

Southern California Edison
SCE EE Business Plan A.17-01-013

DATA REQUEST SET A.17-01-013-ORA-SCE-003

To: ORA
Prepared by: Matt Evans
Title: Senior Manager
Dated: 06/09/2017

Question 01:

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

Response to Question 01:

SCE objects to this request pursuant to Rule 10.1 of the Commission's Rules of Practice and Procedure on the grounds that the burden, expense and intrusiveness of this request outweighs the likelihood that the information sought will lead to discovery of admissible evidence. Subject to and without waiving the foregoing objection, SCE responds as follows:

Listed below are SCE's monthly, quarterly, and annual management and accounting reports regarding its energy efficiency portfolio and programs used at management levels. **Please note that attachments contained in this data request response contains confidential information of SCE and/or its customers or vendors and is provided pursuant to CPUC code § 583, GO 66C, and Commission's decision D.16-08-024. Per agreement between SCE and ORA on June 23, 2017, ORA agrees that in order for SCE to timely provide numerous reports and other documents to ORA, ORA agrees with SCE's labeling of the file names and not individual documents with confidentiality headers or footers and that ORA will treat each document contained in confidential file folders as confidential. SCE will confer with ORA in the future in specifically identifying confidential documents should ORA requests to refer to or attach any of the documents in the confidential file folders in its filing.**

1. Customer Service Goals and Operating Metrics by Strategy
2. Demand Side Management Executive Team Meeting Presentation
3. Demand Side Management Executive Report
4. Key Performance Indicator Tracking Reports
5. Monthly Performance Reports
6. Business Customer Division Program Performance Reports
7. Program Services Dashboards
8. Energy Savings Assistance Program Dashboard
9. Express Efficiency Program Dashboard
10. Home Energy Efficiency Rebate Program Dashboard

11. Multifamily Energy Efficiency Rebate Program Dashboard
12. Demand Side Management Programs Inspection Reports
13. Closing Worksheets
14. Global Labor Reports (Confidential)
15. Transaction Detail Reports (Confidential)
16. Investor Owned Utility - Transaction Detail Reports (Confidential)

The reports above are attached to this data request response. A description of each report is provided below.

1. Customer Service Goals and Operating Metrics by Strategy
This report provides performance metrics and status for SCE Customer Service strategic goals. It includes status on key Energy Efficiency (EE) performance measures, such as EE savings in kWh and MWs. This report is also known as the “Customer Service Performance Dashboard” or the “CS Goals and Operating Metrics Summary.” This report is provided monthly to the Customer Service SVP and Division VPs, as well as to Directors and other EE management personnel. Due to IT issues, the January 2014 report could not be produced for this data request. All other months up to and including May 2017 are included. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 1 to 41.
2. Demand Side Management Executive Team Meeting Presentation
This report provides a summary of EE savings goals in kWh and MW for residential, business, and partnership portfolios. Key information includes goal, forecast, installed and remaining GWh and MW metrics, as well as discussion of key highlights and issues. This report is provided monthly to Customer Programs and Services VP, Directors, and other management personnel. The February 2014 report was not produced. All other months from January 2014 to May 2017 are included. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 42 to 82.
3. Demand Side Management Executive Report
This report provides detailed information on EE savings goals in kWh and MW for residential, business, and partnership portfolios, as well as for Public Sector, Business Portfolio Major Initiatives, Inspections, and YTD and proposed spending. It is provided monthly to the Customer Programs and Services VP, Directors, and other management personnel. All months from January 2014 to May 2017 are included. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 83 to 123.
4. Key Performance Indicator Tracking Reports
This report is provided to Portfolio Managers and their employees for discussion at bi-monthly (could be more frequent to assist in goal attainment) meetings to discuss the current status of program savings and progress toward achieving goals. This report is designed to provide guidance to management as to where mitigation strategies may be needed. Activity is reported at these meetings within 2 weeks of date of data (May 31st, 2017, data was reported at June 7, 2017, meeting). See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 124 to 207.

5. Monthly Performance Reports

These reports are distributed monthly to all managers, program managers, analysts and other interested parties. These reports are designed to provide stakeholders with status updates on budget and recorded information by program and other reporting categories. Monthly performance is reported in subsequent month (May 2017 performance is captured in the June 2017 report). See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 208 to 248.

6. Business Customer Division Program Performance Reports

These reports include a consolidated EE Scoreboard and EE Forecast report for SCE's Business Customer Division (BCD) by combining data from SCE's legacy systems and customer relationship management (CRM) system. They include DSM Opportunities, New Construction Opportunities, and Service Contracts from the CRM system. Specifically, the following service contract types are included - EE Deemed, EE Calculated, Savings by Design, Turnkey & Mainstream. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 249 to 256.

7. Program Services Dashboard

This report is produced monthly and provides operational metrics for Program Services, including volumes, service level indicators, resources, quality and cost for various programs, including California Advanced Homes Program, Comprehensive Manufactured Home Program, Direct Install IDSM (Express Only), Energy Savings Assistance Program, HVAC Commercial, and HVAC Residential. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 257 to 272. The Program Services Organization began producing this report in January 2016 and continues to do so monthly. This report replaced individual dashboards that had been produced from January 2014 to December 2015, which include: Energy Savings Assistance Program Dashboard, Express Efficiency Program Dashboard, Home Energy Efficiency Rebate Program, Multifamily Energy Efficiency Rebate Program.

8. Energy Savings Assistance Program Dashboard

This report provides operational metrics for Energy Savings Assistance Program for the Program Services organization. It includes information on applications received, applications reviewed, internal quality, cycle times, and costs per applications and number of homes treated. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 274 to 275 for reports produced from January 2014 to December 2015. From January 2016 onward, the Energy Savings Assistance Program Dashboard was replaced by the Program Services Dashboard. This report includes volumes, service level indicators, resources, quality metrics, and cost for not only the Energy Savings Assistance Program but also for other programs, including California Advanced Homes Program, Comprehensive Manufactured Home Program, Direct Install IDSM (Express Only), Energy Savings Assistance Program, HVAC Commercial, and HVAC Residential. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 257 to 272.

9. Express Efficiency Program Dashboard

Provides operational metrics for Express Efficiency Program for Program Services organization. Includes information on applications received, applications processed, inspection cycle times, cost per application, and internal quality. This report was produced from January 2014 to December 2015. See attachments

A.17.01-013-ORA-SCE-003 Q.01 Attachment 276 to 277. From January 2016 onward, the Home Energy Efficiency Rebate Program Dashboard was replaced by the Program Services Dashboard. This report includes volumes, service level indicators, resources, quality metrics, and cost for not only the Express Efficiency Program but also for other programs, including California Advanced Homes Program, Comprehensive Manufactured Home Program, Direct Install IDSM (Express Only), Energy Savings Assistance Program, HVAC Commercial, and HVAC Residential. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 257 to 272.

10. Home Energy Efficiency Rebate Program Dashboard

This report is produced monthly by the Customer Contact Center. It tracks applications received, applications processed, inspection cycle times, and cost per application. This report was produced from January 2014 to December 2015. See attachments

A.17.01-013-ORA-SCE-003 Q.01 Attachment 278 to 279. From January 2016 onward, the Home Energy Efficiency Rebate Program Dashboard was replaced by the Program Services Dashboard. This report includes volumes, service level indicators, resources, quality and cost not only for the Home Energy Efficiency Rebate Program but also for other programs, including California Advanced Homes Program, Comprehensive Manufactured Home Program, Direct Install IDSM (Express Only), Energy Savings Assistance Program, HVAC Commercial, and HVAC Residential. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 257 to 272.

11. Multifamily Energy Efficiency Rebate Program Dashboard

This report is produced monthly by the Customer Contact Center. It tracks multi-family energy efficiency rebate program applications received, applications processed, internal accuracy, inspection and processing cycle times, cost. This report was produced from January 2014 to December 2015. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 280 to 281. From January 2016 onward, the Multifamily Energy Efficiency Rebate Program Dashboard was replaced by the Program Services Dashboard. This report includes volumes, service level indicators, resources, quality and cost not only for the Multifamily Energy Efficiency Rebate Program but also for other programs, including California Advanced Homes Program, Comprehensive Manufactured Home Program, Direct Install IDSM (Express Only), Energy Savings Assistance Program, HVAC Commercial, and HVAC Residential. See attachments

A.17.01-013-ORA-SCE-003 Q.01 Attachment 257 to 272.

12. Demand Side Management Programs Inspection Reports

This report is produced quarterly by CP&S Audit Support & Quality Assurance. It presents a DSM Portfolio Summary, followed by sections for each DSM Program Portfolio. Program portfolio sections include a portfolio program summary and individual subsections

for each of the programs within the program portfolio. DSM Portfolio Summary is intended for Senior Management, and provides a high-level summary of inspection results, along with key points, conclusions, and recommendations. Senior Management can drill down into the corresponding program portfolio section for details on information contained in the DSM Portfolio Summary. Program Area Summaries are intended for Program Portfolio Managers, and summarize inspection results and key points at the portfolio program level. Program Portfolio Management can drill down into the corresponding sub-program section for details on information contained in the Program Portfolio Summary. Program Sections provide detailed inspection information at the program level, and are intended for Program Management. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 282 to 293. As of this data request submittal date, the Q1 2017 report had not been produced.

13. Closing Worksheets

This report is completed by Regulatory Accounting and designed to provide a historical view of Balancing Account balances as of month end. Reports for the Procurement Energy Efficiency Balancing Account (PEEBA) and Energy Efficiency Financing Program Balancing Account (EEFPBA – Formerly OBFBA) relate to programs approved for Energy Efficiency. This report provides monthly information and is a year-to-date cumulative report each month, therefore only the year-end report is provided. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 294 to 301.

14. Global Labor Reports (Confidential)

THIS REPORT CONTAINS CONFIDENTIAL INFORMATION. This report is distributed periodically to the same audience as the Monthly Performance Report and provides a detailed view on employee labor charges. See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 302 to 311 for reports from 2016 (9 reports) and 2017 (1 report).

15. Transaction Detail Reports (Confidential)

THIS REPORT CONTAINS CONFIDENTIAL INFORMATION. These reports are distributed monthly and provide a detailed view of transactions related to the recorded information from the Monthly Performance Reports to ensure proper cost tracking. Monthly performance is reported in subsequent month (May 2017 data is captured in the June 2017 report). See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 312 to 444 for reports from 2015 (4 reports per month), 2016 (5 reports per month) and 2017 (5 reports per month through May). Due to IT issues, 2014 reports were not available to include in this data request but can be provided if requested.

16. Investor Owned Utility - Transaction Detail Reports (Confidential)

THIS REPORT CONTAINS CONFIDENTIAL INFORMATION. These reports are distributed monthly and provide a detailed view of the transactions related to cost to be billed to cofounding partners to ensure proper billing and cost tracking. Monthly performance is reported in subsequent month (May 2017 data is captured in the June 2017 report). See attachments A.17.01-013-ORA-SCE-003 Q.01 Attachment 445 to 473 for reports from 2015 (1 Report per month), 2016 (1 report per month), and 2017 (1

report per month, through May). Due to IT issues, 2014 reports were not available to include in this data request but can be provided if requested.