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PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA
ENERGY DIVISION

SUBJECT: Southern California Edison Company's Energy Efficiency Program and Portfolio Annual Budget Advice Letter for Program Years 2022 and 2023

In compliance with California Public Utilities Commission (Commission or CPUC) Decision (D.)18-05-041 and related Commission Decisions,¹ Southern California Edison Company (SCE) hereby submits its Energy Efficiency (EE) Program and Portfolio Annual Budget Advice Letter (ABAL) for Program Years (PY) 2022 and 2023. This ABAL contains the information required by the Commission,² including, but not limited to: (1) SCE's forecasted budgets for various EE and EE/demand response (DR) integration activities;³ (2) SCE's forecasts for the Total System Benefits (TSB),⁴ Total Resource Cost (TRC), Program Administrator Cost (PAC), and Ratepayer Impact Measure (RIM) tests;⁵ (3) SCE's forecasted energy savings;⁶ (4) SCE's portfolio

¹ See D.18-05-041, D.18-10-008, D.19-05-019, D.19-08-034, D.21-09-037, Decision Adopting Energy Efficiency Goals for 2022-2032 (Potential and Goals Decision), and D.21-05-031, Ordering Paragraph (OP) 13.

² See, e.g., D.18-05-041, D.18-10-008, D.19-05-019, and D.21-09-037 Decision Adopting Energy Efficiency Goals for 2022-2032 (Potential and Goals Decision), and D.21-05-031.

³ In SCE's 2019 ABAL (Advice 3859-E), SCE referred to funding for EE/DR Integration activities as "Integrated Demand Side Management (IDSM)" activities and budgets. This should not be confused with the IDSM Program (Program ID: SCE-13-SW-006) that SCE closed, based on the approval received in Advice 3859-E and 3859-E-A. To avoid confusion, SCE now uses the term EE/DR Integration activities and budgets to refer to those activities described as IDSM activities and budgets in the 2019 ABAL.

⁴ See D.21-05-031 OP 1.

⁵ The TRC test is performed for each program and sector and at the portfolio level. PAC and RIM tests are performed only at the portfolio level.

⁶ See D.18-05-041, D.18-10-008, D.19-05-019, and D.19-08-034.

segmentation between resource, equity, and market support programs;⁷ and (5) SCE's transition to at least 60 percent third-party designed and implemented programs by December 31, 2022.⁸ This advice letter also includes funding for the School Energy Efficiency Stimulus Program (SEES Program),⁹ and updates the annual funding levels for the EE portfolio.¹⁰ SCE requests that Commission Staff issue a disposition approving this ABAL, including SCE's PY 2022 and 2023 budget requests and the requested program closures, as detailed herein.¹¹

I. PURPOSE

The purpose of this advice letter is to propose detailed budgets for cost recovery, transfer, and contracting purposes for SCE's EE portfolio for PY 2022 and 2023, in compliance with D.18-05-041 and related Commission decisions.¹² SCE's EE annual budgets and associated forecasted energy savings and cost-effectiveness for PY 2022 and 2023 are summarized below and exclude market effects:¹³

- Pursuant to D.21-01-004,¹⁴ SCE proposes true up budgets, including RENs, of \$450.86 million for PY 2022 and \$481.05 million for 2023.¹⁵ These expanded budgets are necessary to fund the combined sum of the SEES Program budget¹⁶

⁷ See D.21-05-031, OP 2.

⁸ See D.18-01-004, OP 4, p. 56. IOU PAs, including SCE, demonstrate that they have met the third-party requirement in their EE annual report, not the ABAL.

⁹ See D.21-01-004, p.14.

¹⁰ See D.21-01-004, p. 11. The IOUs were permitted to update their expected annual funding levels in their September 1, 2021 annual budget advice letter (or the budget mechanism in place at that time), provided that the overall funding amount through 2025 does not exceed the overall funding amount in their 2018-2025 business plan (as approved by D.18-05-041) for the corresponding timeframe (2022-2025).

¹¹ See D.18-05-041, pp. 134-135.

¹² D.18-05-041., p. 58; see *also* D.18-10-008, D.19-05-019, D.19-08-034, D.21-01-004; D.21-05-031.

¹³ See EE Policy Manual, v6, p.29. Market effects are defined as additional energy savings that occur as a result of the energy efficiency programs, but that are not included in the utility savings claims.

¹⁴ See D.21-01-004, p. 11.

¹⁵ D.18-05-041 authorized PY 2022 & 2023 budgets of \$274.80 million and \$283.00 million. The PY 2022 & 2023 authorized amounts were updated to \$278.60 million and \$286.80 million per the Annual Rolling Portfolio Budget Forecast - True-up Table (in SCE's 2019 ABAL Attachment D Commission Developed ABAL, Table 2a) in SCE Advice 3859-E-A submitted on October 29, 2018.

¹⁶ The SEES Program was established, pursuant to Assembly Bill 841, after the Commission authorized the PY 2022 and 2023 budgets in D.18-05-041. Thus, the budget authorization in that decision did not take the SEES Program into account.

and the EE portfolio. SCE requests authority to recover from rate payers \$394.01 million and \$467.05 million for PY 2022 and PY 2023 respectively, which reflects carryover funds from prior years.

- Without Codes & Standards, SCE's TRC forecasts for resource acquisition programs in 2022 and 2023 are 0.94 and 1.16, respectively.
- Without Codes & Standards, SCE's TRC forecasts for its entire portfolio in 2022 and 2023 are 0.85 and 1.05, respectively.
- Including Codes & Standards, SCE's TRC forecasts for its entire portfolio in 2022 and 2023 are 3.10 and 2.94, respectively.
- Without Codes & Standards, SCE's portfolio for 2022 and 2023 yields forecasted energy savings of 323GWh and 514 GWh, respectively, which is 76 percent and 112 percent of goal, respectively; and 62 MW and 91 MW of forecasted demand reduction for each respective year, which is 95 percent and 132 percent of goal respectively.¹⁷
- Including Codes & Standards, SCE's portfolio for 2022 and 2023 yields forecasted energy savings of 1,381GWh and 1,630 GWh, respectively, which is 98 percent and 111 percent of goal, respectively; and 248 MW and 309 MW demand reduction for each respective year, which is 106 percent and 119 percent of goal respectively.¹⁸
- Without Codes & Standards SCE's portfolio for PYs 2022 and 2023 yields forecasted Total System Benefits (TSB) of \$247 million and \$397 million respectively.
- Including Codes & Standards, SCE's portfolio for PYs 2022 and 2023 yields forecasted TSB of \$1,857 million and \$2,217 million respectively. Without Codes & Standards SCE's portfolio for PYs 2022 and 2023 yields forecasted TSB of \$247 million and \$397 million respectively.

¹⁷ D.21-09-037 (Potential and Goals Decision), p. 20, states that SCE's goals (without Codes and Standards) for PY 2022 are 425 GWh and 65 MW and for PY 2023 goals are 1,470 GWh and 69 MW.

¹⁸ D.21-09-037 (Potential and Goals Decision), p. 20, states that SCE's goals (*including* Codes and Standards) for PY 2022 are 1,404 GWh and 235 MW and for PY 2023 goals are 1,471 GWh and 261 MW.

- Budget assignment is also broken down by program segment. For PY 2022 76 percent, 12 percent, 2 percent, 6 percent, and 4 percent are assigned to the resource acquisition, market support, equity, Codes & Standards and EM&V segments, respectively. For PY 2023 76 percent, 12 percent, 3 percent, 4 percent, and 4 percent are assigned to the resource acquisition, market support, equity, Codes & Standards and EM&V segments, respectively.¹⁹.
- SCE proposes closing specific programs to improve portfolio cost effectiveness and to prepare for new local and statewide third-party programs entering the market.
- SCE forecasts that 81 percent and 85 percent of its portfolio budget will be assigned to third-party programs in PYs 2022 and 2023, respectively, which exceeds the requirement that at least 60 percent of the portfolio budget is assigned to third-party implementers by the end of 2022.²⁰ Budget associated with AB841 is included in the third-party calculation.²¹
- SCE seeks authorization to fund the SEES Program in 2022, as required by AB 841, with \$28.8 million in estimated unspent and uncommitted funds from PY 2021 and includes in its budget \$87.1 million and \$74.7 million previously authorized for 2022 and 2023, respectively. SCE also updated its unspent and uncommitted funds from program year 2020 to reflect the results of the Utility Audit Branch audit.²²

SCE's PY 2022 and 2023 portfolio balances affordability with California's climate goals and broadens the EE market by utilizing new market support and equity segments, which SCE plans to scale in the upcoming 2024-2027 EE Application. SCE has made its best effort to meet the ABAL forecasted goals referenced above, while also meeting all other related Commission requirements included in Section III. SCE requests that the Commission Staff issue a disposition approving the 2022 and 2023 ABAL, including the proposed budgets and program closures described below in Section VIII.²³ The Commission Staff disposition should approve the requested budget in full to minimize impacts to customers, the EE market, and to support new statewide programs and activities, such as Statewide Emerging Technologies, Higher Education and

¹⁹ SCE's IQP budgets for 2022 and 2023 are \$58.7M and \$69.1M, respectively. When combined with EE's budgets, Equity represents 17% and 18% of total budget in 2022 and 2023.

²⁰ See D.18-01-004, p. 56. IOU PAs, including SCE, must demonstrate that they have met the third-party requirement in their EE annual report, not the ABAL.

²¹ See D.21-05-031, p. 55.

²² D.21-01-004, pp. 13-15.

²³ Additional information about program closures is contained in Attachment E to this Advice Letter.

Water/Wastewater programs and new local programs such as the Public and Agricultural offerings.

II. KEY UPDATES

SCE has conducted and is conducting multiple solicitations for third-party EE programs.²⁴ The Statewide Electric Emerging Technologies solicitation resulted in an executed contract in September 2021 and is pending Commission approval, and local solicitations for the Agriculture Sector and Public Sector are scheduled to have final executed contracts by the end of 2021. In 2022, SCE intends to execute contracts following solicitations for Statewide Higher Education and Statewide Water/Wastewater Pumping. The timing of these solicitations and their launch in market results in the following key updates:

- SCE will continue to have at least 40 percent of the EE program budget under contract with third parties for PY 2022 and will have at least 60 percent of the budget under contract with third-party implementers by December 31, 2022, as required by D.18-01-004.²⁵
- SCE is including an estimate of the anticipated budget and cost effectiveness for new SCE-administered local and statewide third-party implemented programs. The total estimated budget, benefits, and costs resulting from SCE-administered local solicitations are distributed evenly across the Public and Agriculture sectors where applicable. The total estimated budget, benefits, and costs resulting from SCE-led statewide solicitations are also split evenly across the respective statewide programs.
- To help ensure a smooth transition from existing program offerings to new statewide and third-party implemented programs and to minimize gaps in the EE market for customers, SCE will continue to operate several programs anticipated to close until project completion. SCE has included these programs in the forecast.
- SCE will submit Tier 2 advice letters for any third-party contracts executed valued at \$5 million or more and/or with a term of longer than three years.²⁶

²⁴ See Attachment D, Appendix C to this Advice Letter.

²⁵ See D.18-01-004, OP 1.

²⁶ See D.18-01-004, OP 2.

The budget allocated for in progress solicitations is \$12.19 million in 2022 and \$16.90 million in 2023, or 3% and 4% of the portfolio, respectively. The total budgets and expected savings for these new programs can be managed consistent with SCE's standard portfolio management practices, including shifting funds if necessary.²⁷ Each of the contracts will also undergo Procurement Review Group (PRG) review and Commission approval. The execution and approval of these contracts are expected to take place after the disposition of this advice letter, but a delay in the disposition of this advice letter is not needed because SCE can manage any differences between estimates and the final contracts as noted above, therefore a prompt review and disposition of this advice letter is appropriate.

In response to the ALJ Ruling²⁸ issued on August 6, 2021, pertaining to Governor Newsom's July 30, 2021 Emergency Proclamation, SCE asked the Commission to allow Program Administrators (PAs) to request additional funding in the PY 2022-2023 ABAL to expand cost effective resource programs but has not received Commission guidance regarding this issue.²⁹ SCE looks forward to receiving final Commission guidance in response to the August 6 Ruling. A discussion of this issue is included in Section XI.

On October 15, 2021 the Commission issued a proposed decision of ALJ Fitch Approving the Inland Regional Energy Network (I-REN) Energy Efficiency Business Plan (I-REN PD). Conclusion of Law 12 of the I-REN PD states that SCE and SoCalGas should account for the I-REN's funding in 2022-2023 ABAL or a supplement. The earliest the I-REN PD could be heard is at the November 18, 2021 Business Meeting. SCE plans to submit a supplement to this advice letter to request budget for I-REN's 2022-2023 program years, pursuant to the final decision, because the I-REN PD requirements will not be final prior to the submittal of this advice letter on November 8, 2021.

III. REGULATORY PROCEDURAL BACKGROUND

A. Commission Directed ABAL Requirements

In D.15-10-028, the Commission ordered each PA to submit a Tier 2 advice letter in September of each year with the PA's annual EE budget for the following year.³⁰

²⁷ SCE is presenting maximum budgets in this ABAL, as well as target savings. Actual contracted savings could be higher, but the budget will not increase.

²⁸ See August 6, 2021 ALJ Finch Emailing Ruling, R.13-11-005: Email ruling requesting comments/proposals to address Governor's Proclamation of a State of Emergency July 30, 2021 (August 6 Ruling).

²⁹ See SCE's Opening Comments on Ruling Requesting Comments/Proposals to Address Governor's Proclamation of July 30, 2021 filed in R.13-11-005 on August 31, 2021.

³⁰ See D.15-10-028, OP 4.

Subsequent decisions, including D.18-05-041³¹ and D.19-05-019, updated the ABAL requirements and review criteria. D.21-05-031, which establishes new approval processes for PAs, modifies key requirements and review criteria in this ABAL, including:³²

- Directs PAs to submit a single ABAL to cover program years 2022 and 2023;³³
- Establishes the TSB, a new metric for measuring benefits of EE Programs, which expresses the benefits of lifecycle energy, capacity, and greenhouse gas (GHG) reduction.³⁴ For the 2022 and 2023 ABAL, the new TSB metric is to be forecast but will not be a basis for rejection;³⁵
- Specifies that cost-effectiveness ratios, for both TRC and PAC, be included for the entire portfolio in the 2022 and 2023 ABAL. The ratios will not be a basis for rejection of the ABAL;³⁶
- Splits EE programs into three segments: resource acquisition, market support, and equity. The combined budgets of programs in the market support and equity program segments may sum up to 30 percent of the total EE portfolio budget, but reasonableness of the program segmentation itself is not a criterion for rejection;³⁷ and
- Stipulates that, beginning in 2022, the resource acquisition segment of the portfolio, without codes & standards, must be cost effective.³⁸

For the purposes of this ABAL, SCE used the 2020 Avoided Cost Calculator as directed in Resolution E-5077 and updated through D.21-09-037 approving the 2021 Potential and Goals Study.³⁹

D.21-05-031 also clarifies what key requirements and review criteria remain in effect from past decisions:⁴⁰

³¹ See D.18-05-041, p. 133.

³² See D.21-05-031, pp. 52-53 and OPs 1-13.

³³ See D.21-05-031, OP 13.

³⁴ See D.21-05-031, OP 1.

³⁵ See D.21-05-031, pp. 53.

³⁶ *Id.*

³⁷ See D.21-05-031, OP 2 and 4.

³⁸ *Id.*, OP 3.

³⁹ An error was identified in the 2020 ACC and was updated in the Potential & Goals Final Decision.

⁴⁰ See D.21-05-031, pp. 52-53.

- Budget requests must stay under the cap authorized for the current business plan period, unchanged from D.18-05-041;⁴¹
- Forecasted energy savings in ABALs for 2022 and 2023 shall meet the annual energy savings goals that were adopted in D.21-09-037 for those program years;
- EM&V budgets remain set at four (4) percent of the overall portfolio budget; and
- The requirement that beginning December 31, 2022, 60 percent of the portfolio budget must be attributed to third-party implemented programs will continue in effect until modified by a future Decision.⁴²

Additional ABAL requirements not specifically addressed or modified by D.21-05-031 include:

- Portfolio cost-effectiveness statement;⁴³
- Application summary tables with forecast budgets and savings by sector and program/intervention;⁴⁴
- Sector-level metrics;⁴⁵
- A description of program and portfolio information;⁴⁶
- Historical portfolio, sector, and program-level budget requests and actual expenditures over the life of the business plan,⁴⁷ which is provided in Attachment C; and

⁴¹ See also D.18-05-041, p. 133.

⁴² See D.21-05-031 p 55.

⁴³ See D.15-10-028, OP 4.

⁴⁴ *Id.*

⁴⁵ Pursuant to D.18-05-041, OP 11, the PAs' reporting and assessments of metrics and targets are included in their respective EE Annual Reports. SCE's latest report on metrics and targets was included in its 2020 EE Annual Report for Program Year 2020. SCE's EE Annual Report is posted on CPUC Energy Efficiency Reporting website <https://www.cpuc.ca.gov/general.aspx?id=6442468251>

⁴⁶ See D.18-05-041, pp. 124-129, &133.

⁴⁷ See *Id.*, p. 125.

- RIM and PAC cost-effectiveness forecasts,⁴⁸ which are not criteria for rejection.

On September 30, 2020, California Assembly Bill (AB) 841 was signed into law. AB 841 required the establishment of the SEES Program and included a number of requirements for the CPUC regarding the development and administration of the SEES Program budgets, including the funding and transfer of funds from the large IOUs to the California Energy Commission (CEC). In compliance with AB 841, Decision 21-01-004 directs SCE to fund the SEES Program for program years 2022 and 2023 with \$87,119,631 and \$74,673,970 respectively, pursuant to Advice Letter 4406-E,⁴⁹ plus unspent/uncommitted funds from PYs 2020 and 2021. SCE provides the details of its contribution to the SEES program in Table 2.

B. Energy Division Staff-Directed ABAL Requirements

In D.18-05-041, Commission Staff was directed to develop templates and further guidance as needed for ABAL submissions.⁵⁰ On July 19, 2018, the Commission's Energy Division (Energy Division) issued its guidance for the PAs' ABAL submissions. The Energy Division instructed the PAs to include the following additional information in their ABALs:

- PA's Program Year Budget and Forecasted Savings; and
- A Narrative of Program and Portfolio Information, including:
 - Proposed program changes;
 - Proposed portfolio changes; and
 - Additional explanations if the PA's cost effectiveness or forecasted energy savings is below Commission established goals.

On June 30, 2020, the Energy Division asked the PAs to include a table that clearly defines the budget uploaded to CEDARS and to identify the difference between the budget and the revenue requirement. This information is presented in Table 4.

⁴⁸ D.19-05-019, p. 24, states "[W]e require the review and consideration of the RIM and PAC tests results during deliberation of all distributed energy resources proceedings and advice letters where cost-effectiveness analyses are required." SCE has included these estimates in Tables 10a and 10b.

⁴⁹ See SCE Advice Letter 4406-E, Joint Tier 1 Advice Letter to Fund the School Energy Efficiency Stimulus Program in Compliance with D.21-01-004 dated February 1, 2021.

⁵⁰ See D.18-05-041, OP 40.

In addition, the Energy Division instructed the IOU PAs to include their allocations for EE/DR Integration activities (also referred to as Integrated Demand Side Management or IDSM).⁵¹ This information is presented in Table 6.

In support of the transition to new statewide programs, Energy Division also requested that the PAs submit a table, based upon the Joint IOUs' Advice Letter of their Shared Funding Mechanism Proposal, to include forecasted budgets for each statewide program and the proportional shares and budgets for each utility.⁵² This table is contained in Attachment F.

Finally, Energy Division requested a table summary of program changes included in this ABAL.⁵³ This table is presented in Attachment E.

IV. 2022 and 2023 EE PORTFOLIO SUMMARY

A. Achieving Commission Requirements

As part of SCE's ABAL planning and development process, SCE developed a portfolio of programs and contracts and optimized the budget for each of the CPUC metrics, including, but not limited to, achieving the Commission's required cost-effectiveness, savings goals, budgets, and budget caps and targets. SCE supports the Commission's intent "to aggressively pursue all potentially achievable cost-effective energy savings opportunities."⁵⁴

SCE prioritized the following Commission goals and cost-effectiveness requirements while optimizing its 2022 and 2023 EE portfolio:

- Optimize all SCE-implemented resource programs, and measures within resource programs, to maximize savings and cost effectiveness;

⁵¹ See D.18-05-041, OP 10.

⁵² Energy Division Staff requested IOUs to update funding percentages and amounts. Energy Division Staff provided IOUs a template, based upon Table 5 (page 9) from the Joint IOUs Supplemental Advice Letter of the Shared Funding Mechanism Proposal submitted on November 15, 2018 (San Diego Gas and Electric Company (SDG&E) Advice 3268-E-A/2701- G-A; Southern California Gas Company (SoCal Gas) Advice 5346-G-A; Southern California Edison Company (SCE) Advice 3861-E-A; and Pacific Gas and Electric Company (PG&E) Advice 5373-E-A/4009-G-A), to be included in their 2020 ABAL.

⁵³ The "Program Level Explanation" was requested by Energy Division Staff at the California Energy Efficiency Coordinating Committee meeting held on August 5, 2021.

⁵⁴ See D. 21-09-037, Potential and Goals Decision, p. 16.

- Eliminate or reduce non-cost-effective programs and programs where new statewide and local third-party programs are expected to launch in 2022 and 2023;
- Enter into contracts with third-party implementers that propose, design and deliver programs, for at least 60 percent of the EE budget by the end of 2022;
- Manage and administer existing and future pay-for-performance, third-party implementer contracts;
- Shift SCE labor and non-labor costs from managing SCE-led programs to administering third-party proposed, designed and delivered programs; and
- Identify market opportunities and budget for new third-party programs in the market support and equity segments.⁵⁵

SCE's portfolio prioritizes cost-effectiveness while transitioning to the new statewide and third-party implementation model that the Commission adopted in D.18-01-004 to attempt to improve innovation and the overall cost-effectiveness of California EE programs and markets. Modifications also address the transition to a balanced portfolio that supports the market support and equity goals included in D.21-05-031,⁵⁶ which aligns the PY 2022 and 2023 portfolio in this ABAL with the strategy in SCE's upcoming 2024-2027 EE Application.

The result of SCE's optimization efforts — the proposed portfolio budget, savings, and cost-effectiveness, based upon currently approved energy savings and cost-effectiveness inputs to its measure and program mix — are contained in Sections V, VI and VII.

B. Reasonableness of Forecasts

While forecasting by definition requires the use of assumptions based on uncertain future outcomes, forecasting the 2022 and 2023 portfolio contains more uncertainty than usual because the EE programs are continuing to transition to statewide and third-party implemented programs, there have been significant market and policy changes that will be implemented during 2022 and 2023, and due to other factors discussed in more detail below and in Sections IX and X.

⁵⁵ New third-party programs in market support and Equity segments are not subject to cost effectiveness requirements for this annual budget advice letter. Measures for the new market support and Equity third-party programs will be identified through the solicitation process.

⁵⁶ See D.21-05-031, OP. 2.

Most significantly, SCE's role is shifting towards design and administration of the entire energy efficiency portfolio and away from individual program design and implementation, as detailed in D.18-01-004.⁵⁷ This transition began in 2020 with the execution of third-party contracts to design and implement programs in various sectors and has continued into 2021 as SCE and the other IOUs have executed new contracts for third-party programs, both local and statewide, that have launched and delivered energy savings to California. Third-party contracts will compose 81 percent and 85 percent of SCE's portfolio budget and 79 percent and 84 percent of savings in 2022 and 2023 respectively, not including Codes and Standards. As such, SCE's role in 2022 and 2023 will focus on the administration of third-party local and statewide program contracts, which differs significantly from having direct control over EE program design and implementation.⁵⁸ For example, SCE has reviewed third-party forecasts for consistency with existing workpapers but has not optimized measure mixes for measure savings as it did when programs were under its own design and implementation. Third parties are fully responsible for the design and delivery of their programs within the requirements of the executed contracts, and thus SCE has less control over ensuring that forecasts are realized.

The energy savings and cost-effectiveness estimates for individual third-party programs contained in this ABAL may differ from the obligations included in their pay-for-performance contracts. SCE asked third-party implementers to update their savings and cost effectiveness estimates as inputs to the 2022 and 2023 forecasts in this ABAL. Implementers with contracts that have delivery obligations in 2022 and 2023 were asked to use best available information for their estimates, including updated savings and benefits values from Commission-approved tools such as the cost-effectiveness tool (CET). These estimates are only used to develop the savings and cost-effectiveness forecasts contained in this ABAL; the contract performance will be managed consistent with the terms and conditions of the executed contract with the third-party implementer. SCE further discusses the drivers or the forecasted TRC values for PY 2022 and 2023 in Section IX.

SCE's contracts contain pay-for-performance elements, as encouraged by Commission Decisions.⁵⁹ Actual results and performance of third-party contracts may therefore exceed or fall short of the third-parties own estimates relied upon in this advice letter. For example, the recent guidance in D.21-05-031 and D.21-09-037 made substantial policy and potential and goals changes that better align with the current and future state of energy efficiency in California. SCE will encourage third-party implementers to ramp up and capture these opportunities within the scope of existing contracts in PY 2022 and 2023. If third parties exceed their current estimates and perform up to their maximum contractual savings targets, actual cost effectiveness will improve, and more

⁵⁷ See D.18-01-004, p. 28, see *also* SB 350.

⁵⁸ See D.20-11-013, p. 20.

⁵⁹ See D.18-01-004, pp. 42-43.

				Party Programs			
2022	\$194,341,984	572,493,449	95,126	\$161,951,653	\$100,254,059	244,231,381	38,591
2023	\$210,678,667	616,262,862	110,864	\$210,678,667	\$170,489,321	417,325,622	63,351

In D.18-05-041, the Commission also recognized that due to multiple non-trivial uncertainties regarding third-party programs, program years 2018 through 2022 should be treated as ramp-up or transition years.⁶⁰ Uncertainties relating to third-party programs in this PY 2022-2023 ABAL include: (1) the timing, costs, benefits and savings associated with new contracts; (2) the timing, costs, benefits, and energy savings associated with implementing statewide and local programs; and (3) the timing and impact of workpaper dispositions and of Evaluation, Measurement, and Verification (EM&V) dispositions. SCE anticipates that the uncertainty will be reduced only after new statewide programs, SCE’s new third-party programs, and various policy changes are fully implemented and operational for a few years. SCE can then further optimize its portfolio to better achieve the Commission-adopted goals cost-effectively and within the budget parameters of its revised and approved 2024-2027 portfolio plan filing on February 15, 2022.

To provide for a smooth transition to the new statewide and local third-party programs, SCE will stop accepting new applications for several existing programs and will close these programs upon completion of commitments. SCE does not know the precise timing of the launch of the new third-party programs locally and across the state of California; however, SCE forecasts that the annual budget for its programs is a reasonable estimate based on expected third-party program launch dates as of this advice letter. SCE will shift sufficient funds to continue operating any programs, as necessary. The source of additional funds may be from any projected underspent sectors, including funds set aside for third parties that have not yet begun implementing their programs. As such, SCE is requesting approval in this advice letter to close these programs ahead of new third-party implemented programs’ ramp-up and SCE has assessed whether those offerings are sufficient for each market sector.

SCE and third-party implementers forecast a specific cost-effectiveness, savings, and measure mix, which SCE has utilized in this ABAL. This mix and resulting cost-effectiveness may change if the Commission Staff releases measure dispositions, resolutions or decisions that can trigger updates to the Database for Energy Efficient Resources (DEER) and Electronic Technical Reference Manual (eTRM), and other key inputs that reduce or improve portfolio savings and cost-effectiveness. Dispositions with a negative impact on measures, in high-volume programs, could have a significant

⁶⁰ See D.18-05-041, p. 71.

impact on SCE’s ability to achieve its savings forecasts. Timely dispositions from the Commission would assist SCE and the market in responding appropriately to such changes. SCE is committed to working closely with the Commission staff to use the appropriate measure and program forecasts while also providing the market with sufficient certainty in making EE investment decisions. As cost-effectiveness inputs change, SCE will continue to evaluate the available mix of measures and programs and make portfolio adjustments as necessary to cost-effectively meet savings goals.

V. 2022 and 2023 EE PORTFOLIO BUDGET

Table 2 provides SCE’s forecast for the 2022 and 2023 EE portfolio budget. See Attachment A for SCE’s 2022 and 2023 EE Portfolio Budget in the Commission-issued ABAL template.

Table 2: Forecasted 2022 and 2023 EE Portfolio Budget (\$) ⁶¹

Sector	2022 Budget	2023 Budget
Residential	67,222,586	88,008,162
Commercial	134,884,764	154,821,000
Industrial	27,236,361	53,006,397
Agriculture	5,695,452	6,754,495
Emerging Technologies	10,190,911	8,893,257
Public	13,477,579	12,841,737
WE&T	9,596,440	9,780,462
Finance	1,324,973	1,369,871
OBF Loan Pool	12,000,000	14,000,000
Codes and Standards	17,177,567	17,078,491
IOU/CPUC EM&V ⁶²	\$13,160,489	15,985,016
AB841	\$87,119,631	\$74,673,970
Total Budget	\$399,086,753	\$457,212,858

⁶¹ The estimated \$19.98 million and \$13.18 million in local third-party programs’ costs are included in Agriculture and Public sectors in 2022 and 2023, respectively.

⁶² IOU/CPUC EM&V budget does not include EM&V funding allocated to Southern California Regional Energy Network (SoCalREN) of \$0.23 million in 2022 and 0.22 million in 2023, Tri-County Regional Energy Network (3CREN) of \$0.04 million in 2022 and \$.05 million in 2023.

Table 3 provides SCE’s 2022 and 2023 EE portfolio budget and cost recovery by funding source:

Table 3: Budget and Cost Recovery by Funding Source (\$)

Budget and Cost Recovery by Funding Source	2022 Amount	2023 Amount
SCE’s Forecasted 2022 and 2023 EE Portfolio Budget (includes SCE’s funding share of statewide programs)	311,967,122	382,538,888
SCE’s Unspent/Uncommitted Program Carryover Funds from Prior Years ⁶³	(28,860,378)	(14,000,000)
Tri-County Regional Energy Network’s (3CREN) Funding Request for 2022 and 2023 EE Portfolio	3,194,857	4,187,874
3CREN’s EM&V	36,608	47,986
3CREN Unspent/Uncommitted Program Carryover Funds from Prior Years	-	-
Southern California Regional Energy Network’s (SoCalREN) Funding Request for 2022 and 2023 EE Portfolio	20,315,645	19,379,705
SoCalREN’s EM&V	232,783	222,059
SoCalREN Unspent/Uncommitted Program Carryover Funds from Prior Years	-	-
Total PA’s Funding Request for 2022 and 2023 EE Portfolio	306,886,637	392,376,512
AB841 Funding Cost Recovery	87,119,631	74,673,970
PY 2020/2021 Unspent/Uncommitted Transfer to CEC for AB841	29,681,289	-

Table 3 does not include SCE requests for EE/DR integration funding of \$9.961 million for 2022 and \$10.253 million for 2023, as discussed in Section V.B., below. Additionally, 3CREN and SoCalREN will submit their own Advice Letters for each of their respective 2022 and 2023 budgets.

Table 4 shows the budget uploaded to CEDARS and identifies the difference with the PY 2022 and 2023 budgets shown in Table 2.

⁶³ Unspent/Uncommitted Program Carryover funds in PY 2022 includes \$12.00 million as detailed in Table 5a for On-Bill Financing Loan Pool.

Table 4: Summary of CEDARS Budget

SCE's 2022 and 2023 CEDARS Budget		
Funding Source	2022 Amount	2023 Amount
SCE's Funding Request Total	\$399,086,753	\$457,212,858
Less OBF Loan Pool	(\$12,000,000)	(\$14,000,000)
Less AB841	(\$87,119,631)	(\$74,673,970)
Total CEDARS Budget	\$299,967,122	\$368,538,888

A. On-Bill Financing Loan Pool

For 2022 and 2023, SCE will continue to offer its On-Bill Financing (OBF) Program, which provides eligible customers with zero-interest financing for the purchase and installation of qualifying energy-efficient measures. Loans are available to qualifying nonresidential customers, including commercial, industrial, government, and institutional customers who repay their OBF loan as a line item on their electric bill. SCE is authorized to use funds recovered in the current year to fund loans committed during the current year.⁶⁴ The Commission and the Energy Division have previously granted SCE the authority to retain funds from prior EE and OBF program cycles and repayments collected from previous loans to be used in subsequent program cycles, resulting in a net decrease between SCE's PY budget and annual EE funding request.⁶⁵ Consistent with this precedent, SCE is requesting authority to retain unspent uncommitted OBF funds from prior funding cycles to use for the 2022 and 2023 funding cycles within the OBF program only.

For program year 2022, SCE requests authorization to retain \$12.00 million from repayments, unspent, and uncommitted OBF funding from the 2010-2012, 2013-2015, 2016, and 2017 OBF program funding cycles to fund OBF Program commitments. SCE proposes to retain approximately \$754,000 from the 2010-2012 program cycle, \$3.20 million from the 2013-2015 OBF program cycle, \$2.77 million from the 2016 program cycle, and \$5.27 million from the 2017 OBF program cycle to make up the \$12.00 million needed for PY 2022.⁶⁶ This is reduced from the \$15.00 million retained for PY 2021⁶⁷ due to lower overall demand for this program and the transition to third-party implemented programs. Table 5a includes the authorized budgets, loans issued,

⁶⁴ Loan repayments are returned to SCE's Energy Efficiency Financing Program Balancing Account (EEFPBA), formerly called the On-Bill Financing Balancing Account.

⁶⁵ See SCE Advice 3880-E.

⁶⁶ SCE will use the available balance in the EEFPBA to fund the \$12.00 million budget OBF loan pool for PY 2022, and the \$14.00 million budget OBF loan pool for PY 2023.

⁶⁷ See SCE Advice 4068-E, p. 11.

commitments, repayments and funds needed from the 2010-2012, 2013-2015, 2016, and 2017 program periods.

For program year 2023, SCE requests authorization to retain \$14.00 million from repayments, unspent, and uncommitted OBF funding from the 2013-2015, 2016, 2017, and 2018 OBF program funding cycles, to fund OBF Program commitments. SCE proposes to retain approximately \$185,000 from the 2013-2015 OBF program cycle, \$100,000 from the 2016 program cycle, \$7.34 million from the 2017 program cycle, and \$6.38 million from the 2018 OBF program cycle to make up the \$14.00 million needed for PY 2023.⁶⁸ This is an increase from the \$12.00 million requested to be retained for PY 2022 ⁶⁹ due to SCE’s forecast that overall demand will increase in 2023 due in part to projected uptake in third-party implemented programs, among other factors. Table 5b includes the authorized budgets, loans issued, commitments, repayments and funds needed from the 2013-2015, 2016, 2017, and 2018 program periods.

Table 5a: OBF Loan Pool Funding Needed for PY 2022

Program Cycle ⁷⁰	Authorized Budgets (a)	Amount Returned	Loans Issued ⁷¹ (b)	Write Offs (c)	Repayments (d)	Commitments ⁷² (e)	Retained for 2018-2021 OBF Loan Pool ⁷³ (f)	Available Balance (a)-(b)-(c)+(d)-(e)-(f)	Proposed to Retain for 2022
2010-2012	\$32,000,000	\$9,450,000	\$21,853,666	\$269,305	\$20,859,465	\$0	\$20,511,122	\$774,236	\$754,236
2013-2015	\$54,724,863		\$47,251,050	\$393,872	\$36,955,280	\$0	\$40,623,758	\$3,411,463	\$3,201,463
2016	\$11,000,000		\$11,333,121	\$0	\$5,588,404	\$0	\$2,365,122	\$2,890,161	\$2,775,161
2017	\$15,000,000		\$4,359,464	\$0	\$2,017,224	\$0	\$0	\$12,657,759	\$5,269,140
									\$12,000,000

Table 5b: OBF Loan Pool Funding Needed for PY 2023

⁶⁸ SCE will use the available balance in the EEFPA to fund the \$12.00 million budget OBF loan pool for PY 2022, and the \$14.00 million budget OBF loan pool for PY 2023.

⁶⁹ See SCE Advice 4068-E, p. 11.

⁷⁰ SCE was previously granted authority to retain funds from prior OBF program cycles to use in subsequent program cycles. See SCE Advice 3880-E.

⁷¹ Cumulative amount of loans issued during the program cycle.

⁷² Commitments are based on the total number of OBF projects that already have committed/reserved funds set aside.

⁷³ Funds retained for the 2018-2021 program cycles.

Program Cycle ⁷⁴	Authorized Budgets	Amount Returned	Loans Issued ⁷⁵	Write Offs	Repayments	Commitments ⁷⁶	Retained for 2018-2022 OBF Loan Pool ⁷⁷	Available Balance	Proposed to Retain for 2023
	(a)		(b)	(c)	(d)	(e)	(f)	(a)-(b)-(c)+(d)-(e)-(f)	
2010-2012	\$32,000,000	\$9,450,000	\$21,853,666	\$269,305	\$20,859,465	\$0	\$21,265,358	\$20,000	\$0
2013-2015	\$54,724,863		\$47,251,050	\$393,872	\$36,955,280	\$0	\$43,825,221	\$210,000	\$185,000
2016	\$11,000,000		\$11,333,121	\$0	\$5,588,404	\$0	\$5,140,283	\$115,000	\$100,000
2017	\$15,000,000		\$4,359,464	\$0	\$2,017,224	\$0	\$5,269,140	\$7,388,620	\$7,338,620
2018	\$14,000,000		\$6,132,307	\$0	\$2,000,873	\$3,462,436	\$0	\$6,406,130	\$6,376,380
									\$14,000,000

B. IOU EE/DR Integration Budget

SCE’s 2018-2025 Business Plan, approved by the Commission in D.18-05-041, includes the Demand Response Program Balancing Account (DRPBA) IDSM 2018-2025 funding for EE/DR Integration activities.⁷⁸ SCE requests DR funding in the amount of \$9.961 million and \$10.253 million for 2022 and 2023, respectively, to continue EE/DR Integration activities, which is in addition to the \$393.97 million and \$466.02 million requested for cost recovery for EE programs in 2022 and 2023, respectively.⁷⁹

In Table 6, SCE provides its EE/DR Integration Budget for 2022 and 2023. SCE will use unspent EE/DR Integration funds from previous years to support SCE’s and new third-party implemented programs for 2022 and 2023, where appropriate. SCE and third-party implementers will update Implementation Plans as needed to reflect any program changes. Third-party programs are eligible for these funds and are currently going through the solicitation process or starting program implementation efforts.

Table 6: SCE’s 2022-2023 EE/DR Integration Budget Allocation (\$)

Funding Source	Sector	2022	2023
DR	Non-Residential	8,961,000	9,253,000

⁷⁴ SCE was previously granted authority to retain funds from prior OBF program cycles to use in subsequent program cycles. See SCE Advice 3880-E.

⁷⁵ Cumulative amount of loans issued during the program cycle.

⁷⁶ Commitments are based on the total number of OBF projects that already have committed/reserved funds set aside.

⁷⁷ Funds retained for the 2018-2021 program cycles.

⁷⁸ Budgets and cost recovery for DR programs and activities are recovered and recorded to SCE’s Preliminary Statement Y, the DRPBA.

⁷⁹ See D.18-05-041, OP 10.

DR	Residential	1,000,000	1,000,000
Total		9,961,000	10,253,000

VI. 2022 and 2023 EE PORTFOLIO SAVINGS

In D.21-05-031, Commission established the TSB metric, a new metric for measuring benefits of EE programs that expresses the benefits of lifecycle energy, capacity, and GHG reduction. The new TSB metric is forecasted for 2022 and 2023 but is not a basis for rejection of the ABAL. Table 7 shows SCE’s 2022 and 2023 forecasted TSB.

Tables 8a, 8b, 9a, and 9b provide SCE’s forecast of energy savings and demand reduction for its 2022 and 2023 EE portfolio. See Attachment A for SCE’s 2022 and 2023 EE Portfolio Savings in the Commission-issued ABAL template. All savings and cost-effectiveness figures used in this ABAL are direct outputs taken from the CET Tool on the CEDARS,⁸⁰ which exclude a five percent adjustment for market effects.

**Table 7: 2022 and 2023 Forecasted Total System Benefit
(SCE Programs Only, Excluding Codes & Standards)**

Year	Forecasted Total System Benefit
2022	\$246,999,330
2023	\$391,763,073

**Table 8a: 2022 EE Portfolio Forecasted Savings
(SCE Programs Only, Excluding Codes & Standards)**

	2022 Forecast		
	Savings	Goal ⁸¹	% of 2021 Goal
Energy Savings (Net GWh)	323	425	76%
Demand Reduction (Net MW)	62	65	95%

**Table 8b: 2023 EE Portfolio Forecasted Savings
(SCE Programs Only, Excluding Codes & Standards)**

	2023 Forecast		
	Savings	Goal ⁸²	% of 2021 Goal

⁸⁰ CEDARS website available at <https://cedars.sound-data.com/>

⁸¹ See D.21-09-037 Potential and Goals Decision, Table – SCE, p. 20.

⁸² *Id.*

Energy Savings (Net GWh)	514	461	112%
Demand Reduction (Net MW)	91	69	132%

**Table 9a: 2022 EE Portfolio Forecasted Savings
(SCE Programs Only, Including Codes & Standards)**

	2022 Forecast		
	Savings	Goal ⁸³	% of 2022 Goal
Energy Savings (Net GWh)	1,381	1,404	98%
Demand Reduction (Net MW)	248	235	106%

**Table 9b: 2023 EE Portfolio Forecasted Savings
(SCE Programs Only, Including Codes & Standards)**

	2023 Forecast		
	Savings	Goal ⁸⁴	% of 2023 Goal
Energy Savings (Net GWh)	1,630	1,471	111%
Demand Reduction (Net MW)	309	261	119%

In Tables 9a and 9b for PY 2022 and 2023, the goal column includes SCE’s Codes & Standards goals from the Potential and Goals Decision (D.21-09-037), whereas SCE’s forecasted savings (the Savings column) reflects SCE’s funding load share of the total Codes & Standards goals in each respective year.⁸⁵

VII. 2022 and 2023 EE PORTFOLIO COST-EFFECTIVENESS

Table 10a sets forth the results of the TRC, PAC, and RIM tests for SCE’s 2022 and 2023 EE portfolio. As indicated in D.21-05-031, portfolio TRC and PAC ratios are included for informational purposes and cannot not be a basis for rejection of the ABAL.⁸⁶ That same Decision directed PAs to calculate the TRC and PAC ratios on the

⁸³ *Id.*, p. 20.

⁸⁴ *Id.*

⁸⁵ D.18-05-041, OP 22 states, “All utility program administrators shall fund statewide programs at levels consistent with their proportional share based on load.”

⁸⁶ D.21-05-031, p. 53 states, “Cost-effectiveness ratios, for both the TRC and PAC, shall be included for the entire portfolio, but these overall portfolio TRC and PAC ratios will not be a basis for rejection of the ABALs.”

resource acquisition portion of the EE portfolio, which is presented in Table 10b.⁸⁷ These estimates exclude: market effects, SCE REN Administrative Costs,⁸⁸ impacts from SCE’s Codes & Standards programs, Statewide Marketing, Education & Outreach, and SCE’s low-income EE program, the Energy Savings Assistance Program. See Attachment A for SCE’s 2022 and 2023 EE Portfolio TRC, PAC, and RIM in the Commission-issued ABAL template.⁸⁹

**Table 10a: 2022 and 2023 EE Portfolio TRC, PAC, and RIM
(Excluding Codes & Standards)**

Cost-Effectiveness Test	2022 Forecast	2023 Forecast
TRC	0.85	1.05
PAC	0.90	1.13
RIM	0.51	0.60

**Table 10b: 2022 and 2023 Resource Acquisition Portfolio (only) TRC, PAC, and RIM
(Excluding Codes & Standards)**

Cost-Effectiveness Test	2022 Forecast	2023 Forecast
TRC	0.94	1.16
PAC	1.01	1.25
RIM	0.54	0.63

VIII. PROPOSED PROGRAM AND PORTFOLIO CHANGES

SCE’s portfolio and program budgets, as discussed in subsection A, below, are optimized to meet goals and requirements established by the Commission while taking into account uncertainties discussed above in Section IV. In D.21-05-031, the

⁸⁷ D.21-05-031, p. 53 states, “Cost-effectiveness ratios shall also be calculated on only the resource acquisition portion of the portfolio and must exceed 1.0 on a forecast basis.”

⁸⁸ D.19-12-021, OP 5, ordered the utilities to track “administrative costs associated with the utility’s performance of the fiscal agent role...” of REN activities. These expenses are to be considered separately for cost-effectiveness purposes beginning in 2021. SCE set up a new separate line item for SCE REN Administrative Costs and included a modest budget for 2022 and 2023, as shown in Attachment C, Table 4. This budget will not be included in SCE’s cost-effectiveness calculations. SCE will track and charge these “SCE REN Administrative” expenses to this new budget starting January 1, 2021.

⁸⁹ See D.18-05-041, OP 40.

Commission instituted a TRC with a 1.0 minimum threshold for all resource programs in a PA's portfolio, to be applied in its 2022 and 2023 ABAL advice letter.⁹⁰ That same Decision directed PAs to split their EE programs into three (3) segments: resource acquisition, market support, and equity.⁹¹ SCE's EE Program Segmentation Strategy is discussed in subsection B below.

A. Proposed Program Budgets

SCE's proposed PY 2022 and 2023 portfolio budgets of \$399.09 million and \$457.18 million, respectively, are higher than the portfolio budgets included in SCE's Annual Rolling Portfolio Budget True-Up for PY 2022 and PY 2023 of \$278.60 million and 286.80 million, respectively⁹² but SCE's overall EE portfolio budget remains under the cap authorized for the business plan period.⁹³ SCE's 2022 and 2023 budgets are higher than the approved 2021 budget of \$164.03 million primarily due to costs set aside for the AB 841 SEES program.⁹⁴ Additionally, SCE's 2022 and 2023 budgets account for approximately \$170.30 million and \$218.54 million in funding for new, local third-party programs and approximately \$34.23 million and \$48.71 million in funding for new statewide programs and activities, as described in subsection C.ii. below.

To help meet the Commission's goals for EE, SCE proposes to eliminate and reduce low-performing programs and maximize savings from cost-effective programs and measures, as described in subsections C.i., C.ii., and C.iv., below. SCE proposes to close certain SCE local programs and existing statewide programs upon completion of committed projects or after new third-party EE programs launch in 2022 and 2023 in order to provide interim market coverage. Other programs will remain open to serve the relevant market through the remainder of PYs 2022 and 2023, while additional third-party solicitations are underway. As third-party programs are launched in the market, SCE intends to close corresponding SCE programs or sub-programs that are no longer necessary.

Tables 11a and 11b show the 2022 and 2023 administrative budgets and compares them to the 2021 and 2022 budgets, respectively. Total administrative expenses went up 143 percent from 2021 to 2022 and 4 percent from 2022 to 2023. The increase in these administrative expenses corresponds with the increase in statewide and local

⁹⁰ See D.21-05-031, Conclusion of Law (COL) 8.

⁹¹ See *Id.*, OP 2.

⁹² See Table 2a (IOU Budget True-Up) in Attachment D of SCE's 2019 ABAL Advice Letter 3859-E-A.

⁹³ See D.18-05-041, p. 133.

⁹⁴ D.21-01-004 directs SCE to fund the SEES Program for program year 2022 with \$116,800,920, which is comprised of: (1) 70 percent of the difference between SCE's funding limit and the PY 2020 budget, (2) any unspent/uncommitted funds from PY 2021, and (3) any additional unspent/uncommitted funds from PY 2020.

third-party programs in SCE's 2022 and 2023 EE portfolio.⁹⁵ In order to improve cost-effectiveness, SCE is committed to managing its administrative and other non-resource-related costs and conducting appropriate oversight of its portfolio during and after the transition to the statewide and third-party program implementation model. There is a small increase in IOU program labor to account for the realignment of SCE labor to manage the growing number of third-party statewide and local third-party programs and contracts.

For all programs, SCE will maintain the required levels of technical review and quality control to provide appropriate ratepayer protections and rigor around the claimed savings from SCE's portfolio. SCE will continue to evaluate and make labor adjustments through 2022 and 2023 as the remaining statewide and local third-party solicitations are completed.

Table 11a: 2021 vs 2022 Administrative Cost Comparison

Administrative Budgets	2020 ABAL [A]	2021 ABAL [B]	2022 ABAL [C]	2020 to 2021 Increase (Reduction) [B - A]	2021 to 2022 Increase (Reduction) [C - B]
G&A Labor	\$5,211,793	\$3,963,233	\$7,413,508	\$(1,248,560)	\$3,450,275
G&A Non-Labor and Consultant	\$1,798,816	\$1,047,065	\$2,415,680	\$(751,751)	\$1,368,615
IOU Program Labor	\$478,879	\$839,652	\$1,811,400	\$360,773	\$971,748
IOU Program Non-Labor	\$153,281	\$25,003	\$1,086,152	\$(128,278)	\$1,061,149
SW Program Labor	\$ -	\$325,571	\$110,566	\$325,571	\$(215,005)
SW Program Non- Labor	\$ -	\$40,381	\$41,783	\$40,381	\$1,402
3TP/Partner/SW	\$563,198	\$6,064,060	\$16,991,834	\$5,500,862	\$10,927,774
Total	\$8,205,967	\$12,304,965	\$29,870,923	\$4,098,998	\$17,565,958

Table 11b: 2022 vs 2023 Administrative Cost Comparison

Administrative Budget	2021 ABAL [A]	2022 ABAL [B]	2023 ABAL [C]	2021 to 2022 Increase (Reduction) [B - A]	2022 to 2023 Increase (Reduction) [C - B]
G&A Labor	\$3,963,233	\$7,428,152	\$7,682,819	\$3,464,919	\$254,667
G&A Non-Labor and Consultant	\$1,047,065	\$2,418,725	\$2,436,324	\$1,371,660	\$17,599
IOU Program Labor	\$839,652	\$1,764,131	\$1,774,997	\$924,479	\$10,866
IOU Program Non-Labor	\$25,003	\$1,084,734	\$1,439,138	\$1,059,731	\$354,404
SW Program Labor	\$325,571	\$112,991	\$166,479	\$(212,580)	\$53,488

⁹⁵ As explained in Section X.A, the Third-Party/Partner administrative expenses and a portion of the Statewide Labor and Non-Labor administrative expenses associated with Emerging Technologies, Higher Education and Water/Wastewater are an estimate in this ABAL.

SW Program Non- Labor	\$40,381	\$70,361	\$85,936	\$29,980	\$15,575
3TP/Partner/SW	\$6,064,060	\$21,206,891	\$21,719,602	\$15,142,831	\$512,711
Total	\$12,304,965	\$34,085,985	\$35,305,295	\$21,781,020	\$1,219,310

B. Program Segmentation Strategy

With the new program segmentation opportunities instituted in D.21-05-031,⁹⁶ SCE's EE portfolio will focus on increasing contributions to California's climate goals and equity-focused objectives while balancing impacts to customers' rates. D.21-05-031 directs the PAs to categorize their portfolio into the following segments: Resource Acquisition, Market Support, Equity, and Codes & Standards. SCE aims to optimize its EE portfolio to: (1) capture cost-effective savings to support affordability by maximizing energy savings and total system benefits; (2) provide EE market support and enable new EE and GHG emissions reduction technology adoption; and (3) drive equitable opportunities and outcomes for customers where additional resources are needed to better serve those customers. SCE's portfolio segmentation efforts begin the transition to a new EE paradigm while pursuing current portfolio goals and objectives. The PY 2022-2023 ABAL provides SCE's categorization of historical programs, recent third-party solicitation results, and new opportunities in preparation for the upcoming 2024-2027 EE Application.

The resource acquisition segment of the portfolio is mostly composed of third-party proposed, designed, and implemented programs contracted through recent solicitations.⁹⁷ The resource acquisition portion of the portfolio is designed to capture all cost-effective EE to effectively meet or exceed SCE's goals. The primary purpose of programs listed in the resource portion of the portfolio is to deliver cost-effective avoided-cost benefits. The resource segment includes the majority of budget, energy savings, and total system benefits in this ABAL forecast.

The market support segment of the portfolio contains programs with a primary objective of supporting the long-term success of the energy efficiency market by educating customers, training contractors, building partnerships, or moving beneficial technologies towards greater cost-effectiveness. The market support segment contains programs such as the Statewide Electric Emerging Technologies Program, local Commercial and Industrial Energy Advisor Programs, the local AB 793 Residential Pay-for-Performance Program, local Finance Programs, and the statewide and local Workforce Education & Training (WE&T) programs. In 2022 and 2023, SCE will enhance the WE&T Integrated Energy Education and Training (IEET) program to include new training on the latest fuel substitution technologies and complementary IDSM activities.

⁹⁶ See D.21-05-031 OP 4.

⁹⁷ For 2022 and 2023 SCE's 78 percent and 82 percent of SCE's resource acquisition segment budget is assigned to third-party programs.

The equity portion of the portfolio is a new opportunity in the EE landscape. Historically, EE programs have been forced to balance competing objectives.⁹⁸ SCE's initial characterization of equity-based programs will set the stage for how the equity segmentation of the EE portfolio can provide increased energy-efficiency opportunities to hard-to-reach customers, underserved customers, and disadvantaged communities. Given the recent adoption of these changes and the on-going California Energy Efficiency Coordinating Committee (CAEECC) Working Groups supporting metrics development and the identification of program objectives, SCE is implementing a "no-regrets" approach in the equity segment supported by data analysis with consideration of customer needs in close coordination with the Low Income Proceeding.

Below are brief descriptions of expanded market support activities and new equity programs that SCE has identified for inclusion in its 2022-2023 EE portfolio.

- **Market Support:** SCE will augment its existing WE&T IEET Program⁹⁹ to increase support and focus on Fuel Substitution efforts. These programs will support installation contractors, developers, builders and building inspectors by providing training on the latest fuel substitution technologies. The program expansions and activities reflect the budget increase for WE&T IEET.
- **Equity:** The Residential Equity Program, also known as Residential Energy Efficiency and Fuel Substitution Equity Program, will focus on single-family residential and multi-family customers who are classified as hard-to-reach or middle income or are in disadvantaged communities. These customers typically have lower EE program participation rates than other EE customers. This program will focus on fuel-substitution opportunities and readiness for these categories of residential customers.
- **Equity:** The Small/Medium Business Equity Program, also known as Small/Medium Business Energy Efficiency and Fuel Substitution Equity Program, will focus on non-residential small and medium businesses that have lower participation rates than larger and more sophisticated customers. Finally, to leverage a single site visit, SCE intends to enable the program to support fuel substitution opportunities and readiness for small and medium business customers.

As described below, SCE expects to solicit bids from third parties to design and implement these new equity programs. However, while these programs are being solicited, SCE will deliver these measures to eligible customers through existing delivery

⁹⁸ See D. 21-05-031, pp. 10-11.

⁹⁹ Existing SCE's WE&T IEET program (Program ID SCE-13-SW-010A).

channels such as the Residential Direct Install Program and Comprehensive Manufactured Homes Program.

The Codes & Standards segment of the portfolio contains programs with a primary objective of advocating for more stringent building and appliance codes, promoting greater knowledge and enforcement of these codes, and coordinating with stakeholders to research the potential for future codes. The Codes & Standards program contains statewide advocacy subprograms (Federal and State advocacy) and local Codes & Standards subprograms (Compliance Improvement, Reach Codes, Planning and Coordination).

Attachment G shows SCE’s proposed program segmentation of its EE portfolio by program categories – resource acquisition, market support, equity, and codes & standards.

C. Program Changes

Tables 12a and 12b provide a list of SCE’s programs categorized by programs proposed to be started or closed in 2022 and 2023, programs with substantially enhanced budgets (>40 percent increase from 2021 budgets) or substantially reduced budgets (>40 percent decrease from 2021 budgets), and continuing programs that are not cost-effective (TRC <1.0). A detailed discussion of these programs is provided in subsections i-iv below and summarized in a table in Attachment E. Of the information contained in Tables 12a and 12b, SCE is seeking Commission Staff approval for program closures only, including for programs that will close in 2022 and 2023 when new third-party local and statewide programs are ramped-up and operational. All other information is for informational purposes only as required by D.18-05-041.¹⁰⁰

Table 12a: Summary of 2022 Program Changes

Program ID	Program Name
INCENTIVE PROGRAMS PROPOSED TO CLOSE IMMEDIATELY	
SCE-13-SW-003E	Market Based Incentive
SCE-13-SW-004C	Agriculture Deemed Energy Efficiency Program
Local Government Partnerships	
SCE-13-L-002H	Eastern Sierra Energy Leader Partnership
SCE-13-L-002J	Desert Cities Energy Leader Partnership
SCE-13-L-002K	Kern County Energy Leader Partnership
SCE-13-L-002N	San Joaquin Valley Energy Leader Partnership
SCE-13-L-002R	Western Riverside Energy Leader Partnership

¹⁰⁰ See D.18-05-041, p. 128.

SCE-13-L-002S	High Desert Regional Energy Leader Partnership
SCE-13-L-002W	San Bernardino Association of Governments
SCE-13-L-003D	County of Riverside Energy Efficiency Partnership
SCE-13-L-003E	County of San Bernardino Energy Efficiency Partnership
Institutional Partnerships	
SCE-13-L-003F	State of California Energy Efficiency Partnership
SCE-13-L-003B	California Dept. of Corrections and Rehabilitation Energy Efficiency Partnership
NON-RESOURCE PROGRAMS PROPOSED TO CLOSE IMMEDIATELY	
SCE-13-SW-010B	Workforce Education & Training (WE&T) Connections
SCE-13-SW-001A	Energy Advisor Program (Enhanced Energy Advisor Tool only) ¹⁰¹
SCE-13-SW-003A	Industrial Energy Advisor Program
INCENTIVE PROGRAMS PROPOSED TO BE CLOSED UPON COMPLETION OF EXISTING COMMITMENTS	
SCE-13-SW-002B	Commercial Calculated Energy Efficiency Program
SCE-13-SW-004B	Agriculture Calculated Energy Efficiency Program
Local Government Partnerships	
SCE-13-L-002B	City of Long Beach Energy Leader Partnership
SCE-13-L-002F	Gateway Cities Energy Leader Partnership
SCE-13-L-002L	Orange County Cities Energy Leader Partnership
SCE-13-L-002M	San Gabriel Valley Energy Leader Partnership
SCE-13-L-002O	South Bay Energy Leader Partnership
SCE-13-L-002P	South Santa Barbara County Energy Leader Partnership
SCE-13-L-002Q	Ventura County Energy Leader Partnership
SCE-13-L-002T	West Side Energy Leader Partnership
SCE-13-L-002V	North Orange County Cities
SCE-13-L-003C	County of Los Angeles Energy Efficiency Partnership
Institutional Partnerships	
SCE-13-L-003I	Public Sector Performance-Based Retrofit High Opportunity
Non-Resource Programs	

¹⁰¹ The Enhanced Energy Advisor Tool (EEAT) also known as the Universal Audit Tool (UAT) is a component of SCE's Energy Advisor Program. SCE proposes to close the EEAT funding and discontinue the tool upon Disposition this advice letter by Commission. SCE intends to fund EEAT through Q2 2022 to account for any final ramp down activities Home Energy Reports (HERs) were also funded through SCE's Energy Advisor Program, however funding for HERs will be transitioning to the new SCE_3P_2020RCI_002 Residential Behavior Program.

SCE-13-SW-009A	Technology Development Support
SCE-13-SW-009B	Technology Assessments
SCE-13-SW-009C	Technology Introduction Support
NEW LOCAL THIRD-PARTY PROGRAMS	
SCE_3P_2020RCI_001	Enervee Marketplace
SCE_3P_2020RCI_002	Residential Behavioral Program
SCE_3P_2020RCI_003	Commercial Behavioral Program
SCE_3P_2020RCI_004	Comprehensive Multifamily Program
SCE_3P_2020RCI_005	Comprehensive Commercial Program
SCE_3P_2020RCI_006	Comprehensive Industrial Program
SCE-13-TP-029	Local Public Sector 3P Solicitation
SCE-13 -TP-030	Local Agriculture 3P Solicitation
SCE-Res-Equity-001	Residential Equity Program
SCE-SMB-Equity-001	Small/Medium Business Equity Program
NEW SCE-LED STATEWIDE THIRD-PARTY RESOURCE PROGRAMS	
SCE_SW_WP	Water/Wastewater Pumping
SCE_SW_IP_Colleges	UC/CSU/CCC
NEW SCE-LED STATEWIDE THIRD-PARTY NON-RESOURCE PROGRAMS	
SCE_SW_ETP_Elec	Electric Emerging Technologies Program
CONTINUING PROGRAMS WITH ENHANCED BUDGETS (>40% BUDGET INCREASE) TO CONTINUE IN 2022	
SCE-13-SW-001G	Residential Direct Install
SCE-13-SW-003D	Strategic Energy Management
SCE_SW_UL	Lighting (Upstream)
SCE-13-TP-001	Comprehensive Manufactured Homes
SCE-13-SW-010A	Workforce, Education & Training (WE&T) Integrated Energy Education and Training
CONTINUING PROGRAMS WITH REDUCED BUDGETS (>40% BUDGET DECREASE) TO CONTINUE IN 2022	
SCE-13-TP-024	AB793 Residential Pay-for-Performance
SCE-13-SW-007C	New Finance Offerings

Table 12b: Summary of 2023 Program Changes

Program ID	Program Name
INCENTIVE PROGRAMS PROPOSED TO CLOSE IMMEDIATELY	
Local Government Partnerships	
SCE-13-L-002Y	Grandfathered Street Lights

INCENTIVE PROGRAMS PROPOSED TO CLOSE UPON COMPLETION OF EXISTING COMMITMENTS	
Institutional Partnerships	
SCE-13-L-003A	California Community Colleges Energy Efficiency Partnership
SCE-13-L-003G	UC/CSU Energy Efficiency Partnership
EXISTING PROGRAMS WITH ENHANCED BUDGETS (>40% BUDGET INCREASE) TO CONTINUE IN 2023	
SCE_3P_2020RCI_003	Commercial Behavioral Program
SCE_3P_2020RCI_004	Comprehensive Multifamily Program
SCE_3P_2020RCI_005	Comprehensive Commercial Program
SCE_3P_2020RCI_006	Comprehensive Industrial Program
SCE_SW_IP_Colleges	UC/CSU/CCC
SCE_SW_WP	Water/Wastewater Pumping
SCE-13-TP-007	Primary and Fabricated Metals ¹⁰²
SCE-Res-Equity-001	Residential Equity Program
SCE-SMB-Equity-001	Small/Medium Business Equity Program
EXISTING PROGRAMS WITH REDUCED BUDGETS (>40% BUDGET DECREASE) TO CONTINUE IN 2023	
Institutional Partnerships	
SCE-13-L-003I	Public Sector Performance-Based Retrofit High Opportunity

i. Program and Subprogram Closures

Proposed program closures are driven by cost-effectiveness considerations and by the same or similar program offerings being made available via third-party implemented contracts, including statewide offerings. A summary of these programs is in Attachment E.

Incentive Programs Proposed to Close Immediately

For PY 2022, SCE requests Commission Staff approval to immediately close the following programs:

- The **Market Based Incentive** (MBI) Pilot program rolled out in April 2020 with support from SCE's account representative team. Despite efforts to drive

¹⁰² SCE was approved to close this program upon completion of existing commitments in the 2021 ABAL (AL 4285-A-E). The program continues to be funded to committed projects in the pipeline.

program participation, it received minimal interest from customers, and no projects were submitted. As a result, the program was sunset effective December 31, 2020.

- SCE's third-party solicitation for Agricultural program(s) is expected to be complete by end of 2021; therefore, the **Agricultural Deemed Energy Efficiency Program** will close effective January 1, 2022.
- SCE plans to close the following city and county partnerships under the **Local Government Partnerships** at the end of 2021: Eastern Sierra Energy Leadership Partnership (ELP) program, Desert Cities ELP, Kern County ELP, San Joaquin Valley ELP, Western Riverside ELP, High Desert Regional ELP, San Bernardino Association of Governments, County of Riverside Energy Efficiency Partnerships (EEP), and County of San Bernardino EEP. These partnership programs are not cost effective, and SCE is completing its Local Public Sector solicitation. The closure of these programs aligns with SCE's current overall strategy of reducing spending on EE resource activities that do not produce cost-effective energy savings.
- The plans to close the **California Department of Corrections and Rehabilitation Energy Efficiency Partnership** and **State of California Energy Efficiency Partnership** at the end of 2021. The new State of California / Department of Corrections Third-Party Program will be led by PG&E and is expected to ramp up by December 2021.
- **Workforce Education & Training Connections** is a sub-program of the umbrella WE&T Program. It is expected that WE&T Connections will be superseded by new program offerings through the third-party implemented Statewide WE&T Career Connections program led by PG&E, which is scheduled to launch in Q4 2021. WE&T Connections will close upon the launch of the new statewide program to mitigate customer disruption and avoid any market gaps.
- The **Enhanced Energy Audit Tool (EEAT)**, also known as the Universal Audit Tool (UAT), is a technology component of SCE's Energy Advisor Program. The tool has had extremely low customer participation and audit completions since its inception in 2015. Even with SCE's attempts to increase participation by employing advanced marketing techniques (i.e., social media, emails, banner ads, bill inserts, print and search engine marketing), the participation levels have not been high enough to generate statistically significant results that would be needed to evaluate and claim savings. As a result, SCE has not claimed savings for EEAT. Therefore, SCE proposes to eliminate EEAT funding upon the Commission's approval of this advice letter. SCE intends to fund EEAT through Q2 2022 to account for any final ramp down activities.
- The **Industrial Energy Advisor Program** provides minimal benefit as a stand-

alone program. Similar to SCE's Agricultural Energy Advisor program, the Industrial Energy Advisor program supports pump test activities, which no longer produce claimable energy savings and thus are no longer appropriate to be included in SCE's EE portfolio. Therefore, SCE will also close the Industrial Energy Advisor program. Other additional components of the program, such as the OASIS on-site audit tool, which are intended for industrial customers, is infrequently used by SCE Account Managers for industrial customers. Industrial customer audit requests will be supported by the Commercial Energy Advisor program as needed, which will streamline program operations.

For PY 2023, SCE requests Commission approval to immediately close the following program:

- SCE previously requested extensions to claim savings and incentives related to the **Grandfathered Streetlights Program** for the service territories of Los Angeles County and eleven Southern California cities.¹⁰³ Resolution E-5096 approved SCE's request to extend the Los Angeles County Grandfathered Streetlights Program until December 31, 2022.¹⁰⁴ Resolution E-5141 approved SCE's request to extend SCE's Legacy Streetlight projects in the cities of Bell, Goleta, Huntington Beach, Industry, Laguna Beach, Manhattan Beach, Pico Rivera, Santa Ana, Santa Clarita, Simi Valley, and West Hollywood to December 31, 2021.¹⁰⁵ SCE plans to discontinue and close the Grandfathered Streetlights Program following these extension dates, as directed.

Incentive Programs Proposed to Close Upon Completion of Existing Commitments

As discussed in Section IV.B, SCE will stop accepting new enrollments for the following programs starting January 1, 2022, and requests Commission approval in this ABAL to close them at the completion of all commitments, which for some programs is expected to go through December 2025. SCE will not submit an additional advice letter to close these programs upon completion of commitments, consistent with Commission approval in SCE's 2021 ABAL.¹⁰⁶

¹⁰³ See, (1) Advice Letter 4163-E, Southern California Edison's Request to Claim Savings for The Los Angeles County Streetlight Project Through 2022 and (2) Advice Letter 4367-E, Southern California Edison's Request to Claim Savings for Legacy Streetlight Projects Through 2021.

¹⁰⁴ See, Resolution E-5096. Request by Southern California Edison for a Time Extension to Claim Savings for the Los Angeles County Streetlight Project.

¹⁰⁵ See, Resolution E-5141. Request by Southern California Edison for a Time Extension to Claim Savings for Legacy Streetlight Projects.

¹⁰⁶ See, CPUC Disposition Letter of SCE Annual Budget Advice (ABAL) Letter 4285-E and 4285-E-A.

- The **Commercial Calculated Energy Efficiency Program**, which is not cost-effective, will be replaced with SCE's local third-party Commercial program that is expected to begin implementation in the fourth quarter of 2021. SCE is continuing its customized commercial program through December 23, 2021 to allow commercial customers to submit energy efficiency projects and prevent a gap in the market. This aligns with SCE's strategy to close programs ahead of new third-party programs launch in market. The Commercial Calculated Energy Efficiency Program will stop accepting new enrollments in December 2021. Adjustments may be made to minimize confusion and overlap with the local program, but the program will continue to manage committed pipeline projects until completion, expected through December 2023.
- The **Agricultural Calculated Energy Efficiency Program**, which is not cost-effective, will be replaced with SCE's local third-party Agricultural program. SCE expects to enter into a third-party contract for that program by December 2021. SCE will continue its customized and deemed agricultural programs through December 23, 2021, to allow agricultural customers to submit EE projects. This aligns with SCE's strategy to close programs ahead of new third-party programs launch in market. The Agricultural Calculated Energy Efficiency Program will stop accepting new enrollments in December 2021 but will continue to manage committed pipeline projects until completion, expected through December 2023.
- SCE will stop taking new enrollments at the end of 2021 for the following **Local Government Partnership** programs including City of Long Beach ELP, Gateway Cities ELP, Orange County Cities ELP, San Gabriel Valley ELP, South Bay ELP, South Santa Barbara County ELP, Ventura County ELP, West Side ELP, North Orange County Cities ELP, and County of Los Angeles EEP. SCE will close these programs following the completion of committed projects. The closure of these programs aligns with SCE's current overall strategy of reducing spending on EE resource activities that do not produce cost-effective energy savings. Additionally, this sector is expected to be served by new third-party programs following SCE's Local Public third-party solicitation, which is expected to conclude by the end of 2021.
- The **Public Sector Performance-Based Retrofit High Opportunity Program** (HOPPs) will stop accepting new applications as of December 23, 2021. The HOPPs program closure is in alignment with the third-party solicitation for Public Sector program(s) that is anticipated to be contracted for by December 2021, and in support of SCE's strategy to close programs as new third-party programs

launch into market. In alignment with that strategy, SCE is continuing this program through the end of 2021 to minimize gaps in the market. Typical execution of these types of projects is 1 to 2 years; thus, the budget for beyond 2022 is for technical review processing and incentives. SCE estimates committed projects to be complete by end of December 2023.

- The locally implemented non-resource **Technology Development Support, Technology Assessments, and Technology Introduction Support** sub-programs of the Emerging Technologies Program will transition to the new Statewide Electric Emerging Technologies Program (EETP). It is expected that these sub-programs activities will ramp down while the new statewide program ramps up in early 2022 under third-party implementation. These sub-programs will stop developing new projects in 2023 but will continue to operate until all committed projects are completed, which shall be no later than December 2025. It is expected that these sub-programs activities will ramp down while the new third-party implemented statewide program ramps up in early 2022.

SCE will stop accepting new enrollments for the following programs in PY 2023 and requests Commission approval in this ABAL to close them at the completion of all commitments, which are expected through 2024. SCE will not submit an additional advice letter to close these programs upon completion of commitments.

- The **California Community Colleges Energy Efficiency Partnership** and **UC/CSU Energy Efficiency Partnership** will stop accepting new applications by Q3 2022. These partnerships will transition into the new Statewide Higher Education Program expected to launch Q4 2022. To avoid any gaps in the market, California Community Colleges Energy Efficiency Partnership and UC/CSU Energy Efficiency Partnership programs will honor any committed projects in the pipeline, with expected completion by Q3 2024.

ii. **New Programs and Sub-Programs**

New local and statewide third-party programs contracted by SCE are anticipated to provide cost-effective energy efficiency solutions to a broad range of customers. The solicitation process and design of the new third-party programs is not intended to be a one-for-one replacement of existing programs, but instead should offer new innovative programs proposed, designed, delivered and implemented by third-party vendors. As discussed above, SCE is closing certain non-cost-effective programs to both improve portfolio cost-effectiveness and open markets for new third-party local and statewide programs. If SCE learns that certain customer groups, EE measures, or other market segments are not being served by the new programs, SCE will consider maintaining

existing programs in these markets or conducting targeted third-party solicitations to provide EE solutions to these customers.

Described below are the new third-party programs that will be in market in PY 2022 and 2023.

In 2020, SCE completed its solicitation for third-party Residential, Commercial, and Industrial (RCI) programs. As described below, five new programs from three third-party implementers are scheduled to launch in the market in 2022.

- The **Enervee Marketplace** is a local third-party delivered downstream resource program that will serve the residential sector by providing comprehensive EE for the residential sector, including the multifamily segment, across SCE's service territory. The goal of the program is to drive greater private investment into energy efficient consumer products purchased at retail by eliminating longstanding market and financial barriers. The program will feature product categories to encourage consumers towards better buying decisions without incentives and offer financing on efficient products in seven measure categories for which approved statewide workpapers are available. This program is unique in its ability to reduce market and financial barriers, reign in plug load and appliance load growth, and transform markets at scale. Subject to Commission approval, the program is expected to launch in January 2022 and the contract-term ends in December 2024.
- ICF's third-party designed and delivered **Residential Behavior Program** will deliver savings through a downstream approach that interacts with residential customers through multiple channels, specifically through Home Energy Reports (HERs) that are delivered to customers through paper and email channels. The program will use appliance-level disaggregation capabilities and behavioral science expertise to provide SCE's customers with paper and email HERs that deliver deeper, longer-term savings. The program will use approved meter-based randomized control trial experimental design and measurement and verification (M&V) methodology to calculate savings. The program design will also incorporate additional tactics or channels to drive energy-saving behavior changes by customers and meet the program objectives, such as rewards and voice technology. The Residential Behavior Program will specifically support customers in the Hard-to-Reach, Low/Middle Income, and Disadvantaged Communities segments by rewarding customers for saving energy and engage with the program. The program also leverages technology by offering a small subset of customers the ability to use smart voice assistant technology to access their HER information, to test this channel's effectiveness and understand the potential impact of this technology to drive SCE customers' behavioral energy savings. The program is expected to launch in Q3 2022 and the contract term ends in Q1 2025.

- ICF's third-party designed and delivered **Commercial Behavior Program** will provide relevant insights in an actionable package with personalized energy-saving recommendations that business owners can put into effect immediately. The program will drive adoption of behavioral changes in small and mid-size commercial customers through personalized Business Energy Reports (BERs), Energy Advisor support, and rewards. These customers will receive customized bi-monthly BERs giving them feedback on their energy use and recommending low-cost or no-cost ways to save energy. Additionally, the Commercial Behavior Program will involve an ongoing targeted outbound coaching campaign by Energy Advisors. The campaign will serve to reinforce the BERs by having data-driven conversations with SCE's customers about their lighting, HVAC, refrigeration, office equipment, cooking, water heating, and other business-related electric end-uses. The program will also include a rewards component that motivates action and ultimately drives business energy savings. The program is expected to launch in launch in Q1 2023 and the contract-term ends in Q1 2025.
- The **Willdan Comprehensive Commercial, Industrial, and Multifamily Programs** are three local downstream programs that aim to integrate broad DSM solutions. These comprehensive offerings serve a large share of the energy efficiency portfolio utilizing calculated, deemed, Behavior, Retro-commissioning, and Operational, and Normalized Metered Energy Consumption methodologies. The programs will use a consolidated approach that includes segment-specific marketing, technical assistance, technologies, whole-facility opportunities, financing opportunities, and measurement and verification. They plan to animate the market by utilizing trade professionals that specialize in all customer segments. The Multifamily sector program will also offer comprehensive solutions through a single-point-of contact who will collaborate with all decision-makers and ownership types, which will minimize split incentive barriers. All three programs will target customers who are Hard-to-Reach and in Disadvantaged Communities. The programs will leverage an extensive platform to secure data, track performance, and manage subcontractors and trade professionals with built-in QA/QC and M&V functionality. SCE and Willdan revised the launch date of these three new programs from PY 2021 to PY 2022 because receiving contract approval from the Commission took longer than expected.¹⁰⁷ The contract term ends in December 2024.

SCE recently completed the solicitation for Statewide Electric Emerging Technologies Program and is completing the following solicitations¹⁰⁸ that are intended to launch in 2022:¹⁰⁹ Agricultural Sector, Local Public Sector, Statewide Higher Education and

¹⁰⁷ See AL 4285-E-A, pp. 25-26

¹⁰⁸ See D.18-01-004, OP1.

¹⁰⁹ Program launch dates are contingent upon whether and when SCE receives Commission approval of the respective third-party contracts.

Statewide Water/Wastewater Pumping. The solicitations schedule for these programs are included in Attachment D, Appendix C.

- The **Statewide EETP** is a non-resource program focused on helping California meet its energy reduction goals by identifying emerging (and underutilized) technologies that have the long-term potential to deliver cost-effective energy savings through the EE program portfolio and codes & standards. Statewide EETP is intended to address program needs of all customer sectors (i.e., residential, commercial, industrial, agricultural, and public) throughout the California IOU service territories. EETP's vision is to identify and bring commercially available technologies promptly to the EE program portfolio by determining the latest emerging technology trends. It is important for EETP to be on the forefront of these trends because it allows EETP to identify, track and vet the efficacy and claims of these technologies, products and solutions through a variety of program tactics to assess and confirm their potential energy savings and operational performance, help estimate long-term cost-effectiveness, recognize technologies with significant energy savings opportunities, and identify potential barriers to market adoption. SCE has an executed contract with a third-party to implement the EETP, which is pending Commission approval.
- The **Local Agricultural Program** will be an innovative resource program that: (1) serves Agricultural Sector customers' EE needs, (2) is designed, proposed, and implemented in SCE's service territory by a third-party implementer, and (3) will comply with the CPUC-established EE policies. The program's objective will be to provide cost-effective energy efficiency solutions to the Agricultural customer sectors including field & seed crops, fruit & nut crops, vegetables & melons, livestock, poultry & products, floriculture, indoor agriculture and associated on-site food processing. The program will also aim to reduce market barriers to entry and increase customer participation for customers defined as Hard-to-Reach, located in Disadvantaged Communities, and Socially Disadvantaged Farmers as defined by AB 1348 ¹¹⁰ where applicable. SCE is currently in negotiations to contract with a third party to implement this program.
- The **Local Public Sector Program** will be an innovative resource program that serves Local Public Sector customers' EE needs, that is designed, proposed, and implemented in SCE's service territory by third-party implementer and that complies with the CPUC-established energy efficiency policies. The program's objective will be to provide cost-effective energy efficiency solutions to the Public Sector customer sectors including local governments, federal governments, special districts, tribal governments (non-residential only), public and private k-12 schools, private universities, private colleges, and trade schools. The program will also aim to reduce market barriers to entry and increase customer participation for customers defined as Hard-to-Reach and/or located in

¹¹⁰ See Assembly Bill (AB) 1348 Farmer Equity Act of 2017 (2017-2018).

Disadvantaged Communities where applicable. SCE is currently in negotiations to contract with a third party to implement this program.

- The **Residential Equity Program**, also known as the Residential EE and Fuel Substitution Equity Program, will target single-family residential and multi-family customers who are classified as Hard-to-Reach or middle income or are in Disadvantaged Communities. These customers typically have lower EE program participation rates than other EE customers. This program will focus on fuel-substitution opportunities and readiness for these categories of residential customers.
- The **Small/Medium Business Equity Program**, also known as the Small/Medium Business EE and Fuel Substitution Equity Program, will focus on non-residential small and medium businesses that have lower participation rates than larger and more sophisticated customers. Finally, to leverage a single site visit, SCE intends to enable the program to support fuel substitution opportunities and readiness for small and medium business customers.
- The **Statewide Water/Wastewater Pumping Program** is a resource program that will provide gas and electric EE savings opportunities, including IDSM savings solutions, for water and wastewater pumping customers statewide. These solutions cover Source Water Pumping, Water Treatment, Water Distribution, and Waste-Water Treatment. Eligible customers may include water district, irrigation district, municipal utilities, city and county departments, as well as investor-owned water utilities. Customers must pay the Public Purpose Programs (PPP) charges on fuels supplied by SCE, Southern California Gas (SCG), San Diego Gas & Electric (SDG&E), or Pacific Gas & Electric (PG&E). This program is currently in the Request for Proposal (RFP) phase of the solicitation process.
- The **Statewide Higher Education Program**, also known as the UC/CSU/CCC Program, is a resource program that will serve the statewide Public Higher Education Institutions such as University of California, California State University, and California Community Colleges energy efficiency needs. This program is currently in the RFP phase of the solicitation process.
- The **Residential Equity Program**, also known as the Residential EE and Fuel Substitution Equity Program, will target single-family residential and multi-family customers who are classified as Hard-to-Reach or middle income or are in Disadvantaged Communities. These customers typically have lower EE program participation rates than other EE customers. This program will focus on fuel-substitution opportunities and readiness for these categories of residential customers.
- The **Small/Medium Business Equity Program**, also known as the

Small/Medium Business EE and Fuel Substitution Equity Program, will focus on non-residential small and medium businesses that have lower participation rates than larger and more sophisticated customers. Finally, to leverage a single site visit, SCE intends to enable the program to support fuel substitution opportunities and readiness for small and medium business customers.

In alignment with D.21-05-031, SCE will conduct additional solicitations to fill gaps and support the new market support and equity segments. SCE will assess the portfolio and identify any potential gaps that remain after implementation of newly-solicited statewide and third-party programs. In particular, SCE will fill gaps so that there are sufficient program offerings targeting fuel substitution measures given the recent Potentials and Goals Decision.¹¹¹ Should gaps be identified, SCE will solicit for innovative program offerings and will fund shift from underspent programs to fill these gaps. Additionally, as discussed in Section VIII.B., SCE's program segmentation strategy will result in new equity programs. These programs are expected to be solicited in 2022 for implementation beginning in 2022 and/or 2023.

SCE is also responsible for funding a portion of new statewide programs for which other IOUs are the lead PA. SCE's costs and savings from statewide programs used the funding share method approved in the Joint IOUs Supplemental Advice Letter of the Shared Funding Mechanism Proposal submitted on November 15, 2018.¹¹² The method for forecasting costs and savings of third-party programs is described in Section X.

iii. Reduced and Expanded Programs

Pursuant to D.18-05-041, Tables 12a and 12b set forth the reduced and expanded programs whose total budget is proposed to increase or decrease by more than 40 percent in 2022 and 2023, respectively. See Attachment E for a summary of these programs.

SCE was authorized to close and stop accepting new enrollments for several programs in SCE's 2020 and 2021 ABALs: **Primary and Fabricated Metals**,¹¹³ **Nonmetallic Minerals and Products**,¹¹⁴ **Comprehensive Petroleum Refining**,¹¹⁵ **Enhanced**

¹¹¹ See, D.21-09-037.

¹¹² See San Diego Gas and Electric Company (SDG&E) Advice 3268-E-A/2701-G-A; Southern California Gas Company (SoCal Gas) Advice 5346-G-A; Southern California Edison Company (SCE) Advice 3861-E-A; and Pacific Gas and Electric Company (PG&E) Advice 5373-E- A/4009-G-A).

¹¹³ See SCE Advice Letter 4258-E-A, pp. 21 and 24

¹¹⁴ *Id.*

¹¹⁵ *Id.*

Retrocommissioning,¹¹⁶ and **Water Infrastructure Systems Energy Efficiency (WISE)**.¹¹⁷ SCE approved applications to the Enhanced Retrocommissioning and WISE programs through 2020, and SCE will approve applications to the Primary and Fabricated Metals, Nonmetallic Minerals and Product, and Comprehensive Petroleum Refining programs only through the end of 2021. The relatively small budget increases or decreases to these program budgets are to account for final project and program closure activities.¹¹⁸ Likewise, programs that SCE plans to stop accepting new enrollments and close upon completion of existing commitments in PY 2022 and 2023, as listed in Tables 12a and 12b above, have forecasted budgets associated with existing commitments. The relatively small budgets for all of these programs increased or decreased based on the final estimated costs.¹¹⁹

Existing Programs with Increased Budgets (>40% Budget Increase)

The following existing programs have a forecasted budgeted increase greater than 40 percent for PY 2022:

- A budget increase is forecasted for the **Residential Direct Install** program for PY 2022. The program implementer plans to increase the volume of Smart Thermostat installations as part of an integration effort with DR's Smart Energy Program. The integration aims to maximize cost-effective EE savings and boost DR capacity. Qualifying customers who receive a Smart Thermostat through the Residential Direct Install program will be enrolled into the Smart Energy Program at the time of thermostat installation, leveraging Residential Direct Install's implementer to conduct the Smart Energy Program enrollment. This effort will help customers meet full savings potential, meet grid needs by increasing DR capacity, and exemplify an IDSM effort.
- SCE's **Strategic Energy Management (SEM)** Program is forecasting a budget increase for PY 2022 due to operational and cohort expansion. The SEM program engages large industrial customers in two-year cycles to drive persistent electric and natural gas savings across their entire facilities. SEM will be adding at least one new cohort and it will enter a new cycle with three current cohorts.
- For PY 2022, SCE has forecast a budget increase for the **CA Statewide Lighting Program**. The implementation plan for this program was approved in 2021 and included only six months (Q3 and Q4) to roll the program out and begin

¹¹⁶ See SCE Advice Letter 4068-E, pp. 15 and 17-18

¹¹⁷ *Id.*

¹¹⁸ For example, SCE forecasts a budget increase for its Primary and Fabricated Metals for PY 2023. This budget increase is to account for Labor, General and Administrative, and Program costs associated with savings forecasted to be installed in PY 2023 versus PY 2022. Labor, General and Administrative, and Program costs are allocated proportionally to the savings being projected to be installed.

¹¹⁹ The programs will close out on March 31, 2022.

delivering savings. The program will scale up in 2022, which will be the first full calendar year that the program is in operation.

- A budget increase is forecasted for the **Comprehensive Manufactured Homes Program** for PY 2022. Recent changes to the Duct Seal measure's Gross Savings Installation Adjustment (GSIA) values have resulted in favorable cost-effective savings for the manufactured home market segment. The program plans to scale up the volume of installations to its maximum potential to take advantage of these cost-effective savings.
- SCE anticipates an increase in the **WE&T Integrated Energy Education and Training (IEET) Program** budget to account for the delivery of additional fuel substitution workforce education and training classes and the Fuel Substitution Contractor Certification Program. These enhancements will support installation contractors, developers, builders and building inspectors by providing training on the latest fuel substitution technologies while better positioning them for re-entry into a developing workforce in the wake of the COVID-19 pandemic. The proposed enhancements would provide training with a focus on fuel substitution and complementary IDSM activities such as DR, solar, and battery storage. The purpose of these enhancements and associated trainings are to prime the workforce and help spur increased adoption of fuel substitution measures and IDSM opportunities. In addition to training the general workforce, SCE plans to leverage fuel substitution classes to train key customer facing employees in order to provide the best customer service possible as this technology is rolled out.

The following existing programs have a forecasted budgeted increase greater than 40 percent for PY 2023:

- SCE is forecasting a budget increase for the new **ICF Commercial Behavioral Program** and **Willdan Comprehensive Multifamily Program, Comprehensive Commercial Program, and Comprehensive Industrial Program**, all under contract, due to program ramp up activities.
- SCE also forecasts a budget increase for the **Statewide Water/Wastewater Program** and the **Statewide Higher Education Program**, currently in solicitation, to account for program ramp up and associated activities.

Existing Programs with Reduced Budgets (>40% Budget Decrease)

The following existing programs have a forecasted budgeted decrease greater than 40 percent for PY 2022:

- The previous third-party implemented **AB 793 Residential Pay-for-Performance** program was not successful under its former design, with the

implementer citing low customer interest and the inability to achieve program goals. SCE intends to leverage existing and upcoming EE programs and offerings to comply with the residential pay-for-performance elements of AB 793;¹²⁰ therefore, SCE does not intend to conduct a solicitation, which results in the lower budget for PY 2022 and 2023.

- The **New Finance Offerings** program is reporting a budget decrease in PY 2022. As a result of Rulemaking (R.)20-08-022 ¹²¹ in August 2020, the Commission issued D.21-08-006,¹²² authorizing an additional an \$75.2 million in ratepayer funding for the California Hub for the Energy Efficiency Financing (CHEEF) programs through June 30, 2027. Out of the authorized \$75.2 million, the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) will utilize approximately \$24 million in carryover funds. Due to the availability of these carryover funds, SCE will not need to recover the \$1,967,497 corresponding to SCE's allocation for PY 2022. D.21-08-006 also authorized SCE to recover up to \$500,000 annually from ratepayers to support the information technology and marketing strategies for the CHEEF programs.¹²³ Based on this, SCE is requesting to recover \$500,000 for information technology and marketing expenses during PY 2022. This means that although the revenue request through this ABAL has decreased from 2021, the overall program operation budget for the New Finance Offerings in PY 2022 is \$2,467,496.87, the equivalent to a 45% increase from PY 2021.

The following existing programs have a forecasted budgeted decrease greater than 40 percent for PY 2023:

- SCE is reporting a budget decrease in PY 2023 for the **Public Sector Performance-Based HOPPs** Program. In PY 2023, the budget decrease accounts for a ramp down in program activity under SCE implementation. HOPPS will transition to the SCE Local Public Sector Program under third-party implementation. There is a high potential that the Normalized Metered Energy Consumption (NMEC) approach utilized by the HOPPS Program will be an option made available by third-party programs targeting Public Sector customers under SCE's Local Public Sector Program solicitation. The remaining HOPPS Program's activities will focus on managing the pipeline of projects, with completion expected by December 31, 2023. Additional time will be needed to account for energy savings validation, through meter data analysis, until

¹²⁰ The Residential AB793 program is a mandated program pursuant to AB 793 and the associated Commission Resolution E-4820.

¹²¹ See, Rulemaking (R.)20-08-022, *Order Instituting Rulemaking to Investigate and Design Clean Energy Financing Options for Electricity and Natural Gas Customers*, issued September 4, 2020.

¹²² See, D. 21-08-006, OP 1.

¹²³ See, *Id.*, OP 3.

approximately December 2024.

iv. Continuation of Non-Cost-Effective Programs

As shown in Table 13, SCE is proposing to continue several non-cost-effective programs in 2022 and 2023 to comply with various regulatory mandates, achieve savings goals, and/or support customers through the transition period to third-party programs, in those respective years. In addition, SCE will continue to evaluate its portfolio of programs in response to the competitive solicitations, cost-effectiveness, and the ability to achieve goals and metrics, as well as other factors, and may propose changing or eliminating programs in the future.

Table 13 – Non-Cost-Effective Resource Programs Continuing in 2022 and 2023

Program ID	Program Name	2022 TRC	2023 TRC
Non-Cost-Effective Programs to Continue due to Regulatory Mandate			
SCE-13-TP-024	AB 793 Residential Pay-for-Performance	0.0	0.0
Non-Cost-Effective Programs to Continue Until New Third-Party Programs Operate			
Institutional Partnerships ¹²⁴			
SCE-13-L-003G	UC/CSU Energy Efficiency Partnership	0.0	0.0
SCE-13-L-003A	California Community Colleges Energy Efficiency Partnership	0.0	0.0

As described in Section VIII.C.iii., SCE intends to leverage existing and upcoming EE programs and offerings to comply with AB 793. While there will be minimal expenditures for the AB 793 Residential Pay-for-Performance program in 2022, SCE does not expect to realize savings until 2023 and beyond. This compliance program is historically non-cost-effective, and SCE hopes that utilizing new and existing EE programs will improve results.

Per the Commission’s guidance in D.16-08-019, there should be no funding gaps for programs which have been identified as future statewide programs.¹²⁵ In addition, D.18-

¹²⁴ Institutional partnerships are expected to be served by new third-party programs following a Statewide Public third-party solicitation led by PG&E for State of California Department of General Services and Dept. of Corrections and SCE for University of California, California State University, and California Community Colleges.

¹²⁵ See D.16-08-019, p. 66.

05-041 states that PAs cannot opt out of statewide programs and are required to fund all statewide programs.¹²⁶

To comply with these Commission directives, the UC/CSU Energy Efficiency Partnership and California Community Colleges Energy Efficiency Partnership programs will ramp down ahead of the new Statewide Higher Education Program expected to launch Q4 2022. To minimize any gaps in the market, these partnerships will complete any committed projects before program closure in the second half of 2022 and ramp down ahead of the new Statewide Higher Education Program.

IX. DISCUSSION OF SCE'S 2022 and 2023 FORECASTED TRC RESULT

A. Why SCE is forecasting TRC below 1.0 in 2022 and above 1.0 in 2023

SCE manages its energy efficiency portfolio to improve customer participation, optimize portfolio cost-effectiveness, meet contractual obligations, support near-term delivery objectives, and address long-term planning needs. As a result, SCE forecasts a portfolio TRC slightly below 1.0 in 2022 and above 1.0 in 2023 for the resource acquisition programs for the following reasons:

- Third-party implementers ramping up programs

SCE is on track to achieve at least 60 percent third-party implemented programs by December 31, 2022. SCE is working with third-party implementers with approved contracts to ramp-up their programmatic efforts in 2022 and reach scale in 2023 and beyond. This ramp-up is reflected in the ABAL forecast, which includes updated savings and commensurate costs associated with third-party contracts. The forecast also includes additional costs without assumed commensurate benefits to ensure that SCE has enough budget to meet its contractual requirements (i.e., if a third-party implementer exceeds ABAL savings estimates within contractual limitations). While SCE is forecasting budgets without benefits for the ABAL, SCE's actual portfolio performance will benefit from pay-for-performance contracts in two ways: 1) either third parties will over-perform their forecast and SCE will pay for additional cost-effective savings that will improve the portfolio's performance, or 2) third parties under-perform or perform to their forecasts and SCE will not be responsible to pay for savings not realized, which will mitigate impacts to TRC by reducing costs. In summary, the 2022 TRC forecast for resource programs includes \$61 million in TRC cost without assigned benefits, resulting in 2022 net benefits of -\$15 million and a corresponding TRC below 1.0 for the resource portfolio. The reasonableness of this approach is discussed above in Section IV.B.

¹²⁶ See D.18-05-041, OP 22.

SCE's 2023 portfolio, which exceeds energy savings, demand and cost-effectiveness goals, benefits from third party programs being ramped-up to a significant portion of their overall contract value while incorporating fuel substitution measures. SCE expects the cost effectiveness of third-party programs to improve over time as the markets mature, achieve full scale operations, incorporate lessons learned and best practices, and become more efficient which is reflected in the forecast.

- Higher savings goals

SCE's portfolio in 2022 and 2023 is expected to achieve more savings than prior years,¹²⁷ but SCE's forecast for 2022 does not meet the energy and demand goals approved in D.21-09-037. In particular, D.21-09-037 substantially increased potential and goals for fuel substitution, which contributes to an overall increase in the savings goals and aligns with SCE and the CPUC objectives to achieve longer term EE savings and measures in the IOUs portfolio. These new, larger savings goals coincide with third parties launching and ramping up their programs, leading to opportunities (gaps) that the third parties and SCE are actively working to fill in their respective capacities as implementers and program administrator. SCE anticipates this issue to dissipate as third-party contracts mature and the portfolio transitions to a TSB metric. For example, the TSB associated with 2022 is \$246,999,330 without Codes & Standards and the portfolio achieves 173 percent of this metric. The 2023 portfolio achieves savings goals and exceeds the proposed TSB metric for 2023, establishing a foundation for the upcoming 2024-2027 EE Application.

- Closing non-cost-effective programs

As described above in Section VIII.C.iv., SCE is closing non-cost-effective programs to prepare for new third-party programs and optimize the portfolio. Closing these programs removes budget that would have lowered TRC in 2022 and 2023.

- Portfolio segmentation

D.21-05-031 mandated that the PAs categorize their portfolios into three segments: resource acquisition, market support, and equity, with only the resource acquisition segment required to be cost effective. Several of SCE's existing programs that are not cost effective but were designed to support the market were removed from the resource acquisition calculations. For 2022, SCE budgeted \$23.84 million for WE&T IEET, Commercial Energy Advisor, OBF, New

¹²⁷ 2020 ABAL forecasted 327 GWh and 65 MW. 2021 ABAL forecasted 372 GWh and 59 MW.

Finance Offerings, and EM&V. These programs and activities represent approximately 6% of SCE's portfolio budget and will be categorized as market support. This policy change increased SCE's forecasted 2022 and 2023 TRC.

B. Ability to Achieve an Evaluated TRC of 1.0 in 2022 and 2023

SCE expects that achievement of an evaluated TRC of 1.0 will be possible, but challenging, in both 2022 and 2023. Recognizing the difficulty in achieving an evaluated TRC of 1.0, SCE aims to minimize the potential for a widening gap between forecasted and evaluated TRC through interventions over which it has direct influence, namely those that drive cost-effective contributions from third-party contracts, labor and non-labor cost reductions, and program closures. While SCE forecasts a TRC below 1.0 in 2022, actual TRC may be higher because the third-party contracts include substantial pay-for-performance components, and thus if third parties don't meet performance commitments SCE's costs will be lower than forecasted, while if third parties exceed performance standards SCE's benefits will be higher than forecasted. In addition, SCE highlights below several key conditions and activities that will support SCE in achieving an evaluated TRC at or near 1.0:

- SCE achieves TRC benefit from pay-for-performance contracts

In the event third parties only realize their forecasted savings and are unable to capture additional savings, SCE will not unnecessarily pay for or accrue additional cost to the EE portfolio.¹²⁸ If third parties exceed their forecasts, SCE will continue to pay for additional performance up to the amount permitted under the existing contractual arrangements. In both scenarios, SCE expects that the portfolio's actual TRC will be equal to or higher than forecasted. By the end of 2022, SCE will have more than 60 percent of its portfolio budget under contract with third parties. SCE remains confident that these third-party administered programs will contribute meaningful savings to the portfolio.

- SCE's quality control efforts

SCE conducts quality control activities to help ensure the anticipated savings are actually achieved and countable for both SCE-implemented and third-party implemented programs. Quality control activities include but are not limited to inspections (in-person and virtual), early screening review for custom projects, custom measure and project reviews in accordance with D.11-07-030,¹²⁹ measure package development oversight and review in accordance with Commission rules

¹²⁸ Unspent funds would likely be considered unspent uncommitted funds under AB-841 which may transfer to the CEC in 2022 if the funds are not utilized elsewhere in the portfolio.

¹²⁹ See D.11-07-030 Third Decision Addressing Petition for Modification of D.09-09-047.

and requirements, and upfront review of CETs submitted by the third-party implementers.

- EM&V studies to continuously improve programs

SCE leverages its EM&V studies and processes to better understand gaps in meeting market needs; identify innovation opportunities and market potential; and determine customer impacts of EE programs. SCE's EM&V team also collaborates with EE Program stakeholders, customers, and CPUC consultants to facilitate information and data collection activities for gathering program improvement inputs through ex-post program evaluation. By utilizing the results of EM&V studies to continuously improve processes or programs, SCE is better able to ensure the expected results are realized.

- Program closures and budget reductions

SCE proposes several program closures and significant budget reductions in non-cost-effective programs to improve overall portfolio cost effectiveness. By eliminating non-cost-effective programs in whole or as part of the third-party solicitation process, downside risk to an evaluated TRC decreases. Budget reductions in non-cost-effective programs still in the market will contribute to this risk reduction as well. These interventions will help optimize for overall cost effectiveness of the portfolio.

X. THIRD-PARTY PROGRAM REQUIREMENTS

SCE will have at least 60 percent of its EE budget under contract with third parties by December 31, 2022, as required by D.18-01-004.¹³⁰ SCE is in the process of completing third-party solicitations for Local Agricultural Sector and Local Public Sector Programs with expected contract negotiations complete by December 31, 2021. In parallel, SCE has completed the solicitation for Statewide EETP and will complete solicitations for the Statewide Higher Education Program and the Statewide Water/Wastewater Pumping Program with contract negotiations anticipated to be completed by February 28, 2022, and April 30, 2022, respectively.¹³¹ SCE's funding share associated with new statewide third-party programs being procured by other California IOUs also contribute to the goal. Details of SCE's EE third-party solicitation activities are posted on the CAEECC website.¹³²

¹³⁰ See D.18-01-004, OP1. Pursuant to D.18-01-004, the Energy Division extended the deadline for SCE to have at least 25% of the EE program budget under contract to September 30, 2020 in a letter from Alice Stebbins dated November 25, 2019.

¹³¹ See Attachment D, Appendix C to this Advice Letter.

¹³² CAEECC website available at <https://www.caeec.org/third-party-solicitation-process>.

SCE's current solicitation plan includes a placeholder for future targeted solicitations. SCE will utilize this to solicit for new Residential Equity and Small/Medium Business Commercial Equity Programs. These solicitations are expected to launch in early 2022 for expected implementation in 2023. Additionally, as new third-party programs ramp up to full implementation, SCE may identify specific gaps in the EE portfolio. SCE may conduct additional targeted solicitations should those gaps occur.

A. Estimated Third-Party Forecast

This ABAL includes estimated budgets, savings and cost effectiveness ratios for programs that are anticipated to be procured through the Local Public Sector solicitation, the Agricultural Sector solicitation, the Statewide Water/Wastewater Pumping Program solicitation, and the and Statewide Higher Education solicitation. Additionally, SCE has included estimated budgets, savings, and cost effectiveness ratios for the new Residential Equity Program and Small and Medium Business Commercial Program that are expected to be solicited in 2022 and 2023. These are placeholders until the contracts for those third-party programs are executed. These values reflect conservative historical data to inform reasonable assumptions pertaining to savings, budgets, and cost-effectiveness. To maintain confidentiality of sensitive market data during negotiations, these data were aggregated and evenly divided between the Public and Agricultural sectors in this Advice Letter. The remaining statewide programs' estimates are also presented in aggregate and divided evenly between the sectors where applicable in this Advice Letter. SCE does not intend to submit a supplemental Advice Letter to update these budget estimates due to the smaller sizes of the remaining solicitations and their representative amount relative to the overall portfolio (3% for 2022 and 4% and 2023).

As mentioned in Section II, SCE's in-progress solicitations have not received final offers from bidders but are nearing completion. As such, the savings and cost-effectiveness values found in this Advice Letter may differ slightly compared to the final contracts.¹³³

Taking into consideration the current estimate of SCE-led third-party programs, third-party proposals, the final information provided by other lead IOUs for their statewide programs, and additional updates to SCE labor and existing program measures, SCE optimized its portfolio in order to balance cost-effectiveness and market coverage for the final two transition years in advance of the upcoming EE application.

B. Third-Party Solicitation Process

As directed by the Commission, third-party solicitations provide market participants the flexibility to propose, design, and deliver their programs, consistent with all applicable

¹³³ Budgets in this Annual Budget Advice Letter reflect bidders maximizing their budgets for the solicitation and SCE and bidders will not exceed those amounts due to caps set in the contracts.

laws, rules, and regulations. As a part of the solicitation process, SCE has been closely evaluating third-party offers and their forecasts as a part of the two-stage solicitation process in accordance with D.18-01-004. Additionally, during the RFP portion of the process, SCE has had multiple rounds of cost-effectiveness discussions and engineering feedback with bidders to support the necessary rigor for third-party assumptions. To complete the cost-effectiveness discussions, SCE worked closely with PRG participants and independent evaluators. SCE is currently working with stakeholders and CPUC staff to refine and streamline the two-stage process to bring programs to the market within a shortened timeframe. Separately, SCE has proposed a one-stage solicitation process in response to the Governor's summer reliability activities.

SCE's solicitation process is designed to comply with the necessary program inputs and support reasonable assumptions for third-party programs while allowing third-party program implementers to use their market knowledge to inform their program designs. SCE is supportive of the Commission's pay-for-performance preference to ensure that third-party compensation is commensurate with the performance of third-party programs and the forecasts associated with their programs.

C. Other IOU-Led Statewide Programs

SCE's budget, savings, and cost effectiveness inputs from statewide third-party programs not led by SCE used the funding share method approved in the Joint IOUs Supplemental Advice Letter of the Shared Funding Mechanism Proposal submitted on November 15, 2018.¹³⁴

XI. Contingency Funding Request Associated with the July 30, 2021 Governor's Emergency Proclamation

A. Background

On August 6, 2021, ALJ Fitch issued *R.13-11-005: Email ruling requesting comments/proposals to address Governor's Proclamation of July 30, 2021*. The Ruling requested parties to propose "specific Commission actions that may fall into one or more of the following categories and result in projects installed and delivering benefits by June 1, 2022 and/or June 1, 2023. The proposals may involve requests for additional funding, funding of alternative or new activities, and/or requests for changes to Commission rules or requirements."

¹³⁴ See San Diego Gas and Electric Company (SDG&E) Advice 3268-E-A/2701-G-A; Southern California Gas Company (SoCal Gas) Advice 5346-G-A; Southern California Edison Company (SCE) Advice 3861-E-A; and Pacific Gas and Electric Company (PG&E) Advice 5373-E- A/4009-G-A).

In comments on the August 6 Ruling, SCE made recommendations designed to both accelerate savings that would otherwise occur after the summer of 2023 and capture potential that would be otherwise stranded. First, SCE recommended the Commission make modifications to EE portfolio policy including: 1) allowing PAs to use a single stage solicitation process for upcoming third-party solicitations, 2) allowing non-lead PAs to fill gaps left by statewide programs, and 3) allowing PAs to utilize this ABAL to request additional funding for EE programs that are accelerated or expanded as a result of rule or policy changes made in response to comments on the August 6 Ruling. Second, SCE proposed recommendations for workpaper and program-specific modifications, including: 1) expediting the review of SCE's Indoor Horticulture Lighting workpaper, 2) enabling a Residential Heat Pump HVAC Fuel Substitution emergency program, and 3) allowing the SEM program to expand to additional sectors.

B. PY 2022-2023 Contingency Funding

As part of the response to the August 6 Ruling, SCE recommended the Commission provide more flexibility to PAs in the PY 2022 and 2023 ABAL by allowing IOUs to request approval for additional funding, specifically to expand resource programs to provide for additional cost-effective energy savings for customers focused on savings during the time of net peak demand. This contingency funding account should be tracked separately from other program funds, be used only to expand resource programs, and it should be fungible between 2022 and 2023 program years. Any unspent/uncommitted funding remaining at the end of 2022 would be transferred forward to the 2023 program year, and any unspent/uncommitted funding remaining at the end of 2023 would be handled in the same manner as other unspent/uncommitted funds and returned to customers or used to offset future EE funding requests.

SCE requests the Commission provide guidance in response to the proposals and required funding described above.

PROPOSED TARIFF CHANGES

This advice letter will not cause the withdrawal of service nor conflict with any other schedule or rule.

ATTACHMENTS

This Advice Letter contains attachments as listed below:

- Attachment A: Commission Developed ABAL Tables
- Attachment B: CEDARS Filing Confirmation
- Attachment C: Historical Annual Budget Advice Letter Tables
- Attachment D: Supplemental Budget Information Pursuant to D.18-05-041, OP #44

- Attachment E: Program Level Explanation
- Attachment F: Joint IOUs Shared Funding Allocations for Statewide Programs
- Attachment G: Program Segmentation Table

TIER DESIGNATION

Pursuant to General Order (GO) 96-B, Energy Industry Rule 5.2, this advice letter is submitted with a Tier 2 designation.

EFFECTIVE DATE

This advice letter will become effective on December 8, 2021, the 30th calendar day after the date submitted.

NOTICE

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

California Public Utilities Commission, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, California 94102
E-mail: edtariffunit@cpuc.ca.gov

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

In addition, protests and all other correspondence regarding this advice letter should also be sent by letter and transmitted via facsimile or electronically to the attention of:

Shinjini C. Menon
Managing Director, State Regulatory Operations
Southern California Edison Company
8631 Rush Street
Rosemead, California 91770
Telephone (626) 302-3377
Facsimile: (626) 302-6396
E-mail: AdviceTariffManager@sce.com

Tara S. Kaushik
Managing Director, Regulatory Relations
c/o Karyn Gansecki
Southern California Edison Company
601 Van Ness Avenue, Suite 2030
San Francisco, California 94102
Facsimile: (415) 929-5544
E-mail: Karyn.Gansecki@sce.com

There are no restrictions on who may submit a protest, but the protest shall set forth specifically the grounds upon which it is based and must be received by the deadline shown above.

In accordance with General Rule 4 of GO 96-B, SCE is serving copies of this advice letter to the interested parties shown on the attached GO 96-B, A.17-01-013 et al and R.13-11-005 service lists. Address change requests to the GO 96-B service list should be directed by electronic mail to AdviceTariffManager@sce.com or at (626) 302-3719. For changes to all other service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

Further, in accordance with Public Utilities Code Section 491, notice to the public is hereby given by submitting and keeping the advice letter at SCE's corporate headquarters. To view other SCE advice letters submitted with the Commission, log on to SCE's web site at <https://www.sce.com/wps/portal/home/regulatory/advice-letters>.

For questions, please contact Brandon Sanders at (626) 302-0949 or by electronic mail at Brandon.Sanders@sce.com.

Southern California Edison Company

/s/ Shinjini C. Menon
Shinjini C. Menon

SCM:bs:cm
Enclosures



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

ELC GAS WATER
 PLC HEAT

Contact Person:

Phone #:
E-mail:
E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type: Monthly Quarterly Annual One-Time Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:

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

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? Yes No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? Yes No

Requested effective date:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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

Tariff schedules affected:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

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

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

Name:
Title:
Utility Name:
Address:
City:
State: Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Name:
Title:
Utility Name:
Address:
City:
State: Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

ENERGY Advice Letter Keywords

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

Attachment A

Commission-Developed ABAL Table

SCE PY 2022 and 2023 Forecasted Budgets and Savings

Southern California Edison
2022-2023
Program Year Budget Savings

Sector	Program Year (PY) 2022 Budget	FORECAST ENERGY SAVINGS (Net)					Program Year (PY) 2023 Budget	FORECAST ENERGY SAVINGS (Net)				
		PA forecast kWh	PA forecast kW	PA forecast therms (MM)	PA Forecast Elec CO2	PA Forecast GasCO2		PA forecast kWh	PA forecast kW	PA forecast therms (MM)	PA Forecast Elec CO2	PA Forecast GasCO2
Resource Acquisition Program Segment												
Residential	\$61,428,738	82,506,977	34,849	1,063,172	20,068	7,762	\$74,587,725	111,800,192.20	36,989.00	1,185,953.97	27,471.56	9,432.74
Commercial	\$131,632,168	156,809,981	16,077	1,848,002	24,859	21,773	\$146,610,579	244,214,538.06	33,664.68	2,835,484.95	41,979.41	32,425.77
Industrial	\$27,236,361	52,781,719	5,520	477,325	10,456	5,055	\$53,036,397	107,746,764.01	10,472.08	1,238,566.92	20,488.73	13,113.73
Agriculture	\$5,695,453	9,809,216	1,916	-	2,653	-	\$6,754,495	12,384,420.49	2,436.16	-	3,471.57	-
Emerging Tech	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Public	\$13,477,579	15,732,456	2,253	70,949	4,106	415	\$12,841,737	18,911,362.72	4,178.91	294,877.66	5,153.38	1,725.03
WE&T	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Finance	\$0	-	-	-	-	-	\$0	-	-	-	-	-
OBFL Loan Pool	\$0	-	-	-	-	-	\$0	-	-	-	-	-
PA Subtotal (does not include ESA budget and savings)	\$239,466,298	317,640,348	60,615	3,459,449	62,141	35,004	\$291,809,933	495,057,278	87,741	5,554,883	98,565	56,707
Resource Acquisition Forecasted Total System Benefit (TSB)	\$241,472,286											
Resource Acquisition Forecasted Total Resource Cost (TRC)	0.94											
Portfolio Forecasted Portfolio Administrator Cost (PAC)	1.01											
Market Support Program Segment												
Residential	\$2,101,098	2,924,774	0	2,455	(99)	676	\$6,026,937	7,728,607.69	(18.82)	86,893.58	(559.38)	2,454.88
Commercial	\$1,132,595	477,824	113	29,655	93	191	\$4,903,999	6,339,189.72	1,489.07	392,016.18	1,272.76	2,569.94
Industrial	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Agriculture	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Emerging Tech	\$10,190,911	-	-	-	-	-	\$8,893,757	-	-	-	-	-
Public	\$0	-	-	-	-	-	\$0	-	-	-	-	-
WE&T	\$9,596,440	-	-	-	-	-	\$9,780,462	-	-	-	-	-
Finance	\$1,324,973	-	-	-	-	-	\$1,369,871	-	-	-	-	-
OBFL Loan Pool	\$12,000,000	-	-	-	-	-	\$14,000,000	-	-	-	-	-
PA Subtotal (does not include ESA budget and savings)	\$36,946,017	3,402,598	113	31,510	(6)	867	\$44,974,526	14,067,797	1,470	478,907	713	5,025
Market Support Program Forecasted Total System Benefit (TSB)	\$1,974,979											
Market Support Program Forecasted Total Resource Cost (TRC)	0.31											
Portfolio Forecasted Portfolio Administrator Cost (PAC)	0.34											
Equity Program Segment												
Residential	\$3,696,750	1,464,980	528	10,254	401	60	\$7,993,500	2,929,961	1,055	20,509	826	120
Commercial	\$2,120,001	827,105	280	(1,102)	203	(6)	\$5,297,422	2,067,764	700	(2,754)	531	(16)
Industrial	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Agriculture	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Emerging Tech	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Public	\$0	-	-	-	-	-	\$0	-	-	-	-	-
WE&T	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Finance	\$0	-	-	-	-	-	\$0	-	-	-	-	-
OBFL Loan Pool	\$0	-	-	-	-	-	\$0	-	-	-	-	-
PA Subtotal (does not include ESA budget and savings)	\$5,816,751	2,292,085	807	9,153	603	54	\$12,690,922	4,997,725	1,754	17,755	1,357	104
Equity Program Forecasted Total System Benefit (TSB)	\$2,121,322											
Equity Program Forecasted Total Resource Cost (TRC)	0.38											
Portfolio Forecasted Portfolio Administrator Cost (PAC)	0.38											
Portfolio												
Residential	\$67,222,586	86,896,731	35,377	1,075,882	20,370	8,498	\$88,008,162	122,458,761.01	38,025.03	1,293,353.35	27,737.98	12,007.60
Commercial	\$134,884,764	158,114,910	16,469	1,875,955	25,155	21,957	\$154,821,000	252,621,402.18	35,853.30	3,224,747.01	43,783.34	34,989.60
Industrial	\$27,236,361	52,781,719	5,520	477,325	10,456	5,055	\$53,036,397	107,746,764.01	10,472.08	1,238,566.92	20,488.73	13,113.73
Agriculture	\$5,695,453	9,809,216	1,916	-	2,653	-	\$6,754,495	12,384,420.49	2,436.16	-	3,471.57	-
Emerging Tech	\$0	-	-	-	-	-	\$0	-	-	-	-	-
Public	\$13,477,579	15,732,456	2,253	70,949	4,106	415	\$12,841,737	18,911,362.72	4,178.91	294,877.66	5,153.38	1,725.03
WE&T	\$9,596,440	-	-	-	-	-	\$9,780,462	-	-	-	-	-
Finance	\$1,324,973	-	-	-	-	-	\$1,369,871	-	-	-	-	-
OBFL Loan Pool	\$12,000,000	-	-	-	-	-	\$14,000,000	-	-	-	-	-
PA Subtotal (does not include ESA budget and savings)	\$281,629,066	323,335,032	61,535	3,500,112	62,739	35,925	\$349,475,381	514,122,800	90,965	6,051,545	100,635	61,836
CPUC Savings Goal (w/o CB&S)		425,000,000	65,000	-	-	-		461,000,000	69,000	-	-	-
Forecast savings as % of CPUC Savings Goal (w/o CB&S)		76.1%	94.7%	-	-	-		111.5%	131.8%	-	-	-
Total EM&V ¹	\$13,160,489											
PA EM&V	\$3,423,826											
ED EM&V	\$9,736,663											
Portfolio Forecasted Total System Benefit (TSB)	\$1,856,616,499											
Portfolio Forecasted Total Resource Cost-TRC (w/o CB&S and w/ EM&V)	0.89											
Portfolio Forecasted Portfolio Administrator Cost (PAC)	6.14											
Portfolio Forecasted Ratepayer Impact Measure (RIM)	3.54											
Codes & Standards	\$17,177,567	1,057,694,927	186,569	-	271,006	-	\$17,078,491	1,115,811,071	218,419	-	298,019	-
PA Spending Budget Request ²	\$311,967,122											
(LESS) PA Pre-2020 Uncommitted and Unspent Carryover Balance ³	\$28,860,378											
CEC AB 841 Program Funding ⁴												
Applicable percentage (70%) of difference between funding limitation and 2020 budget	\$87,119,631											
PA 2020 and Beyond Uncommitted and Unspent Carryover Balance ⁴	\$27,989,880											
CEC AB 841 Total Program Funding	\$115,109,511											
PA Revenue Requirement Request (Cost Recovery) ⁵	\$370,226,375											
% of Equity and Market Support Program Budgets to PA Spending Budget Request (not to Exceed 30%)	14%											
PA Authorized Budget Cap (D.18-05-041)	274,785,000											
For CCA & RENS in IOU Service Territory Only--(IOU PA Only to complete)												
REN Budget Recovery Request	\$23,779,899											
BayREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-											
SoCal REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	20,548,424											
3CREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	3,231,465											
RCEA PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-											
CCA Budget Recovery Request	\$0											
MCE PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-											
Lancaster PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-											
Redwood Coast Energy Authority (excl. REN Uncommitted/Unspent Carryover)	-											
San Jose Clean Energy (excl. REN Uncommitted/Unspent Carryover)	-											
Total PA (IOU+CCA+RENS) Recovery Budget ⁶	\$394,006,265											

[1] This is the IOU's requested EE Portfolio budget. This is the budget by which the Statewide Program compliance budget requirement of 25% will be measured.

[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.

SCE PY 2022 and 2023 Energy Efficiency Cap and Target Expenditure Projections

2022 Energy Efficiency Cap And Target Expenditure Projections										2023 Energy Efficiency Cap And Target Expenditure Projections					
Line	Budget Category	Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance				
		Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs ² (Local SW, CEC & AB 841)	Total Portfolio	Percent of Budget ⁸	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs ² (including SW)	Total Portfolio	Percent of Budget ⁸	Cap %	Target %		
1	Administrative Costs														
2	PA ¹	\$ 10,786,293		\$ 10,786,293	2.5%	10.0%	\$ 11,899,136		\$ 11,899,136	2.7%	10.0%				
3	Non-PA Third Party & Partnership ²	\$ 293,336	\$ 16,560,154	\$ 16,853,490	3.9%	10.0%	\$ 62,000	\$ 21,283,864	\$ 21,345,864	4.9%	10.0%				
4	PA & Non-PA Target Exempt Programs ³	\$ 1,840,547	\$ 390,593	\$ 2,231,140			\$ 1,581,925	\$ 478,370	\$ 2,060,295						
5	Marketing and Outreach Costs⁴														
6	Marketing & Outreach	\$ 1,076,991	\$ 13,156,409	\$ 14,233,400	3.3%	6.0%	\$ 1,003,328	\$ 17,119,292	\$ 18,122,620	4.2%	6.0%				
7	Statewide Marketing & Outreach ⁵	\$ 6,327,696		\$ 6,327,696			\$ 6,327,696		\$ 6,327,696						
8	Direct Implementation Costs														
9	Direct Implementation (Incentives and Rebates)	\$ 21,635,593	\$ 58,007,567	\$ 79,643,160			\$ 18,068,287	\$ 94,212,051	\$ 112,280,338						
10	Direct Implementation (Non Incentives and Non Rebates)	\$ 15,826,535	\$ 110,904,602	\$ 126,731,137	29.2%	20.0%	\$ 15,473,762	\$ 136,005,994	\$ 151,479,756	35.0%	20.0%				
11	Direct Implementation Target Exempt Programs (Non Incentives and Non Rebates) ³	\$ 38,049,645	\$ 10,278,368	\$ 48,328,013			\$ 37,604,205	\$ 11,761,658	\$ 49,365,863						
12	EM&V Costs (PA and Energy Division)^{6,7}	\$ 13,160,489		\$ 13,160,489	4.2%	4.0%	\$ 15,985,016		\$ 15,985,016	4.2%	4.0%				
12a	EM&V - PA	\$ 3,423,826		\$ 3,423,826			\$ 4,200,096		\$ 4,200,096						
12b	EM&V - ED	\$ 9,736,663		\$ 9,736,663			\$ 11,784,920		\$ 11,784,920						
13	Total Portfolio Budget (includes PA Program and EM&V Budget + SW ME&O)⁸	\$ 108,997,125	\$ 209,297,693	\$ 318,294,818			\$ 108,005,355	\$ 280,861,229	\$ 388,866,584						
14	CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.18-08-019, OP 10)		\$ 115,109,511	\$ 115,109,511				\$ 74,673,970	\$ 74,673,970						
15	PA Spending Budget Request (PA Program and EM&V + CEC AB 841)⁹			\$ 433,404,329					\$ 463,540,554						
16	Total Third-Party Implementer Contracts + CEC AB 841 (as defined per D.16-08-019, OP 10 and D.21-01-xxx OP)^{10, 11}		\$ 324,407,204		76.0%	60.0%		\$ 355,535,199		77.8%	60.0%				

1. 10% cap requirement based on D. 09-09-047 is set for IOU only.
2. New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third-Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.
3. Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
4. Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
5. Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter 4371-E. The amount in Line 7 represents the portion allocated to EE.
6. For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget but included REN's CPUC EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED = \$0 . PA EM&V - ED included RENs' EM&V ED budget. (PY 2022 3C REN EM&V ED, \$96,511 and REN EM&V ED, \$613,702. PY 2023 3C REN EM&V ED, \$126,509 and REN EM&V ED, \$585,429.)
7. The EM&V percentage is based on PA's total portfolio budget of \$311,967,122 for PY 2022 and \$382,538,888 for PY 2023, which excludes SWME&O, RENs, CCAs and CEC AB 841. This is the Total in line 13, minus SWME&O in line 7. The PA 2022 EM&V percentage is $(\$13,160,489 - \$96,511 - \$613,702) / (\$311,967,122)$. The PA 2023 EM&V percentage is $(\$15,985,016 - \$126,509 - \$585,429) / (\$382,538,888)$
8. As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 92, this total includes SW ME&O and excludes REN and CCA budgets and is the denominator used to calculate the IOU PA Admin, Marketing, and Direct Implementation Non-Incentives percentages.
9. IOU PA's 2022 Proposed Budget of \$427,076,633 excludes SWME&O budget of \$6,372,696 and includes CEC AB 841 budgets of \$116,800,920. IOU PA's 2023 Proposed Budget of \$457,212,858 excludes SWME&O budget of \$6,372,696 and includes CEC AB 841 budgets of \$74,673,970. PA proposed budget included RENs EM&V ED budget..
10. IOU PA's percentage for Third-Party Implementer Contracts uses \$427,076,633 for PY 2022 and \$457,212,858 for PY 2023 as its denominator, which is the IOU PA Spending Budget Request, but excluding SWME&O. This is the Total in line 15 minus SWME&O in line 7.
11. IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.

Attachment B

CEDARS Filing Confirmation

CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Edison (SCE)

Budget Filing Year: 2022

Submitted: 20:15:27 on 04 Nov 2021

By: Gary Golden

Advice Letter Number: 4633-E

* Portfolio Budget Filing Summary *

- TRC: 3.1
- PAC: 6.14
- TRC (no admin): 4.84
- PAC (no admin): 21.54
- RIM: 3.54
- Budget: \$299,967,121.37
- TotalSystemBenefit: \$1,856,616,499.42
- ElecBen: \$1,796,738,829.24
- GasBen: \$72,537,469.53
- OtherBen: \$61,440.09
- TRCCost: \$603,482,021.99
- PACCost: \$304,313,603.07

* Programs Included in the Budget Filing *

- SCE-13-L-002B: City of Long Beach Energy Leader Partnership
- SCE-13-L-002F: Gateway Cities Energy Leader Partnership
- SCE-13-L-002L: Orange County Cities Energy Leader Partnership
- SCE-13-L-002M: San Gabriel Valley Energy Leader Partnership
- SCE-13-L-002N: San Joaquin Valley Energy Leader Partnership
- SCE-13-L-002O: South Bay Energy Leader Partnership
- SCE-13-L-002P: South Santa Barbara County Energy Leader Partnership
- SCE-13-L-002Q: Ventura County Energy Leader Partnership
- SCE-13-L-002T: West Side Community Energy Leader Partnership
- SCE-13-L-002V: North Orange County Cities
- SCE-13-L-002W: San Bernardino Association of Governments
- SCE-13-L-002Y: Grandfathered Street Lights
- SCE-13-L-003A: California Community Colleges Energy Efficiency Partnership
- SCE-13-L-003C: County of Los Angeles Energy Efficiency Partnership
- SCE-13-L-003G: UC/CSU Energy Efficiency Partnership
- SCE-13-L-003I: Public Sector Performance-Based Retrofit High Opportunity Program
- SCE-13-PB: Pension and Benefits
- SCE-13-PB-RA: Pension & Benefits Resource Acquisition Programs
- SCE-13-PB-TRCX: Pension & Benefits - TRC Exempt Programs

- SCE-13-RENAdmin: IOU REN Administrative Costs
- SCE-13-SW-001A: Energy Advisor Program
- SCE-13-SW-001F: Residential New Construction Program
- SCE-13-SW-001G: Residential Direct Install Program
- SCE-13-SW-002A: Commercial Energy Advisor Program
- SCE-13-SW-002B: Commercial Calculated Program
- SCE-13-SW-002G: Savings By Design
- SCE-13-SW-003A: Industrial Energy Advisor Program
- SCE-13-SW-003B: Industrial Calculated Energy Efficiency Program
- SCE-13-SW-003D: Strategic Energy Management Program
- SCE-13-SW-004B: Agriculture Calculated Energy Efficiency Program
- SCE-13-SW-007A: On-Bill Financing
- SCE-13-SW-007A1: On-Bill Financing Loan Pool
- SCE-13-SW-007C: New Finance Offerings
- SCE-13-SW-008C: Compliance Improvement
- SCE-13-SW-008D: Reach Codes
- SCE-13-SW-008E: Planning and Coordination
- SCE-13-SW-009A: Technology Development Support
- SCE-13-SW-009B: Technology Assessments
- SCE-13-SW-009C: Technology Introduction Support
- SCE-13-SW-010A: WE&T Integrated Energy Education and Training
- SCE-13-TP-001: Comprehensive Manufactured Homes
- SCE-13-TP-007: Primary and Fabricated Metals
- SCE-13-TP-008: Nonmetallic Minerals and Products
- SCE-13-TP-010: Comprehensive Petroleum Refining
- SCE-13-TP-021: Enhanced Retrocommissioning
- SCE-13-TP-022: Water Infrastructure Systems Energy Efficiency Program
- SCE-13-TP-024: AB793 Residential Pay for Performance
- SCE-13-TP-025: Facility Assessment Service Program
- SCE-13-TP-026: Residential 3P Solicitation
- SCE-13-TP-027: Commercial 3P Solicitation
- SCE-13-TP-028: Industrial 3P Solicitation
- SCE-13-TP-029: Local Public Sector 3P Solicitation
- SCE-13-TP-030: Agricultural 3P Solicitation
- SCE-3OV0100: SCE EM&V
- SCE-3OV0200: CPUC EM&V
- SCE_3P_2020RCI_001: Marketplace
- SCE_3P_2020RCI_002: Residential Behavioral Program
- SCE_3P_2020RCI_003: Commercial Behavioral Program
- SCE_3P_2020RCI_004: Comprehensive Multifamily Program
- SCE_3P_2020RCI_005: Comprehensive Commercial Program
- SCE_3P_2020RCI_006: Comprehensive Industrial Program
- SCE_Res_Equity_001: Residential Equity Program
- SCE_SMB_Equity_001: Small/Medium Business Equity Program
- SCE_SW_CSA_Appl: Codes & Standards Advocacy - State Appliance Standards Advocacy
- SCE_SW_CSA_Appl_PA: Codes & Standards Advocacy - State Appliance Standards Advocacy - SCE Costs
- SCE_SW_CSA_Bldg: Codes & Standards Advocacy - State Building Codes Advocacy
- SCE_SW_CSA_Bldg_PA: Codes & Standards Advocacy - State Building Codes Advocacy - SCE Costs
- SCE_SW_CSA_Natl: Codes & Standards Advocacy - National Codes & Standards Advocacy

- SCE_SW_CSA_Natl_PA: Codes & Standards Advocacy - National Codes & Standards Advocacy - SCE Costs
- SCE_SW_ETP_Elec: Emerging Technologies Program, Electric
- SCE_SW_ETP_Elec_PA: Emerging Technologies Program, Electric - SCE Costs
- SCE_SW_FS: Food Service POS
- SCE_SW_FS_PA: Food Service POS - SCE Costs
- SCE_SW_HVAC_QIQM: SW HVAC QI/QM Program
- SCE_SW_HVAC_QIQM_PA: SW HVAC QI/QM Program - SCE Costs
- SCE_SW_HVAC_Up: Upstream HVAC (Comm + Res)
- SCE_SW_HVAC_Up_PA: Upstream HVAC (Comm + Res) - SCE Costs
- SCE_SW_IP_Colleges: Institutional Partnerships, UC/CSU/CCC
- SCE_SW_IP_Colleges_PA: Institutional Partnerships, UC/CSU/CCC - SCE Costs
- SCE_SW_IP_Gov: Institutional Partnerships: DGS & DoC
- SCE_SW_IP_Gov_PA: Institutional Partnerships: DGS & DoC - SCE Costs
- SCE_SW_MCWH: Midstream Comm Water Heating
- SCE_SW_MCWH_PA: Midstream Comm Water Heating - SCE Costs
- SCE_SW_NC_NonRes_Ag_electric: SW New Construction NonRes Ag - All Electric
- SCE_SW_NC_NonRes_Ag_electric_PA: SW New Construction NonRes Ag - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ag_mixed: SW New Construction NonRes Ag - Mixed Fuel
- SCE_SW_NC_NonRes_Ag_mixed_PA: SW New Construction NonRes Ag - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Com_electric: SW New Construction NonRes Com - All Electric
- SCE_SW_NC_NonRes_Com_electric_PA: SW New Construction NonRes Com - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Com_mixed: SW New Construction NonRes Com - Mixed Fuel
- SCE_SW_NC_NonRes_Com_mixed_PA: SW New Construction NonRes Com - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Ind_electric: SW New Construction NonRes Ind - All Electric
- SCE_SW_NC_NonRes_Ind_electric_PA: SW New Construction NonRes Ind - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ind_mixed: SW New Construction NonRes Ind - Mixed Fuel
- SCE_SW_NC_NonRes_Ind_mixed_PA: SW New Construction NonRes Ind - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Pub_electric: SW New Construction NonRes Public - All Electric
- SCE_SW_NC_NonRes_Pub_electric_PA: SW New Construction NonRes Public - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Pub_mixed: SW New Construction NonRes Public - Mixed Fuel
- SCE_SW_NC_NonRes_Pub_mixed_PA: SW New Construction NonRes Public - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Res_electric: SW New Construction NonRes Res - All Electric
- SCE_SW_NC_NonRes_Res_electric_PA: SW New Construction NonRes Res - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Res_mixed: SW New Construction NonRes Res - Mixed Fuel
- SCE_SW_NC_NonRes_Res_mixed_PA: SW New Construction NonRes Res - Mixed Fuel - SCE Costs
- SCE_SW_NC_Res_electric: SW New Construction Res - All Electric
- SCE_SW_NC_Res_electric_PA: SW New Construction Res - All Electric - SCE Costs
- SCE_SW_NC_Res_mixed: SW New Construction Res - Mixed Fuel
- SCE_SW_NC_Res_mixed_PA: SW New Construction Res - Mixed Fuel - SCE Costs
- SCE_SW_PLA: Plug Load and Appliance

- SCE_SW_PLA_PA: Plug Load and Appliance - SCE Costs
- SCE_SW_UL: CA Statewide Lighting Program
- SCE_SW_UL_PA: Lighting (Upstream) - SCE Costs
- SCE_SW_WET_CC: WET Career Connections
- SCE_SW_WET_CC_PA: WET Career Connections - SCE Costs
- SCE_SW_WET_Work: WE&T Career and Workforce Readiness
- SCE_SW_WET_Work_PA: WE&T Career and Workforce Readiness - SCE Costs
- SCE_SW_WP: Water/wastewater Pumping
- SCE_SW_WP_PA: Water/wastewater Pumping - SCE Costs

CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Edison (SCE)

Budget Filing Year: 2023

Submitted: 20:17:09 on 04 Nov 2021

By: Gary Golden

Advice Letter Number: 4633-E

* Portfolio Budget Filing Summary *

- TRC: 2.94
- PAC: 5.76
- TRC (no admin): 4.41
- PAC (no admin): 16.7
- RIM: 3.13
- Budget: \$368,538,887.00
- TotalSystemBenefit: \$2,216,958,608.82
- ElecBen: \$2,114,242,607.08
- GasBen: \$126,869,052.15
- OtherBen: \$2,134,784.75
- TRCCost: \$763,909,836.11
- PACCost: \$389,524,293.37

* Programs Included in the Budget Filing *

- SCE-13-L-002B: City of Long Beach Energy Leader Partnership
- SCE-13-L-002F: Gateway Cities Energy Leader Partnership
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- SCE-13-L-002M: San Gabriel Valley Energy Leader Partnership
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- SCE-13-L-002O: South Bay Energy Leader Partnership
- SCE-13-L-002P: South Santa Barbara County Energy Leader Partnership
- SCE-13-L-002Q: Ventura County Energy Leader Partnership

- SCE-13-L-002T: West Side Community Energy Leader Partnership
- SCE-13-L-002V: North Orange County Cities
- SCE-13-L-002W: San Bernardino Association of Governments
- SCE-13-L-002Y: Grandfathered Street Lights
- SCE-13-L-003A: California Community Colleges Energy Efficiency Partnership
- SCE-13-L-003C: County of Los Angeles Energy Efficiency Partnership
- SCE-13-L-003G: UC/CSU Energy Efficiency Partnership
- SCE-13-L-003I: Public Sector Performance-Based Retrofit High Opportunity Program
- SCE-13-PB: Pension and Benefits
- SCE-13-PB-RA: Pension & Benefits Resource Acquisition Programs
- SCE-13-PB-TRCX: Pension & Benefits - TRC Exempt Programs
- SCE-13-RENAdmin: IOU REN Administrative Costs
- SCE-13-SW-001A: Energy Advisor Program
- SCE-13-SW-001F: Residential New Construction Program
- SCE-13-SW-001G: Residential Direct Install Program
- SCE-13-SW-002A: Commercial Energy Advisor Program
- SCE-13-SW-002B: Commercial Calculated Program
- SCE-13-SW-002G: Savings By Design
- SCE-13-SW-003A: Industrial Energy Advisor Program
- SCE-13-SW-003B: Industrial Calculated Energy Efficiency Program
- SCE-13-SW-003D: Strategic Energy Management Program
- SCE-13-SW-004B: Agriculture Calculated Energy Efficiency Program
- SCE-13-SW-007A: On-Bill Financing
- SCE-13-SW-007A1: On-Bill Financing Loan Pool
- SCE-13-SW-007C: New Finance Offerings
- SCE-13-SW-008C: Compliance Improvement
- SCE-13-SW-008D: Reach Codes
- SCE-13-SW-008E: Planning and Coordination
- SCE-13-SW-009A: Technology Development Support
- SCE-13-SW-009B: Technology Assessments
- SCE-13-SW-009C: Technology Introduction Support
- SCE-13-SW-010A: WE&T Integrated Energy Education and Training
- SCE-13-TP-001: Comprehensive Manufactured Homes
- SCE-13-TP-007: Primary and Fabricated Metals
- SCE-13-TP-008: Nonmetallic Minerals and Products
- SCE-13-TP-010: Comprehensive Petroleum Refining
- SCE-13-TP-021: Enhanced Retrocommissioning
- SCE-13-TP-022: Water Infrastructure Systems Energy Efficiency Program
- SCE-13-TP-024: AB793 Residential Pay for Performance
- SCE-13-TP-025: Facility Assessment Service Program
- SCE-13-TP-026: Residential 3P Solicitation
- SCE-13-TP-027: Commercial 3P Solicitation
- SCE-13-TP-028: Industrial 3P Solicitation
- SCE-13-TP-029: Local Public Sector 3P Solicitation
- SCE-13-TP-030: Agricultural 3P Solicitation
- SCE-3OV0100: SCE EM&V
- SCE-3OV0200: CPUC EM&V
- SCE_3P_2020RCI_001: Marketplace
- SCE_3P_2020RCI_002: Residential Behavioral Program
- SCE_3P_2020RCI_003: Commercial Behavioral Program
- SCE_3P_2020RCI_004: Comprehensive Multifamily Program

- SCE_3P_2020RCI_005: Comprehensive Commercial Program
- SCE_3P_2020RCI_006: Comprehensive Industrial Program
- SCE_Res_Equity_001: Residential Equity Program
- SCE_SMB_Equity_001: Small/Medium Business Equity Program
- SCE_SW_CSA_Appl: Codes & Standards Advocacy - State Appliance Standards Advocacy
- SCE_SW_CSA_Appl_PA: Codes & Standards Advocacy - State Appliance Standards Advocacy - SCE Costs
- SCE_SW_CSA_Bldg: Codes & Standards Advocacy - State Building Codes Advocacy
- SCE_SW_CSA_Bldg_PA: Codes & Standards Advocacy - State Building Codes Advocacy - SCE Costs
- SCE_SW_CSA_Natl: Codes & Standards Advocacy - National Codes & Standards Advocacy
- SCE_SW_CSA_Natl_PA: Codes & Standards Advocacy - National Codes & Standards Advocacy - SCE Costs
- SCE_SW_ETP_Elec: Emerging Technologies Program, Electric
- SCE_SW_ETP_Elec_PA: Emerging Technologies Program, Electric - SCE Costs
- SCE_SW_FS: Food Service POS
- SCE_SW_FS_PA: Food Service POS - SCE Costs
- SCE_SW_HVAC_QIQM: SW HVAC QI/QM Program
- SCE_SW_HVAC_QIQM_PA: SW HVAC QI/QM Program - SCE Costs
- SCE_SW_HVAC_Up: Upstream HVAC (Comm + Res)
- SCE_SW_HVAC_Up_PA: Upstream HVAC (Comm + Res) - SCE Costs
- SCE_SW_IP_Colleges: Institutional Partnerships, UC/CSU/CCC
- SCE_SW_IP_Colleges_PA: Institutional Partnerships, UC/CSU/CCC - SCE Costs
- SCE_SW_IP_Gov: Institutional Partnerships: DGS & DoC
- SCE_SW_IP_Gov_PA: Institutional Partnerships: DGS & DoC - SCE Costs
- SCE_SW_MCWH: Midstream Comm Water Heating
- SCE_SW_MCWH_PA: Midstream Comm Water Heating - SCE Costs
- SCE_SW_NC_NonRes_Ag_electric: SW New Construction NonRes Ag - All Electric
- SCE_SW_NC_NonRes_Ag_electric_PA: SW New Construction NonRes Ag - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ag_mixed: SW New Construction NonRes Ag - Mixed Fuel
- SCE_SW_NC_NonRes_Ag_mixed_PA: SW New Construction NonRes Ag - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Com_electric: SW New Construction NonRes Com - All Electric
- SCE_SW_NC_NonRes_Com_electric_PA: SW New Construction NonRes Com - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Com_mixed: SW New Construction NonRes Com - Mixed Fuel
- SCE_SW_NC_NonRes_Com_mixed_PA: SW New Construction NonRes Com - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Ind_electric: SW New Construction NonRes Ind - All Electric
- SCE_SW_NC_NonRes_Ind_electric_PA: SW New Construction NonRes Ind - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Ind_mixed: SW New Construction NonRes Ind - Mixed Fuel
- SCE_SW_NC_NonRes_Ind_mixed_PA: SW New Construction NonRes Ind - Mixed Fuel - SCE Costs
- SCE_SW_NC_NonRes_Pub_electric: SW New Construction NonRes Public - All Electric
- SCE_SW_NC_NonRes_Pub_electric_PA: SW New Construction NonRes Public - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Pub_mixed: SW New Construction NonRes Public - Mixed Fuel
- SCE_SW_NC_NonRes_Pub_mixed_PA: SW New Construction NonRes Public - Mixed Fuel - SCE Costs

- SCE_SW_NC_NonRes_Res_electric: SW New Construction NonRes Res - All Electric
- SCE_SW_NC_NonRes_Res_electric_PA: SW New Construction NonRes Res - All Electric - SCE Costs
- SCE_SW_NC_NonRes_Res_mixed: SW New Construction NonRes Res - Mixed Fuel
- SCE_SW_NC_NonRes_Res_mixed_PA: SW New Construction NonRes Res - Mixed Fuel - SCE Costs
- SCE_SW_NC_Res_electric: SW New Construction Res - All Electric
- SCE_SW_NC_Res_electric_PA: SW New Construction Res - All Electric - SCE Costs
- SCE_SW_NC_Res_mixed: SW New Construction Res - Mixed Fuel
- SCE_SW_NC_Res_mixed_PA: SW New Construction Res - Mixed Fuel - SCE Costs
- SCE_SW_PLA: Plug Load and Appliance
- SCE_SW_PLA_PA: Plug Load and Appliance - SCE Costs
- SCE_SW_UL: CA Statewide Lighting Program
- SCE_SW_UL_PA: Lighting (Upstream) - SCE Costs
- SCE_SW_WET_CC: WET Career Connections
- SCE_SW_WET_CC_PA: WET Career Connections - SCE Costs
- SCE_SW_WET_Work: WE&T Career and Workforce Readiness
- SCE_SW_WET_Work_PA: WE&T Career and Workforce Readiness - SCE Costs
- SCE_SW_WP: Water/wastewater Pumping
- SCE_SW_WP_PA: Water/wastewater Pumping - SCE Costs

Attachment C

Historical Annual Budget Advice Letter Tables

Table 1: Bill Payer Impact - System Average Rate

Table 1 -Bill Payer Impacts - Rates by Customer Class				
	Electric Average Rate (Res and Non-Res) \$/kwh	Gas Average Rate (Res and Non-Res) \$/therm	Total Average Annual Bill Savings by Year (\$)	Total Average Lifecycle Bill Savings (\$)
Present Rates - System Average				
2021[1]	\$ 0.18	N/A	\$ 63,856,575	\$ 377,883,245
2022 [2]	\$ 0.18	N/A	\$ 56,583,631	\$ 496,913,855
2023 [2]	\$ 0.18	N/A	\$ 89,971,490	\$ 773,233,678

* = Based on current effective rates

Consistent with Standard Practice Manual (SPM) Total Resource Cost (TRC)/ Program Administrator Cost (PAC)/ Ratepayer Impact Measure (RIM) tests, all savings used from actuals and forecasts in this table are NET.

Notes:

- 1) Average first year electric bill savings is calculated by multiplying an average electric rate with first year net kWh energy savings.
- 2) Average first year gas bill savings is calculated by multiplying an average gas rate with first year net therm energy savings.
- 3) Total average first year bill savings is the sum of Notes 1 and 2.
- 4) Average lifecycle electric bill savings is calculated by multiplying an average electric rate with lifecycle net kWh energy savings.
- 5) Average lifecycle gas bill savings is calculated by multiplying an average gas rate with lifecycle net therm energy savings.
- 6) Total average lifecycle bill savings is the sum of Notes 4 and 5.
- 7) Total Annual and Lifecycle Bill Savings excluded savings from Codes & Standards and ESA Programs

Table 2: Bill Payer Impact - By Customer Class

Table 2a: Electric Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2021 Proposed Energy Efficiency Electric Annual Revenue Change [1] \$000	2021 Proposed Percentage Change In Electric Revenue and Rates	2021 Electric Average Rate [2] \$/kWh	2021 Energy Efficiency Portion of Electric Average Rate \$/kWh	2022 Proposed Energy Efficiency Electric Annual Revenue Change \$000	2022 Proposed Percentage Change In Electric Revenue and Rates	2022 Electric Average Rate [3] \$/kWh	2022 Energy Efficiency Portion of Electric Average Rate \$/kWh	2023 Proposed Energy Efficiency Electric Annual Revenue Change \$000	2023 Proposed Percentage Change In Electric Revenue and Rates	2023 Electric Average Rate [3] \$/kWh	2023 Energy Efficiency Portion of Electric Average Rate \$/kWh
Bundled												
Domestic	\$ 25,703	164%	\$ 0.2220	\$ 0.006	\$ 92,445	224%	\$ 0.2220	\$ 0.02078	\$ 117,241	284%	\$ 0.2220	\$ 0.02635
Lighting SM Med Power	\$ 21,101	164%	\$ 0.2160	\$ 0.006	\$ 67,775	224%	\$ 0.2160	\$ 0.02078	\$ 85,953	284%	\$ 0.2160	\$ 0.02635
Large Power	\$ 10,589	164%	\$ 0.1420	\$ 0.006	\$ 33,867	224%	\$ 0.1420	\$ 0.02078	\$ 42,950	284%	\$ 0.1420	\$ 0.02635
Agricultural & Pumping	\$ 2,619	164%	\$ 0.1740	\$ 0.006	\$ 8,950	224%	\$ 0.1740	\$ 0.02078	\$ 11,351	284%	\$ 0.1740	\$ 0.02635
Street & Area Lighting	\$ 462	164%	\$ 0.2420	\$ 0.005	\$ 1,872	224%	\$ 0.2420	\$ 0.02078	\$ 2,375	284%	\$ 0.2420	\$ 0.02635
Direct Access Service												
Domestic	\$ 5,360	164%	\$ 0.1570	\$ 0.005	\$ 23,260	224%	\$ 0.1570	\$ 0.02078	\$ 29,499	284%	\$ 0.1570	\$ 0.02635
Lighting SM Med Power	\$ 5,523	164%	\$ 0.1280	\$ 0.005	\$ 25,006	224%	\$ 0.1280	\$ 0.02078	\$ 31,713	284%	\$ 0.1280	\$ 0.02635
Large Power	\$ 3,751	164%	\$ 0.0780	\$ 0.005	\$ 16,589	224%	\$ 0.0780	\$ 0.02078	\$ 21,038	284%	\$ 0.0780	\$ 0.02635
Agricultural & Pumping	\$ 280	164%	\$ 0.1140	\$ 0.003	\$ 1,699	224%	\$ 0.1140	\$ 0.02078	\$ 2,155	284%	\$ 0.1140	\$ 0.02635
Street & Area Lighting	\$ 264	164%	\$ 0.2420	\$ 0.006	\$ 870	224%	\$ 0.2420	\$ 0.02078	\$ 1,103	284%	\$ 0.2420	\$ 0.02635

- 1) Based on PY 2021 ERRRA Rate
- 2) PY 2021 AB 841 budget was not part of the Energy Efficiency program revenue.
- 3) SCE's PY 2022 ERRRA Rate scheduled to file in November 2021. Used PY 2021 ERRRA to calculate the rate impact for PY 2022 and PY 2023 Energy Efficiency program

Table 2b - Gas Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2021 Proposed Energy Efficiency Gas Annual Revenue Change \$000	2021 Proposed Percentage Change In Gas Revenue and Rates	2021 Gas Average Rate \$/kWh	2021 Energy Efficiency Portion of Gas Average Rate \$/kWh	2022 Proposed Energy Efficiency Gas Annual Revenue Change \$000	2022 Proposed Percentage Change In Gas Revenue and Rates	2022 Gas Average Rate \$/kWh	2022 Energy Efficiency Portion of Gas Average Rate \$/kWh	2023 Proposed Energy Efficiency Gas Annual Revenue Change \$000	2023 Proposed Percentage Change In Gas Revenue and Rates	2023 Gas Average Rate \$/kWh	2023 Energy Efficiency Portion of Gas Average Rate \$/kWh

Table 3: Budget and Cost Recovery by Funding Source + Others

Table 3a - PA Spending Budget Request by Funding Source

PA EE Programs and EM&V	2022	2023
Annual PA Spending Budget Request (Program and EM&V total)	\$ 311,967,122	\$ 382,538,888
CEC AB 841 Program Budget Request		
Applicable percentage of difference between funding limitation and 2020 budget (70% for 2022 and 60% for 2023) ¹	\$ 87,119,631	\$ 74,673,970
Plus 2020 and Beyond Uncommitted and Unspent Carryover Balance	\$ 27,989,880	\$ -
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	\$ 427,076,633	\$ 457,212,858

¹ Applicable percentage is 70% for 2022 and 60% for 2023.

Table 3b - Budget by Funding Source

Portfolio Budget (Before Carryover)	2022 Budget	2022 %Allocation	2023 Budget	2023 %Allocation
Electric Procurement EE Funds	\$ 427,076,633	100%	\$ 457,212,858	100%
Gas PPP Surcharge Funds	\$ -	0%	\$ -	0%
Total Funds	\$ 427,076,633		\$ 457,212,858	

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

Authorized Funding in Rates (including Unspent/Uncommitted Funds)	2022 Revenue Requirement	2022 %Allocation after Carryover adjustment	2023 Revenue Requirement	2023 %Allocation after Carryover adjustment
Electric Procurement EE Funds	\$ 370,226,375	100%	\$ 443,212,858	100%
Gas PPP Surcharge Funds	\$ -	0%	\$ -	0%
Total Funds	\$ 370,226,375		\$ 443,212,858	

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

Program Unspent/Uncommitted Funds	2022			2023		
	Electric	Gas	Total	Electric	Gas	Total
Pre-2020	\$ 28,860,378	\$ -	\$ 28,860,378	\$ 14,000,000	\$ -	\$ 14,000,000
2020 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2021 ²	\$ 27,989,880	\$ -	\$ 27,989,880	\$ -	\$ -	\$ -
2022 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ 56,850,258	\$ -	\$ 56,850,258	\$ 14,000,000	\$ -	\$ 14,000,000

EM&V Unspent/Uncommitted Funds	2022			2023		
	Electric	Gas	Total	Electric	Gas	Total
Pre-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2020 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2021 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2022 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Total Unspent/Uncommitted Funds	2022			2023		
	Electric	Gas	Total	Electric	Gas	Total
Pre-2020	\$ 28,860,378	\$ -	\$ 28,860,378	\$ 14,000,000	\$ -	\$ 14,000,000
2020 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2021 ²	\$ 27,989,880	\$ -	\$ 27,989,880	\$ -	\$ -	\$ -
2022 ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ 56,850,258	\$ -	\$ 56,850,258	\$ 14,000,000	\$ -	\$ 14,000,000

Note on Table 3d

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

² These funds are assigned to CEC AB 841

Table 3e - Total Requested 2022-2023 IOU Revenue Requirement - Demand Response & Energy Efficiency^{1,2}

	2022				2023			
	Electric Demand Response Funds	Energy Efficiency			Electric Demand Response Funds	Energy Efficiency		
		Electric Energy Efficiency Funds	Natural Gas Public Purpose Funds	Total Energy Efficiency Funds		Electric Energy Efficiency Funds	Natural Gas Public Purpose Funds	Total Energy Efficiency Funds
Program Funds - PA ⁴	\$ 9,961,000	\$ 269,946,255	\$ -	\$ 269,946,255	\$ 10,253,000	\$ 352,553,872	\$ -	\$ 352,553,872
Program Funds - CEC ⁵	\$ -	\$ 87,119,631	\$ -	\$ 87,119,631	\$ -	\$ 74,673,970	\$ -	\$ 74,673,970
Program Funds - REN ⁶	\$ -	\$ 23,779,893	\$ -	\$ 23,779,893	\$ -	\$ 23,837,624	\$ -	\$ 23,837,624
Program Funds - CCA ⁵	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
EM&V ⁷	\$ -	\$ 13,160,489	\$ -	\$ 13,160,489	\$ -	\$ 15,985,016	\$ -	\$ 15,985,016
Budget Total	\$ 9,961,000	\$ 394,006,268	\$ -	\$ 394,006,268	\$ 10,253,000	\$ 467,050,482	\$ -	\$ 467,050,482

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

Table 4: Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds ⁶	2021 Authorized Budget	2021 Forecasted Unspent/Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021	2022 PA Spending Budget Request	2022 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement Request	2023 PA Spending Budget Request	2023 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2023 PA Revenue Requirement Request
SCE-13-SW-001		California Statewide Program for Residential Energy Efficiency				\$ -	\$ 23,590,586	\$ -	\$ 17,228,077	\$ 16,032,860	\$ -	\$ 16,032,860	\$ 15,203,914	\$ -	\$ 15,203,914
SCE-13-SW-001A		Energy Advisor Program	Core PA	Residential	Resource Acquisition		\$ 16,082,726	\$ 8,791,786	\$ 693,721	\$ 693,721	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-001B		Plug Load and Appliances Program	Core PA	Residential	0		\$ 3,877,122	\$ 5,825,632	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-001C	SCE-13-SW-001C	Multifamily Energy Efficiency Rebate Program	Core PA	Residential	0		\$ 49,272	\$ 81,036	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-001D	SCE-13-SW-001D	Energy Upgrade California	Core PA	Residential	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-001E	SCE-13-SW-001E	Residential HVAC Program	Core PA	Residential	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-001F		Residential New Construction Program	Core PA	Residential	Resource Acquisition		\$ 570,565	\$ 115,101	\$ 73,162	\$ 73,162	\$ -	\$ 73,162	\$ 79,371	\$ -	\$ 79,371
SCE-13-SW-001G		Residential Direct Install Program	Core PA	Residential	Resource Acquisition		\$ 3,010,901	\$ 2,414,522	\$ 15,265,977	\$ 15,265,977	\$ -	\$ 15,265,977	\$ 15,124,543	\$ -	\$ 15,124,543
SCE-13-SW-002		Statewide Commercial Energy Efficiency Program				\$ -	\$ 8,518,249	\$ -	\$ 3,579,184	\$ 1,222,907	\$ -	\$ 1,222,907	\$ 1,200,185	\$ -	\$ 1,200,185
SCE-13-SW-002A		Commercial Energy Advisor Program	Core PA	Commercial	Market Support		\$ 662,910	\$ 257,035	\$ 668,852	\$ 668,852	\$ -	\$ 668,852	\$ 676,417	\$ -	\$ 676,417
SCE-13-SW-002B		Commercial Calculated Program	Core PA	Commercial	Resource Acquisition		\$ 4,576,768	\$ 1,378,742	\$ 277,188	\$ 277,188	\$ -	\$ 277,188	\$ 271,048	\$ -	\$ 271,048
SCE-13-SW-002C		Commercial Deemed Incentives Program	Core PA	Commercial	0		\$ 802,733	\$ 178,982	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-002D	SCE-13-SW-002D	Commercial Direct Install Program	Core PA	Commercial	0		\$ -	\$ 13,208	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-002E	SCE-13-SW-002E	Commercial Continuous Energy Improvement Program	Core PA	Commercial	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-002F		Nonresidential HVAC Program	Core PA	Commercial	0		\$ 1,330,428	\$ 857,487	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-002G		Savings By Design	Core PA	Commercial	Resource Acquisition		\$ 686,180	\$ 576,616	\$ 276,867	\$ 276,867	\$ -	\$ 276,867	\$ 252,720	\$ -	\$ 252,720
SCE-13-SW-002H		Midstream Point of Purchase Program	Core PA	Commercial	0		\$ 459,230	\$ 317,114	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-003		Statewide Industrial Energy Efficiency Program				\$ -	\$ 4,248,123	\$ -	\$ 1,749,882	\$ 4,393,113	\$ -	\$ 4,393,113	\$ 4,550,668	\$ -	\$ 4,550,668
SCE-13-SW-003A		Industrial Energy Advisor Program	Core PA	Industrial	Market Support		\$ 236,558	\$ 168,347	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-003B		Industrial Calculated Energy Efficiency Program	Core PA	Industrial	Resource Acquisition		\$ 697,098	\$ 345,480	\$ 52,116	\$ 52,116	\$ -	\$ 52,116	\$ 69,187	\$ -	\$ 69,187
SCE-13-SW-003C		Industrial Deemed Energy Efficiency Program	Core PA	Industrial	0		\$ 236,727	\$ 123,945	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-003D		Strategic Energy Management Program	Core PA	Industrial	Resource Acquisition		\$ 3,077,740	\$ 1,112,110	\$ 4,340,997	\$ 4,340,997	\$ -	\$ 4,340,997	\$ 4,481,481	\$ -	\$ 4,481,481
SCE-13-SW-003E		Market Base Incentive	Core PA	Industrial	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-004		Statewide Agriculture Energy Efficiency Program				\$ -	\$ 942,323	\$ -	\$ 509,843	\$ 203,452	\$ -	\$ 203,452	\$ 167,301	\$ -	\$ 167,301
SCE-13-SW-004A	SCE-13-SW-004A	Agriculture Energy Advisor Program	Core PA	Agriculture	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-004B		Agriculture Calculated Energy Efficiency Program	Core PA	Agriculture	Resource Acquisition		\$ 579,358	\$ 292,301	\$ 203,452	\$ 203,452	\$ -	\$ 203,452	\$ 167,301	\$ -	\$ 167,301
SCE-13-SW-004C		Agriculture Deemed Energy Efficiency Program	Core PA	Agriculture	0		\$ 362,965	\$ 217,542	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-004D	SCE-13-SW-004D	Agriculture Continuous Energy Improvement Program	Core PA	Agriculture	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-005		Lighting Program				\$ -	\$ -	\$ -	\$ 6,893	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-005A	SCE-13-SW-005A	Lighting Market Transformation Program	Core PA	Residential	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-005B	SCE-13-SW-005B	Lighting Innovation Program	Core PA	Residential	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-005C		Primary Lighting Program	Core PA	Residential	0		\$ -	\$ 6,893	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	SCE-13-SW-006	Integrated Demand Side Management Program				\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-007		Statewide Finance Program				\$ -	\$ 17,571,760	\$ -	\$ 527,363	\$ 13,324,973	\$ -	\$ 13,324,973	\$ 15,369,871	\$ -	\$ 15,369,871
SCE-13-SW-007A		On-Bill Financing	Core PA	Finance	Market Support		\$ 795,715	\$ 321,280	\$ 732,641	\$ 732,641	\$ -	\$ 732,641	\$ 781,554	\$ -	\$ 781,554
SCE-13-SW-007A1		Finance Revolving Loan	Core PA	OBF Loan Pool	Market Support		\$ 15,000,000	\$ 24,400	\$ 12,000,000	\$ 12,000,000	\$ -	\$ 12,000,000	\$ 14,000,000	\$ -	\$ 14,000,000
SCE-13-SW-007B	SCE-13-SW-007B	ARRA-Originated Financing	Core PA	Finance	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-007C		New Finance Offerings	Core PA	Finance	Market Support		\$ 1,776,045	\$ 181,683	\$ 592,332	\$ 592,332	\$ -	\$ 592,332	\$ 588,317	\$ -	\$ 588,317
SCE-13-SW-008		Codes and Standards Program				\$ -	\$ 12,095,713	\$ -	\$ 3,162,263	\$ 12,731,705	\$ -	\$ 12,731,705	\$ 12,649,622	\$ -	\$ 12,649,622
SCE-13-SW-008A		Building Codes and Compliance Advocacy	Core PA	Codes & Standards	0		\$ -	\$ 8,956	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-008B		Appliance Standards Advocacy	Core PA	Codes & Standards	0		\$ -	\$ 1,992	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-008C		Compliance Improvement	Core PA	Codes & Standards	Resource Acquisition		\$ 2,600,930	\$ 622,216	\$ 3,077,099	\$ 3,077,099	\$ -	\$ 3,077,099	\$ 3,051,711	\$ -	\$ 3,051,711
SCE-13-SW-008D		Reach Codes	Core PA	Codes & Standards	Resource Acquisition		\$ 1,071,712	\$ 570,804	\$ 1,383,919	\$ 1,383,919	\$ -	\$ 1,383,919	\$ 1,379,860	\$ -	\$ 1,379,860
SCE-13-SW-008E		Planning and Coordination	Core PA	Codes & Standards	Resource Acquisition		\$ 8,423,071	\$ 1,958,295	\$ 8,270,687	\$ 8,270,687	\$ -	\$ 8,270,687	\$ 8,218,051	\$ -	\$ 8,218,051
SCE-13-SW-008F		National and International Standards	Core PA	Codes & Standards	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-009		Emerging Technologies Program				\$ -	\$ 7,797,984	\$ -	\$ 3,807,842	\$ 4,232,864	\$ -	\$ 4,232,864	\$ 1,318,710	\$ -	\$ 1,318,710
SCE-13-SW-009A		Technology Development Support	Core PA	Emerging Tech	Market Support		\$ 813,283	\$ 1,033,531	\$ 674,871	\$ 674,871	\$ -	\$ 674,871	\$ 153,434	\$ -	\$ 153,434
SCE-13-SW-009B		Technology Assessments	Core PA	Emerging Tech	Market Support		\$ 3,932,477	\$ 1,881,534	\$ 1,829,012	\$ 1,829,012	\$ -	\$ 1,829,012	\$ 618,330	\$ -	\$ 618,330
SCE-13-SW-009C		Technology Introduction Support	Core PA	Emerging Tech	Market Support		\$ 3,052,224	\$ 892,777	\$ 1,728,981	\$ 1,728,981	\$ -	\$ 1,728,981	\$ 546,946	\$ -	\$ 546,946
SCE-13-SW-010		Workforce Education & Training				\$ -	\$ 4,349,450	\$ -	\$ 2,274,134	\$ 8,696,114	\$ -	\$ 8,696,114	\$ 8,840,814	\$ -	\$ 8,840,814
SCE-13-SW-010A		WE&T Integrated Energy Education and Training (IET)	Core PA	WE&T	Market Support		\$ 3,850,187	\$ 1,919,579	\$ 8,696,114	\$ 8,696,114	\$ -	\$ 8,696,114	\$ 8,840,814	\$ -	\$ 8,840,814
SCE-13-SW-010B		WE&T Career Connections	Core PA	WE&T	0		\$ 499,263	\$ 354,555	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-SW-010C	SCE-13-SW-010C	WE&T Planning	Core PA	WE&T	0		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	SCE-13-L-001	Integrated Demand Side Management Pilot for Food Processing				\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-RENAdmin		IOU REN Administration Costs	Core PA	Public	Resource Acquisition		\$ 73,953	\$ 28,335	\$ 80,476	\$ 80,476	\$ -	\$ 80,476	\$ 83,235	\$ -	\$ 83,235

New/Existing Program #	Discontinued Program #	Program Name	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds ⁶	2021 Authorized Budget	2021 Forecasted Unspent/Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021	2022 PA Spending Budget Request	2022 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement Request	2023 PA Spending Budget Request	2023 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2023 PA Revenue Requirement Request
SCE-13-L-002		Energy Leader Partnership Program				\$ -	\$ 5,834,056	\$ -	\$ 209,736	\$ 3,682,507	\$ -	\$ 3,682,507	\$ 102,888	\$ -	\$ 102,888
SCE-13-L-002Rollup	SCE-13-L-002Rollup	Energy Leader Partnership Program	Core PA	Public	0	\$ -	\$ -	\$ -	\$ 3,490	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-L-002A	SCE-13-L-002A	City of Beaumont Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-L-002B		City of Long Beach Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 44,528	\$ -	\$ 14,176	\$ 6,394	\$ 6,394	\$ 6,394	\$ 6,329	\$ -	\$ 6,329	
SCE-13-L-002C	SCE-13-L-002C	City of Redlands Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002D	SCE-13-L-002D	City of Santa Ana Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002E	SCE-13-L-002E	City of Simi Valley Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002F		Gateway Cities Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 227,909	\$ -	\$ 20,633	\$ 20,063	\$ 20,063	\$ 20,063	\$ 11,811	\$ -	\$ 11,811	
SCE-13-L-002G	SCE-13-L-002G	Community Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002H		Eastern Sierra Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002I	SCE-13-L-002I	Energy Leader Partnership Strategic Support	Core PA	Public	0	\$ -	\$ -	\$ 25,142	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002J		Desert Cities Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002K		Kern County Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002L		Orange County Cities Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 96,305	\$ -	\$ 10,654	\$ 39,751	\$ 39,751	\$ 39,751	\$ 14,730	\$ -	\$ 14,730	
SCE-13-L-002M		San Gabriel Valley Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 75,244	\$ -	\$ 6,593	\$ 10,452	\$ 10,452	\$ 10,452	\$ 5,464	\$ -	\$ 5,464	
SCE-13-L-002N		San Joaquin Valley Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ -	\$ -	\$ 10,410	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002O		South Bay Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 37,365	\$ -	\$ 12,752	\$ 20,624	\$ 20,624	\$ 20,624	\$ 15,877	\$ -	\$ 15,877	
SCE-13-L-002P		South Santa Barbara County Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 154,045	\$ -	\$ 15,195	\$ 15,395	\$ 15,395	\$ 15,395	\$ 7,906	\$ -	\$ 7,906	
SCE-13-L-002Q		Ventura County Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 180,402	\$ -	\$ 10,442	\$ 17,803	\$ 17,803	\$ 17,803	\$ 10,371	\$ -	\$ 10,371	
SCE-13-L-002R		Western Riverside Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ 10,586	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002S		High Desert Regional Energy Leader Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002T		West Side Community Energy Leader Partnership	Core PA	Public	Resource Acquisition	\$ 54,601	\$ -	\$ 19,488	\$ 13,541	\$ 13,541	\$ 13,541	\$ 11,138	\$ -	\$ 11,138	
SCE-13-L-002U	SCE-13-L-002U	Local Government Strategic Planning Pilot Program	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002V		North Orange County Cities	Core PA	Public	Resource Acquisition	\$ 40,113	\$ -	\$ 16,153	\$ 11,567	\$ 11,567	\$ 11,567	\$ 6,604	\$ -	\$ 6,604	
SCE-13-L-002W		San Bernardino Association of Governments	Core PA	Public	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002X	SCE-13-L-002X	Water Energy Nexus Program	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-002Y		Grandfathered Street Lights	Core PA	Public	Resource Acquisition	\$ 3,308,182	\$ -	\$ 7,946	\$ 3,490,683	\$ 3,490,683	\$ 3,490,683	\$ -	\$ -	\$ -	
SCE-13-L-003C		County of Los Angeles Energy Efficiency Partnership	Core PA	Public	Resource Acquisition	\$ 1,615,362	\$ -	\$ 26,076	\$ 36,234	\$ 36,234	\$ 36,234	\$ 12,658	\$ -	\$ 12,658	
SCE-13-L-003D		County of Riverside Energy Efficiency Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-003E		County of San Bernardino Energy Efficiency Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-003		Institutional and Government Core Energy Efficiency Partnership				\$ -	\$ 2,354,057	\$ -	\$ 359,309	\$ 959,134	\$ -	\$ 959,134	\$ 302,118	\$ -	\$ 302,118
SCE-13-L-003A		California Community Colleges Energy Efficiency Partnership	Core PA	Public	Resource Acquisition	\$ 282,314	\$ -	\$ 76,517	\$ 203,844	\$ 203,844	\$ 203,844	\$ 14,161	\$ -	\$ 14,161	
SCE-13-L-003B		California Dept. of Corrections and Rehabilitation EE Partnership	Core PA	Public	0	\$ 273,123	\$ -	\$ 140,951	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-003F		State of California Energy Efficiency Partnership	Core PA	Public	0	\$ 64,650	\$ -	\$ 41,032	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-003G		UC/CSU Energy Efficiency Partnership	Core PA	Public	Resource Acquisition	\$ 307,428	\$ -	\$ 9,189	\$ 228,867	\$ 228,867	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-003H	SCE-13-L-003H	Federals Energy Efficiency Partnership	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-L-003I		Public Sector Performance-Based Retrofit High Opportunity Program	Core PA	Public	Resource Acquisition	\$ 1,426,542	\$ -	\$ 91,620	\$ 526,423	\$ 526,423	\$ 526,423	\$ 287,957	\$ -	\$ 287,957	
		Residential Third Party Programs				\$ -	\$ 2,816,436	\$ -	\$ 1,224,370	\$ 12,615,039	\$ -	\$ 12,615,039	\$ 14,435,955	\$ -	\$ 14,435,955
SCE-13-TP-001		Comprehensive Manufactured Homes	Core PA	Residential	Resource Acquisition	\$ 2,281,556	\$ -	\$ 849,839	\$ 4,674,335	\$ 4,674,335	\$ 4,674,335	\$ 4,564,818	\$ -	\$ 4,564,818	
SCE-13-TP-024		AB793 Residential Pay for Performance	Core PA	Residential	Market Support	\$ 534,880	\$ -	\$ 374,531	\$ 160,089	\$ 160,089	\$ 160,089	\$ 211,197	\$ -	\$ 211,197	
SCE-13-TP-026		Residential 3P Solicitation	Local Third Party	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ 7,290,251	\$ 7,290,251	\$ 7,290,251	\$ 9,147,859	\$ -	\$ 9,147,859	
SCE-13-TP-026 SCE		Residential 3P Solicitation SCE Cost	Core PA	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ 490,364	\$ 490,364	\$ 490,364	\$ 512,081	\$ -	\$ 512,081	
		Commercial Third Party Programs				\$ -	\$ 212,765	\$ -	\$ 425,866	\$ 58,183,660	\$ -	\$ 58,183,660	\$ 32,867,362	\$ -	\$ 32,867,362
SCE-13-TP-002	SCE-13-TP-002	Cool Planet	Core PA	Commercial	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-003	SCE-13-TP-003	Healthcare EE Program	Core PA	Commercial	0	\$ 81,321	\$ -	\$ 71,396	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-004	SCE-13-TP-004	Data Center Energy Efficiency	Core PA	Commercial	0	\$ 34,903	\$ -	\$ 13,495	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-005	SCE-13-TP-005	Lodging EE Program	Core PA	Commercial	0	\$ -	\$ -	\$ 474	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-013	SCE-13-TP-013	Cool Schools	Core PA	Commercial	0	\$ -	\$ -	\$ 474	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-014	SCE-13-TP-014	Commercial Utility Building Efficiency	Core PA	Commercial	0	\$ -	\$ -	\$ 474	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-017	SCE-13-TP-017	Energy Efficiency for Entertainment Centers	Core PA	Commercial	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-018	SCE-13-TP-018	School Energy Efficiency Program	Core PA	Public	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-021	SCE-13-TP-021	Enhanced Retrocommissioning	Core PA	Commercial	Resource Acquisition	\$ 10,152	\$ -	\$ 337,254	\$ 125,098	\$ 125,098	\$ 125,098	\$ 35,380	\$ -	\$ 35,380	
SCE-13-TP-027		Commercial 3P Solicitation	Local Third Party	Commercial	Resource Acquisition	\$ -	\$ -	\$ -	\$ 54,407,342	\$ 54,407,342	\$ 54,407,342	\$ 31,041,486	\$ -	\$ 31,041,486	
SCE-13-TP-027 SCE		Commercial 3P Solicitation SCE Cost	Core PA	Commercial	Resource Acquisition	\$ -	\$ -	\$ -	\$ 3,544,706	\$ 3,544,706	\$ 3,544,706	\$ 1,685,067	\$ -	\$ 1,685,067	
SCE-13-TP-025		Facility Assessment Program	Core PA	Commercial	Resource Acquisition	\$ 86,389	\$ -	\$ 2,299	\$ 106,514	\$ 106,514	\$ 106,514	\$ 105,429	\$ -	\$ 105,429	
		Industrial Third Party Programs				\$ -	\$ 132,737	\$ -	\$ 364,610	\$ 8,061,113	\$ -	\$ 8,061,113	\$ 8,933,970	\$ -	\$ 8,933,970
SCE-13-TP-006	SCE-13-TP-006	Food & Kindred Products	Core PA	Industrial	0	\$ 84,042	\$ -	\$ 76,032	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-007	SCE-13-TP-007	Primary and Fabricated Metals	Core PA	Industrial	Resource Acquisition	\$ 48,695	\$ -	\$ 368,061	\$ 55,908	\$ 55,908	\$ 55,908	\$ 111,941	\$ -	\$ 111,941	
SCE-13-TP-008	SCE-13-TP-008	Nonmetallic Minerals and Products	Core PA	Industrial	Resource Acquisition	\$ -	\$ -	\$ (129,924)	\$ 61,189	\$ 61,189	\$ 61,189	\$ 67,009	\$ -	\$ 67,009	
SCE-13-TP-009	SCE-13-TP-009	Comprehensive Chemical Products	Core PA	Industrial	0	\$ -	\$ -	\$ 474	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-010	SCE-13-TP-010	Comprehensive Petroleum Refining	Core PA	Industrial	Resource Acquisition	\$ -	\$ -	\$ 7,748	\$ 34,561	\$ 34,561	\$ 34,561	\$ 35,380	\$ -	\$ 35,380	
SCE-13-TP-011	SCE-13-TP-011	Oil Production	Core PA	Industrial	0	\$ -	\$ -	\$ 15,063	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-012	SCE-13-TP-012	Refinery Energy Efficiency Program	Core PA	Industrial	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-023	SCE-13-TP-023	Midsize Industrial Customer Program	Core PA	Industrial	0	\$ -	\$ -	\$ 27,156	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SCE-13-TP-028		Industrial 3P Solicitation	Local Third Party	Industrial	Resource Acquisition	\$ -	\$ -	\$ -	\$ 2,905,001	\$ 2,905,001	\$ 2,905,001	\$ 3,297,987	\$ -	\$ 3,297,987	
SCE-13-TP-028 SCE		Industrial 3P Solicitation SCE Cost	Core PA	Industrial	Resource Acquisition	\$ -	\$ -	\$ -	\$ 5,004,454	\$ 5,004,454	\$ 5,004,454	\$ 5,421,653	\$ -	\$ 5,421,653	

New/Existing Program #	Discontinued Program #	Program Name	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds ⁶	2021 Authorized Budget	2021 Forecasted Unspent/Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021	2022 PA Spending Budget Request	2022 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement Request	2023 PA Spending Budget Request	2023 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2023 PA Revenue Requirement Request
Cross Cutting Third Party Programs															
SCE-13-TP-019	SCE-13-TP-019	Sustainable Communities	Core PA	Residential	0	\$ -	\$ 44,849	\$ -	\$ (6,102)	\$ 1,500,626	\$ -	\$ 1,500,626	\$ 451,856	\$ -	\$ 451,856
SCE-13-TP-020	SCE-13-TP-020	IDEEA365 Program	Core PA	Commercial	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE-13-TP-022		Water Infrastructure Systems Energy Efficiency Program	Core PA	Public	Resource Acquisition	\$ -	\$ 44,849	\$ -	\$ (6,102)	\$ 1,500,626	\$ -	\$ 1,500,626	\$ 451,856	\$ -	\$ 451,856
Statewide/Competitive 3TP Program															
SCE 3P 2020RCI 001		Enveree Marketplace	Local Third Party	Residential	Resource Acquisition	\$ -	\$ 66,288,791	\$ -	\$ 4,349,950	\$ 152,886,090	\$ -	\$ 152,886,090	\$ 250,075,403	\$ -	\$ 250,075,403
SCE 3P 2020RCI 001 SCE		Enveree Marketplace - SCE Setup Costs	Core PA	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 5,033,060	\$ -	\$ 5,033,060	\$ 6,567,285	\$ -	\$ 6,567,285
SCE 3P 2020RCI 002		Residential Behavioral Program	Local Third Party	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 301,985	\$ -	\$ 301,985	\$ 390,708	\$ -	\$ 390,708
SCE 3P 2020RCI 002 SCE		Residential Behavioral Program - SCE Setup Costs	Core PA	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 10,537,584	\$ -	\$ 10,537,584	\$ 12,890,188	\$ -	\$ 12,890,188
SCE 3P 2020RCI 003		Commercial Behavioral Program	Local Third Party	Commercial	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 622,686	\$ -	\$ 622,686	\$ 755,892	\$ -	\$ 755,892
SCE 3P 2020RCI 003 SCE		Commercial Behavioral Program - SCE Setup Costs	Core PA	Commercial	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,415,385	\$ -	\$ 2,415,385
SCE 3P 2020RCI 004		Comprehensive Multifamily Program	Local Third Party	Residential	Resource Acquisition	\$ -	\$ 6,321,840	\$ -	\$ 97,038	\$ 10,978,266	\$ -	\$ 10,978,266	\$ 18,508,997	\$ -	\$ 18,508,997
SCE 3P 2020RCI 004 SCE		Comprehensive Multifamily Program SCE Costs	Core PA	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 649,834	\$ -	\$ 649,834	\$ 1,086,055	\$ -	\$ 1,086,055
SCE 3P 2020RCI 005		Comprehensive Commercial Program	Local Third Party	Commercial	Resource Acquisition	\$ -	\$ 36,252,000	\$ -	\$ 126,776	\$ 54,966,189	\$ -	\$ 54,966,189	\$ 87,943,764	\$ -	\$ 87,943,764
SCE 3P 2020RCI 005 SCE		Comprehensive Commercial Program SCE Costs	Core PA	Commercial	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 3,247,593	\$ -	\$ 3,247,593	\$ 5,156,893	\$ -	\$ 5,156,893
SCE 3P 2020RCI 006		Comprehensive Industrial Program	Local Third Party	Industrial	Resource Acquisition	\$ -	\$ 3,402,600	\$ -	\$ 61,795	\$ 13,955,693	\$ -	\$ 13,955,693	\$ 37,330,852	\$ -	\$ 37,330,852
SCE 3P 2020RCI 006 SCE		Comprehensive Industrial Program SCE Costs	Core PA	Industrial	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 826,442	\$ -	\$ 826,442	\$ 2,190,907	\$ -	\$ 2,190,907
SCE-13-TP-029		Local Public Sector 3P Solicitation	Local Third Party	Public	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 5,181,133	\$ -	\$ 5,181,133	\$ 6,217,330	\$ -	\$ 6,217,330
SCE-13-TP-029 SCE		Local Public Sector 3P Solicitation SCE Costs	Core PA	Public	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 310,868	\$ -	\$ 310,868	\$ 373,071	\$ -	\$ 373,071
SCE-13-TP-030		Agriculture 3P Solicitation	Local Third Party	Agriculture	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 5,181,132	\$ -	\$ 5,181,132	\$ 6,217,359	\$ -	\$ 6,217,359
SCE-13-TP-030 SCE		Agriculture 3P Solicitation SCE Costs	Core PA	Agriculture	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ 310,868	\$ -	\$ 310,868	\$ 369,835	\$ -	\$ 369,835
Equity 1		Refrigerant Exchange Program	Local Third Party	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equity 1 SCE		Refrigerant Exchange Program SCE Costs	Core PA	Residential	Resource Acquisition	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equity 2		Fuel Sub Workforce Education & Training Program	Local Third Party	Commercial	Equity	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equity 2 SCE		Fuel Sub Workforce Education & Training Program SCE Costs	Core PA	Commercial	Equity	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equity 3		Residential Home Electrification Readiness Equity Program	Local Third Party	Residential	Equity	\$ -	\$ -	\$ -	\$ -	\$ 3,487,500	\$ -	\$ 3,487,500	\$ 6,975,000	\$ -	\$ 6,975,000
Equity 3 SCE		Residential Home Electrification Readiness Equity Program SCE Costs	Core PA	Residential	Equity	\$ -	\$ -	\$ -	\$ -	\$ 209,250	\$ -	\$ 209,250	\$ 418,500	\$ -	\$ 418,500
Equity 4		Small/Medium Business Electrification Readiness Equity Program	Local Third Party	Commercial	Equity	\$ -	\$ -	\$ -	\$ -	\$ 2,003,325	\$ -	\$ 2,003,325	\$ 5,000,000	\$ -	\$ 5,000,000
Equity 4 SCE		Small/Medium Business Electrification Readiness Equity Program SCE Costs	Core PA	Commercial	Equity	\$ -	\$ -	\$ -	\$ -	\$ 116,676	\$ -	\$ 116,676	\$ 297,422	\$ -	\$ 297,422
Equity 5		Public Equity Program	Local Third Party	Public	Equity	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equity 5 SCE		Public Equity Program SCE Costs	Core PA	Public	Equity	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCE SW NC Res mixed		SW Res Mixed New Construction	SW Third Party	Residential	Market Support	\$ -	\$ 1,697,674	\$ -	\$ -	\$ 608,186	\$ -	\$ 608,186	\$ 816,610	\$ -	\$ 816,610
SCE SW NC Res mixed PA		SW Res Mixed New Construction - SCE Costs	Core PA	Residential	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 11,132	\$ -	\$ 11,132	\$ 10,674	\$ -	\$ 10,674
SCE SW NC Res electric		SW Res New Construction	SW Third Party	Residential	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 1,297,933	\$ -	\$ 1,297,933	\$ 2,710,573	\$ -	\$ 2,710,573
SCE SW NC Res electric PA		SW Res New Construction - SCE Costs	Core PA	Residential	Market Support	\$ -	\$ 16,998	\$ -	\$ -	\$ 23,758	\$ -	\$ 23,758	\$ 35,430	\$ -	\$ 35,430
SCE SW NC NonRes Ag electric		SW Non Res Ag New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ 641,600	\$ -	\$ -	\$ 9,746	\$ -	\$ 9,746	\$ 97,870	\$ -	\$ 97,870
SCE SW NC NonRes Ag electric PA		SW Non Res Ag New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 178	\$ -	\$ 178	\$ 1,279	\$ -	\$ 1,279
SCE SW NC NonRes Com electric		SW Non Res Comm New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 44,440	\$ -	\$ 44,440	\$ 435,833	\$ -	\$ 435,833
SCE SW NC NonRes Com electric PA		SW Non Res Comm New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 813	\$ -	\$ 813	\$ 5,697	\$ -	\$ 5,697
SCE SW NC NonRes Ind electric		SW Non Res Ind New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 25,131	\$ -	\$ 25,131	\$ 241,916	\$ -	\$ 241,916
SCE SW NC NonRes Ind electric PA		SW Non Res Ind New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 460	\$ -	\$ 460	\$ 3,162	\$ -	\$ 3,162
SCE SW NC NonRes Pub electric		SW Non Res Pub New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 22,121	\$ -	\$ 22,121	\$ 212,611	\$ -	\$ 212,611
SCE SW NC NonRes Pub electric PA		SW Non Res Pub New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 405	\$ -	\$ 405	\$ 2,779	\$ -	\$ 2,779
SCE SW NC NonRes Res electric		SW Non Res Res New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 38,463	\$ -	\$ 38,463	\$ 378,801	\$ -	\$ 378,801
SCE SW NC NonRes Res electric PA		SW Non Res Res New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 704	\$ -	\$ 704	\$ 4,951	\$ -	\$ 4,951
SCE SW NC NonRes Ag mixed		SW Non Res Ag Mixed New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 30,678	\$ -	\$ 30,678	\$ 234,587	\$ -	\$ 234,587
SCE SW NC NonRes Ag mixed PA		SW Non Res Ag Mixed New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 562	\$ -	\$ 562	\$ 3,066	\$ -	\$ 3,066
SCE SW NC NonRes Com mixed		SW Non Res Comm Mixed New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 83,442	\$ -	\$ 83,442	\$ 828,270	\$ -	\$ 828,270
SCE SW NC NonRes Com mixed PA		SW Non Res Comm Mixed New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 1,527	\$ -	\$ 1,527	\$ 10,826	\$ -	\$ 10,826
SCE SW NC NonRes Ind mixed		SW Non Res Ind Mixed New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 105,927	\$ -	\$ 105,927	\$ 911,048	\$ -	\$ 911,048
SCE SW NC NonRes Ind mixed PA		SW Non Res Ind Mixed New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 1,939	\$ -	\$ 1,939	\$ 11,908	\$ -	\$ 11,908
SCE SW NC NonRes Pub mixed		SW Non Res Pub Mixed New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 25,106	\$ -	\$ 25,106	\$ 217,106	\$ -	\$ 217,106
SCE SW NC NonRes Pub mixed PA		SW Non Res Pub Mixed New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 460	\$ -	\$ 460	\$ 2,838	\$ -	\$ 2,838
SCE SW NC NonRes Res mixed		SW Non Res Res Mixed New Construction	SW Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ 70,353	\$ -	\$ 70,353	\$ 614,995	\$ -	\$ 614,995
SCE SW NC NonRes Res mixed PA		SW Non Res Res Mixed New Construction - SCE Costs	Core PA	Commercial	Market Support	\$ -	\$ 87,734	\$ -	\$ -	\$ 1,288	\$ -	\$ 1,288	\$ 8,039	\$ -	\$ 8,039

New/Existing Program #	Discontinued Program #	Program Name	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds ⁶	2021 Authorized Budget	2021 Forecasted Unspent/Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021	2022 PA Spending Budget Request	2022 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement Request	2023 PA Spending Budget Request	2023 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2023 PA Revenue Requirement Request	
SCE SW UL		CA Statewide Lighting Program	SW Third Party	Commercial	Resource Acquisition		\$ 3,002,688		\$ -	\$ 4,858,464		\$ 4,858,464	\$ 5,035,279	\$ -	\$ 5,035,279	
SCE SW UL PA		CA StateWide Lighting Program - SCE Costs	Core PA	Commercial	Resource Acquisition		\$ 180,161		\$ -	\$ 291,508		\$ 291,508	\$ 302,116	\$ -	\$ 302,116	
SCE SW IP Colleges		UC/CSU/CCC	SW Third Party	Public	Resource Acquisition		\$ -		\$ -	\$ 601,876		\$ 601,876	\$ 1,856,800	\$ -	\$ 1,856,800	
SCE SW IP Colleges PA		UC/CSU/CCC - SCE Costs	Core PA	Public	Resource Acquisition		\$ 24,724		\$ -	\$ 36,114		\$ 36,114	\$ 111,408	\$ -	\$ 111,408	
SCE SW IP Gov		Department of General Services	SW Third Party	Public	Resource Acquisition		\$ 133,667		\$ -	\$ 478,105		\$ 478,105	\$ 1,357,084	\$ -	\$ 1,357,084	
SCE SW IP Gov PA		Department of General Services - SCE Costs	Core PA	Public	Resource Acquisition		\$ 68,296		\$ -	\$ 8,751		\$ 8,751	\$ 17,738	\$ -	\$ 17,738	
SCE SW ETP Elec		ETP, electric	SW Third Party	Emerging Tech	Market Support		\$ -		\$ -	\$ 5,620,799		\$ 5,620,799	\$ 7,145,799	\$ -	\$ 7,145,799	
SCE SW ETP Elec PA		ETP, electric - SCE Costs	Core PA	Emerging Tech	Market Support		\$ -		\$ -	\$ 337,248		\$ 337,248	\$ 428,748	\$ -	\$ 428,748	
SCE SW FS		Food Service POS	SW Third Party	Commercial	Resource Acquisition		\$ 1,883,909		\$ 315,618	\$ 2,459,455		\$ 2,459,455	\$ 2,942,253	\$ -	\$ 2,942,253	
SCE SW FS PA		Food Service POS - SCE Costs	Core PA	Commercial	Resource Acquisition		\$ -		\$ -	\$ 45,019		\$ 45,019	\$ 38,458	\$ -	\$ 38,458	
SCE SW MCWH		Midstream Comm Water Heating	SW Third Party	Commercial	Resource Acquisition		\$ 1,994,489		\$ 334,143	\$ 2,356,330		\$ 2,356,330	\$ 2,767,294	\$ -	\$ 2,767,294	
SCE SW MCWH PA		Midstream Comm Water Heating - SCE Costs	Core PA	Commercial	Resource Acquisition		\$ -		\$ -	\$ 43,131		\$ 43,131	\$ 36,171	\$ -	\$ 36,171	
SCE SW PLA		Plug Load and Appliance	SW Third Party	Residential	Resource Acquisition		\$ 2,325,800		\$ -	\$ 4,726,989		\$ 4,726,989	\$ 4,895,934	\$ -	\$ 4,895,934	
SCE SW PLA PA		Plug Load and Appliance - SCE Costs	Core PA	Residential	Resource Acquisition		\$ 49,448		\$ -	\$ 86,524		\$ 86,524	\$ 63,994	\$ -	\$ 63,994	
SCE SW HVAC QIQM		Res HVAC QI/QM	SW Third Party	Residential	Market Support		\$ -		\$ -	\$ -		\$ -	\$ 2,213,520	\$ -	\$ 2,213,520	
SCE SW HVAC QIQM PA		Res HVAC QI/QM - SCE Costs	Core PA	Residential	Market Support		\$ -		\$ -	\$ -		\$ -	\$ 28,933	\$ -	\$ 28,933	
SCE SW HVAC Up		Upstream HVAC (Comm + Res)	SW Third Party	Commercial	Resource Acquisition		\$ 3,317,691		\$ 952,841	\$ 4,201,531		\$ 4,201,531	\$ 4,389,105	\$ -	\$ 4,389,105	
SCE SW HVAC Up PA		Upstream HVAC (Comm + Res) - SCE Costs	Core PA	Commercial	Resource Acquisition		\$ 84,883		\$ -	\$ 76,906		\$ 76,906	\$ 57,370	\$ -	\$ 57,370	
SCE SW WET Work		WE&T Career and Workforce Readiness	SW Third Party	WE&T	Market Support		\$ 395,332		\$ -	\$ 563,342		\$ 563,342	\$ 606,725	\$ -	\$ 606,725	
SCE SW WET Work PA		WE&T Career and Workforce Readiness - SCE Costs	Core PA	WE&T	Market Support		\$ -		\$ 10,312	\$ 10,312		\$ 7,930	\$ 7,930	\$ -	\$ 7,930	
SCE SW WET CC		WE&T K-12 Connections	SW Third Party	WE&T	Market Support		\$ 187,133		\$ -	\$ 320,800		\$ 320,800	\$ 320,800	\$ -	\$ 320,800	
SCE SW WET CC PA		WE&T K-12 Connections - SCE Costs	Core PA	WE&T	Market Support		\$ -		\$ -	\$ 5,872		\$ 5,872	\$ 4,193	\$ -	\$ 4,193	
SCE SW WP		Water/wastewater pumping	SW Third Party	Public	Resource Acquisition		\$ -		\$ -	\$ 601,876		\$ 601,876	\$ 1,856,800	\$ -	\$ 1,856,800	
SCE SW WP PA		Water/wastewater pumping - SCE Costs	Core PA	Public	Resource Acquisition		\$ -		\$ -	\$ 36,113		\$ 36,113	\$ 111,409	\$ -	\$ 111,409	
SCE SW CSA Appl		Codes & Standards Advocacy - State Appliance Standards Advocacy	SW Third Party	Codes & Standards	Codes & Standards		\$ 1,270,243		\$ 740,975	\$ 586,236		\$ 586,236	\$ 586,236	\$ -	\$ 586,236	
SCE SW CSA Appl PA		Codes & Standards Advocacy - State Appliance Standards Advocacy - SCE Costs	Core PA	Codes & Standards	Codes & Standards		\$ -		\$ -	\$ 54,324		\$ 54,324	\$ 52,751	\$ -	\$ 52,751	
SCE SW CSA Bldg		Codes & Standards Advocacy - State Building Codes Advocacy	SW Third Party	Codes & Standards	Codes & Standards		\$ 1,804,407		\$ 1,052,571	\$ 1,924,293		\$ 1,924,293	\$ 1,924,293	\$ -	\$ 1,924,293	
SCE SW CSA Bldg PA		Codes & Standards Advocacy - State Building Codes Advocacy - SCE Costs	Core PA	Codes & Standards	Codes & Standards		\$ -		\$ -	\$ 106,043		\$ 106,043	\$ 98,401	\$ -	\$ 98,401	
SCE SW CSA Natl		Codes & Standards Advocacy - National Codes & Standards Advocacy	SW Third Party	Codes & Standards	Codes & Standards		\$ 1,145,474		\$ 668,193	\$ 1,709,595		\$ 1,709,595	\$ 1,709,595	\$ -	\$ 1,709,595	
SCE SW CSA Natl PA		Codes & Standards Advocacy - National Codes & Standards Advocacy - SCE Costs	Core PA	Codes & Standards	Codes & Standards		\$ -		\$ -	\$ 65,371		\$ 65,371	\$ 57,593	\$ -	\$ 57,593	
		PA PROGRAM TOTAL					\$ 28,860,378	\$ 156,871,832	\$ 27,989,880	\$ 39,801,555	\$ 298,806,633	\$ 28,860,378	\$ 269,946,255	\$ 366,553,872	\$ 14,000,000	\$ 352,553,872
		EM&V (PA & ED Portions) Total														
SCE-3OV0100		EM&V - PA					\$ 1,797,490		\$ 412,238	\$ 3,423,826		\$ 3,423,826	\$ 4,200,096		\$ 4,200,096	
SCE-3OV0200		EM&V - ED ¹					\$ 5,359,793		\$ 1,625	\$ 9,735,686		\$ 9,735,686	\$ 11,755,051		\$ 11,755,051	
		EM&V TOTAL					\$ 7,157,283		\$ 413,863	\$ 13,159,512	\$ -	\$ 13,159,512	\$ 15,955,147	\$ -	\$ 15,955,147	
		PA Program and EM&V Total					\$ 28,860,378	\$ 164,029,115	\$ 27,989,880	\$ 40,215,418	\$ 311,966,145	\$ 28,860,378	\$ 283,105,767	\$ 382,509,019	\$ 14,000,000	\$ 368,509,019
		CEC AB 841 Program Budget--IOU PA only														
		Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget ³								\$ 87,119,631	\$ -	\$ 87,119,631	\$ 74,673,970	\$ -	\$ 74,673,970	
		IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance								\$ 27,989,880	\$ 27,989,880	\$ -	\$ -	\$ -	\$ -	
		CEC AB 841 Total								\$ 115,109,511	\$ 27,989,880	\$ 87,119,631	\$ 74,673,970	\$ -	\$ 74,673,970	
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)					\$ 28,860,378	\$ 164,029,115	\$ 27,989,880	\$ 40,215,418	\$ 427,075,656	\$ 56,850,258	\$ 370,225,398	\$ 457,182,989	\$ 14,000,000	\$ 443,182,989
		Financing Pilot Programs														
										\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
										\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
										\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
										\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
										\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		Financing Pilot Programs Total					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		ME&O & ESA														
		ME&O ²								\$ 6,327,696	\$ 6,327,696	\$ 6,327,696	\$ 6,327,696	\$ -	\$ 6,327,696	
		ESA ³								\$ 58,773,576	\$ 58,773,576	\$ 69,127,408	\$ 69,127,408	\$ -	\$ 69,127,408	
										\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

1. Included 3C REN EM&V ED budget (PY 2022 - \$96,511 and PY 2023 - \$126,509), REN EM&V ED budget (PY 2022 - \$613,702 and PY 2023 - \$585,429)
2. ME&O requested budget for 2021 per AL 4371-E
3. ESA budget per Decision D.21-06-015

Table 5: 2021 Request and 2013-2020 Authorized

Accrued funds not yet spent	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
Category			
2017 to date EM&V Funds	\$12,031,870		\$12,031,870
2017 to date Program Funds - Utility	\$2,704,628		\$2,704,628
2017 to date Program Funds - REN			\$0
2017 to date Program Funds - CCA			\$0
2018 to date EM&V Funds	\$9,037,652		\$9,037,652
2018 to date Program Funds - Utility	\$3,070,947		\$3,070,947
2018 to date Program Funds - REN			\$0
2018 to date Program Funds - CCA			\$0
2019 to date EM&V Funds	\$9,044,150		\$9,044,150
2019 to date Program Funds - Utility	\$10,512,030		\$10,512,030
2019 to date Program Funds - REN			\$0
2019 to date Program Funds - CCA			\$0
2020 to date EM&V Funds	\$5,572,474		\$5,572,474
2020 to date Program Funds - Utility	\$12,033,280		\$12,033,280
2020 to date Program Funds - REN			\$0
2020 to date Program Funds - CCA			\$0
2021 to date EM&V Funds	\$6,743,420		\$6,743,420
2021 to date Program Funds - Utility	\$70,743,219		\$70,743,219
2021 to date Program Funds - REN	\$7,690,226		\$7,690,226
2021 to date Program Funds - CCA			\$0

Attachment D

Supplemental Budget Information Pursuant
to D.18-05-041, OP #44
(Meet and Confer Budget Tables)

I.
**NARRATIVE DESCRIPTION OF SCE'S ORGANIZATIONS
SUPPORTING ITS EE PORTFOLIO**

A. Description of SCE's Organizations Supporting Its EE Portfolio

Pursuant to Decision (D.)18-05-041, Ordering Paragraph 44, the California Public Utilities Commission (Commission) directs Program Administrators (PAs) to include updated budget estimates, starting with the PAs' 2020 Annual Budget Advice Letter (ABAL), in the same format as the supplemental budget information filed in the Business Plan Proceeding.¹ The following sections and responses were provided in SCE's Business Plan Supplemental Budget Filing, including functions conducted by each organization, organization charts, staffing needs by organization, non-program functions performed by contractors, anticipated cost drivers, and explanation of forecasting cost method. SCE has updated its information and responses and provides its supplemental budget information below.

1. Functions Conducted by Each Organization

Multiple functions are performed to support SCE's EE portfolio, including program management; engineering services; marketing; planning; compliance; contract management; and evaluation, measurement, and verification (EM&V). These functions are performed by employees in various SCE organizations as well as contractors to those organizations (discussed in Section 4 hereof). To aid parties' understanding of the functions performed by each SCE organization, SCE has included in Appendix B of this Attachment D the function descriptions performed by each respective organization that supports its EE portfolio. As SCE shifts funding and programs to third-parties, SCE's labor will adjust to meet the portfolio and third-party needs. While SCE has realized a reduction in overall staffing levels, SCE will retain its role in overseeing administration of the portfolio, manage the close-out of previous program commitments, and manage the necessary labor for the remaining IOU operated programs.

2. Management Structure and Organization Charts

As described above, multiple internal organizations support SCE's EE portfolio, including SCE's Customer Programs and Services organization (CP&S), Business Customer Division (BCD), Customer Service Operations Division (CSOD), and Regulatory Affairs. SCE provides its organization chart for those organizations in Appendix A of this Attachment D. In general, SCE's chief executive officer, president, and vice-presidents do not directly charge the EE balancing account. However, these positions have been included in the organization charts to show line-of-sight from SCE employees to executive management. In addition, certain other support organizations do not charge to the EE balancing account and have therefore been excluded. These

¹ The supplemental budget information was filed in A.17-01-013 et al. on June 12, 2017.

organizations include Finance, Legal, and Information Technology. The positions included in SCE's organization charts in Appendix A include SCE employees that charged to the EE balancing account as of September 2021. The organization charts exclude contingent workers, vacancies, and employees on leave of absence, interns, and service maintenance providers.

3. Staffing Needs by Organization

Full Time Equivalents (FTEs) are a unit of measure showing how many employees SCE has performing work on a full-time schedule. In 2020, 198 FTEs supported SCE's EE portfolio. In 2022, SCE forecasts 170 FTEs to support its EE portfolio. Note that forecasting FTEs that will support SCE's EE portfolio has some uncertainty because solicitations for new third-party programs are not complete at this time.

The headcount amounts provided in the organization charts provided in Appendix A will not reconcile to FTE amounts provided in Appendix B of this Attachment D. Headcount is different than FTE. The headcount information in the organization charts represents SCE employees only and does not include contingent workers, supplemental workers, vacancies, employees on leave of absence, interns, and service maintenance providers. The organization charts also show positions that charge a portion of their time to EE.

4. Non-Program Functions Performed by Contractors

Currently, contractors (e.g., advisory consultants) perform the functions listed below. However, none of the following functions are fully "outsourced" to contractors; rather, contractors supplement SCE employees in performing such functions.

1. Strategic planning support
2. Program and portfolio support
3. Regulatory, legal, and compliance support
4. Policy support
5. Project management support
6. Program or pilot planning and support
7. Engineering support or other technical services

SCE anticipates that in 2022 and 2023 contractors (e.g., advisory consultants) will perform similar functions to those described above; however, contractors' work may shift (i.e., away from program planning) or decrease as more programs are proposed, designed, and implemented by third parties.

5. Anticipated Cost Drivers of In-House Cost Changes by Organization

The primary drivers of administrative and implementation costs for programs are the number and type of programs offered. SCE currently offers and reports on dozens

of programs in its EE portfolio. Each program requires a certain level of staffing based on the program delivery method. For example, an upstream program that targets large manufacturers will have minimal administrative and implementation costs. However, a downstream program that targets many customers that require a high level of interaction between program staff, engineers, vendors, and other PAs will have high administrative and implementation costs. Other more complex programs, or those that involve mass market, will require more significant sales and marketing support.

SCE has incorporated significant efficiencies in its portfolio over the last several years (see Table 9: Administrative Cost Comparison in the ABAL). SCE will continue to refine its labor needs to achieve efficiencies based on experience with new and innovative programs offered by third parties in the marketplace. Additionally, SCE anticipates that the new statewide administration of EE programs may yield additional efficiencies; however, because the new statewide administration model is in its early years of operation, SCE does not yet know how administrative costs for these programs will be affected.

SCE will be transitioning as much of its portfolio as possible to third-party implementers to achieve the requirement that at least 60 percent of the portfolio be proposed, designed, and delivered by third parties by the end of 2022. As the transition to the statewide and third-party model is still in its early stages, it is difficult to forecast exactly how administrative and implementation costs will vary over time. SCE is also aware there are significant cost impacts in the marketplace that could place upward pressure on costs. For example, increasing review costs and declining measures have made it harder for vendors to deliver results.

The anticipated major cost drivers of in-house cost changes are:

1. Number and type of programs funded;
2. SCE-implemented compared to third-party-implemented programs;
3. New 2022 and 2023 savings and demand reduction goals based on Commission D.21-09-037, the Decision Adopting Energy Efficiency Goals for 2022-2032;
4. Cost for new programs launched through the third-party solicitation process;
5. Cost to administer statewide programs;
6. Legislative mandates that require new or increased funding to implement; and
7. Number of data requests or need for additional reporting requirements.

6. Explanation of Method for Forecasting Costs

As SCE's transition period to a third-party designed and delivered model begins, a majority of its budget forecast for 2022 and 2023 will be determined by the third-party implementers. The costs associated with third-party implementers are defined by the terms of their contracts and standard reporting practices. Implementers utilize their

associated budgets to update their forecast to reflect updated inputs such as corrections to the 2020 Avoided Cost Calculator. SCE aggregates third-party projections with statewide and SCE operated programs to present an overall portfolio and associated costs. Statewide programs' associated costs are developed by the lead IOU and their third-party implementer and are disseminated to non-lead IOUs to include in their forecasts. Finally, SCE optimized its remaining energy efficiency portfolio. SCE's portfolio optimization process included activities such as: optimizing all measures and programs to maximize savings and cost-effectiveness, eliminating or reducing non-cost-effective programs, minimizing gaps in the market, and reducing SCE administrative costs. SCE's role in 2022 and 2023 will be increasingly focused on the administration of the local and statewide third party implemented programs.

B. FTEs by Organization

SCE's FTEs supporting its EE portfolio by organization for 2020 recorded and 2022 and 2023 forecasted is provided in Appendix B.

C. Costs by Functional Area of Management Structure

Expenses broken out by functional area of management structure are provided in Appendix B.

D. Cost Drivers Across the EE Organization

Cost drivers across SCE's EE organization are included in the discussion in Section A.5. of this Attachment D.

E. Allocation of Labor and O&M Costs

All EE-related time for employees working on EE is tracked through internal orders or distributed cost centers (EE cost objects) that settle costs to internal orders, which are assigned to an account grouping for EE. The portion of an employee's time is allocated to those orders, and therefore to the Public Purpose Programs, based on the time spent by the employee working on tasks related to the EE portfolio of programs. All time sheets for hourly employees and some salaried employees are approved by the employee's manager. For other salaried employees, their time is allocated to EE cost objects on a pre-established basis determined by their manager based on the expected time to be spent on tasks related to EE for the year. These allocations are reviewed periodically as well as when employees' positions and responsibilities change. SCE's SAP system allows for timekeeping increments of 15 minutes. Time sheets and pre-established accounting for EE-related tasks described above are the basis for determining the appropriate EE and non-EE labor costs.

SCE labor costs charged against EE rates include paid time off but are not loaded with benefits. SCE's benefits burden is collected through General Rate Case (GRC) rates; however, SCE does include employee benefits cost in its cost-effectiveness calculations. They are currently reported and filed in the CPUC's California Energy Data and Reporting System (CEDARS) as a separate program.

Non-labor resource costs are allocated to EE and non-EE activity similarly to labor costs, by time for tasks completed. Non-labor resources such as events, conferences, or marketing campaigns may be allocated based on the agenda or topics covered. These costs may include activities that are supported through GRC or other rates.

All costs related to EE rates are recorded separately from those related to GRC rates and are not included in determining the forecasts for the GRC.

II.

UPDATED BUDGET TABLES PROVIDED IN SCE'S JUNE 12, 2017 SUPPLEMENTAL BUDGET INFORMATION

On June 12, 2017, SCE provided certain information regarding SCE's proposed budgets in its Business Plan Application (A.17-01-013 et al). SCE provides updates to that information identified below:

A. Energy Savings Targets and Expenditures

See Attachment A of SCE's PY 2022 and 2023 ABAL which contains the table summarizing energy savings targets and expenditures by sector.

B. In-House Budget by Sector and Cross-Cutting Program

Using the agreed upon template, SCE provides information pertaining to how much of each year's budget SCE anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program in Appendix B of this Attachment D.

C. Solicitation Schedule

In Appendix C, SCE provides its anticipated solicitation schedule by calendar year and quarter. Consistent with the Commission's direction, statewide program budgets will be determined by the funding PAs based on the savings potential in their respective service territories, Commission-approved goals, historical budgets, and their influence on overall portfolio cost-effectiveness. For existing statewide programs, the Lead-PA uses their historic program budget levels to conduct statewide program solicitations. For new statewide programs, the budget will be determined based on each PA's overall portfolio cost-effectiveness analysis and the Commission-approved goals. These budgets will be adjusted and finalized by each PA, based on the results of the

solicitations, to arrive at the annual statewide program budgets. Consistent with the Rolling Portfolio approach, the statewide program budgets may change over the life of the Business Plan. Any budget updates will be presented in the ABAL.

D. Statewide Aggregate Budgets for Each Statewide Program

See Attachment F for the requested information.

AL 4068-E Attachment D – Appendix A
SCE Organizational Charts

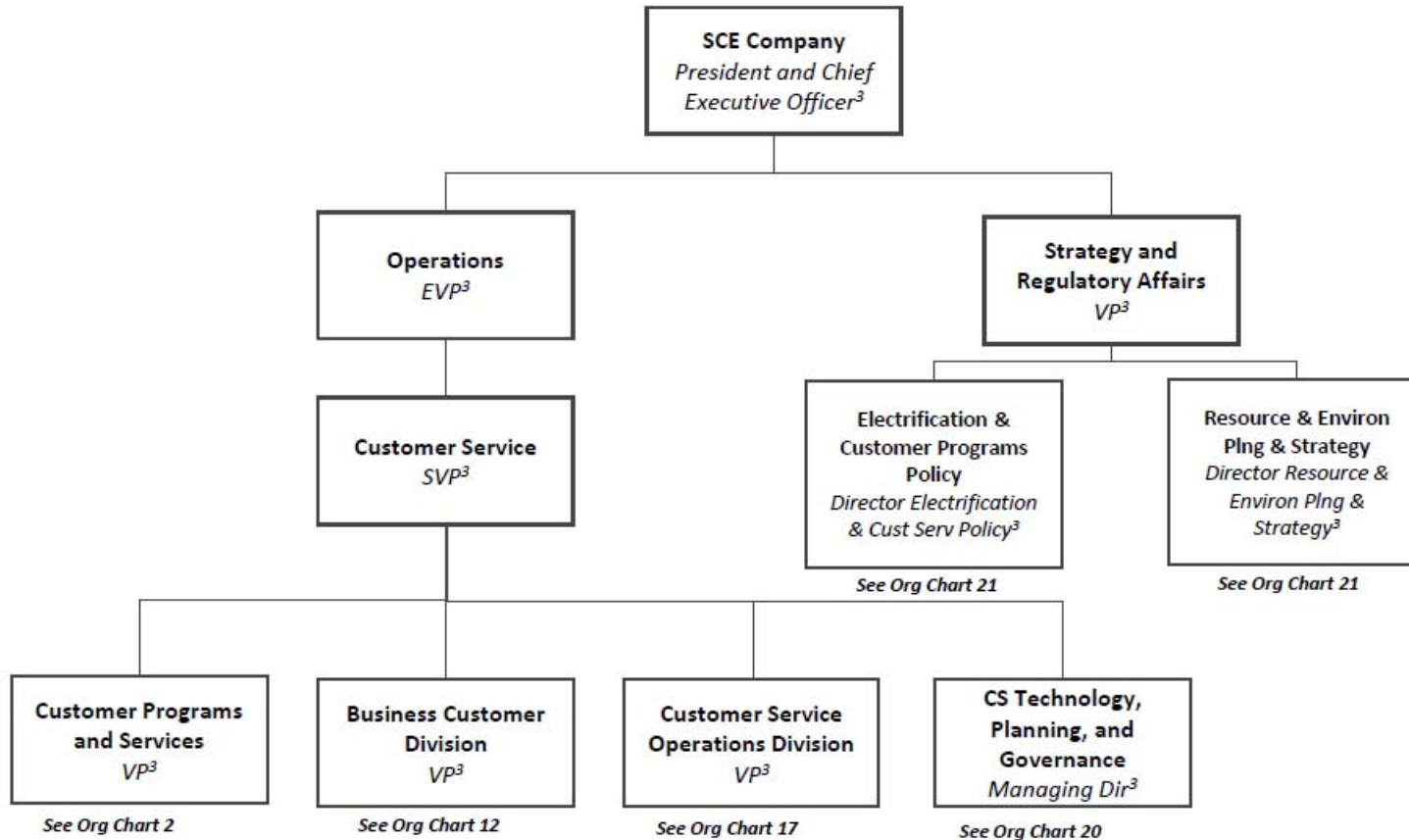
SCE Energy Efficiency Organization Charts

Org Chart #	Organization Chart Description
1	Southern California Edison Company
2	Customer Programs and Services
3	Customer Programs and Services – Advanced Energy Solutions
4	Customer Programs and Services – Advanced Energy Solutions – Energy Efficiency Products
5	Customer Programs and Services – Advanced Energy Solutions – Portfolio Development & Compliance
6	Customer Programs and Services – Advanced Energy Solutions – DSM Operational & Technical Support
7	Customer Programs and Services – Advanced Energy Solutions – Engineering Services
8	Customer Programs and Services – Customer Experience
9	Customer Programs and Services – Community & Climate Equity
10	Customer Programs and Services – eMobility & Building Electrification
11	Customer Programs and Services – Regulatory Strategy & Planning
12	Business Customer Division
13	Business Customer Division – Commercial and Industrial
14	Business Customer Division – Government, Institution, Agriculture, & Water
15	Business Customer Division – Energy Analysis & Customer Outreach
16	Business Customer Division – BCD Operations
17	Customer Service Operations Division
18	Customer Service Operations Division – Customer Contact Center
19	Customer Service Operations Division – Customer Contact Center
20	Customer Service – Technology, Planning, and Governance
21	Regulatory Affairs

Southern California Edison Company

SCE EE Organization Chart 1

Organization Chart Headcount: 309^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

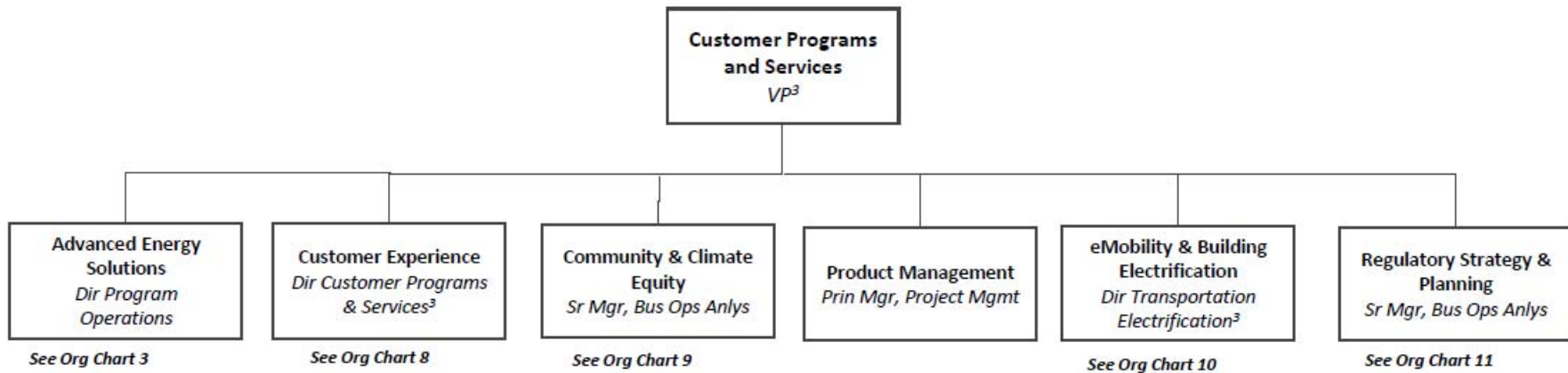
Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Programs & Services

SCE EE Organization Chart 2

Summary Function Description: Manages the DSM Program Management, Business DSM Programs, Product Development and Division Management, Customer Insights and Measurement & Evaluation, Customer Engagement, and Information Governance & Analytics, Measurement and Evaluation groups.
Organization Chart Headcount: 140^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Programs & Services

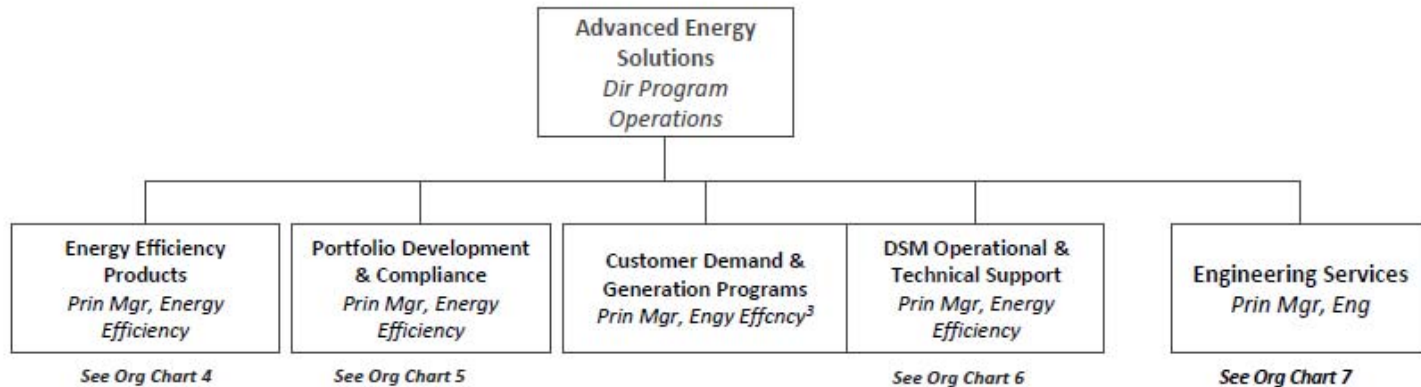
Advanced Energy Solutions

Functional Category: Program Management and Delivery

Detailed Definition: 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 QJ); 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

Summary Function Description: Provides DSM program management, including program planning, design, implementation, compliance, reporting and technical operations/support.

Organization Chart Headcount: 108^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Programs & Services

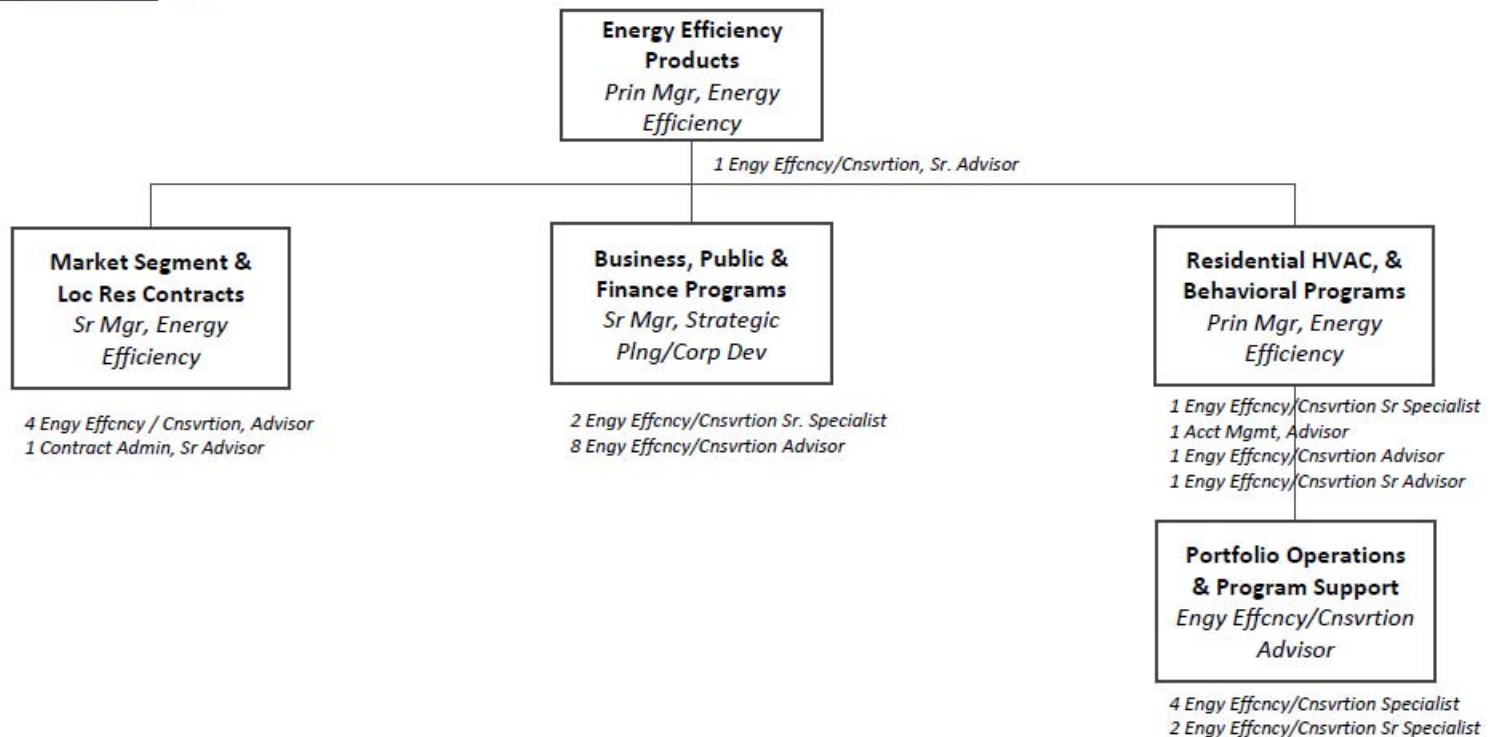
Energy Efficiency Products

Functional Category: Program Management and Delivery

Detailed Definition: 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

Summary Function Description:

Organization Chart Headcount: 30^{1,2}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Customer Programs & Services

SCE EE Organization Chart 5

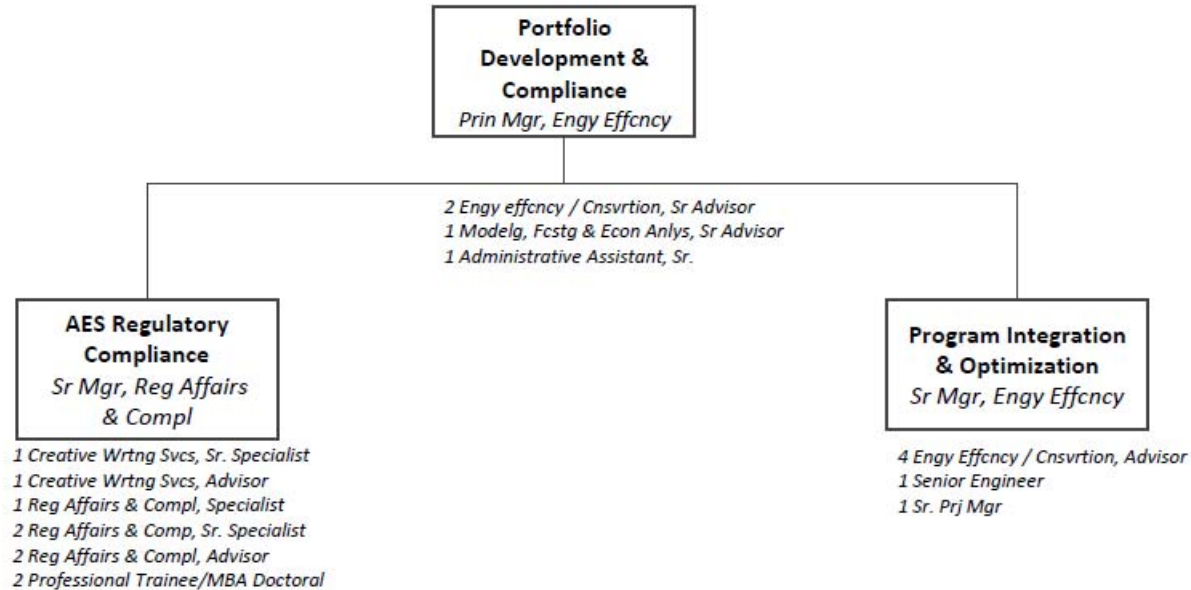
Portfolio Development & Compliance

Functional Category: Program Management and Delivery

Detailed Definition: 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

Summary Function Description:

Organization Chart Headcount: 22^{1,2}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Customer Programs & Services

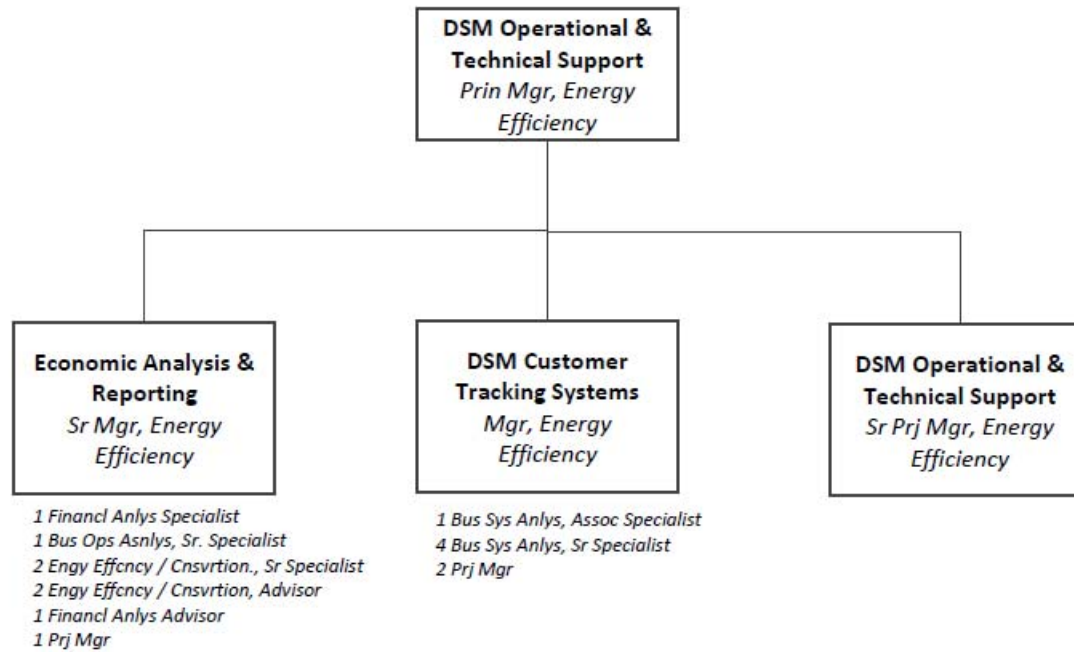
DSM Operational & Technical Support

Functional Category: Program Management and Delivery

Detailed Definition: 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

Summary Function Description:

Organization Chart Headcount: 19^{1,2}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Customer Programs & Services

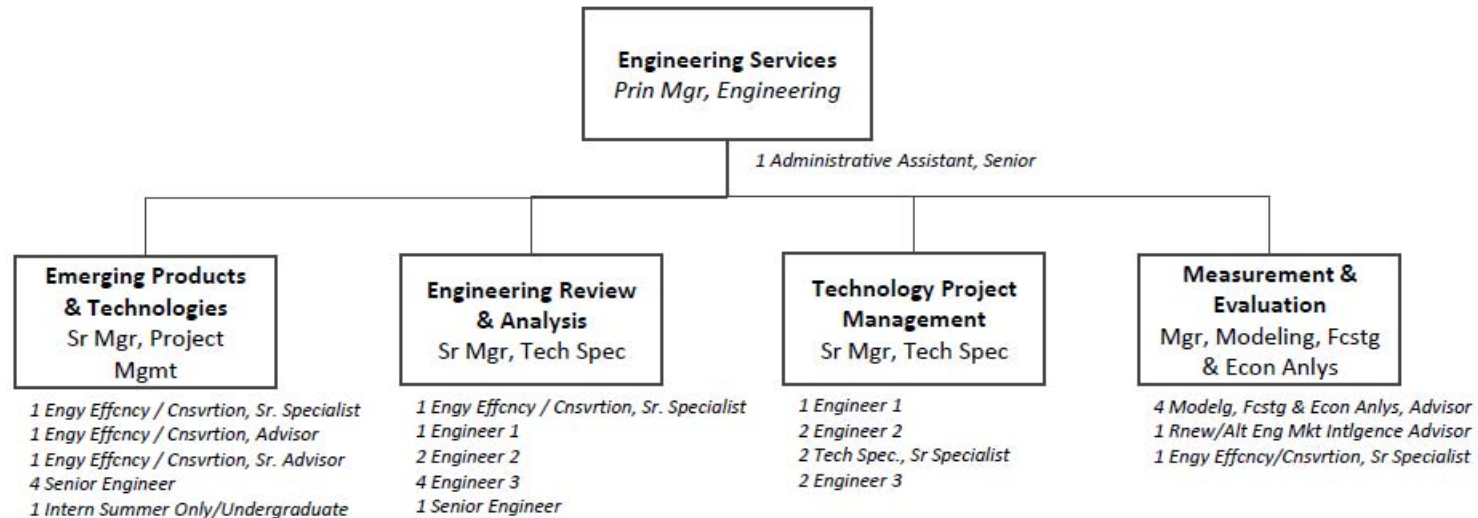
Engineering Services

Functional Category: Program Management and Delivery

Detailed Definition: 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

Summary Function Description: Manages and operates SCE’s business EE programs, including SCE’s Core and Finance Programs, HVAC & Technical Services, and Market Segment & Local Resource Contracts.

Organization Chart Headcount: 36^{1,2}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Customer Programs & Services

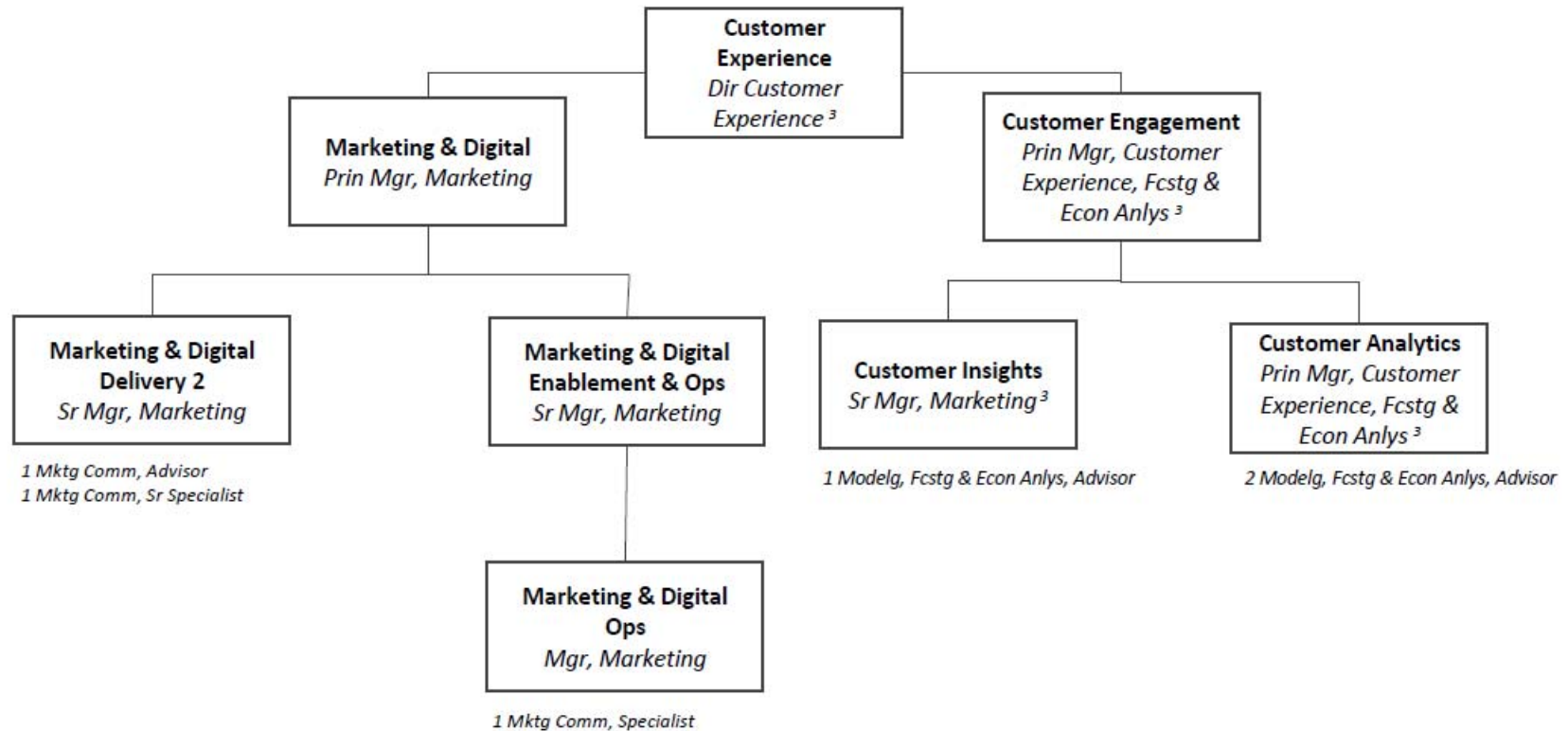
Customer Experience

Functional Category: Marketing

Detailed Definition: Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization

Summary Function Description: Engages customers with information related to EE programs using a mix of delivery channels and marketing communication campaigns.

Organization Chart Headcount: 10^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

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Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Programs & Services

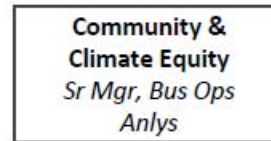
Community & Climate Equity

Functional Category: Community and Customer Engagement

Detailed Definition: The Community and Climate Equity team in Customer Program and Services is responsible for Regional / Neighborhood Delivery & Acquisition, Stakeholder Coordination & Support, and Customer & Community Demonstration Projects. This will be achieved by informing, educating, and engaging hard-to-reach populations to influence and increase the acquisition of energy solutions where a gap or divide exists, promoting inclusion and equity in achieving our Pathway 2045 goals, and creating a sustainable future for all customers within SCE's service area.

Summary Function Description: Tracks all data requests and engagement strategies targeting customer segments and community-based organization partnerships supporting energy efficiency programs. Develops and maintains a strong community network to develop and manage localized, high-impact/high visibility community and external engagement strategies for customer education and adoption on energy efficiency programs focused on promoting inclusion and equity.

Organization Chart Headcount: 2^{1,2}



1 Trade Shows/Events, Specialist

Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Customer Programs & Services

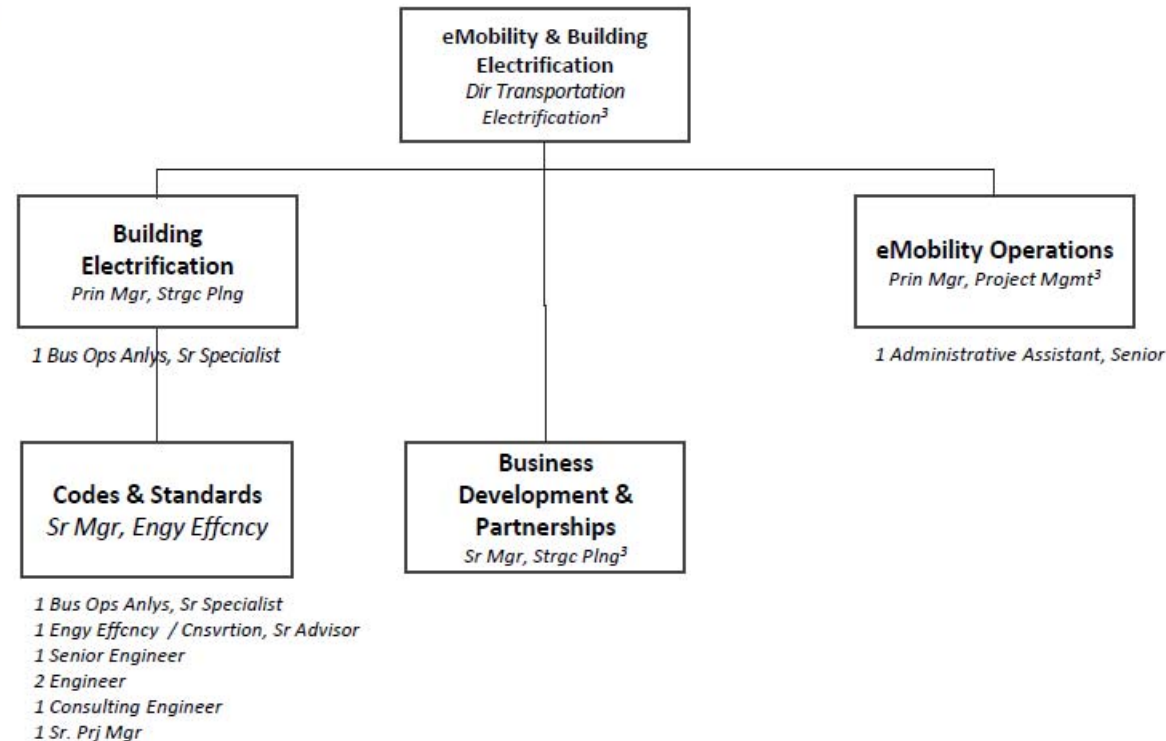
eMobility & Building Electrification

Functional Category: Product Management and Delivery

Detailed Definition: Electrification is responsible for SCE’s eMobility (transportation electrification) and building electrification portfolio, including the planning, strategy development, and execution of electrification implementation activities, including those driven by codes & standards, across the company. Provides the vision and leadership necessary to establish and maintain a coordinated approach to electrification technology advancements that will inform SCE’s views of the utility of the future. Responsible for short-and long-range planning of electrification programs to ensure that required resources (human, material, and equipment) are available to achieve program objectives, strategies and goals. Responsible for leading and managing cross-functional project teams comprised of personnel from customer service, environmental affairs, regulatory, planning, local/state/federal public affairs and distribution operations.

Summary Function Description: Drives the availability and adoption of new eMobility and building electrification customer solutions that promote decarbonization and a clean energy future.

Organization Chart Headcount: 11^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from “Organization Chart Headcount”.

Customer Programs & Services

SCE EE Organization Chart 11

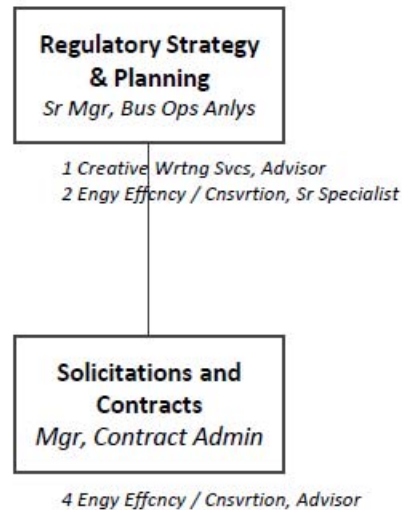
Regulatory Strategy & Planning

Functional Category: Product Management

Detailed Definition: Manage end-to-end EE, DR, IQP contracts & solicitations process. Develop EE program controls for all new programs and review and enhance existing program control environments including inspection plans, develop and implement a management oversight process on key program controls, develop and implement processes to ensure appropriate oversight of new third-party contracts, coordination of statewide program activities, and remaining SCE programs, develop a system to record and manage all audit and EE program reviews

Summary Function Description: Manages EE solicitations and contracts and develops EE program process & controls to ensure operational and process efficiency.

Organization Chart Headcount: 9^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

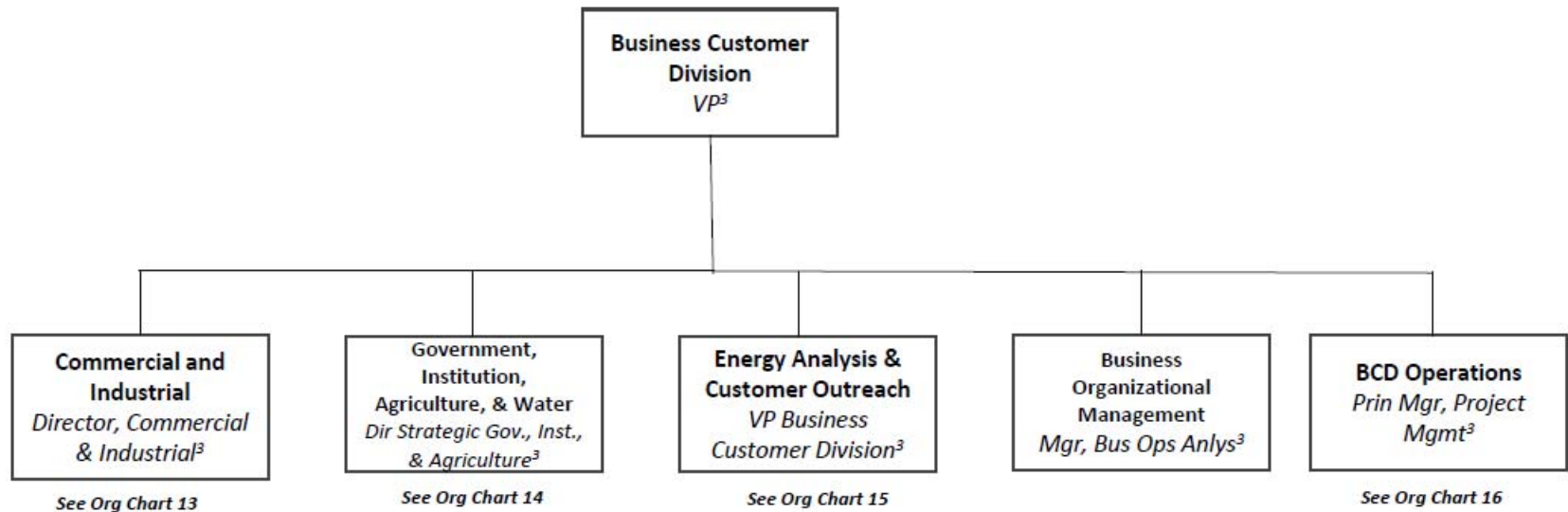
Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Business Customer Division

Summary Function Description: Provides account management and other support to SCE’s business customers, meeting their needs by leveraging strategic relationships to safely delivery quality programs, provide exceptional customer engagement and enhance business value.

Organization Chart Headcount: 113^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from “Organization Chart Headcount”.

Business Customer Division

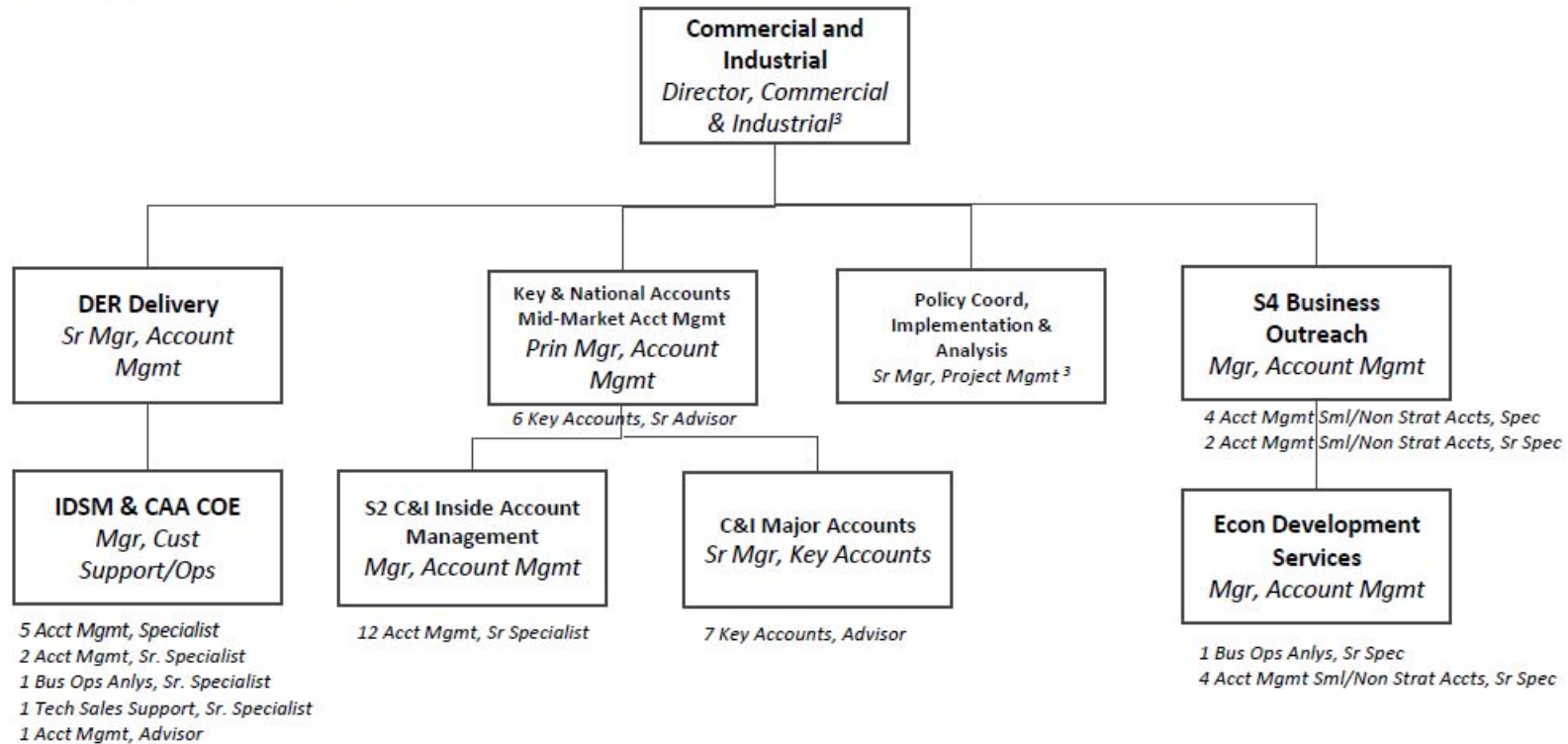
Commercial and Industrial

Functional Category: Account Management

Detailed Definition: Represents the Company by delivering consultative sales and marketing of electric energy, services, and products to ensure the attainment of revenue goals. Consults with customers to assess their business needs and requirements, and identifies value added Company products, services, and/or innovative solutions to address their needs.

Summary Function Description: Provides client account management support to commercial and industrial (C&I) customers, including engaging with customers by serving as their Trusted Energy Advisors and advocate. The C&I segment assists this diverse group of customers with energy efficiency, demand response, and distributed energy resource offerings, while also providing value through a variety of customer care issues.

Organization Chart Headcount: 53^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Business Customer Division

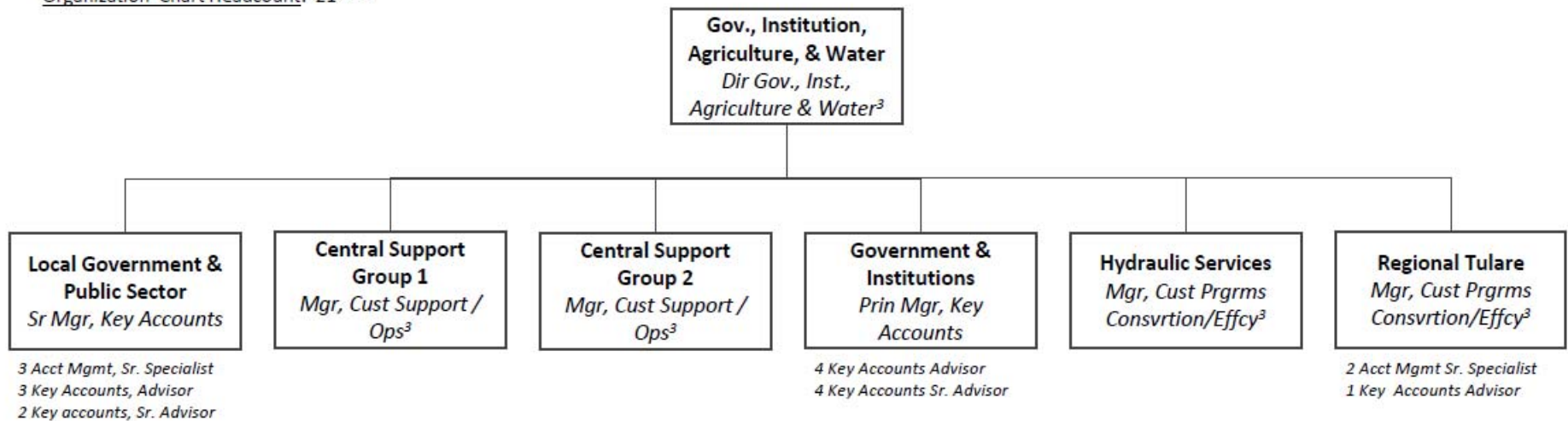
Government, Institution, Agriculture, & Water

Functional Category: Account Management

Detailed Definition: Represents the Company by delivering consultative sales and marketing of electric energy, services, and products to ensure the attainment of revenue goals. Consults with customers to assess their business needs and requirements, and identifies value added Company products, services, and/or innovative solutions to address their needs.

Summary Function Description: Provides client account management support to government, institutions, agriculture and water (GIA&W) customers, including delivering cost effective and creative customer solutions to exceed expectations for delivering programs and customer care. The GIA&W segment assists this diverse, complex, and political customer base with emerging issues and technologies.

Organization Chart Headcount: 21.^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

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Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Business Customer Division

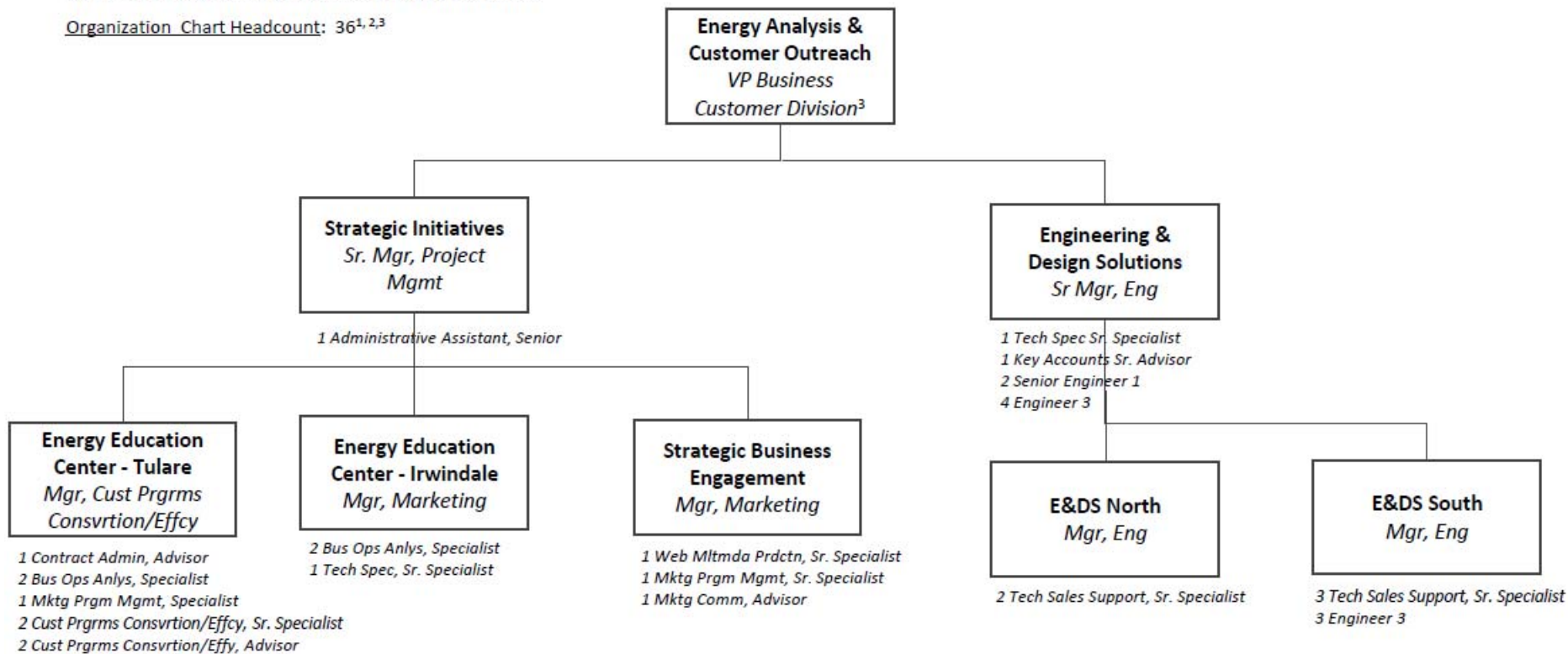
Energy Analysis & Customer Outreach

Functional Category: Marketing

Detailed Definition: Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization

Summary Function Description: Energy Analysis and Customer Outreach (EA&CO) provides cutting-edge solutions to help customers make energy-related decisions that save energy and money, while helping create a smarter, safer, and reliable energy future. Provides integrated demand-side management Engineering & Design Solutions; Workforce Education and Training through instruction of energy related workshops and seminars, and utilization of displays and tools offered through our Energy Education Centers; and Outreach through Strategic Business Engagement events.

Organization Chart Headcount: 36^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

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Business Customer Division

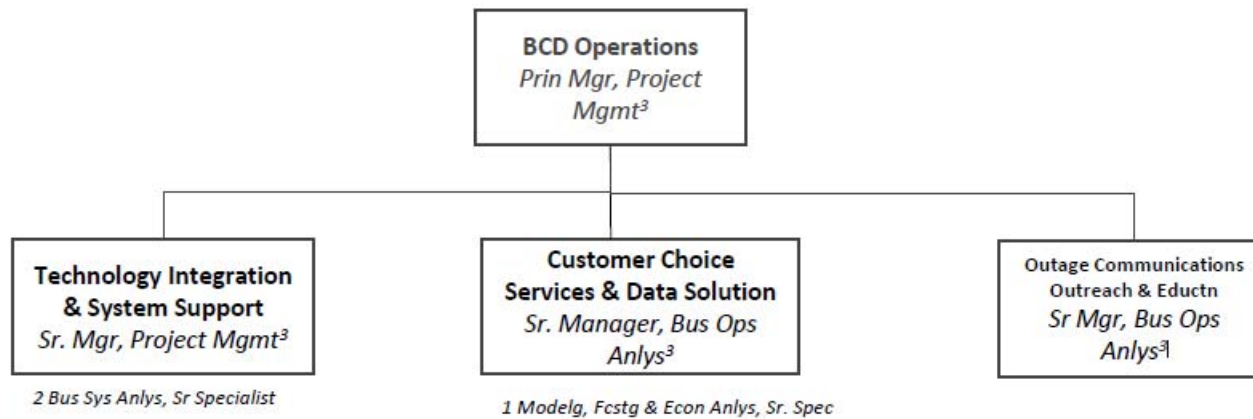
BCD Operations

Functional Category: Account Management

Detailed Definition: Represents the Company by delivering consultative sales and marketing of electric energy, services, and products to ensure the attainment of revenue goals. Consults with customers to assess their business needs and requirements, and identifies value added Company products, services, and/or innovative solutions to address their needs.

Summary Function Description: Partner with organizations within SCE to build and improve process and measures to positively impact service to customers in the specialties of outage management and communication, energy efficiency programs and tools, as well as data accuracy and business readiness. Provide experience and expertise in a wide variety of customer care services, project management, and Integrated Demand Side Management support and services.

Organization Chart Headcount: 3^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

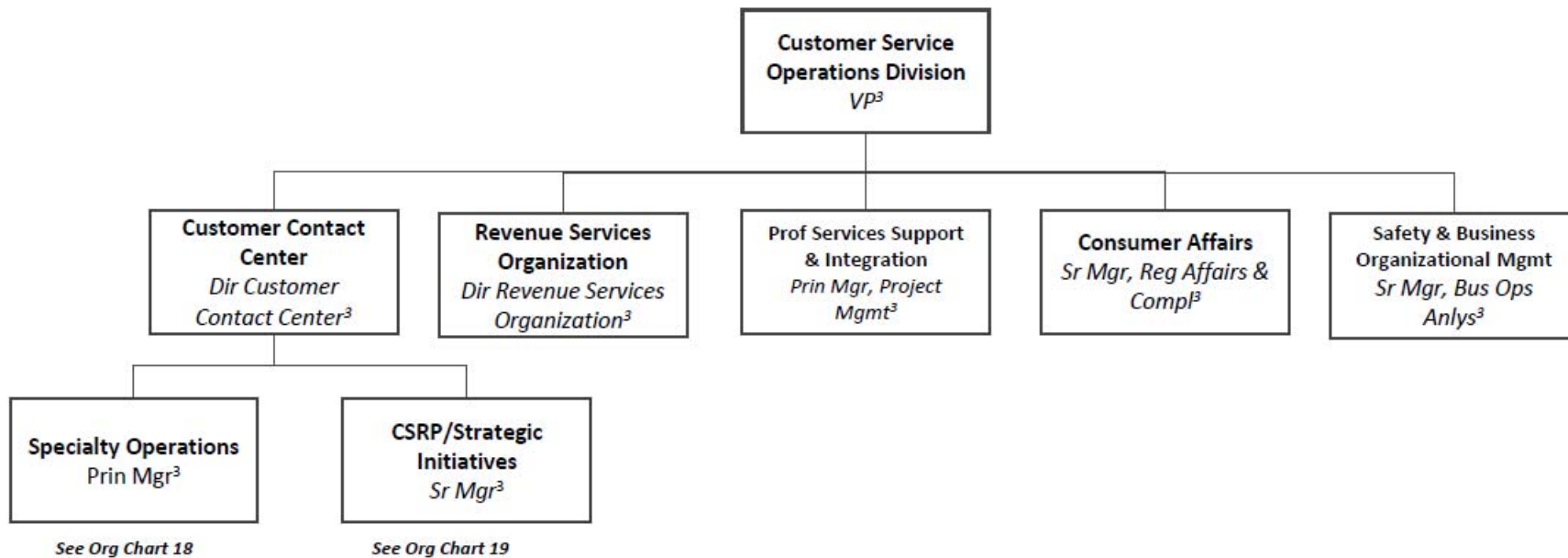
Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Service Operations Division

SCE EE Organization Chart 17

Summary Function Description: This group is responsible for customer operations to support EE programs, including call center support and processing program sign-ups.

Organization Chart Headcount: 41^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Service Operations Division

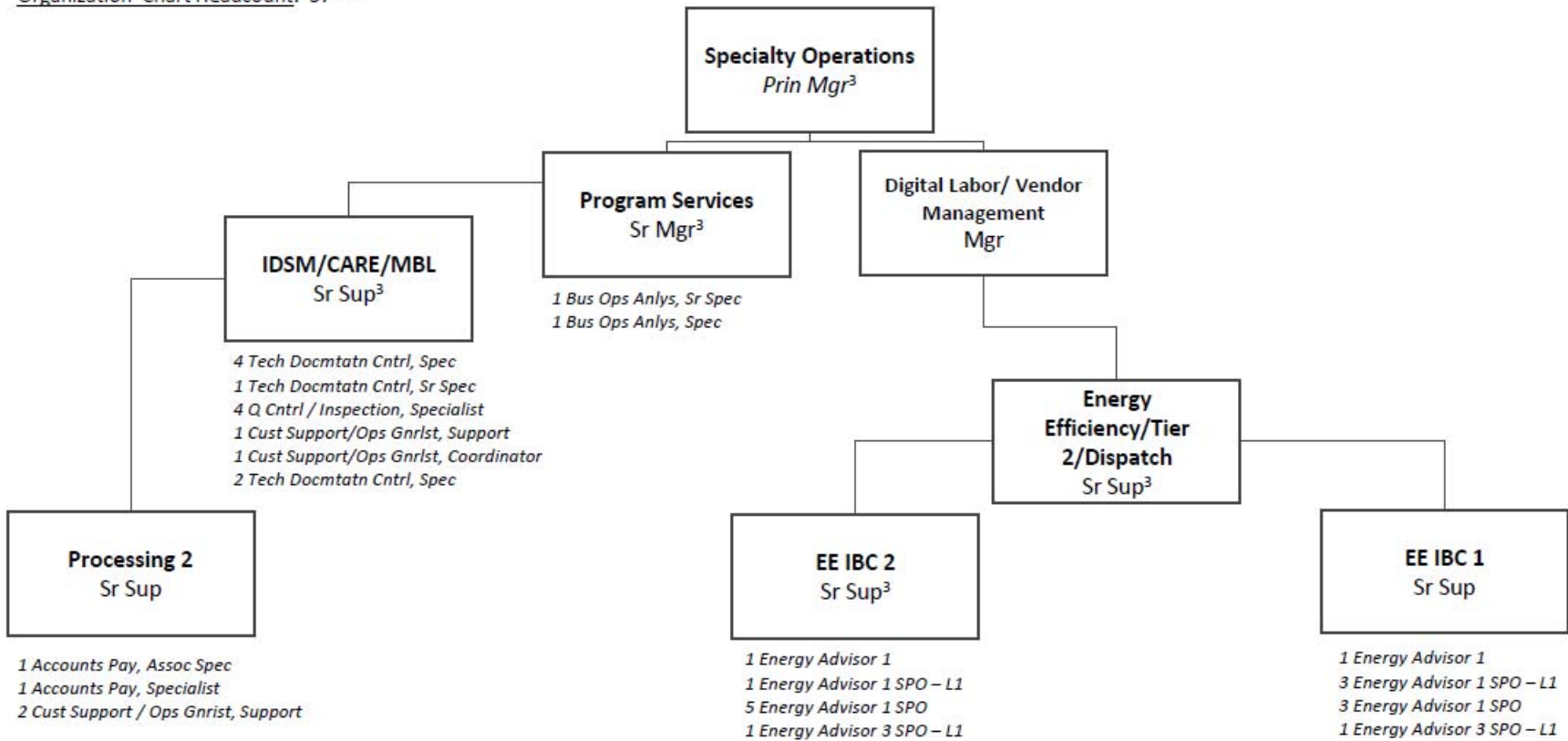
Customer Contact Center

Functional Category: Call Center

Detailed Definition: Support programs and customers with the processing of rebate and/or incentive applications, evaluates and resolves customer inquiries, issues, and problems, conduct pre and post inspections of energy efficiency equipment for residential and commercial customers, to help ensure key compliance controls and ensures that appropriate action is taken to the satisfaction of the customer, Company, and/or CPUC in compliance with policies, procedures, tariff rules and rates.

Summary Function Description: Provides call center and processing support for EE programs.

Organization Chart Headcount: 37^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

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Customer Service Operations Division

Customer Contact Center

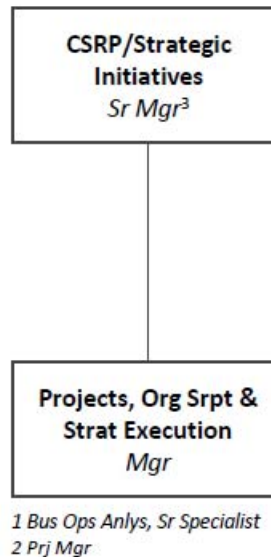
SCE EE Organization Chart 19

Functional Category: Call Center

Detailed Definition: Supports the Customer Contact Center and Customer Program & Services in the design, coordination, implementation, reporting and process/knowledge management of energy efficiency programs and its partnership designed to meet and/or address customer needs.

Summary Function Description: Provides project implementation and business process support for EE programs.

Organization Chart Headcount: 4^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

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Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Service

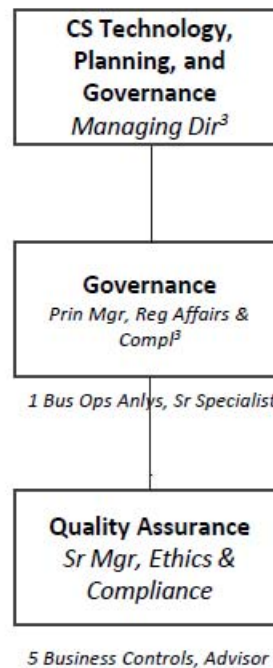
Technology, Planning, and Governance

Functional Category: Data Analytics

Detailed Definition: 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

Summary Function Description: Manages information governance, analytics, measurement and evaluation.

Organization Chart Headcount: 7^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

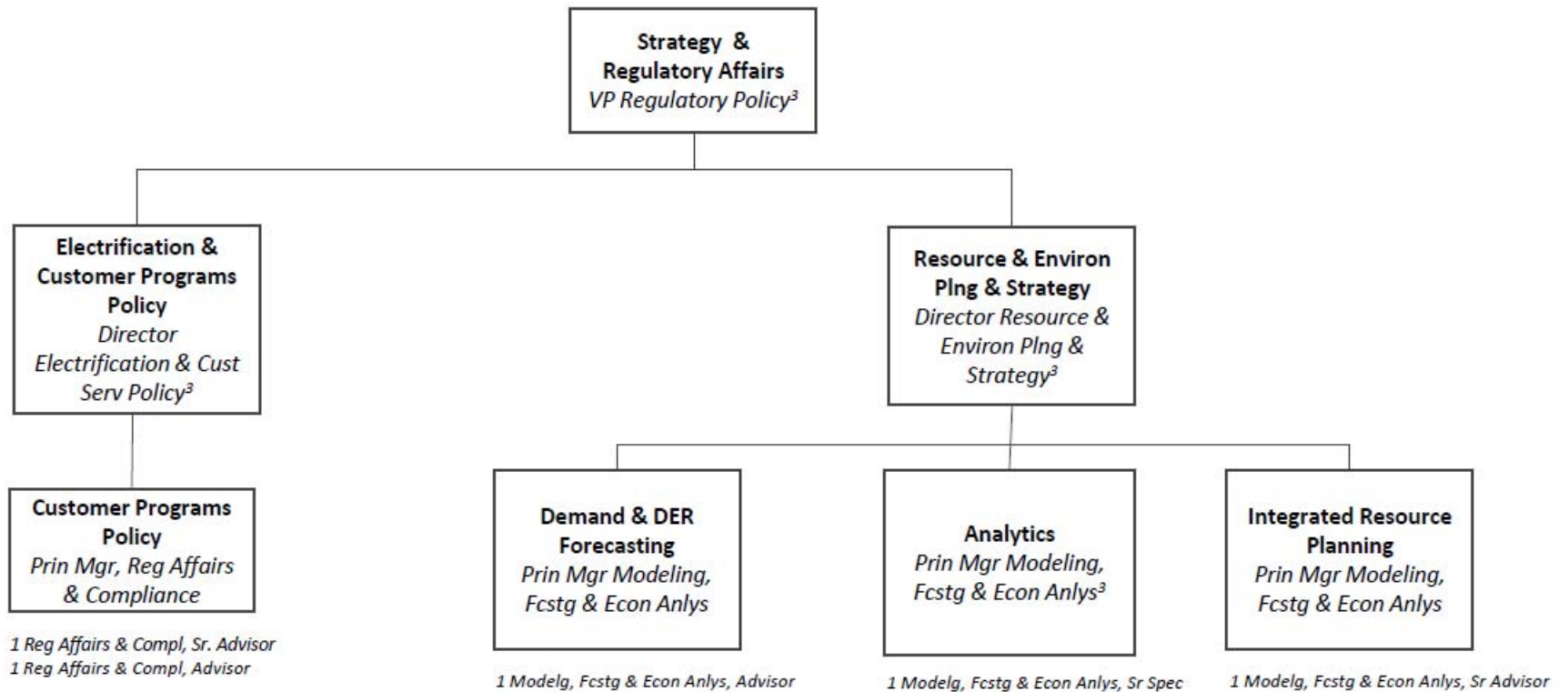
Strategy and Regulatory Affairs

Functional Category: Company Regulatory Support

Detailed Definition: Case management for EE proceedings

Summary Function Description: Provides case management and other regulatory support for EE proceedings.

Organization Chart Headcount: 8^{1,2,3}



Note 1: Data current as of September 3, 2021. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule.

Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from “Organization Chart Headcount”.

AL 4068-E Attachment D – Appendix B
Supplemental Budget Tables

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 OOR opportunities; develop external partnerships & strategic alliances; work with various companies and associations to help advance standards, products, and tech.; work with external experts to help reduce 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

Aggregated Category	Definition	Functional Category	Detailed Definition
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project technical reviews and design assistance	Custom project support	Management of Emerging Products projects; Customized reviews; LCR/RFO support; Ex-ante review management; Technical policy support; Technical assessments; Workpapers; Tool development; End use subject matter expertise
		Deemed workpapers	
		Project management	
Customer Application/Rebate and Incentive Processing	Costs associated with application management and rebate and incentive processing (deemed and custom)	Rebate & Application Processing	
Inspections	Costs associated with project inspections	Inspections	
Portfolio Analytics	Includes analytics support, including internal performance reporting and external reporting	Data analytics	Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance
EM&V	EM&V expenditures	EM&V Studies	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTPP and IEPR; market potential study; integration w/ procurement planning; CPUC Demand Analysis Working Group
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research

Aggregated Category	Definition	Functional Category	Detailed Definition
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	

EE Full Time Equivalent (FTE) Headcount by Functional Group

Functional Group	2020 EE Portfolio FTE (1)	2022 EE Portfolio FTE (1)	2023 EE Portfolio FTE (1)
Policy, Strategy, and Regulatory Reporting Compliance	22.77	38.33	38.33
Program Management	63.89	46.02	46.02
Engineering Services	35.65	34.29	34.29
Customer Application/Rebate/Incentive Processing	9.61	8.47	8.47
Customer Project Inspections	5.24	4.44	4.44
Portfolio Analytics	11.14	9.88	9.88
EM&V	3.34	4.22	4.22
ME&O (Local)	3.41	4.00	4.00
Account Management / Sales	27.24	9.56	9.56
IT	6.21	8.94	8.94
Call Center	9.45	2.28	2.28
Total	197.95	170.43	170.43

(1) FTE is equal to 2,080 annual "working" hour

Energy Efficiency Costs by Functional Group

Residential -

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023EE Portfolio Budget		
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 2,274,233	\$ 1,495,193	\$ 1,679,048		
		Program Management	\$ 3,682,660	\$ 559,424	\$ 697,989		
		Engineering services	\$ 951,939	\$ 341,049	\$ 381,171		
		Customer Application/Rebate/Incentive Processing	\$ 254,903	\$ 472,326	\$ 488,594		
		Customer Project Inspections	\$ 139,100	\$ 247,453	\$ 255,977		
		Portfolio Analytics	\$ 607,701	\$ 268,541	\$ 301,189		
		ME&O (Local)	\$ 283,327	\$ 179,509	\$ 200,568		
		Account Management / Sales	\$ 29,624	\$ 4,796	\$ 6,252		
		IT	\$ 511,705	\$ 200,332	\$ 223,836		
		Call Center	\$ 250,749	\$ 127,234	\$ 131,616		
		Labor Total			\$ 8,985,941	\$ 3,895,857	\$ 4,366,240
		Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	Local/Government Partnerships Contracts (3)	\$ 16,830,760	\$ 33,710,250	\$ 47,378,257
				Other Contracts			
				Program Implementation			
				Policy, Strategy, and Regulatory Reporting Compliance			
				Program Management	\$ 467,595	\$ 2,644,517	\$ 3,315,375
				Engineering services		\$ 159,261	\$ 161,963
				Customer Application/Rebate/Incentive Processing			
				Customer Project Inspections			
				Portfolio Analytics			
				ME&O (Local)			
				Account Management / Sales			
				IT (4)		\$ 203,604	\$ 219,948
Call Center							
Facilities							
Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 14,814,891			\$ 17,750,310	\$ 17,680,537		
Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 7,224,783			\$ 10,232,133	\$ 17,304,938		
Non-Labor Total					\$ 39,338,029	\$ 64,700,075	\$ 86,061,018
Residential Total					\$ 48,323,970	\$ 68,595,932	\$ 90,427,258
	Other (collected through GRC) (2)			Labor Overheads	\$ 1,627,480	\$ 1,199,397	\$ 1,329,786

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

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

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

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

Commercial -

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 883,116	\$ 3,081,539	\$ 2,897,914
		Program Management	\$ 1,835,465	\$ 1,164,956	\$ 1,304,661
		Engineering services	\$ 798,995	\$ 724,451	\$ 676,805
		Customer Application/Rebate/Incentive Processing	\$ 286,391	\$ 112,636	\$ 120,242
		Customer Project Inspections	\$ 156,283	\$ 59,011	\$ 62,995
		Portfolio Analytics	\$ 240,882	\$ 532,686	\$ 504,656
		ME&O (Local)	\$ (33,923)	\$ 374,099	\$ 348,465
		Account Management / Sales	\$ 1,325,900	\$ 119,186	\$ 126,953
		IT	\$ 206,754	\$ 417,499	\$ 388,888
		Call Center	\$ 281,723	\$ 30,342	\$ 32,391
	Labor Total		\$ 5,981,586	\$ 6,616,405	\$ 6,463,970
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 354,197	\$ 90,951,936	\$ 94,192,555
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	\$ 1,295,651	\$ 748,850	\$ 392,317
		Engineering services		\$ 331,903	\$ 281,392
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)		\$ 424,314	\$ 382,137
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 5,024,332		
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 689,261	\$ 34,780,256	\$ 51,476,563
	Non-Labor Total		\$ 7,363,441	\$ 127,237,259	\$ 146,724,964
Commercial Total (5)			\$ 13,345,027	\$ 133,853,664	\$ 153,188,934
	Other (collected through Labor Overheads		\$ 1,824,255	\$ 2,200,288	\$ 2,077,173

- (1) Labor costs are already loaded with (state loaders covered by EE)
- (2) These costs are collected through GRC D.16-06-054
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".
- (5) Under the previous program categories, the following programs were classified as Cross Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM. These are included in Table 16 Cross Cutting. These three programs are now classified as Commercial with the elimination of Cross Cutting programs.

Industrial -

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 414,055	\$ 2,092,335	\$ 2,556,960
		Program Management	\$ 1,338,361	\$ 2,335,178	\$ 2,992,244
		Engineering services	\$ 334,744	\$ 528,085	\$ 647,552
		Customer Application/Rebate/Incentive Processing	\$ 73,268	\$ 189,659	\$ 192,433
		Customer Project Inspections	\$ 39,982	\$ 99,363	\$ 100,816
		Portfolio Analytics	\$ 106,370	\$ 328,304	\$ 402,077
		ME&O (Local)	\$ 10,610	\$ 259,126	\$ 317,355
		Account Management / Sales	\$ 505,424	\$ 292,089	\$ 367,682
		IT	\$ 96,470	\$ 289,186	\$ 354,171
		Call Center	\$ 72,074	\$ 51,091	\$ 51,837
	Labor Total		\$ 2,991,358	\$ 6,464,416	\$ 7,983,127
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 2,018,035	\$ 8,198,312	\$ 22,411,480
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	\$ 258,565	\$ 5,565,881	\$ 5,959,070
		Engineering services		\$ 229,900	\$ 256,720
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)		\$ 293,908	\$ 348,021
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 258,255	\$ 394,600	\$ 387,750
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)		\$ 5,747,098	\$ 14,873,199
	Non-Labor Total		\$ 2,534,855	\$ 20,429,699	\$ 44,236,240
Industrial Total (5)			\$ 5,526,213	\$ 26,894,115	\$ 52,219,367
	Other (collected through Labor Overheads		\$ 800,730	\$ 2,212,001	\$ 2,702,090

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

Agricultural -

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 151,254	\$ 147,451	\$ 172,264
		Program Management	\$ 451,659	\$ 126,732	\$ 139,470
		Engineering services	\$ 178,453	\$ 37,062	\$ 42,834
		Customer Application/Rebate/Incentive Processing	\$ 19,454	\$ 18,914	\$ 19,564
		Customer Project Inspections	\$ 10,616	\$ 9,909	\$ 10,250
		Portfolio Analytics	\$ 39,142	\$ 23,640	\$ 27,508
		ME&O (Local)	\$ 13,665	\$ 18,659	\$ 21,711
		Account Management / Sales	\$ 354,724	\$ 13,357	\$ 13,193
		IT	\$ 35,640	\$ 20,823	\$ 24,230
		Call Center	\$ 19,137	\$ 5,095	\$ 5,270
	Labor Total		\$ 1,273,744	\$ 421,642	\$ 476,294
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)		\$ 1,981,132	\$ 2,377,359
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	\$ 128,190	\$ 54,960	\$ 19,500
		Engineering services		\$ 16,554	\$ 17,532
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)		\$ 21,164	\$ 23,810
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 478,649		
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 3,200,000	\$ 3,840,000
	Non-Labor Total		\$ 606,839	\$ 5,273,810	\$ 6,278,201
Agricultural Total (5)			\$ 1,880,583	\$ 5,695,452	\$ 6,754,495
	Other (collected through G	Labor Overheads	\$ 358,954	\$ 137,680	\$ 153,489

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

Public Sector -

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 326,239	\$ 215,849	\$ 246,901
		Program Management	\$ 2,081,989	\$ 501,445	\$ 407,879
		Engineering services	\$ 180,574	\$ 63,876	\$ 57,758
		Customer Application/Rebate/Incentive Processing	\$ 57,208	\$ 70,993	\$ 73,429
		Customer Project Inspections	\$ 31,219	\$ 37,193	\$ 38,469
		Portfolio Analytics	\$ 75,300	\$ 36,048	\$ 41,534
		ME&O (Local)	\$ 59,089	\$ 26,116	\$ 28,043
		Account Management / Sales	\$ 115,218	\$ 114,390	\$ 36,498
		IT	\$ 71,856	\$ 29,144	\$ 31,295
		Call Center	\$ 56,276	\$ 19,124	\$ 19,782
	Labor Total		\$ 3,054,968	\$ 1,114,178	\$ 981,588
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 1,285,725	\$ 2,814,909	\$ 4,570,692
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	\$ 193,190	\$ 1,956,941	\$ 518,711
		Engineering services		\$ 23,168	\$ 22,644
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)		\$ 29,620	\$ 30,751
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 5,186,983	\$ 3,490,683	\$ -
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 4,048,080	\$ 6,717,351
	Non-Labor Total		\$ 6,665,898	\$ 12,363,401	\$ 11,860,149
Public Sector Total (5)			\$ 9,720,866	\$ 13,477,579	\$ 12,841,737
	Other (collected through	Labor Overheads	\$ 472,309	\$ 409,664	\$ 347,149

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

Cross-Cutting -

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Cross-Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 1,282,570	\$ 960,569	\$ 745,472
		Program Management	\$ 6,633,439	\$ 4,311,843	\$ 4,166,532
		Engineering services	\$ 760,591	\$ 287,266	\$ 243,169
		Customer Application/Rebate/Incentive Processing	\$ 36,345	\$ 45,119	\$ 46,668
		Customer Project Inspections	\$ 19,833	\$ 23,638	\$ 24,450
		Portfolio Analytics	\$ 326,624	\$ 173,932	\$ 132,923
		ME&O (Local)	\$ 102,831	\$ 112,313	\$ 86,931
		Account Management / Sales	\$ 752,035	\$ 592,015	\$ 624,194
		IT	\$ -	\$ 125,344	\$ 97,017
		Call Center	\$ 35,752	\$ 12,154	\$ 12,571
	Labor Total		\$ 9,950,020	\$ 6,644,193	\$ 6,179,927
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 4,300,587	\$ 11,618,585	\$ 12,293,448
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	\$ 10,603,197	\$ 19,800,078	\$ 18,483,175
		Engineering services		\$ 99,645	\$ 70,199
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)		\$ 127,390	\$ 95,332
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Impleme	\$ 302,973		
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 277,573		
	Non-Labor Total		\$ 15,484,330	\$ 31,645,698	\$ 30,942,154
Cross-Cutting Total (5)			\$ 25,434,350	\$ 38,289,891	\$ 37,122,081
	Other (collected t	Labor Overheads	\$ 2,041,241	\$ 2,556,911	\$ 2,394,114

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

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

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

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

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

Energy Efficiency Costs and Savings Forecast by Sector

Sector	2020 EE Portfolio Expenditures				2022 EE Portfolio Budget				2023 EE Portfolio Budget				2020 EE Portfolio Savings			2022 EE Portfolio Forecasted Savings			2023 EE Portfolio Forecasted Savings			
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS	
Residential	\$ 8,985,941	\$ 17,298,355	\$ 22,039,674	\$ 48,323,970	\$ 3,895,857	\$ 36,717,632	\$ 27,982,443	\$ 68,595,932	\$ 4,366,240	\$ 51,075,543	\$ 34,985,475	\$ 90,427,258	193,316,322	26,098	-	86,896,731	35,377	1,075,882	122,458,761	38,025	1,293,353	
Commercial	\$ 5,981,586	\$ 1,649,848	\$ 5,713,593	\$ 13,345,027	\$ 6,616,405	\$ 92,457,003	\$ 34,780,256	\$ 133,853,664	\$ 6,463,970	\$ 95,248,401	\$ 51,476,563	\$ 153,188,934	17,748,170	3,492	-	158,114,910	16,469	1,875,955	252,621,492	35,853	3,224,747	
Industrial	\$ 2,991,358	\$ 2,276,600	\$ 258,255	\$ 5,526,213	\$ 6,464,416	\$ 14,288,001	\$ 6,141,698	\$ 26,894,115	\$ 7,983,127	\$ 28,975,291	\$ 15,260,949	\$ 52,219,367	8,387,049	1,232	-	52,781,719	5,520	477,325	107,746,764	10,472	1,238,567	
Agriculture	\$ 1,273,744	\$ 128,190	\$ 478,649	\$ 1,880,583	\$ 421,642	\$ 2,073,810	\$ 3,200,000	\$ 5,695,452	\$ 476,294	\$ 2,438,201	\$ 3,840,000	\$ 6,754,495	1,468,257	462	-	9,809,216	1,916	-	12,384,420	2,436	-	
Public	\$ 3,054,968	\$ 1,478,915	\$ 5,186,983	\$ 9,720,866	\$ 1,114,178	\$ 4,824,638	\$ 7,538,763	\$ 13,477,579	\$ 981,588	\$ 5,142,798	\$ 6,717,351	\$ 12,841,737	8,607,953	79	-	15,732,456	2,253	70,949	18,911,363	4,179	294,878	
Cross Cutting ¹	\$ 9,950,020	\$ 14,903,784	\$ 580,546	\$ 25,434,350	\$ 6,644,193	\$ 31,645,698	\$ -	\$ 38,289,891	\$ 6,179,927	\$ 30,942,154	\$ -	\$ 37,122,081	1,260,805,007	210,898	-	1,057,694,927	186,569	-	1,115,811,071	218,419	-	
Total Sector Budget	\$ 32,237,617	\$ 37,735,692	\$ 34,257,700	\$ 104,231,009	\$ 25,156,691	\$ 182,006,782	\$ 79,643,160	\$ 286,806,633	\$ 26,451,146	\$ 213,822,388	\$ 112,280,338	\$ 352,553,872	1,490,330,758	242,261	-	1,381,029,959	248,104	3,500,112	1,629,933,871	309,385	6,051,545	
EM&V-PA	\$ 491,937	\$ -	\$ -	\$ 491,937	\$ 576,264	\$ -	\$ -	\$ 576,264	\$ 596,021	\$ -	\$ -	\$ 596,021	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
EM&V-ED	\$ -	\$ 7,295,587	\$ -	\$ 7,295,587	\$ -	\$ 9,736,663	\$ -	\$ 9,736,663	\$ -	\$ 11,784,920	\$ -	\$ 11,784,920	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
DBF - Loan Pool	\$ -	\$ (3,479,324)	\$ -	\$ (3,479,324)	\$ -	\$ 12,000,000	\$ -	\$ 12,000,000	\$ -	\$ 14,000,000	\$ -	\$ 14,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
CEC AB841	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,109,511	\$ -	\$ 115,109,511	\$ -	\$ 74,673,970	\$ -	\$ 74,673,970	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	\$ 32,729,554	\$ 42,126,742	\$ 34,257,700	\$ 109,113,996	\$ 25,732,955	\$ 321,700,518	\$ 79,643,160	\$ 427,076,633	\$ 27,047,167	\$ 317,885,353	\$ 112,280,338	\$ 457,212,858	1,490,330,758	242,261	-	1,381,029,959	248,104	3,500,112	1,629,933,871	309,385	6,051,545	

1. Cross Cutting Sector includes Codes & Standard, Emerging Technologies, Workforce Education & Training, and Finance.

AL 4068-E Attachment D – Appendix C
SCE Third Party Solicitations Schedule

Solicitation Schedule

IOU	Year		2019												2020												2021												2022												2023																						
	Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4																									
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
SCE	Local Customer Programs	Commercial				RFP Prep								RFP												Contract Negotiation																																															
SCE	Local Customer Programs	Industrial				RFP Prep								RFP												Contract Negotiation																																															
SCE	Local Customer Programs	Residential				RFP Prep								RFP												Contract Negotiation																																															
SCE	Local Customer Programs	Agricultural																																																																							
SCE	Local Customer Programs	Public																																																																							
SCE	Statewide Programs	Lighting Program				RFA Prep	RFA	RFP Prep						RFP												Contract Negotiation																																															
SCE	Statewide Programs	Higher Education																																																																							
SCE	Statewide Programs	Water/Wastewater Pumping																																																																							
SCE	Cross-cutting	Electric Emerging Technologies																																																																							
SCE	Future Targeted Solicitations	TBD																																																																							

Note: Solicitation schedule is current as of October 1, 2021 posted on the California Energy Efficiency Coordinating Committee website (<https://www.caeec.org/third-party-solicitation-process>). Schedules and budgets are subject to change.

Attachment E

Program-Level Explanation

Program-Level Explanation

PA justification	Third party implementer or Core	Statewide or Local	Programs to be Closed Immediately	% change	2020 Claimed TRC	2021(Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started*	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
The MBI Pilot program rolled out in April 2020 with support from SCE's account representative team. Despite efforts to drive program participation, it received minimal interest from customers, and no projects were submitted. As a result, the program was sunset effective December 31, 2020.	Core	Local	Market Based Incentive	N/A	-	-	-	-	-	-	-	2019	N/A	N/A
The Agricultural Deemed Energy Efficiency Program has generated minimal interest from customers over the years. In alignment with SCE's third-party solicitations for Agricultural program(s), expected to be completed by end of 2021; the Agricultural Deemed Energy Efficiency Program will close effective January 1, 2022.	Core	Local	Agriculture Deemed Energy Efficiency Program	-100%	0.39	0.64	-	-	362,965	-	-	2016	N/A	N/A
These partnership programs are not cost-effective. The closure of these programs aligns with SCE's current overall strategy of reducing spending on EE resource activities that do not produce cost-effective energy savings. Additionally, SCE is completing its Local Public Sector solicitation that is expected to cover this market.	Core	Local	Eastern Sierra Energy Leader Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	Desert Cities Energy Leader Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	Kern County Energy Leader Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	San Joaquin Valley Energy Leader Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	Western Riverside Energy Leader Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	High Desert Regional Energy Leader Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	San Bernardino Association of Governments	N/A	0.06	-	-	-	-	-	-	2016	N/A	N/A
	Core	Local	County of Riverside Energy Efficiency Partnership	N/A	-	-	-	-	-	-	-	2016	N/A	N/A
The State of California Energy Efficiency Partnership program will close at the end of 2021. The new State of California/ Department of Corrections Third Party program will be led by Pacific Gas & Electric (PG&E) and is expected to ramp up by December 2021.	Core	Local	State of California Energy Efficiency Partnership	-100%	-	-	-	-	64,650	-	-	2016	N/A	N/A
The California Department of Corrections and Rehabilitation Energy Efficiency Partnership program will close at the end of 2021. The new State of California/ Department of Corrections Third Party program will be led by Pacific Gas & Electric (PG&E) and is expected to ramp up by December 2021.	Core	Local	California Dept. of Corrections and Rehabilitation Energy Efficiency Partnership	-100%	0.51	-	-	-	273,123	-	-	2016	N/A	N/A
Workforce Education & Training (WE&T) Connections is a sub-program of the umbrella WE&T Program. It is expected that WE&T Connections will be superseded by new program offerings through the third-party implemented Statewide WE&T Career Connections program led by PG&E, which is scheduled to launch in Q4 2021. WE&T Connections will close upon the launch of the new statewide program to mitigate customer disruption and avoid any market gaps.	Core	Local	Workforce Education & Training (WE&T) Connections	-100%	-	-	-	-	499,263	-	-	2016	N/A	N/A
A technology component of SCE's Energy Advisor Program, the Enhanced Energy Advisor Tool (EEAT), also known as the Universal Audit Tool (UAT), has had an extremely low average volume of customer participation and audit completions since its inception in 2015. Even with SCE's attempts to increase participation by employing advanced marketing techniques (i.e., social media, emails, banner ads, bill inserts, print and search engine marketing), the participation levels have not risen enough to generate statistically significant results that would be needed to evaluate and claim savings. As a result, SCE has not claimed savings for EEAT and proposes to eliminate EEAT funding a upon Commission's approval of this advice letter. SCE intends to fund EEAT through Q2 2022 to account for any final ramp down activities.	Core	Local	Energy Advisor Program (Enhanced Energy Advisor Tool only)	-96%	0.96	0.92	-	-	16,082,726	693,721	-	2016	N/A	N/A
The Industrial Energy Advisor Program provides minimal benefit as a stand-alone program and has not proven to be operationally cost effective. Similar to SCE's Agricultural Energy Advisor program, which SCE closed in the 2021 ABAL due to pump test no longer producing claimable energy savings and because it was transitioning from EE funding to SCE's 2021 General Rate Case (GRC), the Industrial Energy Advisor program also supports pump test activities which no longer produce claimable energy savings. As a result, the Industrial Energy Advisor Program is no longer appropriate to be included in SCE's EE portfolio and will close program. Additionally, components of the program, such as the OASIS on-site audit tool, which are intended for industrial customers, are infrequently used by SCE Account Managers for industrial customers. Industrial customer audit requests will be supported by the Commercial Energy Advisor program as needed, which will streamline program operations.	Core	Local	Industrial Energy Advisor Program	-100%	-	-	-	-	236,558	-	-	2016	N/A	N/A
SCE requested extensions to claim savings and incentives related to Grandfathered Streetlights Program for the service territories of Los Angeles County and eleven Southern California cities. Resolution E-5096 approved SCE's request to extend the Los Angeles County Grandfathered Streetlights Program until December 31, 2022. Resolution E-5141 approved SCE's request to extend SCE's Legacy Streetlight projects in the cities of Bell, Goleta, Huntington Beach, Industry, Laguna Beach, Manhattan Beach, Pico Rivera, Santa Ana, Santa Clarita, Simi Valley, and West Hollywood to December 31, 2021. SCE plans to discontinue and close the Grandfathered Streetlights Program following these extension dates, as directed.	Core	Local	Grandfathered Street Lights	-100%	0.47	-	-	-	3,308,182	-	-	2018	N/A	N/A

PA Justification	Third party implementer or Core	Statewide or Local	Programs to be Closed Upon Completion of Commitments	% change	2020 Claimed TRC	2021(Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started*	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
The Commercial Calculated EE Program, which is not cost-effective, will be replaced with SCE's local third-party Commercial program that is expected to begin implementation in the fourth quarter of 2021. SCE is continuing its customized commercial program through December 31, 2021 to allow commercial customers to submit energy efficiency projects and prevent a gap in the market. The Commercial Calculated Energy Efficiency Program will stop accepting new enrollments in December 2021. Adjustments may be made to minimize confusion and overlap with the local program, but the program will continue to manage committed pipeline projects until completion, expected through December 2023.	Core	Local	Commercial Calculated Energy Efficiency Program	-94%	0.43	-	-	-	4,576,768	277,188	271,048	2016	N/A	N/A
The Agricultural Calculated EE Program, which is not cost-effective, will be replaced with SCE's local third-party Agricultural program. SCE expects to enter into a third-party contract for that program by December 2021. SCE will continue its customized and deemed agricultural programs through December 23, 2021 to allow agricultural customers to submit energy efficiency projects. The Agricultural Calculated Energy Efficiency Program will stop accepting new enrollments in December 2021 but will continue to manage committed pipeline projects until completion, expected through December 2023.	Core	Local	Agriculture Calculated Energy Efficiency Program	-65%	0.34	0.06	-	-	579,358	203,452	167,301	2016	N/A	N/A
These partnership programs are not cost-effective. The closure of these programs aligns with SCE's current overall strategy of reducing spending on EE resource activities that do not produce cost-effective energy savings. SCE will stop taking new enrollments at the end of 2021 and close upon the completion of committed projects for these Local Government Partnership programs. SCE will close these programs following the completion of committed projects. This sector is expected to be served by new third-party programs following SCE's Local Public third-party solicitation, which is expected to conclude by the end of 2021.	Core	Local	City of Long Beach Energy Leader Partnership	-86%	-	-	-	-	44,528	6,394	6,329	2016	N/A	N/A
	Core	Local	Gateway Cities Energy Leader Partnership	-91%	-	0.41	-	-	227,909	20,063	11,811	2016	N/A	N/A
	Core	Local	Orange County Cities Energy Leader Partnership	-59%	0.26	-	-	-	96,305	39,751	14,730	2016	N/A	N/A
	Core	Local	San Gabriel Valley Energy Leader Partnership	-86%	0.04	-	-	-	75,244	10,452	5,464	2016	N/A	N/A
	Core	Local	South Bay Energy Leader Partnership	-45%	-	-	-	-	37,365	20,624	15,877	2016	N/A	N/A
	Core	Local	South Santa Barbara County Energy Leader Partnership	-90%	0.22	-	-	-	154,045	15,395	7,906	2016	N/A	N/A
	Core	Local	Ventura County Energy Leader Partnership	-90%	0.49	-	-	-	180,402	17,803	10,371	2016	N/A	N/A
	Core	Local	West Side Energy Leader Partnership	-75%	0.01	-	-	-	54,601	13,541	11,138	2016	N/A	N/A
	Core	Local	North Orange County Cities	-71%	-	-	-	-	40,113	11,567	6,604	2016	N/A	N/A
	Core	Local	County of Los Angeles Energy Efficiency Partnership	-98%	0.19	-	-	-	1,615,362	36,234	12,658	2016	N/A	N/A
The Public Sector Performance-Based Retrofit High Opportunity Program (HOPPs) program closure is in alignment with the third-party solicitations for Public Sector program(s) that is anticipated to be contacted by December 2021, and in support of SCE's strategy to close programs as new third-party programs launch into market. In alignment with that strategy, SCE is continuing this program through the end of 2021 to minimize gaps in the market. SCE estimates committed projects to be complete by end of December 2023.	Core	Local	Public Sector Performance-Based Retrofit High Opportunity	-63%	0.47	-	-	-	1,426,542	526,423	287,957	2017	N/A	N/A
The three will transition to the new Statewide Electric Emerging Technologies Program. It is expected that these sub-programs activities will ramp down while the new statewide program ramps up in early 2022 under third-party implementation.	Core	Local	Technology Development Support	-17%	-	-	-	-	813,283	674,871	153,434	2016	N/A	N/A
	Core	Local	Technology Assessments	-53%	-	-	-	-	3,932,477	1,829,012	618,330	2016	N/A	N/A
	Core	Local	Technology Introduction Support	-43%	-	-	-	-	3,052,224	1,728,981	546,946	2016	N/A	N/A
The California Community Colleges Energy Efficiency Partnership program will ramp down ahead of the new Statewide Higher Education Program expected to launch Q4 2022. To avoid any gaps in the market, this partnership program will honor any committed projects in the pipeline, with expected completion by Q3 2024.	Core	Local	California Community Colleges Energy Efficiency Partnership	-28%	0.51	-	-	-	282,314	203,844	14,161	2016	N/A	N/A
The UC/CSU Energy Efficiency Partnership program will ramp down ahead of the new Statewide Higher Education Program expected to launch Q4 2022. To avoid any gaps in the market, this partnership program will honor any committed projects in the pipeline, with expected completion by Q3 2024.	Core	Local	UC/CSU Energy Efficiency Partnership	-26%	0.05	-	-	-	307,428	228,867	-	2016	N/A	N/A

PA Justification	Third party implementer or Core	Statewide or Local	Programs with reduced budgets (>40% budget decrease), to continue in 2022	% change	2020 Claimed TRC	2021(Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started*	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
SCE is leveraging existing and upcoming EE programs and offerings to comply with AB793: Residential Pay for Performance programs, which are statutorily-mandated programs. SCE does not intend to send out these programs for third-party solicitation which reflects the lower budget for PY 2022 and 2023 being reported. The previous third-party implemented program was not successful under its former design, with the implementer citing low customer interest and the inability to achieve program goals.	Core	Local	AB793 Residential Pay for Performance	-70%	-	-	-	-	534,880	160,089	211,197	2017	N/A	N/A
The New Finance Offerings program is reporting a budget decrease in PY 2022. As a result of Rulemaking (R.)20-08-022 in August 2020, the Commission issued D.21-08-006, authorizing an additional \$75.2 million in ratepayer funding for the California Hub for the Energy Efficiency Financing (CHEEF) programs through June 30, 2027. Out of the authorized \$75.2 million, the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) will utilize approximately \$24 million in carryover funds. Due to the availability of these carryover funds, SCE will not need to recover the \$1,967,497 corresponding to SCE's allocation for PY 2022. D.21-08-006 also authorized SCE to recover up to \$500,000 annually from ratepayers to support the information technology and marketing strategies for the CHEEF programs. Based on this, SCE is requesting to recover \$500,000 for information technology and marketing expenses during PY 2022. This means that although the revenue request through this ABAL has decreased from 2021, the overall program operation budget for the New Finance Offerings in PY 2022 is \$2,467,496.87, the equivalent to a 45% increase from PY 2021.	Core	Local	New Finance Offerings	-67%	-	-	-	-	1,776,045	592,332	588,317	2016	N/A	N/A
SCE is reporting a budget decrease in PY 2023 for the Public Sector Performance-Based Retrofit High Opportunity (HOPPs) program. The budget decrease account for ramp down in program activity under SCE implementation. HOPPs will transition to the SCE Local Public Sector program under third-party implementation. There is a high potential that the Normalized Metered Energy Consumption (NMEC) approach utilized by the HOPPs program will be an option made available by third-party programs targeting Public Sector customers under SCE's Local Public Sector program solicitation. The remaining HOPPs program's activities will focus on managing final pipeline projects to completion, expected by December 31, 2023.	Core	Local	Public Sector Performance-Based Retrofit High Opportunity	-63%	0.47	-	-	-	1,426,542	526,423	287,957	2017	N/A	N/A

PA justification	Third party implementer or Core	Statewide or Local	Programs with enhanced budgets (>40% budget increase)	% change	2020 Claimed TRC	2021(Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started*	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
A budget increase is forecasted for the Residential Direct Install program for PY 2022. The program plans to increase the volume of Smart Thermostat installations as part of an integration effort with Demand Response's Smart Energy Program	Core	Local	Residential Direct Install	402%	0.74	0.06	2.22	2.38	3,010,901	15,124,543	15,124,543	2016	N/A	N/A
SCE's Strategic Energy Management (SEM) program is forecasting a budget increase for PY 2022 due to operational and cohort expansion. The SEM program engages large industrial customers in two-year cycles to drive persistent electric and natural gas savings across their entire facilities. SEM will be adding a new cohort and it will enter a new cycle with three current cohorts.	Core	Local	Strategic Energy Management	46%	1.23	-	1.85	1.71	3,077,740	4,481,481	4,481,481	2016	N/A	N/A
For PY 2022, SCE has forecast a budget increase for the CA Statewide Lighting Program. The implementation plan for this program was approved in 2021 and included only six months (Q3 and Q4) to roll the program out and begin delivering savings. The program will scale up in 2022, which will be the first full calendar year that the program is in operation.	Third party	Statewide	Lighting (Upstream)	62%	-	-	1.16	1.23	3,002,688	4,858,464	5,035,279	2021	NEW 3P	NEW 3P
Recent changes to the Duct Seal measure's Gross Savings Installation Adjustment (GSIA) values have resulted in very favorable cost-effective savings for the manufactured home market segment. The Comprehensive Manufactured Homes program plans to scale up the volume of installations to its maximum potential to take advantage of these cost-effective savings.	Core	Local	Comprehensive Manufactured Homes	105%	0.92	0.30	3.64	3.95	2,281,556	4,674,335	4,564,818	2016	N/A	N/A
SCE is increasing the WE&T Integrated Energy Education and Training Program budget to account for the delivery of additional fuel substitution workforce education and training classes and the Fuel Substitution Contractor Certification Program. The proposed enhancements would provide training with a focus on fuel substitution and complementary Integrated Demand Side Management (IDSM) activities such as demand response, solar, and battery storage. The purpose of these enhancements and associated trainings are to prime the workforce and help spur increased adoption of fuel substitution measures and IDSM opportunities.	Core	Local	Workforce, Education & Training (WE&T) Integrated Energy Education and Training	126%	-	-	-	-	3,850,187	8,696,114	8,840,814	2016	N/A	N/A
For PY 2023, SCE is forecasting a budget increase for the new ICF Commercial Behavioral Program, which is under contract, due to program ramp up activities.	Third Party	Local	Commercial Behavioral Program	N/A	-	-	-	2.12	-	348,327	2,559,746	2020	NEW 3P	NEW 3P
For PY 2023, SCE is forecasting a budget increase for the new Willdan Comprehensive Multifamily Program, which is under contract, due to program ramp up activities.	Third Party	Local	Comprehensive Multifamily Program	84%	-	-	1.31	1.35	6,321,840	11,628,100	19,595,052	2020	NEW 3P	NEW 3P
For PY 2023, SCE is forecasting a budget increase for the new Willdan Comprehensive Commercial Program, which is under contract, due to program ramp up activities.	Third Party	Local	Comprehensive Commercial Program	61%	-	-	1.33	1.33	36,252,000	58,213,782	93,100,657	2020	NEW 3P	NEW 3P
For PY 2023, SCE is forecasting a budget increase for the new Willdan Comprehensive Industrial Program, which is under contract, due to program ramp up activities.	Third Party	Local	Comprehensive Industrial Program	334%	-	-	1.38	1.42	3,402,600	14,782,135	39,521,758	2020	NEW 3P	NEW 3P
SCE forecasts a budget increase for the new Statewide Higher Education Program, currently in solicitation, to account for program launch, ramp up, and associated activities.	Third Party	Statewide	SW UC/CSU/CCC	N/A	-	-	1.29	1.29	-	601,876	1,856,800	2021	NEW 3P	NEW 3P
SCE also forecasts a budget increase for the Statewide Water/Wastewater Program, currently in solicitation, to account for program launch, ramp up, and associated activities.	Third Party	Statewide	Water/Wastewater Pumping	N/A	-	-	1.29	1.29	-	601,876	1,856,800	2021	NEW 3P	NEW 3P
SCE forecasts a budget increase for its Primary and Fabricated Metals for PY 2023. SCE was approved to spot accepting new enrollments to this program through SCE's 2021 Annual Budget Advise Letter (ABAL) and close upon completion of existing commitments. This budget increase is to account for Labor, General and Administrative, and Program costs associated with savings forecasted to be installed in PY 2023 versus PY 2022. Labor, General and Administrative, and Program costs are allocated proportionally to the savings being projected to be installed.	Third Party	Local	Primary and Fabricated Metals	15%	-	(0.03)	-	-	48,695	55,908	111,941	2016	Closed to new enrollments in 2021 ABAL	n/a
The Residential Equity program is a new program that will target single-family residential and multi-family customers who are classified as hard-to-reach or middle income or are in disadvantaged communities. These customers typically have lower EE program participation rates than other EE customers. This program will focus on fuel-substitution opportunities and readiness for these categories of residential customers.	Third Party	Local	Residential Equity Program	N/A	-	-	-	0.49	-	3,696,750	7,393,500	2022	NEW 3P	NEW 3P
The Small/Medium Business Equity Program is a new program that will focus on non-residential small and medium businesses (SMB) that have lower participation rates than larger and more sophisticated customers. Finally, to leverage a single site visit, SCE intends to enable the program to support fuel substitution opportunities and readiness for SMB customers.	Third Party	Local	Small/Medium Business Equity Program	N/A	-	-	-	0.27	-	2,120,001	5,297,422	2022	NEW 3P	NEW 3P

* Year program was added to CEDARS.

Attachment F

Joint IOUs Shared Funding Allocations for Statewide Programs

Joint IOUs Shared Funding Allocations for Statewide Programs

Statewide Program*	Lead IOU	2020 Program Contract Budget (Total for all IOUs)**	2021 Program Contract Budget (Total for all IOUs)**	2022 Program Contract Budget (Total for all IOUs)**	2023 Program Contract Budget (Total for all IOUs)**	Expected or Actual Contract Execution Date (MM/YYYY)***	Percent Electric	Combined (Electric & Gas) Proportional Contribution to Contract Cost per Load-Share (Either as reflected in co-funding agreement, or expected in co-funding agreement. Funding share may be within +/- 20% of Target per formula in row 1 above)				2020 Program Contract Expenditures by IOU**				2020 IOU Administrative Expenditures^				2021 Total Program Contract Expenditures, as Reported by Lead IOU** (YTD as of July 31, 2021)	2021 IOU Administrative Expenditures (YTD as of July 31, 2021)^				2022 IOU Administrative Budgets^				2023 IOU Administrative Budgets^																			
								PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	2021 Total Contract Expenditures	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG												
Workforce education, and training: Career and workforce readiness	PG&E	\$ -	\$ 389,260	\$ 1,756,054	\$ 1,891,288	Aug-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,700	\$ 1,015	\$ -	\$ -	\$ -	\$ -	\$ 204,159	\$ 3,231	\$ 10,312	\$ 14,500	\$ 212,628	\$ 3,262	\$ 10,312	\$ 17,500										
Res New Construction (all electric)	PG&E	\$ 1,000,000	\$ 657,000	\$ 3,236,740	\$ 6,759,536	Jul-2021	100%	44.40%	15.50%	40.10%	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 414,586	\$ 3,205	\$ 23,758	\$ -	\$ 725,585	\$ 4,643	\$ 23,758	\$ -						
Res New Construction (mixed fuel)	PG&E	\$ -	\$ 596,500	\$ 1,895,840	\$ 2,545,541	Jul-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 378,930	\$ 2,425	\$ 11,132	\$ 42,500	\$ 493,180	\$ 2,628	\$ 11,132	\$ 48,000						
NonRes New Construction (all electric)	PG&E	\$ 1,666,667	\$ -	\$ 348,879	\$ 3,409,051	Dec-2020	100%	44.40%	15.50%	40.10%	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 258,878	\$ 3,528	\$ 2,560	\$ -	\$ 549,023	\$ 3,014	\$ 2,560	\$ -						
NonRes New Construction (mixed fuel)	PG&E	\$ -	\$ -	\$ 983,492	\$ 8,746,903	Dec-2020	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 309,521	\$ 3,690	\$ 4,488	\$ 10,000	\$ 1,026,673	\$ 4,835	\$ 5,776	\$ 12,500						
Codes and Standards Advocacy (Appl)	PG&E	\$ 3,714,408	\$ 3,847,799	\$ 1,827,419	\$ 1,827,419	Jan-2020	80%	45.60%	13.96%	32.08%	8.36%	\$ 896,909	\$ 255,108	\$ 628,938	\$ 287,769	\$ 2,132,520	\$ 23,474	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,452,681	\$ 1,052,057	\$ 21,625	\$ -	\$ -	\$ 541,053	\$ 39,562	\$ 54,324	\$ 2,000	\$ 544,228	\$ 57,181	\$ 54,324	\$ 2,300									
Codes and Standards Advocacy (Bldg)	PG&E	\$ 5,998,421	\$ 5,795,123	\$ 5,998,421	\$ 5,998,421	Jan-2020	80%	45.60%	13.96%	32.08%	8.36%	\$ 3,535,596	\$ 1,014,221	\$ 2,518,355	\$ 501,468	\$ 1,109,067	\$ 35,211	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,855,322	\$ 1,089,047	\$ 28,918	\$ -	\$ -	\$ 1,656,823	\$ 48,939	\$ 106,043	\$ 2,000	\$ 2,504,911	\$ 66,712	\$ 106,043	\$ 2,300									
Codes and Standards Advocacy (Nat)	PG&E	\$ 3,442,171	\$ 3,512,080	\$ 5,329,160	\$ 5,329,160	Jan-2020	80%	45.60%	13.96%	32.08%	8.36%	\$ 1,992,822	\$ 567,109	\$ 1,398,747	\$ 310,524	\$ 189,864	\$ 20,540	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,272,165	\$ 120,533	\$ 21,083	\$ -	\$ -	\$ 597,327	\$ 39,378	\$ 65,371	\$ 2,000	\$ 596,203	\$ 57,018	\$ 65,371	\$ 2,300									
Institutional Partnerships, DGS & Dept of Corrections	PG&E	\$ -	\$ 120,000	\$ 1,490,351	\$ 4,230,309	May-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 405,358	\$ 3,088	\$ 8,751	\$ 14,500	\$ 748,491	\$ 3,178	\$ 8,751	\$ 17,500					
WE&T K-12 Connections	PG&E	\$ -	\$ 85,000	\$ 1,000,000	\$ 1,000,000	Aug-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 21,500	\$ 4,005	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 167,642	\$ 2,883	\$ 5,872	\$ 14,500	\$ 170,745	\$ 2,900	\$ 5,872	\$ 17,500					
Water/wastewater pumping	SCE	\$ -	\$ -	\$ 1,988,742	\$ 6,135,311	Apr-2022	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 325,526	\$ 3,951	\$ 36,113	\$ 15,000	\$ 402,588	\$ 5,454	\$ 36,113	\$ 18,000					
Lighting (Upstream)	SCE	\$ -	\$ 7,488,000	\$ 13,737,600	\$ 14,042,880	Sep-2020	100%	44.40%	15.50%	40.10%	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 381,996	\$ 16,695	\$ 291,508	\$ -	\$ 411,089	\$ 14,848	\$ 291,508	\$ -				
ETP, electric	SCE	\$ -	\$ -	\$ 14,857,972	\$ 18,889,144	Aug-2021	100%	44.40%	15.50%	40.10%	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 346,396	\$ 167,639	\$ 337,248	\$ -	\$ 391,569	\$ 220,561	\$ 337,248	\$ -	
Institutional Partnerships, UC/CSU/CCC	SCG	\$ -	\$ -	\$ 1,988,742	\$ 6,135,311	Feb-2022	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 336,778	\$ 3,952	\$ 36,114	\$ 15,000	\$ 414,237	\$ 5,454	\$ 36,114	\$ 18,000		
ETP, gas	SCG	\$ -	\$ 144,325	\$ 2,053,992	\$ 4,339,776	Jun-2021	0%	50.40%	7.80%	41.80%	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 341,833	\$ 15,812	\$ -	\$ 310,738	\$ 387,006	\$ 20,642	\$ -	\$ 320,933
Food Service POS	SDG&E	\$ -	\$ 9,862,776	\$ 15,333,260	\$ 18,343,225	Dec-2020	40%	48.00%	10.88%	16.04%	25.08%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,426,644	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Midstream Comm Water Heating	SDG&E	\$ -	\$ 7,324,277	\$ 14,690,333	\$ 17,252,452	Dec-2020	40%	48.00%	10.88%	16.04%	25.08%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 468,574	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Res HVAC Q/QM	SDG&E	\$ -	\$ -	\$ -	\$ 6,900,000	Aug-2022	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Plug Load and Appliance	SDG&E	\$ -	\$ -	\$ 14,735,004	\$ 15,261,637	Dec-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Upstream HVAC (Comm + Res)	SDG&E	\$ -	\$ 10,195,516	\$ 13,097,045	\$ 13,681,748	Oct-2020	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
Total		\$ 15,821,667	\$ 50,017,656	\$ 116,349,047	\$ 162,719,112									\$ -	\$ 1,836,438	\$ 4,546,040	\$ 1,099,761	\$ 3,431,451	\$ 79,225	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,268,627	\$ 2,321,982	\$ 251,422	\$ -	\$ 896	\$ 8,641,255	\$ 2,839,535	\$ 1,245,174	\$ 1,161,745	\$ 12,041,036	\$ 3,485,052	\$ 1,246,462	\$ 1,246,643										

*Modify rows as needed to reflect consolidation or division of a program category per solicitation approach or contracts. Ultimately there should be one line per executed 3P contract.

**The contract budget or signed contract amount for a given year accounts for the anticipated launch date of the program. Program contract budgets reflect third party implementation contract values and expenditures.

^ Administrative budgets for statewide programs are IOU specific and are filed under separate program IDs. They include all non-contract program expenditures which cover coordination, support and management

***Launch date assumes that the signed contracts filed via AL are approved by ED in 90-days, where applicable.

BP Decision (D.18-05-041): OP 23. The 25 percent requirement for statewide funding articulated in D.16-08-019 shall be calculated as a proportion of the utility program administrator's total portfolio budget, including evaluation, measurement, and verification funding, but excluding funding allocated to other program administrators for other (non-statewide) programs. The percentage requirement for statewide program funding for the Southern California Gas Company shall be reduced to 15 percent, but remain 25 percent for the other utility program administrators consistent with D.16-08-019.

INPUT TABLE						
IOU	Percent PPP Electric	Percent PPP Gas	Electric Proportional Share	Gas Proportiona l Share		
PG&E	80%	20%	44.4%	50.4%		
SDG&E	90%	10%	15.5%	7.8%		
SCE	100%	0%	40.1%	0.0%		
SoCalGas	0%	100%	0.0%	41.8%		

Attachment G

SCE New Program Segmentation

Resource Acquisition

ProgramID	Program Name	2022		2023	
		Budget (\$)	% of Portfolio Budget	Budget (\$)	% of Portfolio Budget
SCE_3P_2020RCI_001	Enervee Marketplace	5,335,045	1.71%	6,957,993	1.82%
SCE_3P_2020RCI_002	Residential Behavioral Program	11,160,270	3.58%	13,646,080	3.57%
SCE_3P_2020RCI_003	Commercial Behavioral Program	348,327	0.11%	2,559,746	0.67%
SCE_3P_2020RCI_004	Willdan Multifamily Program	11,628,100	3.73%	19,595,052	5.12%
SCE_3P_2020RCI_005	Willdan Commercial Program	58,213,782	18.66%	93,100,657	24.34%
SCE_3P_2020RCI_006	Willdan Industrial Program	14,782,135	4.74%	39,521,758	10.33%
SCE_SW_FS	Food Service POS	2,459,455	0.79%	2,942,253	0.77%
SCE_SW_FS_PA	Food Service POS - SCE Costs	45,019	0.01%	37,972	0.01%
SCE_SW_HVAC_Up	Upstream HVAC (Comm + Res)	4,201,531	1.35%	4,389,105	1.15%
SCE_SW_HVAC_Up_PA	Upstream HVAC (Comm + Res) - SCE Costs	76,906	0.02%	56,645	0.01%
SCE_SW_IP_Colleges	UC/CSU/CCC	601,876	0.19%	1,856,800	0.49%
SCE_SW_IP_Colleges_PA	UC/CSU/CCC - SCE Costs	36,114	0.01%	111,408	0.03%
SCE_SW_IP_Gov	Department of General Services	478,105	0.15%	1,357,084	0.35%
SCE_SW_IP_Gov_PA	Department of General Services - SCE Costs	8,751	0.00%	17,514	0.00%
SCE_SW_MCWH	Midstream Comm Water Heating	2,356,330	0.76%	2,767,294	0.72%
SCE_SW_MCWH_PA	Midstream Comm Water Heating - SCE Costs	43,131	0.01%	40,900	0.01%
SCE_SW_PLA	Plug Load and Appliance	4,726,989	1.52%	4,895,934	1.28%
SCE_SW_PLA_PA	Plug Load and Appliance - SCE Costs	86,524	0.03%	63,186	0.02%
SCE_SW_UL	Lighting (Upstream)	4,858,464	1.56%	5,035,279	1.32%
SCE_SW_UL_PA	Lighting (Upstream) - SCE Costs	291,508	0.09%	302,116	0.08%
SCE_SW_WP	Water/wastewater pumping	601,876	0.19%	1,856,800	0.49%
SCE_SW_WP_PA	Water/wastewater pumping - SCE Costs	36,113	0.01%	111,409	0.03%
SCE-13-L-002B	City of Long Beach Energy Leader Partnership	6,394	0.00%	6,329	0.00%
SCE-13-L-002F	Gateway Cities Energy Leader Partnership	20,063	0.01%	11,811	0.00%
SCE-13-L-002L	Orange County Cities Energy Leader Partnership	39,751	0.01%	14,730	0.00%
SCE-13-L-002M	San Gabriel Valley Energy Leader Partnership	10,452	0.00%	5,464	0.00%
SCE-13-L-002N	San Joaquin Valley Energy Leader Partnership	-	0.00%	-	0.00%
SCE-13-L-002O	South Bay Energy Leader Partnership	20,624	0.01%	15,877	0.00%
SCE-13-L-002P	South Santa Barbara County Energy Leader Partnership	15,395	0.00%	7,906	0.00%
SCE-13-L-002Q	Ventura County Energy Leader Partnership	17,803	0.01%	10,371	0.00%

SCE-13-L-002T	West Side Energy Leader Partnership	13,541	0.00%	11,138	0.00%
SCE-13-L-002V	North Orange County Cities	11,567	0.00%	6,604	0.00%
SCE-13-L-002W	San Bernardino Association of Governments	-	0.00%	-	0.00%
SCE-13-L-002Y	Grandfathered Street Lights	3,490,683	1.12%	-	0.00%
SCE-13-L-003A	California Community Colleges Energy Efficiency Partnership	203,844	0.07%	14,161	0.00%
SCE-13-L-003C	County of Los Angeles Energy Efficiency Partnership	36,234	0.01%	12,658	0.00%
SCE-13-L-003G	UC/CSU Energy Efficiency Partnership	228,867	0.07%	-	0.00%
SCE-13-L-003I	Public Sector Performance-Based Retrofit High Opportunity	526,423	0.17%	287,957	0.08%
SCE-13-RENAdmin	REN Administrative Costs (excluded from TRC)	80,476	0.03%	83,235	0.02%
SCE-13-SW-001A	Energy Advisor Program	693,721	0.22%	-	0.00%
SCE-13-SW-001F	Residential New Construction Program	73,162	0.02%	79,371	0.02%
SCE-13-SW-001G	Residential Direct Install	15,265,977	4.89%	15,124,543	3.95%
SCE-13-SW-002B	Commercial Calculated Program	277,188	0.09%	271,048	0.07%
SCE-13-SW-002G	Savings By Design	276,867	0.09%	252,720	0.07%
SCE-13-SW-003B	Industrial Calculated Energy Efficiency Program	52,116	0.02%	69,187	0.02%
SCE-13-SW-003D	Strategic Energy Management	4,340,997	1.39%	4,481,481	1.17%
SCE-13-SW-004B	Agriculture Calculated Energy Efficiency Program	203,452	0.07%	167,301	0.04%
SCE-13-TP-001	Comprehensive Manufactured Homes	4,674,335	1.50%	4,564,818	1.19%
SCE-13-TP-007	Primary and Fabricated Metals	55,908	0.02%	111,941	0.03%
SCE-13-TP-008	Nonmetallic Minerals and Products	61,189	0.02%	67,009	0.02%
SCE-13-TP-010	Comprehensive Petroleum Refining	34,561	0.01%	35,380	0.01%
SCE-13-TP-021	Enhanced Retrocommissioning	125,098	0.04%	35,380	0.01%
SCE-13-TP-022	Water Infrastructure Systems EE Program	1,500,626	0.48%	451,856	0.12%
SCE-13-TP-025	Facility Assessment Service Program	106,514	0.03%	105,429	0.03%
SCE-13-TP-026	Residential 3P Solicitation	7,780,615	2.49%	9,659,940	2.53%
SCE-13-TP-027	Commercial 3P Solicitation	57,952,048	18.58%	32,726,553	8.56%
SCE-13-TP-028	Industrial 3P Solicitation	7,909,455	2.54%	8,719,640	2.28%
SCE-13-TP-029	Local Government 3P Solicitation	5,492,001	1.76%	6,590,401	1.72%
SCE-13-TP-030	Agriculture 3P Solicitation	5,492,000	1.76%	6,587,194	1.72%
Resource Acquisition Subtotal		239,466,297	76.76%	291,812,418	76.28%
Market Support					
ProgramID	Program Name	2022		2023	
		Budget (\$)	% of Portfolio Budget	Budget (\$)	% of Portfolio Budget

SCE_SW_ETP_Elec	ETP, electric	5,620,799	1.80%	7,145,799	1.87%
SCE_SW_ETP_Elec_PA	ETP, electric - SCE Costs	337,248	0.11%	428,748	0.11%
SCE_SW_HVAC_QIQM	Res HVAC QI/QM	-	0.00%	2,213,520	0.58%
SCE_SW_HVAC_QIQM_PA	Res HVAC QI/QM - SCE Costs	-	0.00%	28,567	0.01%
SCE_SW_NC_NonRes_Ag_electric	SW Non Res Ag New Construction	9,746	0.00%	97,870	0.03%
SCE_SW_NC_NonRes_Ag_electric_PA	SW Non Res Ag New Construction - SCE Costs	178	0.00%	1,263	0.00%
SCE_SW_NC_NonRes_Ag_mixed	SW Non Res Ag Mixed New Construction	30,678	0.01%	234,587	0.06%
SCE_SW_NC_NonRes_Ag_mixed_PA	SW Non Res Ag Mixed New Construction - SCE Costs	562	0.00%	3,028	0.00%
SCE_SW_NC_NonRes_Com_electric	SW Non Res Comm New Construction	44,440	0.01%	435,833	0.11%
SCE_SW_NC_NonRes_Com_electric_PA	SW Non Res Comm New Construction - SCE Costs	813	0.00%	5,625	0.00%
SCE_SW_NC_NonRes_Com_mixed	SW Non Res Comm Mixed New Construction	83,442	0.03%	828,270	0.22%
SCE_SW_NC_NonRes_Com_mixed_PA	SW Non Res Comm Mixed New Construction - SCE Costs	1,527	0.00%	10,690	0.00%
SCE_SW_NC_NonRes_Ind_electric	SW Non Res Ind New Construction	25,131	0.01%	241,916	0.06%
SCE_SW_NC_NonRes_Ind_electric_PA	SW Non Res Ind New Construction - SCE Costs	460	0.00%	3,122	0.00%
SCE_SW_NC_NonRes_Ind_mixed	SW Non Res Ind Mixed New Construction	105,927	0.03%	911,048	0.24%
SCE_SW_NC_NonRes_Ind_mixed_PA	SW Non Res Ind Mixed New Construction - SCE Costs	1,939	0.00%	11,758	0.00%
SCE_SW_NC_NonRes_Pub_electric	SW Non Res Pub New Construction	22,121	0.01%	212,611	0.06%
SCE_SW_NC_NonRes_Pub_electric_PA	SW Non Res Pub New Construction - SCE Costs	405	0.00%	2,744	0.00%
SCE_SW_NC_NonRes_Pub_mixed	SW Non Res Pub Mixed New Construction	25,106	0.01%	217,106	0.06%
SCE_SW_NC_NonRes_Pub_mixed_PA	SW Non Res Pub Mixed New Construction - SCE Costs	460	0.00%	2,802	0.00%
SCE_SW_NC_NonRes_Res_electric	SW Non Res Res New Construction	38,463	0.01%	378,801	0.10%
SCE_SW_NC_NonRes_Res_electric_PA	SW Non Res Res New Construction - SCE Costs	704	0.00%	4,889	0.00%
SCE_SW_NC_NonRes_Res_mixed	SW Non Res Res Mixed New Construction	70,353	0.02%	614,995	0.16%
SCE_SW_NC_NonRes_Res_mixed_PA	SW Non Res Res Mixed New Construction - SCE Costs	1,288	0.00%	7,937	0.00%
SCE_SW_NC_Res_electric	SW Res New Construction	1,297,933	0.42%	2,710,573	0.71%
SCE_SW_NC_Res_electric_PA	SW Res New Construction - SCE Costs	23,758	0.01%	34,982	0.01%
SCE_SW_NC_Res_mixed	SW Res Mixed New Construction	608,186	0.19%	816,610	0.21%
SCE_SW_NC_Res_mixed_PA	SW Res Mixed New Construction - SCE Costs	11,132	0.00%	10,539	0.00%
SCE_SW_WET_CC	WET Career Connections	320,800	0.10%	320,800	0.08%
SCE_SW_WET_CC_PA	WET Career Connections - SCE Costs	5,872	0.00%	4,140	0.00%
SCE_SW_WET_Work	WE&T Career and Workforce Readiness	563,342	0.18%	606,725	0.16%
SCE_SW_WET_Work_PA	WE&T Career and Workforce Readiness - SCE Costs	10,312	0.00%	7,830	0.00%
SCE-13-SW-002A	Commercial Energy Advisor Program	668,852	0.21%	676,417	0.18%
SCE-13-SW-003A	Industrial Energy Advisor Program	-	0.00%	-	0.00%

SCE-13-SW-007A	On-Bill Financing	732,641	0.23%	781,554	0.20%
SCE-13-SW-007A1	On-Bill Financing Loan Pool	12,000,000	3.85%	14,000,000	3.66%
SCE-13-SW-007C	New Finance Offerings	592,332	0.19%	588,317	0.15%
SCE-13-SW-009A	Technology Development Support	674,871	0.22%	153,434	0.04%
SCE-13-SW-009B	Technology Assessments	1,829,012	0.59%	618,330	0.16%
SCE-13-SW-009C	Technology Introduction Support	1,728,981	0.55%	546,946	0.14%
SCE-13-SW-010A	WE&T Integrated Energy Education and Training	8,696,114	2.79%	8,840,814	2.31%
SCE-13-TP-024	AB841	160,089	0.05%	211,197	0.06%
Market Support Subtotal		36,346,017	11.65%	44,972,737	11.76%
Equity					
ProgramID	Program Name	2022		2023	
		Budget (\$)	% of Portfolio Budget	Budget (\$)	% of Portfolio Budget
SCE-Res-Equity-001	Residential Equity Program	3,696,750	1.19%	7,393,500	1.93%
SCE-SMB-Equity-001	Small/Medium Business Equity Program	2,120,001	0.68%	5,297,422	1.38%
Equity Subtotal		5,816,751	1.86%	12,690,922	3.32%
Codes and Standards					
ProgramID	Program Name	2022		2023	
		Budget (\$)	% of Portfolio Budget	Budget (\$)	% of Portfolio Budget
SCE_SW_CSA_Appl	Codes & Standards Advocacy - State Appliance Standards Advocacy	586,236	0.19%	586,236	0.15%
SCE_SW_CSA_Appl_PA	Codes & Standards Advocacy - State Appliance Standards Advocacy - SCE Costs	54,324	0.02%	52,654	0.01%
SCE_SW_CSA_Bldg	Codes & Standards Advocacy - State Building Codes Advocacy	1,924,293	0.62%	1,924,293	0.50%
SCE_SW_CSA_Bldg_PA	Codes & Standards Advocacy - State Building Codes Advocacy - SCE Costs	106,043	0.03%	98,083	0.03%
SCE_SW_CSA_Natl	Codes & Standards Advocacy - National Codes & Standards Advocacy	1,709,595	0.55%	1,709,595	0.45%
SCE_SW_CSA_Natl_PA	Codes & Standards Advocacy - National Codes & Standards Advocacy - SCE Costs	65,371	0.02%	57,311	0.01%
SCE-13-SW-008C	Compliance Improvement	3,077,099	0.99%	3,051,711	0.80%
SCE-13-SW-008D	Reach Codes	1,383,919	0.44%	1,379,860	0.36%
SCE-13-SW-008E	Planning and Coordination	8,270,687	2.65%	8,218,051	2.15%
Equity Subtotal		17,177,567	5.51%	17,077,794	4.46%
Evaluation, Measurement and Verification					
ProgramID	Program Name	2022		2023	

		Budget (\$)	% of Portfolio Budget	Budget (\$)	% of Portfolio Budget
SCE-3OV0100	SCE EM&V	3,423,826	1.10%	4,200,096	1.10%
SCE-3OV0200	CPUC EM&V	9,736,663	3.12%	11,784,920	3.08%
Evaluation, Measurement and Verification Subtotal		13,160,489	4.22%	15,985,016	4.18%
Grand Total		311,967,121	100%	382,538,887	100%