,800,000	9,600,000	10,000,000	10,400,000	41,600,000	
					kW savings	1,012	1,120	1,223	1,203	4,813	
					therm savings	42,972	51,990	105,842	66,340	265,362	
					GHGs emissions avoided	2,037	2,249	2,617	2,490	9,958	
		Additional benefits in equity-targeted populations while supporting green energy and energy saving projects	Utility bill savings in equity-targeted populations	*DAC/HTR owners, as well as DAC tenants, save on their utility bill	Estimated annual bill savings by DAC/HTR owner	$3,400	$3,400	$3,400	$3,700	$3,800	
					Estimated annual bill savings by the average DAC/HTR tenant	$200	$200	$200	$180	$180	
	Codes & Standards	Building energy capacity & economic resilience	Increased demand for energy efficient products or services among SoCalREN targeted groups	Better compliance with energy code requirements, reduced energy use in new and existing buildings, and greater number of high energy performance buildings	# of jurisdictions receiving C&S services and assistance	7	15	25	30	45	
					% of increased code compliance and permit closeout in participating jurisdictions	15.00%	15.00%	15.00%	15.00%	15.00%	
			Communities are better equipped to facilitate energy efficiency savings	C&S stakeholders have the tools and assistance necessary to enhance codes and standards policies	# of local governments using SoCalREN data evaluation tools & assistance to enhance C&S activities and policies	3	15	25	35	45	
		Delivery energy & climate impacts	Energy and GHG reductions due to SoCalREN's innovative or gap filling program offerings	Support, design, and adoption of buildings emissions performance standards and benchmarking and audit ordinances/regulations	# of local governments passing advanced energy codes, standard, or policies	2	4	6	8	10	

Pa Name:	#REF!
Budget Year:	2024-2027

Comments and Suggestions

This is an optional space to offer comments, feedback, and/or suggestions for improving information exchange between the Commission and PAs. Please keep this section focused on this and other instruments used for the Energy Efficiency Applications

SoCalREN appreciates the guidance this template has provided in preparation of its EE application.

ATTACHMENT B

(Modified to Incorporate Dates Relevant to D.21-05-031)

Approved Meet & Confer Document by Program Administrators, Office of Ratepayers and The Utility Reform Network in A.17-01-003 et. al.

Required by D.18-05-041 Ordering Paragraph 44

Table of Contents

Attachment B

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

BACKGROUND:

Decision (D.) 18-05-041 Ordering Paragraph 44 states:

> Beginning with the Annual Budget Advice Letters due on September 3, 2019, the Program Administrators must include updated budget estimates in the same format as the supplemental budget information filed in this proceeding on June 12, 2017.

Therefore, consistent with this Commission direction, this narrative and the accompanying Attachment A Tables 9 through 16, SOCALREN provides the following information in Attachment B.

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

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

SoCalREN is currently administered and managed by the County of Los Angeles (LA County) Internal Services Department (ISD). Within LA County ISD there are three departments that support the administration and management of SoCalREN. These departments include:

- County Office of Sustainability (EES):
  - Environmental Initiatives Division
  - EES Planning & Administration
- Information Technology Service
  - Shared Services Branch Internet Development
- Administration & Finance Service
  - Finance

These departments work as shared services between LA County's workforce of more than 100,000 employees in over 40 County Departments, and the County's government and community initiatives portfolio (including the Southern California Regional Energy Network). These departments are further described in detail below.

1. Functions conducted by each department/organization

SOCALREN Response: Office of Energy and Environmental Services. The LA County Office of Energy and Environmental Services (EES) is composed of two divisions - the Energy Management Division (EMD) and the Environmental Initiatives Division (EID)—and coordinates energy efficiency, climate action, conservation, and sustainability programs to decrease utilization and maximize the efficient use of natural resources. Some initiatives that this office supports include climate mitigation, energy efficiency, land-use planning, alternative fuels and transportation.

EES was originally formed to respond to legislation, regulation, and policy related to Climate Change and to serve as a central programmatic agency for coordination of Energy Efficiency, Conservation and Sustainability Programs within the County, its facilities, and the region. EES develops and implements programs and projects that impact and benefit the constituents of Los Angeles County, for instance: SoCalREN, Environmental Service Center, and websites such as SolarMap.LACounty.gov and Green.LACounty.gov. In addition, EES is playing an important role in coordinating and implementing Energy and Environmental initiatives, County Green Building programs, and Climate Action activities for the State, region, and all County departments.

Between the two EES Divisions, EID works internally with County departments and represents the County in local and statewide organizations to promote energy efficiency, sustainability, climate action planning, related regulatory and legislative review and advisement, and environmental programs and policies. These efforts are supported through various funding sources, such as grants and utility ratepayer programs.

EMD supports the County and ISD by providing energy management services to County Departments, municipalities, and other districts and agencies. Services include utility support, energy efficiency projects, monitoring of building management systems, procurement of electricity, natural gas and water, and the operation of power plants. The Division is composed of four sections, Power Plants, Energy Efficiency Projects, Energy Support Services, and Energy Management Systems (EEMIS).

Information Technology Service. ISD Information Technology Services (ITS) delivers reliable and secure solutions to support Los Angeles County's technology needs. Providing

services to a workforce of more than 80,000 employees in over 40 County Departments, the department safeguards and support mission-critical systems, networks, and data. ITS comprehensive information technology shared services include application development and maintenance, data center operations, telecommunications support, countywide email solutions, and cloud computing services.

Administration & Finance Service. ISD's Administration and Finance Service provides legal, procurement, compliance, and oversight services to EID Programs, including SoCalREN. In addition, these units assist our business partners and customers in making informed decisions by providing essential information, timely payments and billings and budgetary allocations (including vendor payment inquiry, employment opportunities, and employment verification).

2. Energy Efficiency Management Structure and Org Chart

SOCALREN Response: Figures 1 and 2 provide in illustrative detail the current management structure, support staff and internal support organizations.

Figure 1. SoCalREN Administration and Management Organization Chart, 2022

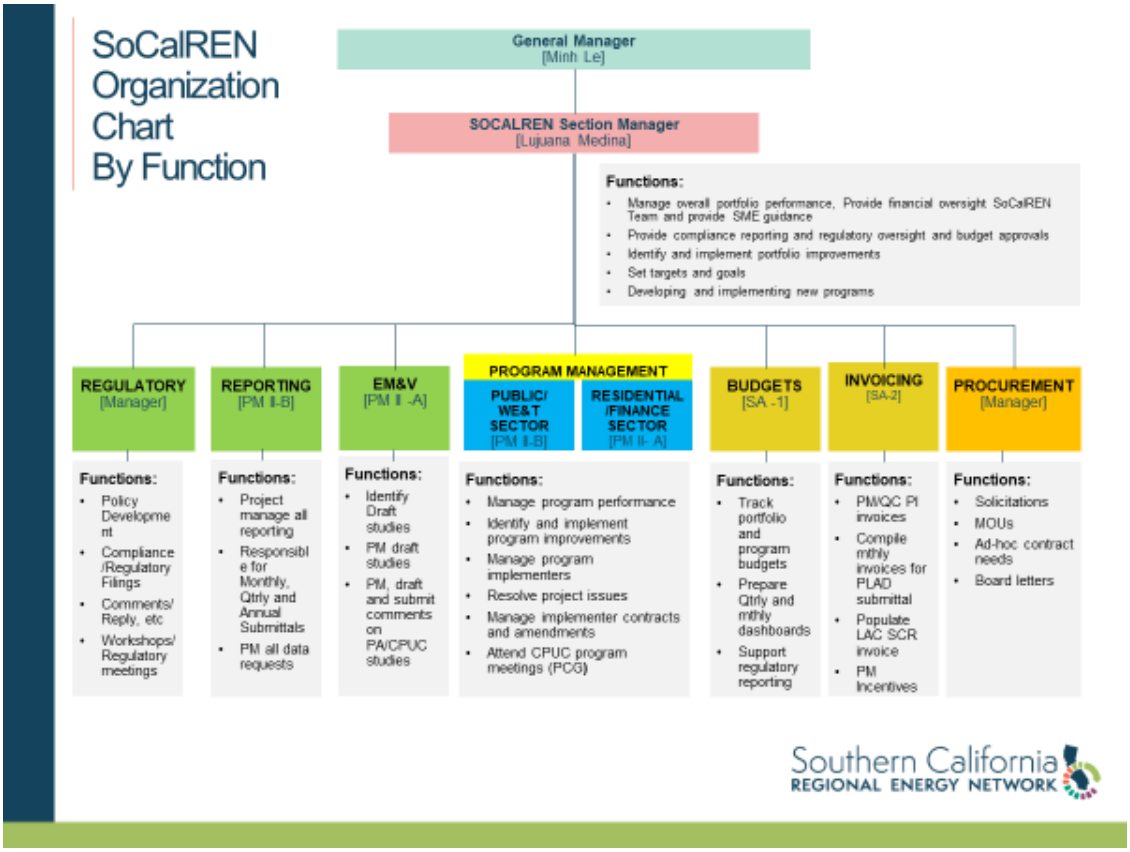
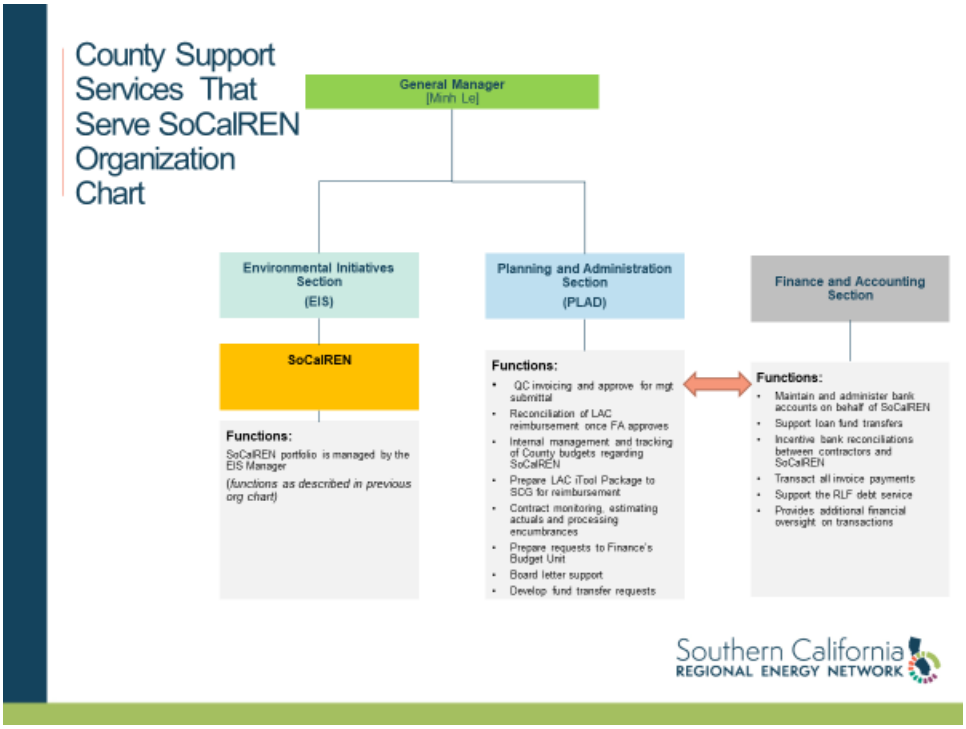


Figure 2. County Support Services That Serve SoCalREN Organization Chart



3. Staffing needs by department/organization, including current and forecast for 2022-2023, as well as a description of what changes are expected between 2024-2027 or why it's impossible to predict beyond 2024, if that's the PA's position.

SOCALREN Response: Currently, SoCalREN's staffing organization as is illustrated in Figure 1 above. In 2020, the County of Los Angeles officially hired two internal program managers to support the REN, two internal Staff Assistants/Program Coordinators and one internal manager. There are no current plans to change this staffing structure within the near term (2022). Subject to SoCalREN being approved for its 2024-2027 EE application it will reassess in 2024 if additional staff are needed. However, it would be impossible to state any new positions without approval of the proposed portfolio.

4. Non-program functions currently performed by contractors (e.g., advisory consultants), as well as a description of what changes are expected between 2024-2027 or why it's impossible to predict beyond 2024, if that's the PA's position.

SOCALREN Response: Since 2018, SoCalREN program administration, design, and implementation has been currently outsourced to third parties that have been selected through a competitive bidding process by LA County, the Administrator of SoCalREN. SoCalREN does

not currently nor anticipate in the near term contracting for "non-program" functions. Non-program, contract and billing, and some support functions are conducted by LA County ISD services, with statistically miniscule financial impact on SoCalREN.

As part of a recent program-by-program and Portfolio-wide performance assessment of SoCalREN, LA County has taken in-house (and will continue to exercise) greater Portfolio planning, oversight, management, and performance tracking. This is an integral part of LA County's pivot to an energy-savings-centric, cost-conscious, and performance-based approach for the SoCalREN. This deeper engagement will reflect somewhat higher LA County administration costs, but these costs are net positive against efficiencies and reduced costs of outside consultants. This impact will, however, be economically-scaled and not impact implementation.

Notwithstanding the above, the SoCalREN does plan to continue to outsource program design, and implementation. The intent is to continue to outsource virtually all components of program implementation in the future, pursuant to strict, comprehensive local government and statewide procurement and contracting requirements.

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

SOCALREN Response: As stated above, there are no current plans for in-house cost changes within the near term (2022-2023). However, for the timeframe in this current application of 2024–2027 (mid-term), the SoCalREN would reassess the staffing needs based on the authority provided in the new application. This would likely occur 2024.

6. Explanation of method for forecasting costs

In determining FTEs forecasts, SoCalREN utilizes the number of annual hours necessary to fulfill each function category for the entire portfolio. This then is divided by the total annual working hours per 1 FTE.

SOCALREN Response:

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

7. TURN and CAL PA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. We would be looking for 2019, 2020, or 2021 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we'd want at least 2024.

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

SOCALREN Response:

Table 1 below represents SoCalREN's recorded positions for 2021 (2019 and 2020 were identical to 2021) as well as forecast years 2024–2027.
The forecast numbers are based on number of programs proposed and would need to be reassessed after an application decision is issued.

Table 1. SoCalREN's FTE headcount by department/organization [1,2]

Pa Name:	SoCalREN						
Budget Year:	2024-2027						
PORTFOLIO STAFFING							
Functional Group	2021 EE Portfolio FTE	2022 EE Portfolio FTE	2023 EE Portfolio FTE	2024 EE	2025 EE	2026 EE	2027 EE
Policy, Strategy, and Regulatory Reporting Compliance	1.0	1.0	1.0	1.3	1.5	1.5	1.5
Program Management	3.0	3.0	3.0	3.5	4.0	4.0	4.0
Engineering Services	-	-	-	-	-	-	-
Customer Application/Rebate/Incentive Processing	0.5	0.5	0.5	0.8	1.0	1.0	1.0
Customer Project Inspections	-	-	-	-	-	-	-
Portfolio Analytics (1)	0.5	0.5	0.5	0.8	1.0	1.0	1.0
EM&V	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ME&O (Local)	0.3	0.3	0.3	0.5	0.8	0.8	0.8
Account Management / Sales	0.1	0.1	0.1	0.3	0.3	0.3	0.3
IT	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Call Center	-	-	-	-	-	-	-
Total	6.5	6.5	6.5	8.1	9.7	9.7	9.7

[1] Please note SoCalREN's FTE head count include direct full-time SoCalREN staff and County Support Staff services (e.g., Finance, etc).

[2] Full-time equivalent (FTE) is a unit that indicates the workload of an employed person (or student) in a way that makes workloads or class loads comparable across various contexts.

C. Table showing costs by functional area of management structure

Please see Tables 2 through 4 below which provides SoCalREN's costs by functional area of management structure.

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

SOCALREN Response:

Table 2. SoCalREN's Residential Sector Costs by Labor and Non-Labor Cost Elements

Pa Name:	SoCalREN									
Budget Year:	2024-2027									
RESIDENTIAL BUDGET DETAIL										
Sector	Cost Element	Functional Group	2021 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	$ 154,081.005	$ 143,425.000	$ 140,584.000	$ 28,049.730	$ 30,526.010	$ 32,932.230	$ 35,016.360
		Program Management	$ 462,342.422	$ 430,277.000	$ 421,752.000	$ 84,167.290	$ 91,597.720	$ 98,817.940	$ 105,071.660
		Engineering services	$ -	$-		$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 77,040.503	$ 71,713.000	$ 70,292.000	$ 14,024.870	$ 15,263.010	$ 16,466.120	$ 17,508.180
		Customer Project Inspections	$ -	$-	$-	$ -	$ -	$ -	$ -
		Portfolio Analytics	$ 231,220.915	$ 215,139.000	$ 210,876.000	$ 42,092.690	$ 45,808.710	$ 49,419.590	$ 52,547.130
		ME&O (Local)	$ 38,569.955	$ 35,856.000	$ 35,146.000	$ 7,021.480	$ 7,641.350	$ 8,243.680	$ 8,765.390
		Account Management / Sales	$ 15,408.101	$ 14,343.000	$ 14,058.000	$ 2,804.970	$ 3,052.600	$ 3,293.220	$ 3,501.640
		IT	$ 15,408.101	$ 14,343.000	$ 14,059.000	$ 2,804.970	$ 3,052.600	$ 3,293.220	$ 3,501.640
		Call Center							
	Labor Total		**$ 994,071.000**	**$ 925,096.000**	**$ 906,767.000**	**$ 180,966.000**	**$ 196,942.000**	**$ 212,466.000**	**$ 225,912.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation	$ 3,450,401.000	$ 3,156,198.000	$ 3,174,498.000	$ 3,004,253.000	$ 3,269,467.000	$ 3,527,185.000	$ 3,750,417.000
		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	$ 4,316,000.000	$ 6,164,706.000	$ 5,264,706.000	$ 7,773,100.000	$ 8,459,305.000	$ 9,126,116.000	$ 9,703,697.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		**$ 7,766,401.000**	**$ 9,320,904.000**	**$ 8,439,204.000**	**$ 10,777,353.000**	**$ 11,728,772.000**	**$ 12,653,301.000**	**$ 13,454,114.000**
Residential Total			**$ 8,760,472.000**	**$ 10,246,000.000**	**$ 9,345,971.000**	**$ 10,958,319.000**	**$ 11,925,714.000**	**$ 12,865,767.000**	**$ 13,680,026.000**
	Other (collected through	Labor Overheads							
			$ -			$ -	$ 1.00	$ (2.00)	$ -

Table 3. SoCalREN's Commercial Sector Costs by Labor and Non-Labor Cost Elements

Pa Name:	SoCalREN								
Budget Year:	2024-2027								
COMMERCIAL BUDGET DETAIL									
						527085	622323	438540	814509
Sector	Cost Element	Functional Group	2021 EE Portfolio	2022 EE Portfolio	2023 EE Portfolio	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				$ 81,698.180	$ 96,460.070	$ 67,973.700	$ 126,248.900
		Program Management				$ 245,147.230	$ 289,442.420	$ 203,964.950	$ 378,828.140
		Engineering services				$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing				$ 40,849.090	$ 48,230.030	$ 33,986.850	$ 63,124.450
		Customer Project Inspections				$ -	$ -	$ -	$ -
		Portfolio Analytics				$ 122,599.960	$ 144,752.330	$ 102,004.400	$ 189,454.790
		ME&O (Local)				$ 20,450.900	$ 24,146.130	$ 17,015.360	$ 31,602.940
		Account Management / Sales				$ 8,169.820	$ 9,646.010	$ 6,797.370	$ 12,624.890
		IT				$ 8,169.820	$ 9,646.010	$ 6,797.370	$ 12,624.890
		Call Center							
	Labor Total		$ -	$ -	$ -	**$ 527,085.000**	**$ 622,323.000**	**$ 438,540.000**	**$ 814,509.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation				$ 2,828,672.000	$ 3,008,389.000	$ 2,570,152.000	$ 3,717,620.000
		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				$ 2,040,097.000	$ 4,672,541.000	$ 3,472,656.000	$ 6,082,814.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		$ -	$ -	$ -	**$ 4,868,769.000**	**$ 7,680,930.000**	**$ 6,042,808.000**	**$ 9,800,434.000**
Commercial Total (5)			$ -	$ -	$ -	**$ 5,395,854.000**	**$ 8,303,253.000**	**$ 6,481,348.000**	**$ 10,614,943.000**
	Other (collected throug	Labor Overheads							

Table 4. SoCalREN's Agriculture Sector Costs by Labor and Non-Labor Cost Elements

Pa Name:	SoCalREN								
Budget Year:	2024-2027								
AGRICULTURAL BUDGET DETAIL									
Sector	Cost Element	Functional Group	2021 EE Portfolio	2022 EE Portfolio	2023 EE Portfolio	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				$ 41,536.440	$ 82,055.300	$ 101,541.120	$ 115,975.500
		Program Management				$ 124,636.100	$ 246,218.820	$ 304,688.870	$ 348,001.310
		Engineering services				$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing				$ 20,768.220	$ 41,027.650	$ 50,770.560	$ 57,987.730
		Customer Project Inspections				$ -	$ -	$ -	$ -
		Portfolio Analytics				$ 62,331.450	$ 123,135.880	$ 152,377.190	$ 174,038.070
		ME&O (Local)				$ 10,397.510	$ 20,540.290	$ 25,418.040	$ 29,031.290
		Account Management / Sales				$ 4,153.640	$ 8,205.530	$ 10,154.110	$ 11,597.550
		IT				$ 4,153.640	$ 8,205.530	$ 10,154.110	$ 11,597.550
		Call Center							
	Labor Total		**$ -**	**$ -**	**$ -**	**$ 267,977.000**	**$ 529,389.000**	**$ 655,104.000**	**$ 748,229.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation				$ 1,102,980.000	$ 1,819,257.000	$ 2,171,094.000	$ 2,429,905.000
		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				$ 1,308,822.000	$ 2,945,243.000	$ 3,724,846.000	$ 4,304,157.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		**$ -**	**$ -**	**$ -**	**$ 2,411,802.000**	**$ 4,764,500.000**	**$ 5,895,940.000**	**$ 6,734,062.000**
Agricultural Total (5)			**$ -**	**$ -**	**$ -**	**$ 2,679,779.000**	**$ 5,293,889.000**	**$ 6,551,044.000**	**$ 7,482,291.000**
	Other (collected thro	Labor Overheads							

Table 5. SoCalREN's Public Sector Costs by Labor and Non-Labor Cost Elements

Pa Name:	SoCalREN								
Budget Year:	2024-2027								
PUBLIC SECTOR BUDGET DETAIL									
Sector	Cost Element	Functional Group	2021 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	$ 281,870.140	$ 206,824.000	$ 201,581.000	$ 192,762.500	$ 227,422.360	$ 261,224.290	$ 282,649.480
		Program Management	$ 845,792.260	$ 620,469.000	$ 604,745.000	$ 578,411.830	$ 682,413.790	$ 783,841.400	$ 848,130.780
		Engineering services	$	$-	$-	$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 140,935.070	$ 103,411.000	$ 100,791.000	$ 96,381.250	$ 113,711.180	$ 130,612.150	$ 141,324.740
		Customer Project Inspections	$			$ -	$ -	$ -	$ -
		Portfolio Analytics	$ 422,987.050	$ 310,234.000	$ 302,372.000	$ 289,268.110	$ 341,280.260	$ 392,004.960	$ 424,156.570
		ME&O (Local)	$ 70,558.460	$ 51,706.000	$ 50,395.000	$ 48,252.810	$ 56,928.930	$ 65,390.340	$ 70,753.550
		Account Management / Sales	$ 28,187.010	$ 20,682.000	$ 20,158.000	$ 19,276.250	$ 22,742.240	$ 26,122.430	$ 28,264.940
		IT	$ 28,187.010	$ 20,682.000	$ 20,158.000	$ 19,276.250	$ 22,742.240	$ 26,122.430	$ 28,264.940
		Call Center							
	Labor Total		**$ 1,818,517.000**	**$ 1,334,008.000**	**$ 1,300,200.000**	**$ 1,243,629.000**	**$ 1,467,241.000**	**$ 1,685,318.000**	**$ 1,823,545.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation	$ 9,406,950.000	$ 11,171,071.000	$ 10,566,800.000	$ 15,089,042.000	$ 16,487,810.000	$ 18,859,549.000	$ 20,792,905.000
		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		$ 835,000.000	$ 1,135,000.000	$ 2,034,713.000	$ 4,624,110.000	$ 5,450,401.000	$ 6,574,981.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)							
	Non-Labor Total		**$ 9,406,950.000**	**$ 12,006,071.000**	**$ 11,701,800.000**	**$ 17,123,755.000**	**$ 21,111,920.000**	**$ 24,309,950.000**	**$ 27,367,886.000**
Public Sector Total (5)			**$ 11,225,467.000**	**$ 13,340,079.000**	**$ 13,002,000.000**	**$ 18,367,384.000**	**$ 22,579,161.000**	**$ 25,995,268.000**	**$ 29,191,431.000**

Table 6. SoCalREN's Cross-Cutting – Costs by Labor and Non-Labor Cost Elements

Pa Name:	SoCalREN								
Budget Year:	2024-2027								
CROSS -CUTTING BUDGET DETAIL									
Sector	Cost Element	Functional Group	2021 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	$ 40,114.780	$ 20,155.000	$ 20,155.000	$ 49,662.000	$ 49,848.000	$ 52,917.000	$ 54,296.500
		Program Management	$ 120,370.210	$ 60,465.000	$ 60,465.000	$ 149,018.040	$ 149,576.160	$ 158,785.140	$ 162,924.530
		Engineering services	$ -	$ -	$ -	$ -	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 20,057.390	$ 10,078.000	$ 10,078.000	$ 24,831.000	$ 24,924.000	$ 26,458.500	$ 27,148.250
		Customer Project Inspections	$ -			$ -	$ -	$ -	$ -
		Portfolio Analytics	$ 60,198.040	$ 30,233.000	$ 30,233.000	$ 74,525.040	$ 74,804.160	$ 79,409.640	$ 81,479.780
		ME&O (Local)	$ 10,041.630	$ 5,039.000	$ 5,039.000	$ 12,431.520	$ 12,478.080	$ 13,246.320	$ 13,591.640
		Account Management / Sales	$ 4,011.480	$ 2,015.000	$ 2,015.000	$ 4,966.200	$ 4,984.800	$ 5,291.700	$ 5,429.650
		IT	$ 4,011.480	$ 2,015.000	$ 2,015.000	$ 4,966.200	$ 4,984.800	$ 5,291.700	$ 5,429.650
		Call Center							
	Labor Total		**$ 258,805.010**	**$ 130,000.000**	**$ 130,000.000**	**$ 320,400.000**	**$ 321,600.000**	**$ 341,400.000**	**$ 350,300.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)							
		Local/Government Partnerships Contracts (3)							
		Other Contracts							
		Program Implementation	$ 1,041,326.990	$ 1,170,000.000	$ 1,170,000.000	$ 3,919,600.000	$ 4,268,400.000	$ 4,504,600.000	$ 4,629,700.000
		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		**$ 1,041,326.990**	**$ 1,170,000.000**	**$ 1,170,000.000**	**$ 3,919,600.000**	**$ 4,268,400.000**	**$ 4,504,600.000**	**$ 4,629,700.000**
Cross-Cutting Total (5)			**$ 1,300,132.000**	**$ 1,300,000.000**	**$ 1,300,000.000**	**$ 4,240,000.000**	**$ 4,590,000.000**	**$ 4,846,000.000**	**$ 4,980,000.000**
	Other (collected through GRC) (2)	Labor Overheads							

9. Identify any capital costs

SOCALREN Response: The County of Los Angeles has no capital costs to claim for SoCalREN. Any and all capital costs are paid by County of Los Angeles.

D. Table showing cost drivers across the EE organization

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

SOCALREN Response: Since the last rolling portfolio business plan of 2018, SoCalREN's has been tracking administration and management costs. SoCalREN has found the need for increased regulatory and policy support as well as a need for increased coverage across a variety of proceedings. The associated costs drivers for this application are due to the increase in the number of programs proposed and reflect the increase in portfolio complexity and the drive for process improvements. However, SoCalREN continues to drive efficiency in its administration and portfolio management as well as utilizes performance bar of maintain administration costs at or below 10% annually.

Table 7. FTE Increase by Functional Group Cost Category

Functional Group	FTE Increase (2024-2027)
Policy, Strategy, and Regulatory Reporting Compliance	0.5
Program Management	1.0
Engineering Services	-

Customer Application/Rebate/Incentive Processing	0.5
Customer Project Inspections	-
Portfolio Analytics (1)	0.5
EM&V	-
ME&O (Local)	0.5
Account Management / Sales	0.2
IT	0.1
Call Center	-
Total	3.2

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

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

SOCALREN Response: SoCalREN as a non-IOU PA does not have applicable GRC costs or rates. However, LA County ISD who administers and manages SoCalREN utilizes a daily "timesheet" and program/projects code menu that all employees use to track activities and the respective times allocated to those activities. Activities and time spent supporting those can easily be tracked by initiative as well as by county departments. A monthly report by program/projects code and indicated each employee who has charged to that specific is program/projects code. This report is reviewed and approved by SoCalREN County Management monthly.

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

SOCALREN Response: As a non-IOU PA, this question is not applicable to SoCalREN.

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

SOCALREN Response:

As mentioned previously in Section II A, SoCalREN is supported by a few of the departments within LA County ISD and these departments act as shared services and support more than 100,000 employees in 40 county departments as well as a multitude of county initiatives. Below is a list of some of the EE functions currently performed by LA County ISD department who also support non-EE county initiatives:

- County Office of Sustainability (EES):
  - Environmental Initiatives Division: program management and oversight, policy, strategy, and regulatory reporting compliance;
  - EES Planning & Administration: contract management and billing and invoicing;
- Information Technology Service
  - Shared Services Branch Internet Development: website and software support
- Administration & Finance Service
  - Finance: payroll services, vendor management

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

SOCALREN Response: As a non-IOU PA, this question is not applicable to SoCalREN.

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

SOCALREN Response: SoCalREN program design, and implementation is currently outsourced to third parties. SoCalREN non-labor resources and attributing costs are only allocated to EE activities as dictated by Decision (D.)12-11-015. Currently, all SoCalREN non-labor resource allocations only support EE activities. Any non-EE activities would be charged to the County of Los Angeles or the externally funded sources (i.e., DOE ARRA funding managed by the County, CEC funding managed by the County).

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

SOCALREN Response: As a non-IOU PA, this question is not applicable to SoCalREN.

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

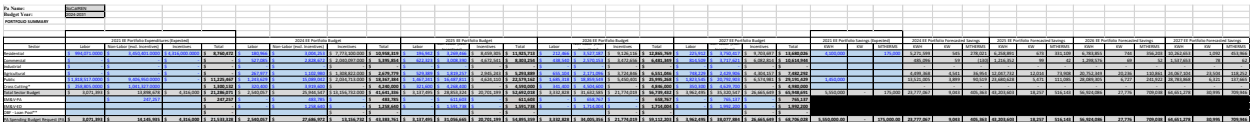
This section refers to the April 14, 2017, Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges in A.17-01-003 et. al.

A. Attachment-A, Question C.8

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

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

SOCALREN Response: This table can also be located in SoCalREN 2024-2031 Application Attachment Tables.



B. Attachment-A, Question C.9

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

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

SOCALREN Response: Please see Table 2 to Table 6 above. These tables can also be found in SoCalREN 2024-2031 Application Attachment Tables file.

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

SOCALREN Response: SoCalREN budgets for the 2024-2031 EE application were based off a Zero-based budgeting methodology and reflect the needs necessary to manage, administer and implement the portfolio.

C. Attachment-A, Question C.10

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

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

SOCALREN Response: As a non-IOU PA, this question is not applicable to SoCalREN.