

Energy Efficiency
Portfolio Application
of the

San Diego Regional Energy Network

Exhibit 4

*SDREN's Responses, Pursuant to Energy Division
Template*

Exhibit 4: SDREN's Responses, Pursuant to Energy Division Template

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Pa Name:
 Budget Year:
 (This Table applies only to the 10U PAs)

Table 1 - Bill Payer Impacts (based on program savings forecasted for the year)

	(Res and Non-Res) \$/kwh	(Res and Non-Res)	Annual Bill Savings	Lifecycle Bill
Present Rates - System Average *				
2021				
2022				
2023				
2024				
2025				
2026				
2027				
2028				
2029				
2030				
2031				

* = Based on [relevant date](#) current effective rates

Total Average Annual Bill Savings by Year (\$) Electric Average Rate (Res and Non-Res) \$/kwh * Total First Year Electric Net Savings KWH + Gas Average Rate(Res and Non-Res) \$/therm * Total First Year Gas Net Savings Therms
 Total Average Lifecycle Bill Savings (\$) Electric Average Rate (Res and Non-Res) \$/kwh * Total Lifecycle Electric Net Savings KWH + Gas Average Rate(Res and Non-Res) \$/therm * Total Lifecycle Gas Net Savings Therms

Pa Name: **SDREN**
 Budget Year: **2024-2031**

Table 3.1 - PA 2024-2031 Funding Source Summary

	Spending Budget Request	Electric Procurement	% Electric	Gas	% Gas
2024	15,852,720	9,511,632	60.0%	6,341,088	40.0%
2025	32,755,736	19,653,441	60.0%	13,102,294	40.0%
2026	36,031,310	21,618,786	60.0%	14,412,524	40.0%
2027	39,634,441	23,780,665	60.0%	15,853,777	40.0%
2028	41,219,821	24,731,893	60.0%	16,487,928	40.0%
2029	42,868,616	25,721,170	60.0%	17,147,446	40.0%
2030	44,583,355	26,750,013	60.0%	17,833,342	40.0%
2031	46,366,693	27,820,016	60.0%	18,546,677	40.0%
Total	299,312,692	179,587,615		119,725,077	

	Revenue Requirement Request	Electric Procurement	% Electric	Gas	% Gas
2024	15,852,720	9,511,632	60.0%	6,341,088	40.0%
2025	32,755,736	19,653,441	60.0%	13,102,294	40.0%
2026	36,031,310	21,618,786	60.0%	14,412,524	40.0%
2027	39,634,441	23,780,665	60.0%	15,853,777	40.0%
2028	41,219,821	24,731,893	60.0%	16,487,928	40.0%
2029	42,868,616	25,721,170	60.0%	17,147,446	40.0%
2030	44,583,355	26,750,013	60.0%	17,833,342	40.0%
2031	46,366,693	27,820,016	60.0%	18,546,677	40.0%
Total	299,312,692	179,587,615		119,725,077	

	PA (DOU+CCAs+RENs) Recovery Budget	Electric Procurement	% Electric	Gas	% Gas
2024	15,852,720	9,511,632	60.0%	6,341,088	40.0%
2025	32,755,736	19,653,441	60.0%	13,102,294	40.0%
2026	36,031,310	21,618,786	60.0%	14,412,524	40.0%
2027	39,634,441	23,780,665	60.0%	15,853,777	40.0%
2028	41,219,821	24,731,893	60.0%	16,487,928	40.0%
2029	42,868,616	25,721,170	60.0%	17,147,446	40.0%
2030	44,583,355	26,750,013	60.0%	17,833,342	40.0%
2031	46,366,693	27,820,016	60.0%	18,546,677	40.0%
Total	299,312,692	179,587,615		119,725,077	

8 Year Funding Sources - RENs/CCAs

Year	PG&E		SDG&E		SCE	SCG
	Electric \$	Gas \$	Electric \$	Gas \$	Electric \$	Gas \$
2024						
2025						
2026						
2027						
2028						
2029						
2030						
2031						
Total	-		-			-

FY 2025
 Budget Year

Table 2 - Budget and Cost Recovery by Funding Source

Table 2a - FY 2025 Budget Summary by Funding Source

Funding Source	2024			2025		
	Budget	Actual	Change	Budget	Actual	Change
State	1,000,000	950,000	(50,000)	1,000,000	950,000	(50,000)
Federal	500,000	500,000	0	500,000	500,000	0
Local	500,000	500,000	0	500,000	500,000	0
Total	2,000,000	1,950,000	(50,000)	2,000,000	1,950,000	(50,000)

Table 2b - Budget by Funding Source

Category	2024		2025	
	Budget	Actual	Budget	Actual
Personnel	1,000,000	950,000	1,000,000	950,000
Travel	500,000	500,000	500,000	500,000
Materials	500,000	500,000	500,000	500,000
Other	0	0	0	0
Total	2,000,000	1,950,000	2,000,000	1,950,000

Table 2c - Revenue Requirements for Cost Recovery by Funding Source

Category	2024		2025	
	Requirement	Actual	Requirement	Actual
Personnel	1,000,000	950,000	1,000,000	950,000
Travel	500,000	500,000	500,000	500,000
Materials	500,000	500,000	500,000	500,000
Other	0	0	0	0
Total	2,000,000	1,950,000	2,000,000	1,950,000

Table 2d - Project/Contracted Customer Funds by project / contract

Project/Contract	2024			2025		
	Budget	Actual	Total	Budget	Actual	Total
Project A	1,000,000	950,000	1,950,000	1,000,000	950,000	1,950,000
Project B	500,000	500,000	1,000,000	500,000	500,000	1,000,000
Project C	500,000	500,000	1,000,000	500,000	500,000	1,000,000
Total	2,000,000	1,950,000	3,950,000	2,000,000	1,950,000	3,950,000

Note on Table 2d
 Any actual amount that is greater than the budget amount for 2025 will be recorded in the 2026 report period and not in 2025 report period for 2025.
 * These funds are subject to 2025-26.

Table 2e - Budget Summary by Funding Source

Funding Source	2024			2025		
	Budget	Actual	Change	Budget	Actual	Change
State	1,000,000	950,000	(50,000)	1,000,000	950,000	(50,000)
Federal	500,000	500,000	0	500,000	500,000	0
Local	500,000	500,000	0	500,000	500,000	0
Total	2,000,000	1,950,000	(50,000)	2,000,000	1,950,000	(50,000)

Note:
 1. All budget figures include federal and state funds, however not including all funding agreements (e.g., 2024-25, 2025-26, 2026-27, etc.).
 2. All budget figures are in US dollars.
 3. All budget figures are in US dollars.
 4. Budget figures represent the total program budget, including 2025.
 5. See the 2025 report for more information on budget.

Pa Name: **CEC**
 Budget Year: **2025-2027**
 (report budgets to the \$--do not round)
 Table 4 - Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Sector Name	Portfolio Segment	2027 PA Spending Budget Request	Baseline Percentage Increase	2028											
						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 (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures	
		Residential	Resource Acquisition	1	-	RCV00											
		Commercial	Resource Acquisition	1	6,285,730	4.2%	\$ 6,480,285	4,756,237.00				1,827.00		25,741,273.00		18,288.00	
		Industrial	Resource Acquisition	1	-	RCV00											
		Agricultural	Resource Acquisition	1	-	RCV00											
		Emerging Tech	Resource Acquisition	1	-	RCV00											
		Public	Resource Acquisition	1	-	RCV00											
		W&E	Resource Acquisition	1	-	RCV00											
		Finance	Resource Acquisition	1	-	RCV00											
		DBF Loan Pool	Resource Acquisition	1	-	RCV00											
		Residential	Market Support	1	-	RCV00											
		Commercial	Market Support	1	-	RCV00											
		Industrial	Market Support	1	-	RCV00											
		Agricultural	Market Support	1	-	RCV00											
		Emerging Tech	Market Support	1	-	RCV00											
		Public	Market Support	1	6,831,005	4.2%	\$ 7,154,288	140,000.00	122.00	177,832.00	48.00	944.00	17,182,342.00	1,241,547.00	268.00	9,778.00	
		W&E	Market Support	1	6,121,876	4.3%	\$ 6,376,544										
		Finance	Market Support	1	-	RCV00											
		DBF Loan Pool	Market Support	1	-	RCV00											
		Residential	Equity	1	12,016,320	13.3%	\$ 13,277,280	2,044,141.00	128.00	82,714.00	1,531.00	480.00	18,032,381.00	984,937.00	11,987.00	2,507.00	
		Commercial	Equity	1	6,285,730	13.3%	\$ 6,924,201	883,333.00	128.00	1187.00	312.00	(1.00)	8,856,648.00	12,971.00	1,318.00	(11.00)	
		Industrial	Equity	1	-	RCV00											
		Agricultural	Equity	1	-	RCV00											
		Emerging Tech	Equity	1	-	RCV00											
		Public	Equity	1	328,551	13.3%	\$ 367,351										
		W&E	Equity	1	-	RCV00											
		Finance	Equity	1	-	RCV00											
		DBF Loan Pool	Equity	1	-	RCV00											
		Codes & Standards	Codes & Standards	1	2,127,315	13.3%	\$ 2,409,342										
		PA PROGRAM TOTAL					\$ 39,424,442	5,386,381.00	270.00	268,389.00	1,703.00	1,423.00	49,913,316.00	2,799,486.00	14,938.00	14,863.00	
		EM&V (PA & ED Portfolios) Total *															
		EM&V - PA		432,211		\$ 432,211											
		EM&V - ED		1,186,181		\$ 1,146,328											
		EM&V TOTAL		1,618,392		\$ 1,588,539											
		PA spending budget request (PA Program and EM&V Total)					\$ 41,215,821	5,386,381.00	270.00	268,389.00	1,703.00	1,423.00	49,913,316.00	2,799,486.00	14,938.00	14,863.00	
		CEC AB 841 Program Budget 2027 PA only															
		applicable Annual % of difference between 2027 and 2028 Unencumbered and															
		CEC AB 841 Total															
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)					\$ 41,215,821	5,386,381.00	270.00	268,389.00	1,703.00	1,423.00	49,913,316.00	2,799,486.00	14,938.00	14,863.00	
		Financing Pilot Programs															
		M&E & ES&M															

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other needed explanations).
 1. M&E requested budget for 2027 per AL 5499-E/5535-D.
 4 Portfolio Support allocated into sectors/segments to capture total budget request.
 * For all PA, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it does not include RSE or CCA EM&V budget.
 * PAs have the option of inputting by program or by total.

Pa Name: SDREN
 Budget Year: 2024-2031

Table 5 - Committed Energy Efficiency Program Funding - Funds Not Yet Spent as of 7/31/2021

Committed funds but not yet spent Category **	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2017 to date EM&V Funds	\$0	\$0	\$0
2017 to date Program Funds - Utility	\$0	\$0	\$0
2017 to date Program Funds - REN	\$0	\$0	\$0
2017 to date Program Funds - CCA	\$0	\$0	\$0
2018 to date EM&V Funds	\$0	\$0	\$0
2018 to date Program Funds - Utility	\$0	\$0	\$0
2018 to date Program Funds - REN	\$0	\$0	\$0
2018 to date Program Funds - CCA	\$0	\$0	\$0
2019 to date EM&V Funds	\$0	\$0	\$0
2019 to date Program Funds - Utility	\$0	\$0	\$0
2019 to date Program Funds - REN	\$0	\$0	\$0
2019 to date Program Funds - CCA	\$0	\$0	\$0
2020 to date EM&V Funds	\$0	\$0	\$0
2020 to date Program Funds - Utility	\$0	\$0	\$0
2020 to date Program Funds - REN	\$0	\$0	\$0
2020 to date Program Funds - CCA	\$0	\$0	\$0
2021 to date EM&V Funds	\$0	\$0	\$0
2021 to date Program Funds - Utility	\$0	\$0	\$0
2021 to date Program Funds - REN	\$0	\$0	\$0
2021 to date Program Funds - CCA	\$0	\$0	\$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: SDREN
 Budget Yr: 2024-2031
 Table 7.1 - PA 2024-2031 Budget Savings By Segment

	Segment	Requested Budget*	TSB	TRC	PAC	kWh	kW	Therms (MM)	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	1,891,800	-	-	-	-	-	-	-	-	-	-	-	-	-
	Market Support	4,665,600	-	-	-	-	-	-	-	-	-	-	-	-	-
	Equity	6,320,700	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Standards	840,600	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	609,720	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	15,852,720	-	-	-	-	-	-	-	-	-	-	-	-	-
2025	Resource Acquisition	3,909,240	1,979,434	0	0	3,333,474	-	-	1,143	-	37,668,258	-	11,724	-	-
	Market Support	9,641,700	1,753,895	0	0	101,716	86	125,319	28	665	(1,917,423)	1,297,850	(603)	6,892	-
	Equity	13,057,919	1,132,454	0	0	429,473	117	75,469	130	401	(394,925)	784,174	(80)	4,164	-
	Codes & Standards	1,737,450	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,259,836	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	32,755,736	4,865,783	1	1	3,864,663	203	200,788	1,302	1,066	35,355,910	2,082,023	11,041	11,056	-
2026	Resource Acquisition	4,300,164	2,624,811	0	1	4,444,630	-	-	1,553	-	50,224,315	-	15,383	-	-
	Market Support	10,605,870	2,230,875	0	0	120,809	103	150,518	36	799	(2,313,397)	1,558,772	(712)	8,277	-
	Equity	14,363,712	1,312,645	0	0	425,165	124	85,231	135	453	(751,484)	885,427	(190)	4,702	-
	Codes & Standards	1,911,195	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,385,820	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	36,031,310	6,168,331	1	1	4,990,604	227	235,749	1,725	1,252	47,159,434	2,444,199	14,482	12,979	-
2027	Resource Acquisition	4,730,180	2,824,697	0	1	4,837,697	-	-	1,581	-	54,665,975	-	16,429	-	-
	Market Support	11,666,457	2,841,538	0	0	142,470	124	180,889	44	961	(2,799,664)	1,873,210	(835)	9,947	-
	Equity	15,800,083	1,494,065	0	0	411,346	130	93,743	133	498	(1,094,820)	974,327	(290)	5,174	-
	Codes & Standards	2,102,315	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,524,402	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	39,634,441	7,160,300	1	1	5,391,513	254	274,632	1,758	1,458	50,771,491	2,847,537	15,304	15,120	-
2028	Resource Acquisition	5,465,985	2,919,598	0	1	4,755,927	-	-	1,532	-	53,741,973	-	16,088	-	-
	Market Support	13,481,242	2,919,602	0	0	140,062	122	177,832	45	944	(2,752,342)	1,841,547	(839)	9,779	-
	Equity	18,257,874	1,531,603	0	0	404,392	128	92,157	128	489	(1,076,315)	957,859	(319)	5,086	-
	Codes & Standards	2,429,342	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,585,378	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	41,219,821	7,370,803	1	1	5,300,381	250	269,989	1,705	1,433	49,913,316	2,799,406	14,930	14,865	-
2029	Resource Acquisition	5,684,626	2,856,028	0	1	4,677,446	-	-	1,462	-	52,855,137	-	15,626	-	-
	Market Support	14,020,492	3,034,481	0	0	137,751	120	174,897	36	929	(2,706,924)	1,811,159	(834)	9,617	-
	Equity	18,988,189	1,589,395	0	0	397,720	126	90,637	109	481	(1,058,553)	942,052	(342)	5,002	-
	Codes & Standards	2,526,516	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,648,793	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	42,868,616	7,479,904	1	1	5,212,917	246	265,534	1,607	1,410	49,089,660	2,753,211	14,450	14,619	-
2030	Resource Acquisition	5,912,010	2,810,399	0	0	4,602,020	-	-	1,391	-	52,002,829	-	15,194	-	-
	Market Support	14,581,309	3,156,950	0	0	135,530	118	172,077	22	914	(2,663,274)	1,781,953	(826)	9,462	-
	Equity	19,747,715	1,653,217	0	0	391,307	124	89,175	91	473	(1,041,485)	926,861	(355)	4,921	-
	Codes & Standards	2,627,576	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,714,745	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	44,583,355	7,620,566	1	1	5,128,857	242	261,252	1,504	1,387	47,536,335	2,666,092	13,621	14,157	-
2031	Resource Acquisition	6,148,490	2,837,637	0	0	4,529,439	-	-	1,386	-	51,182,662	-	14,788	-	-
	Market Support	15,164,563	3,292,333	0	0	133,392	116	169,363	23	899	(2,621,270)	1,753,849	(809)	9,313	-
	Equity	20,537,626	1,722,899	0	0	385,135	122	87,769	92	466	(1,025,057)	912,243	(358)	4,844	-
	Codes & Standards	2,732,679	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,783,335	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	46,366,693	7,852,869	1	1	5,047,966	238	257,132	1,501	1,365	47,536,335	2,666,092	13,621	14,157	-
8-Yr Total	299,312,691	48,518,556	6	6	34,936,901	1,660	1,765,076	11,102	9,371	328,124,216	18,301,282	97,840	97,179	-	

*Requested budget shown in this table does not include Portfolio Support by segment due to template design. Total Portfolio requested budget includes Portfolio Support.

	Sector	Requested Budget*	T58	TRC	PAC	kWh	kW	Therms (MM)	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	Residential	4,007,700	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Commercial	3,994,200	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	2,669,400	0	0	0	-	-	-	-	-	-	-	-	-	-	
	WE&T	2,206,800	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	840,600	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	609,720	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	15,852,720	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
2025	Residential	8,280,000	637,360	0.16	0.12	(477,015)	-	75,606	(154)	401	(4,923,791)	785,998	(1,502)	4,174	-	
	Commercial	8,252,820	2,474,628	0.28	0.3	4,239,962	117	(137)	1,428	(1)	42,197,125	(1,824)	13,147	(10)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	5,515,290	1,783,895	0.37	0.37	101,716	86	125,319	28	665	(1,917,423)	1,297,850	(603)	6,892	-	
	WE&T	4,560,750	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	1,737,450	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,259,836	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	32,755,736	4,865,783	1	1	3,864,663	203	200,788	1,302	1,066	35,355,910	2,082,023	11,041	11,056	-		
2026	Residential	9,108,000	778,969	0.17	0.13	(540,354)	-	85,379	(183)	453	(5,580,308)	887,393	(1,672)	4,712	-	
	Commercial	9,078,102	3,198,488	0.32	0.38	5,410,149	124	(148)	1,872	(1)	55,053,139	(1,966)	16,866	(10)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	6,066,819	2,230,875	0.42	0.42	120,809	103	150,518	36	799	(2,313,397)	1,558,772	(712)	8,277	-	
	WE&T	5,016,825	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	1,911,195	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,385,820	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	36,031,310	6,168,332	1	1	4,990,604	227	235,749	1,725	1,252	47,159,434	2,444,199	14,482	12,979	-		
2027	Residential	10,018,800	830,324	0.18	0.14	(594,204)	-	93,902	(203)	499	(6,136,687)	976,434	(1,794)	5,185	-	
	Commercial	9,985,912	3,338,637	0.31	0.38	5,843,247	130	(159)	1,918	(1)	59,707,842	(2,107)	17,932	(11)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	6,673,501	2,841,838	0.48	0.48	142,470	124	180,889	44	961	(2,799,664)	1,873,210	(835)	9,947	-	
	WE&T	5,318,508	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	2,102,315	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,524,402	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	39,634,441	7,160,299	1	1	5,391,513	254	274,632	1,758	1,458	50,771,491	2,847,537	15,304	15,130	-		
2028	Residential	11,577,280	968,471	0.18	0.15	(584,161)	-	92,314	(185)	490	(6,136,687)	976,434	(1,794)	5,097	-	
	Commercial	11,539,276	3,462,731	0.31	0.34	5,744,480	128	(157)	1,845	(1)	58,698,619	(2,071)	17,466	(11)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	7,711,601	2,919,602	0.48	0.48	140,062	122	177,832	45	944	(2,752,342)	1,841,547	(839)	9,779	-	
	WE&T	6,376,944	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	2,429,342	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,585,378	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	41,219,821	7,370,804	1	1	5,300,381	250	269,989	1,705	1,433	49,913,316	2,799,406	14,930	14,865	-		
2029	Residential	12,040,371	1,084,725	0.18	0.15	(574,521)	-	90,791	(170)	482	(5,933,406)	944,089	(1,631)	5,013	-	
	Commercial	12,000,848	3,380,699	0.3	0.32	5,649,687	126	(154)	1,741	(1)	57,729,990	(2,037)	16,915	(11)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	8,020,066	3,034,481	0.48	0.48	137,751	120	174,897	36	929	(2,706,924)	1,811,159	(834)	9,617	-	
	WE&T	6,632,022	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	2,526,516	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,648,793	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	42,868,616	7,479,905	1	1	5,212,917	246	265,534	1,607	1,410	49,089,660	2,753,211	14,450	14,619	-		
2030	Residential	12,521,986	1,144,621	0.19	0.15	(565,256)	-	89,327	(161)	474	(5,837,729)	928,865	(1,577)	4,932	-	
	Commercial	12,480,880	3,318,994	0.29	0.3	5,558,583	124	(152)	1,643	(1)	56,799,073	(2,004)	16,416	(11)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	8,340,867	3,156,950	0.47	0.47	135,530	118	172,077	22	914	(2,663,274)	1,781,953	(826)	9,462	-	
	WE&T	6,897,301	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	2,627,576	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,714,745	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	44,583,355	7,620,565	1	1	5,128,857	242	261,252	1,504	1,387	48,298,070	2,708,814	14,013	14,383	-		
2031	Residential	13,022,866	1,213,178	0.19	0.15	(556,341)	-	87,918	(160)	467	(5,745,657)	914,216	(1,527)	4,854	-	
	Commercial	12,980,116	3,247,387	0.28	0.29	5,470,915	122	(149)	1,638	(1)	55,903,262	(1,973)	15,957	(10)	-	
	Industrial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Agricultural	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Emerging Tech	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Public	8,674,503	3,292,333	0.47	0.47	133,392	116	169,363	23	899	(2,621,270)	1,753,849	(809)	9,313	-	
	WE&T	7,173,194	0	0	0	-	-	-	-	-	-	-	-	-	-	
	Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	OFB Loan Pool	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Stds	2,732,679	0	0	0	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,783,335	0	0	0	-	-	-	-	-	-	-	-	-	-	-
TOTAL Portfolio	46,366,693	7,852,868	1	1	5,047,966	238	257,132	1,501	1,365	47,536,335	2,666,092	13,621	14,157	-		
8-Yr Total	299,312,691	48,518,556	7	6	34,936,901	1,660	1,765,076	11,102	9,371	328,124,216	18,301,282	97,840	97,179	-		

*Requested budget shown in this table does not include Portfolio Support by segment due to template design. Total Portfolio requested budget includes Portfolio Support.

Pa Name: SDREN
 Budget Year: 2024-2031
 Table 7.3 - PA 2024-2031 Budget Savings By Sector and Segment

Calculate TSB for all sectors, include GHG

Line	Sector	Program Year (PY) 2024 Budget*	PY2024 FORECAST ENERGY SAVINGS (Net)					Program Year (PY) 2025 Budget*	PY2025 FORECAST ENERGY SAVINGS (Net)					Program Year (PY) 2026 Budget*	PY2026 FORECAST ENERGY SAVINGS (Net)				
			PA forecast kWh	PA forecast kW	PA forecast thrms (MM)	First Year Net Elec CO2e	First Year Net Gas CO2e		PA forecast kWh	PA forecast kW	PA forecast thrms (MM)	First Year Net Elec CO2e	First Year Net Gas CO2e		PA forecast kWh	PA forecast kW	PA forecast thrms (MM)	First Year Net Elec CO2e	First Year Net Gas CO2e
Resource Acquisition																			
	Residential	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Commercial	\$1,891,800	-	-	-	-	\$3,909,240	3,333,474.17	-	-	1,143	-	\$4,300,164	4,444,629.66	-	1,553			
	Industrial	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Agricultural	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Emerging Tech	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Public	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	WE&T	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Finance	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	OBF Loan Pool	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
4	PA Subtotal (does not include ESA budget and savings)	\$1,891,800	-	-	-	-	\$3,909,240	3,333,474	-	-	1,143	-	\$4,300,164	4,444,630	-	1,553			
	Forecasted Total System Benefit (TSB)	\$0	-	-	-	-	\$1,979,434	-	-	-	-	-	\$2,624,811	-	-	-			
	Forecasted Total Resource Cost (TRC)	0.00	-	-	-	-	0.40	-	-	-	-	-	0.46	-	-	-			
	Forecasted Administrator Cost (AC)	0.00	-	-	-	-	0.47	-	-	-	-	-	0.57	-	-	-			
Market Support																			
	Residential	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Commercial	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Industrial	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Agricultural	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Emerging Tech	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-			
	Public	\$2,458,800	-	-	-	-	\$5,080,950	101,715.83	86.00	125,319.00	28	665	\$5,589,045	120,809.38	103.00	150,518.00	36	799	
	WE&T	\$2,206,800	-	-	-	-	\$4,560,750	-	-	-	-	-	\$5,016,825	-	-	-	-	-	
	Finance	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	OBF Loan Pool	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
4	PA Subtotal (does not include ESA budget and savings)	\$4,665,600	-	-	-	\$0	\$9,641,700	101,716	86	125,319	28	665	\$10,605,870	120,809	103	150,518	36	799	
	Forecasted Total System Benefit (TSB)	\$0	-	-	-	-	\$1,753,895	-	-	-	-	-	\$2,230,875	-	-	-	-	-	
	Forecasted Total Resource Cost (TRC)	0.00	-	-	-	-	0.20	-	-	-	-	-	0.23	-	-	-	-	-	
	Forecasted Administrator Cost (AC)	0.00	-	-	-	-	0.20	-	-	-	-	-	0.23	-	-	-	-	-	
Equity																			
	Residential	\$4,007,700	-	-	-	-	\$8,280,000	(477,015.07)	-	75,606.00	(154)	401	\$9,108,000	(540,354.34)	-	85,379.00	(183)	453	
	Commercial	\$2,102,400	-	-	-	-	\$4,343,580	906,488.10	117.00	(137.00)	285	(1)	\$4,777,938	965,519.10	124.00	(148.00)	318	(1)	
	Industrial	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Agricultural	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Emerging Tech	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Public	\$210,600	-	-	-	-	\$434,340	-	-	-	-	-	\$477,774	-	-	-	-	-	
	WE&T	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Finance	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	OBF Loan Pool	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
4	PA Subtotal (does not include ESA budget and savings)	\$6,320,700	-	-	-	-	\$13,057,919	429,473	117	75,469	130	401	\$14,363,712	425,165	124	85,231	135	453	
	Forecasted Total System Benefit (TSB)	\$0	-	-	-	-	\$1,132,454	-	-	-	-	-	\$1,312,645	-	-	-	-	-	
	Forecasted Total Resource Cost (TRC)	0.00	-	-	-	-	0.12	-	-	-	-	-	0.12	-	-	-	-	-	
	Forecasted Administrator Cost (AC)	0.00	-	-	-	-	0.11	-	-	-	-	-	0.11	-	-	-	-	-	
Portfolio																			
	Residential	\$4,007,700	-	-	-	-	\$8,280,000	(477,015.07)	-	75,606.00	(154)	401	\$9,108,000	(540,354.34)	-	85,379.00	(183)	453	
	Commercial	\$3,994,200	-	-	-	-	\$8,252,820	4,239,962.27	117.00	(137.00)	1,428	(1)	\$9,078,102	5,410,148.76	124.00	(148.00)	1,872	(1)	
	Industrial	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Agricultural	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Emerging Tech	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	Public	\$2,669,400	-	-	-	-	\$5,515,290	101,715.83	86.00	125,319.00	28	665	\$6,066,819	120,809.38	103.00	150,518.00	36	799	
	WE&T	\$2,206,800	-	-	-	-	\$4,560,750	-	-	-	-	-	\$5,016,825	-	-	-	-	-	
	Finance	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
	OBF Loan Pool	\$0	-	-	-	-	\$0	-	-	-	-	-	\$0	-	-	-	-	-	
4	PA Subtotal (does not include ESA budget and savings)	\$12,878,100	-	-	-	-	\$26,608,860	3,864,663	203	200,788	1,302	1,066	\$29,269,746	4,990,604	227	235,749	1,725	1,252	
5	CPUC Savings Goal (w/o C&S)																		
6	Forecast savings as % of CPUC Savings Goal (w/o C&S)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
8	Total EM&V ⁷	\$609,720					\$1,259,836						\$1,385,820						
8a	PA EM&V	\$167,673					\$346,455						\$381,101						
8b	ED EM&V	\$442,047					\$913,381						\$1,004,720						
	Forecasted Total System Benefit (TSB)	\$0					\$4,865,784						\$6,168,332						
	Forecasted Total Resource Cost (TRC)	0.00					0.18						0.21						
	Forecasted Portfolio Administrator Cost (PAC)	0.00					0.18						0.20						
	Forecasted Ratepayer Impact Measure (RIM)																		
7	Codes and Standards	\$840,600					\$1,737,450						\$1,911,195						
9	PA Spending Budget Request ¹	\$15,852,720					\$32,755,736						\$36,031,310						
10	(LESS) PA Pre-2020 Uncommitted and Unspent Carryover Balance ²	\$0					\$0						\$0						
11	PA Revenue Requirement Request (Cost Recovery) ⁵	\$15,852,720					\$32,755,736						\$36,031,310						
	% of Equity and Market Support Program Budgets to PA Spending Budget Request (not to Exceed)	69%					69%						69%						
17	PA Authorized Budget Cap (D.18-05-041)																		
ONLY IOU COMPLETES THIS SECTION - For CCA & RENS in IOU Service Territory Only																			
13	REN Budget Recovery Request	\$0					\$0						\$0						
13a	BayREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)																		
13b	SoCal REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)																		
13c	3CREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)																		
13d	RCEA PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)																		
14	CCA Budget Recovery Request	\$0					\$0						\$0						
14a	MCE PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)																		
14b	Lancaster PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)																		
14c	Redwood Coast Energy Authority (excl. REN Uncommitted/Unspent Carryover)																		
14d	San Jose Clean Energy (excl. REN Uncommitted/Unspent Carryover)																		
15	Total PA (IOU+CCAs+RENS) Recovery Budget ⁶	\$15,852,720					\$32,755,736						\$36,031,310						

*Requested budget shown in this table does not include Portfolio Support by Segment and Sector due to template design. The PA Spending Budget Requests do include Portfolio Support.
¹ This is the PA's requested budget. It is the sum of the segment totals from above plus the portfolio support category.
² The balance of unspent uncommitted must reflect the total unspent uncommitted from pre-2020 EE authorized budgets Jan 1 2018 through Dec 31 of current year (PY-1). Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.
³ See D.21-01-004 Tables 2 (2022) and 3 (2022)
⁴ Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.
⁵ The amount of funds to be collected (cost recovery) for the PA EE Program Year = Line 9 - Line 10 + Line 12
⁶ Total amount to be requested in IOU's PPP advice letter for their programs, RENS and CCAs in their service territory, Line 15+ Line 21 + Line 22
⁷ 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 .

Pa Name:
 Budget Year:
 Table 8 - Cap & Targets

Line	Budget Category	2024 Energy Efficiency Cap And Target Expenditure Projections						2025 Energy Efficiency Cap And Target Expenditure Projections					
		Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
		Non-Third Party Qualifying Costs (including PA costs and all other 3P/CP contracts that don't meet the new definition)	Third Party Qualifying Costs ¹ (incl SW, CEC & AB 841)	Total Portfolio	Percent of Budget ²	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and all other 3P/CP contracts that don't meet the new definition)	Third Party Qualifying Costs ¹ (including SW)	Total Portfolio	Percent of Budget ²	Cap %	Target %
1	Administrative Costs												
2	PA ³	\$ -	\$ -	\$ -	0.0%	10.0%	\$ -	\$ -	\$ -	0.0%	10.0%	\$ -	\$ -
3	Non-PA Third Party & Partnership ²	\$ -	\$ -	\$ -	0.0%	10.0%	\$ -	\$ -	\$ -	0.0%	10.0%	\$ -	\$ -
4	PA & Non-PA Target Exempt Programs ³	\$ 1,324,302	\$ -	\$ 1,324,302			\$ 1,149,592	\$ -	\$ 1,149,592			\$ -	\$ -
5	Marketing and Outreach Costs ⁴												
6	Marketing & Outreach	\$ -	\$ 914,532	\$ 914,532	5.8%	6.8%	\$ -	\$ 1,311,522	\$ 1,311,522	9.5%	6.8%	\$ -	\$ -
7	Statewide Marketing & Outreach ⁴	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -			\$ -	\$ -
8	Direct Implementation Costs												
9	Direct Implementation (Incentives and Rebates)	\$ -	\$ -	\$ -			\$ -	\$ 11,324,236	\$ 11,324,236			\$ -	\$ -
10	Direct Implementation (Non Incentives and Non Rebates)	\$ -	\$ 9,763,328	\$ 9,763,328	61.4%	26.9%	\$ -	\$ 9,226,638	\$ 9,226,638	68.7%	26.9%	\$ -	\$ -
11	Incentives and Non Rebates ⁵	\$ -	\$ 3,040,898	\$ 3,040,898			\$ -	\$ 6,263,794	\$ 6,263,794			\$ -	\$ -
12	EMSV Costs (PA and Energy Division) ^{6,7}	\$ 693,726	\$ -	\$ 693,726	3.8%	4.8%	\$ 1,209,304	\$ -	\$ 1,209,304	3.8%	4.8%	\$ -	\$ -
12a	EMSV - PA	\$ 167,673	\$ -	\$ 167,673			\$ 348,430	\$ -	\$ 348,430			\$ -	\$ -
12b	EMSV - ED	\$ 642,247	\$ -	\$ 642,247			\$ 813,381	\$ -	\$ 813,381			\$ -	\$ -
13	Total Portfolio Budget (includes PA Program and EMSV Budget + SW M&O) ⁸	\$ 2,134,628	\$ 13,718,706	\$ 15,853,334			\$ 4,409,426	\$ 28,346,310	\$ 32,755,736			\$ -	\$ -
14	CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.16-08-019, OP 10)	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -			\$ -	\$ -
15	PA Spending Budget Request (PA Program and EMSV + CEC AB 841) ⁹	\$ -	\$ -	\$ 15,853,334			\$ -	\$ -	\$ 32,755,736			\$ -	\$ -
16	Total Third-Party Implementer Contracts + CEC AB 841 (as defined per D.16-08-019, OP 10 and D.21-01-xxx CP) ^{10,11}	\$ -	\$ 13,718,706	\$ 13,718,706	60.2%	60.2%	\$ -	\$ 28,346,310	\$ 28,346,310	60.2%	60.2%	\$ -	\$ -

- Notes:
- 10% cap requirement based on D. 09-09-047 is set for IOU only.
 - 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.
 - 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 (including Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
 - Statewide Marketing & Outreach (SW M&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-030, at p. 82.
 - Statewide M&O budgets for October 2019 through 2021 were requested in Advice Letter 4205 075544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
 - For IOUs, EMSV costs only includes IOU's Total EMSV budget (PA + ED) and does not include REN or CCA's EMSV budget. For RENs & CCAs, include EMSV-PA Budget and EMSV-ED = \$0.
 - The EMSV percentage is based on PA's total portfolio budget of \$X, which excludes SWM&O, RENs, CCAs and CEC AB 841. This is the Total in line 13, minus SWM&O in line 7.
 - As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 62, this total includes SW M&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.
 - IOU PA's 2021 Proposed Budget of \$X excludes SWM&O budget of \$Y and includes CEC AB 841 budgets of \$Z.
 - IOU PA's percentage for Third-Party Implementer Contracts uses \$X as its denominator, which is IOU PA Subtotal including EMSV, but excluding SWM&O, REN, and CCA. This is the Total in line 13 15, minus SWM&O in line 7.
 - 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.

2026 Energy Efficiency Cap And Target Expenditure			Projections			2027 Energy Efficiency Cap And Target Expenditure			Projections		
Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
Non-Fossil Party Qualifying Costs (including FA costs and an additional 30:00 contracts that don't meet the new definition)	Third Party Qualifying Costs (including DW)	Total Portfolio	Percent of Budget*	Cap %	Target %	Non-Fossil Party Qualifying Costs (including FA costs and an additional 30:00 contracts that don't meet the new definition)	Third Party Qualifying Costs (including DW)	Total Portfolio	Percent of Budget*	Cap %	Target %
\$ -	\$ -	\$ -	0.0%	10.0%	10.0%	\$ -	\$ -	\$ -	0.0%	10.0%	10.0%
\$ 3,684,349	\$ -	\$ 3,684,349				\$ 3,871,004	\$ -	\$ 3,871,004			
\$ -	\$ 1,347,776	\$ 1,347,776	0.0%	0.0%		\$ -	\$ 1,712,545	\$ 1,712,545	10.0%	0.0%	
\$ -	\$ -	\$ -				\$ -	\$ -	\$ -			
\$ -	\$ 11,903,040	\$ 11,903,040				\$ -	\$ 16,267,033	\$ 16,267,033			
\$ -	\$ 8,703,066	\$ 8,703,066	30.7%	30.0%		\$ -	\$ 8,893,312	\$ 8,893,312	34.8%	30.0%	
\$ -	\$ 6,976,209	\$ 6,976,209				\$ -	\$ 7,626,245	\$ 7,626,245			
\$ 1,381,609	\$ -	\$ 1,381,609	0.0%	0.0%		\$ 1,324,403	\$ -	\$ 1,324,403	0.0%	0.0%	
\$ 381,101	\$ -	\$ 381,101				\$ 419,211	\$ -	\$ 419,211			
\$ 1,004,729	\$ -	\$ 1,004,729				\$ 1,105,191	\$ -	\$ 1,105,191			
\$ 4,859,249	\$ 31,180,341	\$ 36,039,590				\$ 5,325,406	\$ 34,299,035	\$ 39,624,441			
\$ -	\$ -	\$ -				\$ -	\$ -	\$ -			
\$ -	\$ 36,039,590	\$ 36,039,590				\$ -	\$ 39,624,441	\$ 39,624,441			
\$ -	\$ 31,180,341	\$ 31,180,341	86.0%	60.0%		\$ -	\$ 34,299,035	\$ 34,299,035	86.0%	60.0%	

Pa Name:	SDREN
Budget Year:	2024-2031

FUNCTION DEFINITIONS

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and regulatory support	Planning & Compliance	DSM Goal Planning; lead legislative review/positioning; policy support on reg proceedings; portfolio optimization; end use-market strategy; DSM lead for PRP, DRP, ES; locational targeting; audit support; SOX certifications; developing control plans; developing action plans; continuous monitoring; inspections; program/product QA/QC; decision compliance oversight/tracking; data requests; policies & procedures
		Company Regulatory Support	Case management for EE proceedings
Program management	Includes labor, contracts, admin costs for program design, program implementation, product and channel management for all sectors	Program Management & Delivery	Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking
		Product Management	Manage end-to-end new products and services (P&S) intake, evaluation, and launch process; develop and facilitate P&S governance teams, coordination of all sub-process owners, stakeholders, and technical resources required to evaluate and launch new products; evaluate and launch new services and ODR opportunities; develop external partnerships & strategic alliances; work with various companies and associations to help advance standards, products, and tech.; work with external experts to help reduce SCE costs to deliver new prog. and products; develop and launch new customer technologies, products, services for residential and business customers; conduct customer pilots of new technologies and programs; lead customer field demonstrations of new technologies and products; align new P&S to savings programs/incentives; develop new programs/incentives in support of savings goals
		Channel Management	
		Contract Management	Budget forecasting, spend tracking, invoice processing, and contract management with vendors and suppliers; Regulatory support for ME&O activities
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project 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 IEPK, market potential study, integration w/ procurement planning, CPUC
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing	Customer Programs, Products, and services marketing, digital Product development, digital content & optimization
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research
Account Management / Sales	Costs associated with account rep energy efficiency sales functions	Account Management	
IT	IT project specific costs and regular O&M	IT - project specific	Projects and minor enhancements. Includes project management/business integration ("PMO/BID"). Excluded: maintenance (which SCE defines as when something goes down, normal batch processing, verifying interfaces, etc.).
		IT - regular O&M	
Call Center	Costs associated with call center staff fielding EE program questions	Call Center	
Incentives	Costs of rebate and incentive payments to customers	Incentives	

Pa Name:
Budget Year:
PORTFOLIO STAFFING

SDREN
2024-2027

Functional Group	2020 EE Portfolio	2022 EE Portfolio	2023 EE Portfolio	2024 EE	2025 EE	2026 EE	2027 EE
Policy, Strategy, and Regulatory Reporting Compliance				1.2	2.5	2.7	3.0
Program Management				3.6	7.4	8.2	9.0
Engineering Services							
Customer Application/Rebate/Incentive Processing							
Customer Project Inspections							
Portfolio Analytics (1)							
EM&V							
ME&O (Local)				0.3	0.5	0.5	0.5
Account Management / Sales							
IT							
Call Center							
Total	-	-	-	5.1	10.4	11.4	12.5

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

¶

- → Functions conducted by each department/organization¶
- → Management structure and org chart¶
- → Staffing needs by department/organization, including current and forecast for 2018, as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.¶
- → Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.¶
- → Anticipated drivers of in-house cost changes by department/organization¶
- → Explanation of method for forecasting costs¶

¶

¶

B. → Table showing PA EE headcount by department/organization¶

¶

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

Pa Name: **SDREN**
 Budget Year: **2024-2031**
PORTFOLIO SUMMARY

Sector	2020 EE Portfolio Expenditures				2024 EE Portfolio Budget				2025 EE Portfolio Budget				Labor
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	
Residential				\$ -	\$ 472,018	\$ 3,980,982	\$ -	\$ 4,453,000	\$ 960,765	\$ 2,899,219	\$ 5,340,017	\$ 9,200,000	\$ 1,051,187
Commercial				\$ -	\$ 470,428	\$ 3,967,572	\$ -	\$ 4,438,000	\$ 961,384	\$ 4,155,632	\$ 4,052,784	\$ 9,169,800	\$ 1,045,374
Industrial				\$ -			\$ -	\$ -			\$ -	\$ -	
Agricultural				\$ -			\$ -	\$ -			\$ -	\$ -	
Public				\$ -	\$ 314,396	\$ 2,651,604	\$ -	\$ 2,966,000	\$ 636,807	\$ 3,559,858	\$ 1,931,435	\$ 6,128,100	\$ 712,803
Cross Cutting*				\$ -	\$ 358,916	\$ 3,027,084	\$ -	\$ 3,386,000	\$ 741,788	\$ 6,256,212	\$ -	\$ 6,998,000	\$ 809,962
Total Sector Budget	\$ -	\$ -	\$ -	\$ -	\$ 1,615,758	\$ 13,627,242	\$ -	\$ 15,243,000	\$ 3,300,744	\$ 16,870,921	\$ 11,324,236	\$ 31,495,900	\$ 3,619,327
EM&V-PA				\$ -	\$ 167,673	\$ -	\$ -	\$ 167,673	\$ -	\$ 346,455	\$ -	\$ 346,455	\$ -
EM&V-ED				\$ -	\$ 442,047	\$ -	\$ -	\$ 442,047	\$ -	\$ 913,381	\$ -	\$ 913,381	\$ -
DBF - Loan Pool**				\$ -			\$ -	\$ -			\$ -	\$ -	
PA Spending Budget Request	\$ -	\$ -	\$ -	\$ -	\$ 1,615,758	\$ 14,236,962	\$ -	\$ 15,652,720	\$ 3,300,744	\$ 18,130,757	\$ 11,324,236	\$ 32,755,736	\$ 3,619,327

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Finance.
 ** For SD&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.

4 - 11/20/2024, 10:00 AM, C:\P
 * Please refer to the accompanying budget request and supporting information for the most current information. This table should reflect the latest information available as of the date of this report. All figures are in dollars unless otherwise noted.
 ** For SD&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.
 *** Additionally, we have a loan pool for the medical center for the PA spending budget request as shown in the C. 1. Table 4.

2026 EE Portfolio Budget			2027 EE Portfolio Budget			2020 EE Portfolio Savings			2024 EE Portfolio Forecasted Savings			2025 EE Portfolio Forecasted Savings			2026 EE Portfolio Forecasted Savings			2027 EE Portfolio Forecasted Savings			
Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS
\$ 2,778,509	\$ 6,290,304	\$ 10,120,000	\$ 1,156,917	\$ 2,650,065	\$ 7,325,018	\$ 11,132,000	-	-	-	-	-	-	(477,015)	-	75,606	(540,354)	-	85,379	(594,204)	-	93,902
\$ 3,864,160	\$ 5,177,247	\$ 10,086,780	\$ 1,157,349	\$ 4,070,715	\$ 5,867,394	\$ 11,095,458	-	-	-	-	-	-	4,239,962	117	(137)	5,410,149	124	(148)	5,843,247	130	(159)
\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
\$ 3,591,818	\$ 2,436,289	\$ 6,740,910	\$ 772,523	\$ 3,567,357	\$ 3,075,121	\$ 7,415,001	-	-	-	-	-	-	101,716	86	125,319	120,809	103	150,518	142,470	124	180,889
\$ 6,887,838	\$ -	\$ 7,697,800	\$ 895,508	\$ 7,572,072	\$ -	\$ 8,467,580	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
\$ 17,122,323	\$ 13,903,840	\$ 34,645,490	\$ 3,982,297	\$ 17,860,209	\$ 16,267,533	\$ 38,110,039	-	-	-	-	-	-	3,864,663	203	200,788	4,990,604	227	235,749	5,391,513	254	274,632
\$ 381,101	\$ -	\$ 381,101	\$ -	\$ 419,211	\$ -	\$ 419,211	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
\$ 1,004,720	\$ -	\$ 1,004,720	\$ -	\$ 1,105,191	\$ -	\$ 1,105,191	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
\$ 18,508,143	\$ 13,903,840	\$ 36,031,310	\$ 3,982,297	\$ 19,384,611	\$ 16,267,533	\$ 39,634,441	-	-	-	-	-	-	3,864,663	203	200,788	4,990,604	227	235,749	5,391,513	254	274,632

Sector	Cost Element	Functional Group	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	\$ 111,325	\$ 230,000	\$ 253,000	\$ 278,300
		Program Management	\$ 333,975	\$ 690,000	\$ 759,000	\$ 834,900
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 26,718	\$ 40,765	\$ 39,188	\$ 43,717
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 472,018	\$ 960,765	\$ 1,051,187	\$ 1,156,917
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 3,740,520	\$ 2,532,333	\$ 2,425,921	\$ 2,256,608
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 240,462	\$ 366,886	\$ 352,688	\$ 393,457
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs		\$ 5,340,017	\$ 6,290,304	\$ 7,325,018
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 3,980,982.000	\$ 8,239,235.400	\$ 9,068,812.520	\$ 9,975,082.674
Residential Total			\$ 4,453,000.000	\$ 9,200,000.000	\$ 10,120,000.000	\$ 11,132,000.000
	Other (collected through GRC) (2)	Labor Overheads	\$	\$	\$	\$
			\$ 4,453,000.00	\$ 9,200,000.00	\$ 10,120,000.00	\$ 11,132,000.00

Notes: (1) Labor costs are already loaded with (state loaders covered by EE) \$ 267,180
 (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

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

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."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Sector	Cost Element	Functional Group	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	\$ 110,950	\$ 229,245	\$ 252,170	\$ 277,386
		Program Management	\$ 312,850	\$ 687,738	\$ 756,509	\$ 832,159
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		M&O (Local)	\$ 26,628	\$ 44,403	\$ 36,695	\$ 47,803
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 470,428	\$ 961,384	\$ 1,045,374	\$ 1,157,349
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 3,727,620	\$ 3,756,007	\$ 3,533,903	\$ 3,640,489
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		M&O (Local)	\$ 239,652	\$ 399,623	\$ 330,257	\$ 430,226
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives—(PA implemented and Other Contracts Program Implementation) Programs		\$ 4,052,784	\$ 3,177,247	\$ 3,867,334
		Incentives—Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 3,967,272	\$ 8,208,434	\$ 9,041,406	\$ 9,938,109
Commercial Total (5)			\$ 4,438,000	\$ 9,169,800	\$ 10,086,780	\$ 11,095,458
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 4,438,000.00	\$ 9,169,800.00	\$ 10,086,780.00	\$ 11,095,458.00

- 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-M&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¶

- - Expenses broken out into labor, non-labor-O&M (with contract labor identified)¶
- - Identify any capital costs¶

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."¶

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.¶
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.¶

Sector	Cost Element	Functional Group	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.16-06-019, 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.16-06-019, 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)
 (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¶

- Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- Identify any capital costs¶

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."¶

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.¶
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.¶

Sector	Cost Element	Functional Group	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				
		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.16-06-019, 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.16-06-019, OP 10)				
	Non-Labor Total		\$ -	\$ -	\$ -	\$ -
	Agricultural Total (5)		\$ -	\$ -	\$ -	\$ -
	Other (collected through GRC) (2)	Labor Overheads				
			\$ -	\$ -	\$ -	\$ -

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

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

- → Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- → Identify any capital costs¶

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."¶

- → TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.¶
- → Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.¶

Sector	Cost Element	Functional Group	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	\$ 74,150,000	\$ 153,202,417	\$ 168,522,895	\$ 185,375,117
		Program Management	\$ 222,450,000	\$ 459,607,252	\$ 505,568,086	\$ 556,125,351
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 17,796,000	\$ 23,997,300	\$ 38,712,500	\$ 31,022,527
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 314,396,000	\$ 636,806,969	\$ 712,803,281	\$ 772,522,995
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 2,491,440,000	\$ 3,343,882,000	\$ 3,243,405,000	\$ 3,288,154,100
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 160,164,000	\$ 215,975,700	\$ 348,412,500	\$ 279,202,743
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs		\$ 1,931,435,331	\$ 2,436,289,219	\$ 3,075,121,162
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 2,651,604,000	\$ 5,491,293,031	\$ 6,028,106,719	\$ 6,642,478,005
Public Sector Total (5)			\$ 2,966,000,000	\$ 6,128,100,000	\$ 6,740,910,000	\$ 7,415,001,000
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 2,966,000.00	\$ 6,128,100.00	\$ 6,740,910.00	\$ 7,415,001.00

- 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¶

¶

- → Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- → Identify any capital costs¶

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."¶

¶

- → TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.¶
- → Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.¶

Sector	Cost Element	Functional Group	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	\$ 84,650,000	\$ 174,350,000	\$ 192,445,000	\$ 211,689,100
		Program Management	\$ 253,950,000	\$ 524,850,000	\$ 577,335,000	\$ 635,067,300
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		M&O (Local)	\$ 20,316,000	\$ 41,988,000	\$ 40,182,400	\$ 48,751,660
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 358,916,000	\$ 741,788,000	\$ 809,962,400	\$ 895,508,060
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 2,844,240,000	\$ 5,878,320,000	\$ 6,526,196,000	\$ 7,133,307,000
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		M&O (Local)	\$ 182,844,000	\$ 377,897,000	\$ 363,641,600	\$ 438,764,940
		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		\$ 3,027,084,000	\$ 6,256,212,000	\$ 6,889,837,600	\$ 7,572,071,940
Cross-Cutting Total (5)			\$ 3,386,000,000	\$ 6,998,000,000	\$ 7,697,800,000	\$ 8,467,580,000
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 3,586,000.00	\$ 6,998,000.00	\$ 7,697,800.00	\$ 8,467,580.00

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-M&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¶

- Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- Identify any capital costs¶

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."¶

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

Pa Name: **SDREN**Budget Year: **2024-2027**

Adopted Market Support & Equity Indicators (does not include AKAB indicators)

SDREN WILL FOLLOW GUIDANCE ON ADOPTED METHODOLOGIES AND CLARIFICATIONS ON THE BELOW ADOPTED INDICATORS ANTICIPATED THROUGH A JOINT TIER 2 ADVICE LETTER IN MAY 2024

Metric/Indicator	Equity/Market Support	Description	Reported quarterly (Q) or annually (A)	Reported by segment (S) or portfolio (P)
Indicator	Equity	Count of equity target participants in equity segment, by sector	Q	S
Indicator	Equity	Sum of equity target participants' expected first-year bill savings in equity segment, by sector	Q	S
Indicator	Equity	Count of equity target participants in market support segment, by sector	Q	S
Indicator	Equity	Count of equity target participants in resource acquisition segment, by sector	Q	S
Indicator	Equity	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment	Q	S
Indicator	Equity	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment	Q	S
Indicator	Equity	Sum of all equity segment participants' kW savings in equity segment	Q	S
Indicator	Equity	Sum of all equity segment participants' therm savings in equity segment	Q	S
Indicator	Equity	Sum of all equity segment participants' TSB in equity segment	Q	S
Indicator	Equity	Median of equity target participants' expected first-year bill savings in equity segment, by sector	Q	S
Indicator	Equity	Percent of hard-to-reach customer participants in portfolio, by residential single family / multi-family and commercial sector	A	P
Indicator	Equity	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multifamily and commercial sector	A	P
Indicator	Equity	Percent of equity target participants in equity segment, by sector	Q	S
Indicator	Market Support	Number of partners by type and purposes	Q	P
Indicator	Market Support	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships	A	P
Indicator	Market Support	Percent of participation relative to eligible target population for curriculum	Q	S
Indicator	Market Support	Percent of total WE&T program participants that meet the definition of disadvantaged worker	Q	S
Indicator	Market Support	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training	A	S
Indicator	Market Support	Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies	A	P
Indicator	Market Support	Prior year number of new measures added to the portfolio that were previously ETP technologies	A	P
Indicator	Market Support	Prior year percentage of new codes or standards that were previously ETP technologies	A	P
Indicator	Market Support	Prior year number of new codes and standards that were previously ETP technologies	A	P

Indicator	Market Support	Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available	A	P
Indicator	Market Support	Number of new, validated technologies recommended to the California Technical Forum	A	P
Indicator	Market Support	Cost-effectiveness of a technology prior to market support program relative to cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness)	A	S
Indicator	Market Support	Number of collaborations, with a contextual descriptions, by business plan sector to jointly develop or share training materials or resources	A	P
Indicator	Market Support	Number of unique participants by sector that complete training	Q	S
Indicator	Market Support	Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy efficient technology	A	P
Indicator	Market Support	Total projects completed/measures installed and dollar value of consolidated programs by sector	Q	P
Indicator	Market Support	Ratio of ratepayer funds expended to private capital leveraged by sector	Q	P
Indicator	Market Support	Percentage of partners that have taken action supporting energy efficiency by type	Q	P
Indicator	Market Support	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency	Q	S
Indicator	Market Support	Assessed value of the partnership by partners	A	P
Indicator	Market Support	Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services	A	P
Indicator	Market Support	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services	A	P
Indicator	Market Support	Aggregated confidence level in performance verification by production, project, and service (for relevant programs)	A	P
Indicator	Market Support	Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products)	A	P
Indicator	Market Support	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment)	A	P

Pa Name: SDREN
 Budget Year: 2024-2027
 SDREN Unique Value Metrics

Metric/Indicator	Measurement	Description	Segment	Sector	(Y/N)	Numerator	Denominator	Methodology	Target 2024	Target 2025	Target 2026	Target 2027	4-Year Target
Metric	Percent	energy costs as a result of program participation	Equity	Public,	N	SDREN commercial, public, or residential	participate in SDREN commercial, public,	intervention	100%	100%	100%	100%	100%
Indicator	kbtu	EE savings channeled to non SDREN programs		Public,	Y	n/a	n/a	request to PA. Methodology may	n/a	n/a	n/a	n/a	n/a
Metric	Percent	% of customers channeled to non SDREN programs			Y	SDREN programs introduced to a non-SDREN	with SDREN programs	is introduced to SDG&E, or other	50%	50%	50%	50%	50%
Metric	Percent	programs/ communities (% of total budget spend)			Y	time period	Total SDREN spend	the sum of the following: funding	50%	50%	50%	50%	50%
Indicator	Count	Count of newly educated or credentialed individuals	Market Support	WE&T	N	N/A	N/A	training through an SDREN program	n/a	n/a	n/a	n/a	n/a
Metric	Percent	customers served	Equity	Public,	Y	program classified as underserved or HTR	SDREN programs	program classified as underserved	75%	75%	75%	75%	75%

Pa Name:

SDREN

 Budget Year:

2024-2027

Program Segmentation Justification (Attachment A from D. 23.06.055)

PA	Program Name	Program ID	Market Sector	Program Segment	Brief description of rationale for program segmentation	Metric/Indicator Identification
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' kW savings in equity segment
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' therm savings in equity segment
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' TSB in equity segment
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Count of equity target participants in equity segment, by sector
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Percent of equity target participants in equity segment, by sector
SDREN	SMB Energy Coach	SDREN-01-COM-SMB	Commercial	Equity	This program provides energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of equity target participants' expected first-year bill savings in equity segment, by sector
SDREN	Efficient Refrigeration	SDREN-02-COM-ERF	Commercial	Equity	Provide energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment
SDREN	Efficient Refrigeration	SDREN-02-COM-ERF	Commercial	Equity	Provide energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' therm savings in equity segment
SDREN	Efficient Refrigeration	SDREN-02-COM-ERF	Commercial	Equity	Provide energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of all equity segment participants' TSB in equity segment
SDREN	Efficient Refrigeration	SDREN-02-COM-ERF	Commercial	Equity	Provide energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Count of equity target participants in equity segment, by sector
SDREN	Efficient Refrigeration	SDREN-02-COM-ERF	Commercial	Equity	Provide energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Sum of equity target participants' expected first-year bill savings in equity segment, by sector
SDREN	Efficient Refrigeration	SDREN-02-COM-ERF	Commercial	Equity	Provide energy efficiency services to hard-to-reach and/or underserved communities in alignment with the Commission's Environmental and Social Justice Action Plan.	Median of equity target participants' expected first-year bill savings in equity segment, by sector
SDREN	Market Access Program	SDREN-03-COM-MAP	Commercial	Resource Acquisition	Deliver cost-effective avoided cost benefits to the state's energy systems. SDREN will rely on this program to deliver the bulk of the commercial portfolio's TSB target, in alignment with the CPUC's directive to expand NMEC programs statewide.	Count of equity target participants in resource acquisition segment, by sector
SDREN	Market Access Program	SDREN-03-COM-MAP	Commercial	Resource Acquisition	Deliver cost-effective avoided cost benefits to the state's energy systems. SDREN will rely on this program to deliver the bulk of the commercial portfolio's TSB target, in alignment with the CPUC's directive to expand NMEC programs statewide.	Total System Benefit (TSB) Achieved
SDREN	Market Access Program	SDREN-03-COM-MAP	Commercial	Resource Acquisition	Deliver cost-effective avoided cost benefits to the state's energy systems. SDREN will rely on this program to deliver the bulk of the commercial portfolio's TSB target, in alignment with the CPUC's directive to expand NMEC programs statewide.	Net GHG reduction
SDREN	Market Access Program	SDREN-03-COM-MAP	Commercial	Resource Acquisition	Deliver cost-effective avoided cost benefits to the state's energy systems. SDREN will rely on this program to deliver the bulk of the commercial portfolio's TSB target, in alignment with the CPUC's directive to expand NMEC programs statewide.	Net kWh savings
SDREN	Market Access Program	SDREN-03-COM-MAP	Commercial	Resource Acquisition	Deliver cost-effective avoided cost benefits to the state's energy systems. SDREN will rely on this program to deliver the bulk of the commercial portfolio's TSB target, in alignment with the CPUC's directive to expand NMEC programs statewide.	Net kW savings
SDREN	Market Access Program	SDREN-03-COM-MAP	Commercial	Resource Acquisition	Deliver cost-effective avoided cost benefits to the state's energy systems. SDREN will rely on this program to deliver the bulk of the commercial portfolio's TSB target, in alignment with the CPUC's directive to expand NMEC programs statewide.	Net therm savings

					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		The number of local government Reach Codes implemented (this is a joint IOU and REN effort)
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size [number of the target audience] by sector. (M) Number of training activities
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size [number of the target audience] by sector. (M) Number of participants
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		Increase in code compliance knowledge pre/post training
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number and percent of jurisdictions with staff participating in an Energy Policy Forum
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number and percent of jurisdictions with staff participating in an Energy Policy Forum
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number and percent of jurisdictions receiving Energy Policy technical assistance.
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		
					This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S		
					Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Percent of total WE&T program participants that meet the definition of disadvantaged worker
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support		
					Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Count of equity target participants in market support segment, by sector
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support		
					Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Percent of participation relative to eligible target population for curriculum
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support		
					Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Number of unique participants by sector that complete training
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support		
					Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Ratio of ratepayer funds expended to private capital leveraged by sector
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support		
					Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships
					Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Percent of total WE&T program participants that meet the definition of disadvantaged worker
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support		
					Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Count of equity target participants in market support segment, by sector
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support		
					Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Percent of participation relative to eligible target population for curriculum
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support		
					Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Number of unique participants by sector that complete training
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support		
					Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support		
					Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Number of partners by type and purposes
SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support		
					Build capacity for public agency participants through education, training, and technical services and install EE as a best practice. These goals are in alignment with the Commission M3 objective to support long term success of the EE market.	Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2005. Ex ante with gross and net for all measures, with ex post where available

SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support	Build capacity for public agency participants through education, training, and technical services and install EE as a best practice. These goals are in alignment with the Commission MS objective to support long term success of the EE market.	Count of equity target participants in market support segment, by sector
SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support	Build capacity for public agency participants through education, training, and technical services and install EE as a best practice. These goals are in alignment with the Commission MS objective to support long term success of the EE market.	Percent of participation relative to eligible target population for curriculum
SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support	Build capacity for public agency participants through education, training, and technical services and install EE as a best practice. These goals are in alignment with the Commission MS objective to support long term success of the EE market.	Total projects completed/measures installed and dollar value of consolidated programs by sector
SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support	Build capacity for public agency participants through education, training, and technical services and install EE as a best practice. These goals are in alignment with the Commission MS objective to support long term success of the EE market.	Ratio of ratepayer funds expended to private capital leveraged by sector
SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support	Build capacity for public agency participants through education, training, and technical services and install EE as a best practice. These goals are in alignment with the Commission MS objective to support long term success of the EE market.	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships
SDREN	Tribal Engagement	SDREN-02-PUB-TRE	Public	Equity	Provide energy efficiency services to Tribes, a hard-to-reach community that has been historically underserved. This goal is in alignment with the primary purpose of Equity segment program, i.e. to provide EE services to HTR customers in DACs in advancement of the Commission's Environmental and Social Justice Action Plan.	Percent of equity target participants in equity segment, by sector
SDREN	Tribal Engagement	SDREN-02-PUB-TRE	Public	Equity	Provide energy efficiency services to Tribes, a hard-to-reach community that has been historically underserved. This goal is in alignment with the primary purpose of Equity segment program, i.e. to provide EE services to HTR customers in DACs in advancement of the Commission's Environmental and Social Justice Action Plan.	Count of equity target participants in equity segment, by sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' TSB in equity segment
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Percent of equity target participants in equity segment, by sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Count of equity target participants in equity segment, by sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multifamily and commercial sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Percent of hard-to-reach customer participants in portfolio, by residential single-family / multi-family and commercial sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Median of equity target participants' expected first-year bill savings in equity segment, by sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of equity target participants' expected first-year bill savings in equity segment, by sector
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment
SDREN	Multifamily	SDREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' kW savings in equity segment

SOREN	Multifamily	SOREN-01-RES-MFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' theme savings in equity segment
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' kilowatt hour (kWh) savings in equity segment
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' theme savings in equity segment
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' TSB in equity segment
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of all equity segment participants' greenhouse gas reductions (in tons of carbon dioxide equivalent) in equity segment
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Percent of equity target participants in equity segment, by sector
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Count of equity target participants in equity segment, by sector
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Percent of hard-to-reach customer participants in portfolio, by residential single family / multifamily and commercial sector
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Percent of disadvantaged community customer participants in portfolio, by residential single-family / multifamily and commercial sector
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Sum of equity target participants' expected first-year bill savings in equity segment, by sector
SOREN	Single Family	SOREN-02-RES-SFM	Residential	Equity	The primary goal of the program is to provide energy efficiency services to hard-to-reach customers and/or disadvantaged communities in alignment with the Commission's Environment and Social Justice Action Plan.	Median of equity target participants' expected first-year bill savings in equity segment, by sector

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**

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Attachment B

Approved Meet & 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 *SDREN's Energy Efficiency 2024-2031 Application Tables, Pursuant To Energy Division Template, Tables 9 through 16*, SDREN 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

San Diego Community Power (SDCP) is the lead agency in the administration of San Diego Regional Energy Network (SDREN). SDCP is a Community Choice Aggregator (CCA) formed via a Joint Powers Authority by San Diego, Encinitas, La Mesa, Chula Vista, Imperial Beach, National City, and the County of San Diego. As a not-for-profit public entity, SDCP is focused on bringing cleaner power at competitive rates to its customers and investing excess revenue in the communities it serves. Within SDCP, the following four departments will support the administration and management of SDREN:

- Customer Programs
- Regulatory and Legislative Affairs
- Finance
- Public Affairs

The County of San Diego, Office of Sustainability and Environmental Justice (OSEJ) is the second public agency in SDREN's governance and will co-lead the administration of SDREN. OSEJ is organized within the Land Use and Environment Group and is the central point to steward collaborative sustainability solutions, reduce disparities, and expand opportunities in traditionally underserved communities while working to achieve zero carbon emissions and safeguard the health of the San Diego region's people and natural resources. OSEJ program management staff along with the Tribal Community Liaison and the Sustainability and Environmental Justice Liaison, whose roles are described below, will support SDREN.

- OSEJ Tribal Community Liaison – provide a mindful approach to fostering cross-governmental partnerships. This position serves as the main point of contact for all County matters with the region’s Tribal Governments to partner on areas related to health and well-being, emergency preparedness, quality of life, and sustainability.
- OSEJ Sustainability and Environmental Justice Liaison – use a lens of environmental justice and advance internal sustainability programs throughout the County enterprise and identify, co-develop, and implement external initiatives related to the County’s Regional Decarbonization Framework. Engage with communities disproportionately exposed to environmental burdens to address climate-related issues and provide user-friendly resources to move our region to zero carbon emissions.

1. Functions conducted by each department/organization

The SDREN’s management and administration by functional group and by department and function are as follows:

Policy, Strategy, and Regulatory Reporting Compliance	
SDCP Customer Programs Department	Serve on Oversight and Administration team to provide portfolio-level vision and strategy, enact program changes during the portfolio cycle, and oversee future Business Plan development. This team provides overall portfolio management and alignment with regional planning and goals.
SDCP Regulatory & Legislative Affairs Department	Lead all regulatory and legislative matters.
County of San Diego OSEJ	Serve on Oversight and Administration team to provide portfolio-level vision and strategy, enact program changes during the portfolio cycle, and oversee future Business Plan development. This team provides overall portfolio management and alignment with regional planning and goals.
Program Management	
SDCP Customer Programs Department	Manage day-to-day program operations and implementation activities, IT management and reporting, stakeholder coordination, EM&V activities and studies.
SDCP Finance Department	Provide contract management, procurement, invoice processing, monthly reconciliation, and overall fiscal management.
ME&O (Local)	
SDCP Public Affairs Department	Provide website management, coordination with CBO stakeholders, and manage overall SDREN-wide marketing and outreach.

2. Energy Efficiency Management Structure and Org Chart

The **Oversight and Administration** team of SDCP and the County of San Diego will provide portfolio-level vision and strategy, enact program changes during the portfolio cycle, and oversee future Business Plan development.

The **Advisory Committee** will be facilitated by SDCP and the County of San Diego and will include local and regional governments and community-based organizations to advise on outreach and enrollment, provide feedback on program evaluation reports, and recommend program improvements.

SDCP will be the **Lead Portfolio Administrator** responsible for all fiscal, regulatory, procurement, and program management activities including reporting, marketing, education, and outreach (ME&O) and evaluation, measurement, and verification (EM&V).

The management structure and organizational chart of SDREN is provided below.



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.

As SDREN is not yet an approved PA, there are no current staffing needs. Forecasted staffing needs of Full Time Equivalent (FTE) are provided in the "Portfolio FTE" tab of *SDREN's Energy Efficiency 2024-2031 Application Tables*.

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.

Currently, there are no contractors performing non-program functions as SDREN is not yet an approved PA.

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

Currently, there are no costs as SDREN is not yet an approved PA. Estimated costs are based on the submitted business plan scope of programs and are subject to change based on the final approved scope of programs and scale and any unforeseen labor or material costs.

6. Explanation of method for forecasting costs

The program-level budgets were developed using a zero-based budget approach and followed guidance from the CPUC and EE Policy Manual. The budget forecast includes 10% administrative costs allocated within each program to be apportioned at the portfolio level for all activities that are not associated with program implementation. As a new REN, SDCP is allocating the full 10% cap, but anticipates developing administrative efficiencies to reduce administrative costs during operation. 6% ME&O has been allocated within each program to be apportioned for activities both at the program level and the portfolio level. Direct Implementation for incentives has been allocated at the program level for any program that offers incentives for measures that deliver TSB. The allocation by program has been determined based on the estimated incentive value disbursed through the program and energy savings targets achieved for measures installed or delivered. Direct Implementation for non-incentives has been allocated at the program level and is based on the services and resources the programs will deliver. It has been developed to align with the incentive program forecast when applicable. 4% has been allocated to EM&V at the portfolio level in accordance with D.21-05-031 and in alignment with the 2024-2031 EE Application Attachment Tables. Costs were estimated based on the best available information and from program staff experience. Fully loaded rates were used to calculate FTE forecasts.

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

7. For forecast years, 2024-2027.

SDREN’s response is provided in SDREN’s Energy Efficiency 2024-2031 Application Tables – Table 10 Portfolio FTE. Note, if the PAs’ FTE needs change, these changes can be made without reporting or seeking CPUC approval.

C. Table showing costs by functional area of management structure

8. Expenses broken out into labor, non-labor O&M (with contract labor identified)

SDREN’s forecasted costs are provided in *SDREN’s Energy Efficiency 2024-2031 Application Tables*, Tables 11 through 16 Sector Budget details.

9. Identify any capital costs

SDREN will have no capital costs.

D. Table showing cost drivers across the EE organization

10. Narrative of cost drivers in place of a table

SDREN anticipates the ability to identify actual cost drivers upon approval and administration of its portfolio. As SDREN is not yet an approved PA, SDREN uses the best available information to provide forecasted program budgets in Tables 4.1 and 4.2 of *SDREN's Energy Efficiency 2024-2031 Application Tables*. Upon approval, SDREN expects cost drivers for administration and implementation of programs to include labor costs, procurement and contracting, program ramp-up, number of programs, number of participants in a program, marketing, education and outreach activities, and project management activities.

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.).

San Diego Community Power and the County of San Diego have established procedures and software to track costs and are prepared to track/report employee costs for SDREN activities once approved as a PA. Both SDCP and the County have experience implementing grant-funded projects that require tracking and reporting of staff time by funding source and cost category. For example, SDCP is currently a program administrator of the CPUC disadvantaged communities green tariff (DAC-GT) and community solar green tariff (CSGT) programs which necessitates tracking and reporting costs.

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

Overhead costs, including the cost of non-EE staff time performing general functions that are considered overhead, are included in the fully loaded rates used in the budget forecast found in *SDREN's Energy Efficiency 2024-2031 Application Tables*. No overhead costs will be incurred for SDREN when there is no direct staff time charged to SDREN activities.

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?)

EE functions that are most likely to be performed by employees who also do non-EE work include information technology, fiscal management, marketing, and customer account representatives.

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.

This is not applicable to SDREN.

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?

General administrative costs are factored into the fully loaded rates for employees and will be recovered proportionally to the amount of time charged to individual programs.

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

The O&M costs that will support both SDREN EE activities and non-SDREN EE activities will be included in the fully loaded rates and will be allocated proportionally to the individual programs charging labor.

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.

SDREN’s response is provided in *SDREN’s Energy Efficiency 2024-2031 Application Tables – Table 7*.

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.

SDREN’s response is provided in *SDREN’s Energy Efficiency 2024-2031 Application Tables – Tables 11 through 16*.

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

SDREN estimated costs using a zero-based budget approach and followed guidance from the CPUC and EE Policy Manual. The proposed budgets are calibrated to allow a sufficient scale for program delivery to the targeted customer segments in the SDREN service territory and to confidently expect significant positive customer impacts.

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.

SDREN does not currently administer any statewide programs, as indicated in *SDREN’s Energy Efficiency 2024-2031 Application Tables – Table 6 Statewide Programs*.