

Energy Efficiency
Portfolio Application
of the

San Diego Regional Energy Network

Exhibit 4

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

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

Attachment A: SDREN's Energy Efficiency 2024-2031 Application Tables, Pursuant To Energy Division Template

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Pa Name:

SDREN

 Budget Year:

2024-2031

 (This Table applies only to the IOU PAs)

Table 1 -Bill Payer Impacts (based on program savings forecasted for the year)				
	(Res and Non-Res) \$/kwh	(Res and Non-Res)	Annual Bill Savings	Lifecycle Bill
Present Rates - System Average *				
2021				
2022				
2023				
2024				
2025				
2026				
2027				
2028				
2029				
2030				
2031				

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

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

Pa Name: SDREN
 Budget Year: 2024-2031

Table 3.1 - PA 2024-2031 Funding Source Summary

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

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

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

8 Year Funding Sources - RENs/CCAs

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

PA Name: **EM&V**
 Budget Year: **2024-2027**

Table 3 - Budget and Cost Recovery by Funding Source

	Source in Table 4				Source in Table 7			
	2024	2025	2026	2027	2028	2029	2030	2031
Annual PA Spending Budget (Program and EM&V total)	\$ 15,852,728	\$ 22,755,726	\$ 36,831,318	\$ 39,624,441	\$ 42,219,821	\$ 42,868,616	\$ 44,583,351	\$ 46,366,693
CEC AB 841 Program Budget Request								
for 2022 and 60% for 2023								
Plus 2023 and beyond Uncommitted and Unspent Carryover Balance								
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	\$ 15,852,728	\$ 22,755,726	\$ 36,831,318	\$ 39,624,441	\$ 42,219,821	\$ 42,868,616	\$ 44,583,351	\$ 46,366,693
*Applicable percentage is 70% for 2022 and 60% for 2023.								

Table 3b - Budget by Funding Source

Portfolio Budget (Before Carryover)	2024 Budget		2025 Budget		2026 Budget		2027 Budget		2028 Budget		2029 Budget		2030 Budget		2031 Budget	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Electric Procurement Funds	\$ 7,921,612	50%	\$ 11,377,863	50%	\$ 18,415,659	50%	\$ 19,812,220	50%	\$ 21,109,910	50%	\$ 21,434,308	50%	\$ 22,291,754	50%	\$ 23,189,346	50%
Gas PPP Exchange Funds	\$ 6,341,288	40%	\$ 11,102,294	48%	\$ 18,415,659	50%	\$ 19,812,220	50%	\$ 21,109,910	50%	\$ 21,434,308	50%	\$ 22,291,754	50%	\$ 23,189,346	50%
Total Funds	\$ 15,852,728		\$ 22,755,726		\$ 36,831,318		\$ 39,624,441		\$ 42,219,821		\$ 42,868,616		\$ 44,583,351		\$ 46,366,693	

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

Authorized Funding in Rates (Including Unspent/Uncommitted Funds)	Requirement		Carryover adjustment		Requirement		Carryover adjustment		Requirement		Carryover adjustment		Requirement		Carryover adjustment	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Electric Procurement FF Funds	\$ 9,511,622	60%	\$ 19,653,441	60%	\$ 22,419,385	60%	\$ 23,789,664	60%	\$ 24,721,893	60%	\$ 25,721,176	60%	\$ 26,792,013	60%	\$ 27,923,016	60%
Gas PPP Exchange Funds	\$ 6,341,288	40%	\$ 13,102,294	40%	\$ 14,415,659	40%	\$ 15,031,776	40%	\$ 15,487,928	40%	\$ 15,747,440	40%	\$ 16,066,777	40%	\$ 16,566,677	40%
Total Funds	\$ 15,852,728		\$ 32,755,736		\$ 36,835,044		\$ 38,821,440		\$ 40,209,821		\$ 41,468,616		\$ 42,858,790		\$ 44,489,693	

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

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

Notes on Table 3d

Any actual uncommitted/unspent funds for 2023 will be tracked-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.

Energy Efficiency ^{1,2}

Program Funds - PA ¹	2024			2025			2026			2027			2028			2029			2030			2031			
	Response Funds	Efficiency Funds	Public Purpose Funds	Response Funds	Efficiency Funds	Public Purpose Funds	Response Funds	Efficiency Funds	Public Purpose Funds	Response Funds	Efficiency Funds	Public Purpose Funds	Response Funds	Efficiency Funds	Public Purpose Funds	Response Funds	Efficiency Funds	Public Purpose Funds	Response Funds	Efficiency Funds	Public Purpose Funds				
Program Funds - PA ¹	\$ -	\$ 9,143,800	\$ 6,097,300	\$ -	\$ 13,143,000	\$ -	\$ 18,397,340	\$ 12,388,100	\$ 31,405,900	\$ -	\$ 20,787,304	\$ 13,838,100	\$ 34,643,400	\$ -	\$ 22,866,024	\$ 15,344,000	\$ 38,182,020	\$ -	\$ 23,789,664	\$ 15,852,728	\$ 42,219,821	\$ -	\$ 25,721,176	\$ 17,147,440	\$ 44,583,351
Program Funds - CEC ²	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Funds - CCB ³	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
EM&V ⁴	\$ -	\$ 361,611	\$ 242,000	\$ -	\$ 697,742	\$ -	\$ 715,902	\$ 301,594	\$ 1,239,435	\$ -	\$ 811,492	\$ 543,310	\$ 1,354,802	\$ -	\$ 914,641	\$ 619,361	\$ 1,263,511	\$ -	\$ 992,210	\$ 655,211	\$ 1,246,793	\$ -	\$ 1,023,347	\$ 683,610	\$ 1,214,740
Budget Total ⁵	\$ -	\$ 9,511,622	\$ 6,341,288	\$ -	\$ 13,840,742	\$ -	\$ 19,113,242	\$ 12,689,694	\$ 32,595,336	\$ -	\$ 21,618,796	\$ 14,381,410	\$ 35,998,202	\$ -	\$ 23,789,665	\$ 15,963,361	\$ 43,445,531	\$ -	\$ 26,720,876	\$ 16,487,939	\$ 44,466,614	\$ -	\$ 26,744,523	\$ 17,831,250	\$ 46,366,693

Notes:
 1 Authorized budget excludes reductions from past unspent funds, carryover and is consistent with funding approved in D. 09-09-047, D. 12-11-015, D. 14-10-046 and D. 15-10-024, D. 18-05-061 and D. 21-01-024. CEC AB 841 program ends in 2023.
 2 ERN and CCA information provided by all ERN and CCA and is consistent with their respective ABNs.
 3 This represents total CCB=CCA=REN EM&V.
 4 Program Funds represents the total program budget, excluding EM&V.
 5 Only the IOU completes this line and should be consistent table 7.

Pa Name: SDREN
 Budget Year: 2024-2027
 (report budgets to the \$-do not round)
 Table 4 - Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	Target Exempt	Program Type	Business Sector	Portfolio Segment	Sort by Segment				2024																			
							Administrative	Marketing/Outreach	Direct Implementation Non-Incentive	Incentive/Rbate	2024 PA Spending Budget Request	2024 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2024 PA Revenue Requirement Request	First Year Net KWH	First Year Net KW	First Year Net Therms (MM)	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from Inver-IOWP Measure							
SDREN-01-WET-EPF		Energy Efficiency Program	Yes	Local Third Party	WEAT	Market Support	\$ -	\$ 10,840	\$ 784,500	\$ -	\$ 840,000	\$ -	\$ 840,000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-02-WET-SRC		Workforce Training & Capacity Building	Yes	Local Third Party	WEAT	Market Support	\$ -	\$ 51,600	\$ 1,275,120	\$ -	\$ 1,366,200	\$ -	\$ 1,366,200	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-01-RES-MFM		Murkemy	No	Local Third Party	Residential	Equity	\$ -	\$ 93,840	\$ 1,301,160	\$ -	\$ 1,394,100	\$ -	\$ 1,394,100	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-02-RES-SFM		Single-Family	No	Local Third Party	Residential	Equity	\$ -	\$ 174,240	\$ 2,439,360	\$ -	\$ 2,613,600	\$ -	\$ 2,613,600	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-01-PUB-GRL		Climate Resilience Leadership	No	Local Third Party	Public	Market Support	\$ -	\$ 163,200	\$ 2,254,800	\$ -	\$ 2,418,000	\$ -	\$ 2,418,000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-02-PUB-TRE		Tribal Engagement	Yes	Local Third Party	Public	Equity	\$ -	\$ 14,640	\$ 196,560	\$ -	\$ 210,600	\$ -	\$ 210,600	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-01-COM-SMB		SMB Energy Coach	No	Local Third Party	Commercial	Equity	\$ -	\$ 84,120	\$ 1,177,680	\$ -	\$ 1,261,800	\$ -	\$ 1,261,800	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-02-COM-ERP		Efficient Refrigeration	No	Local Third Party	Commercial	Equity	\$ -	\$ 50,640	\$ 704,560	\$ -	\$ 840,600	\$ -	\$ 840,600	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-02-COM-MAP		Market Access Program	No	Local Third Party	Commercial	Resource Acquisition	\$ -	\$ 126,120	\$ 1,765,680	\$ -	\$ 1,891,800	\$ -	\$ 1,891,800	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN-01-CB-CSS		Codes & Standards	Yes	Local Third Party	Codes & Standards	Codes & Standards	\$ -	\$ 16,840	\$ 784,560	\$ -	\$ 840,600	\$ -	\$ 840,600	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN_CS_PortfolioSupport		Codes & Standards Portfolio Support	Yes	Core PA	Portfolio Support	Codes & Standards	\$ 93,400	\$ -	\$ -	\$ -	\$ 93,400	\$ -	\$ 93,400	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN_RA_PortfolioSupport		Resource Acquisition Portfolio Support	Yes	Core PA	Portfolio Support	Resource Acquisition	\$ 210,200	\$ -	\$ -	\$ -	\$ 210,200	\$ -	\$ 210,200	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN_MS_PortfolioSupport		Market Support Portfolio Support	Yes	Core PA	Portfolio Support	Market Support	\$ 518,400	\$ -	\$ -	\$ -	\$ 518,400	\$ -	\$ 518,400	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
SDREN_EQ_PortfolioSupport		Equity Portfolio Support	Yes	Core PA	Portfolio Support	Equity	\$ 702,300	\$ -	\$ -	\$ -	\$ 702,300	\$ -	\$ 702,300	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
PA PROGRAM TOTAL							\$ 1,624,000	\$ 914,680	\$ 12,804,120	\$ -	\$ 16,242,800	\$ -	\$ 16,242,800	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
EM&V (PA & ED Portions) Total¹																														
EM&V - PA											\$ 167,573		\$ 167,573																	
EM&V - ED											\$ 442,047		\$ 442,047																	
EM&V TOTAL											\$ 609,720		\$ 609,720																	
PA Program and EM&V Total							\$ 1,624,000	\$ 914,680	\$ 12,804,120	\$ -	\$ 16,852,720	\$ -	\$ 16,852,720	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
CEC AB 841 Program Budget-IOU PA only																														
Applicable Annual % of Difference between																														
IOU 2020 and Beyond Uncommitted and																														
CEC AB 841 Total																														
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)							\$ 1,624,000	\$ 914,680	\$ 12,804,120	\$ -	\$ 16,852,720	\$ -	\$ 16,852,720	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Financing Pilot Programs																														
											\$ -		\$ -																	
											\$ -		\$ -																	
											\$ -		\$ -																	
											\$ -		\$ -																	
Financing Pilot Programs Total							\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
ME&V & EXA																														
ME&V											\$ -		\$ -																	
EXA											\$ -		\$ -																	

Notes: (PA is add as needed, e.g., relevant advice letter references, decision references and any other needed explanation)
 1. ME&V requested budget for 2021 per AL 3498-E/0315-G.
 2. SDG&E Financing Administrative cost is per AL 3451-E-A/2018-G.
 3. For 0.21-01-xxx, percentage allocation is 70% for 2022 and 60% for 2023. For SDG&E that base for calculation is \$116-80
 4. Add footnote on Non-EE budgeted overheads
 * For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it does not include REN or CCAs EM&V budget
 * PAs have the option of inputting by program or by lots

Pa Name: SDREN
 Budget Year: 2028-2031
 (report budgets to the \$--do not round)

Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Sector Name	Portfolio Segment	2027 PA Spending Budget Request	Baseline Percentage increase	2028											
						2028 PA Spending Budget Request	First Year Net KWH	First Year Net KW	First Year Net Therms (MM)	First Year Net Electric CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures	
		Residential	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		Commercial	Resource Acquisition	\$ 5,255,756	4.0%	\$ 5,465,988	4,755,927.00	-	-	1,532.00	-	53,741,973.00	-	16,088.00	-	-	-
		Industrial	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		Agricultural	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		Emerging Tech	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		Public	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		WE&T	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		Finance	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		OBF Loan Pool	Resource Acquisition	\$ -	#DIV/0!	\$ -											
		Residential	Market Support	\$ -	#DIV/0!	\$ -											
		Commercial	Market Support	\$ -	#DIV/0!	\$ -											
		Industrial	Market Support	\$ -	#DIV/0!	\$ -											
		Agricultural	Market Support	\$ -	#DIV/0!	\$ -											
		Emerging Tech	Market Support	\$ -	#DIV/0!	\$ -											
		Public	Market Support	\$ 8,831,056	4.0%	\$ 7,104,298	140,082.00	122.00	177,832.00	45.00	944.00	(2,752,342.00)	1,841,547.00	(839.00)	6,779.00	-	-
		WE&T	Market Support	\$ 6,131,875	4.0%	\$ 6,376,644											
		Finance	Market Support	\$ -	#DIV/0!	\$ -											
		OBF Loan Pool	Market Support	\$ -	#DIV/0!	\$ -											
		Residential	Equity	\$ 10,018,600	15.6%	\$ 11,577,280	(584,161.00)	128.00	62,314.00	(165.00)	460.00	(6,032,961.00)	959,930.00	(1,697.00)	5,097.00	-	-
		Commercial	Equity	\$ 5,255,732	15.6%	\$ 6,073,291	988,553.00	128.00	(157.00)	313.00	(1.00)	4,856,848.00	(2,071.00)	1,378.00	(11.00)	-	-
		Industrial	Equity	\$ -	#DIV/0!	\$ -											
		Agricultural	Equity	\$ -	#DIV/0!	\$ -											
		Emerging Tech	Equity	\$ -	#DIV/0!	\$ -											
		Public	Equity	\$ 525,551	15.6%	\$ 607,303											
		WE&T	Equity	\$ -	#DIV/0!	\$ -											
		Finance	Equity	\$ -	#DIV/0!	\$ -											
		OBF Loan Pool	Equity	\$ -	#DIV/0!	\$ -											
		Codes & Standards	Codes & Standards	\$ 2,102,315	15.6%	\$ 2,429,342											
		PA PROGRAM TOTAL				\$ 39,634,443	5,300,381.00	250.00	269,989.00	1,705.00	1,433.00	49,913,316.00	2,799,406.00	14,930.00	14,865.00	-	-
		EM&V (PA & ED Portions) Total ⁴															
		EM&V - PA		\$ 419,211		\$ 435,979											
		EM&V - ED		\$ 1,105,191		\$ 1,149,399											
		EM&V TOTAL		\$ 1,524,402		\$ 1,585,378											
		PA Spending Budget Request (PA Program and EM&V Total)				\$ 41,219,821	5,300,381.00	250.00	269,989.00	1,705.00	1,433.00	49,913,316.00	2,799,406.00	14,930.00	14,865.00	-	-
		CEC AB 841 Program Budget--IOU PA only															
		Applicable Annual % of difference between IOU 2020 and Beyond Uncommitted and															
		CEC AB 841 Total															
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)				\$ 41,219,821	5,300,381.00	250.00	269,989.00	1,705.00	1,433.00	49,913,316.00	2,799,406.00	14,930.00	14,865.00	-	-
		Financing Pilot Programs															
		Financing Pilot Programs Total				\$ -	-	-	-	-	-	-	-	-	-	-	-
		ME&O & ESA															
		ME&O															
		ES&A															

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other needed explanations.
 1. ME&O requested budget for 2021 per AL 3498-E/3835-G.

⁴ Portfolio Support allocated into sectors/segments to capture total budget request.
⁵ For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it does not include REN or CCAs EM&V budget.
⁶ PAs have the option of inputting by program or by total

Pa Name:	SDREN
Budget Year:	2024-2031

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

Committed funds but not yet spent	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
Category **			
2017 to date EM&V Funds	\$0	\$0	\$0
2017 to date Program Funds - Utility	\$0	\$0	\$0
2017 to date Program Funds - REN	\$0	\$0	\$0
2017 to date Program Funds - CCA	\$0	\$0	\$0
2018 to date EM&V Funds	\$0	\$0	\$0
2018 to date Program Funds - Utility	\$0	\$0	\$0
2018 to date Program Funds - REN	\$0	\$0	\$0
2018 to date Program Funds - CCA	\$0	\$0	\$0
2019 to date EM&V Funds	\$0	\$0	\$0
2019 to date Program Funds - Utility	\$0	\$0	\$0
2019 to date Program Funds - REN	\$0	\$0	\$0
2019 to date Program Funds - CCA	\$0	\$0	\$0
2020 to date EM&V Funds	\$0	\$0	\$0
2020 to date Program Funds - Utility	\$0	\$0	\$0
2020 to date Program Funds - REN	\$0	\$0	\$0
2020 to date Program Funds - CCA	\$0	\$0	\$0
2021 to date EM&V Funds	\$0	\$0	\$0
2021 to date Program Funds - Utility	\$0	\$0	\$0
2021 to date Program Funds - REN	\$0	\$0	\$0
2021 to date Program Funds - CCA	\$0	\$0	\$0

** For Non-IOU PAs: complete on the EM&V and REN/CCA; provide information to your IOU partner for the IOUs share of the commitment.

For IOU PA: Input IOU EM&V and IOU commitments. Incorporate REN/CCA information into the table. IOU Tab 5 will provide full picture of all committed funds for the IOU/CCA/REN combined portfolios.

File Name: **SENER**
 Budget Year: **2024-2025**
 Table 6 - Revenue Programs (Identical For All IOUs)

(All IOUs) 2023 Proposed Base Year (FY23) (M) ***
 (All IOUs) 2024 Proposed Base Year (FY24) (M) ***

Energy Programs

Revenue Program*	Program Subpart	Lead IOU	Contract Budget (Contract Amount)								Initial (Expected or Actual) Contract Amount (M) (FY23)	Expected Contract End (Date) (MM/YY)	Expected to be Retired or Replaced?	Contractual (Electric & Gas) Proportional Contribution to Contract Cost per Load-Serve (Other as reflected in co-funding agreement, or reported in co-funding agreement. Funding share may be within a 10% of target per IOU to meet a contract)	2023 IOU Administrative Budget**				2024 IOU Administrative Budget**				2025 IOU Administrative Budget**				2026 IOU Administrative Budget**				2027 IOU Administrative Budget**			
			2023 Program	2023 Program	2023 Program	2024 Program	2025 Program	2026 Program	2027 Program	2028 Program					PDM	SOBE	SC	SCB	PDM	SOBE	SC	SCB	PDM	SOBE	SC	SCB	PDM	SOBE	SC	SCB	PDM	SOBE	SC	SCB
			Contract Budget (M) (FY23)	Contract Budget (M) (FY23)	Contract Budget (M) (FY23)	Contract Budget (M) (FY24)	Contract Budget (M) (FY25)	Contract Budget (M) (FY26)	Contract Budget (M) (FY27)	Contract Budget (M) (FY28)																								
Weatherization and Training: Career and workforce readiness																																		
Renew Construction																																		
Weather New Construction																																		
Water and Wastewater Administration																																		
Weatherization: Energy, SCE & Sage of																																		
Weather: B-13 Connections																																		
Water Infrastructure: Energy																																		
Lighting (Equipment)																																		
EV: EVSE																																		
Weatherization: Energy, SCE/Sage/EEC																																		
EV: EVSE																																		
Food Service POS																																		
Watermain Corrosion Water Heating																																		
Weather: Energy																																		
Weather: Energy and Appliances																																		
Weather: Energy, SCE/Sage/S&S																																		
Total																																		

*Modify rows as needed to reflect consolidation or division of a program category per solicitation approach or contract. Ultimately there should be one line per executed IP contract.
 **The contract budget or signed contract amount. Here given year accounts for the anticipated launch date of the program. Program contract budgets reflect total party implementation contract values and expenditures. Estimated values for year end 2023.
 ***Administrative budgets for statewide programs are IOU specific and are filed under separate programs (IO). They include all non-contract program expenditures which cover coordination, support and management. Estimate for year end 2023. This does not include any contract implementation cost.
 ****Assumes data assumes that the signed contracts filed via AL are approved by IOU in 90-days, where applicable.
 (All IOUs) 2023 Proposed Base Year (FY23) (M) ***
 (All IOUs) 2024 Proposed Base Year (FY24) (M) ***
 (All IOUs) 2025 Proposed Base Year (FY25) (M) ***
 (All IOUs) 2026 Proposed Base Year (FY26) (M) ***
 (All IOUs) 2027 Proposed Base Year (FY27) (M) ***

APPROXIMATE COST SPLIT				
IOU	Percent EVSE	Percent Water Heating	Electric	Gas
PG&E	0%	20%	64.6%	50.4%
SDG&E	0%	0%	15.5%	7.3%
SCE	100%	0%	40.1%	0.0%
SoCalGas	0%	100%	0.0%	41.3%

ADVANCE LETTER 2024-6-22736-G-A
 (San Diego Gas & Electric Company - 1963 M)
 ADVANCE LETTER 2485-G-A
 (Southern California Gas Company - 1804 G)
 ADVANCE LETTER 3865-G-A
 (Southern California Edison Company - 1338 E)
 ADVANCE LETTER 5275-G-A/MS03-G-A
 (Pacific Gas & Electric Company - 1338 M)

	Segment	Requested Budget*	TSB	TRC	PAC	kWh	kW	Therms (MM)	First Year Net Elec CO2e	First Year Net Gas CO2e	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Electric CO2e	Lifecycle Net Gas CO2e	Lifecycle Net CO2e from low-GWP Measures
2024	Resource Acquisition	1,891,800	-	-	-	-	-	-	-	-	-	-	-	-	-
	Market Support	4,665,600	-	-	-	-	-	-	-	-	-	-	-	-	-
	Equity	6,320,700	-	-	-	-	-	-	-	-	-	-	-	-	-
	Codes & Standards	840,600	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	609,720	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	15,852,720	-	-	-	-	-	-	-	-	-	-	-	-	-
2025	Resource Acquisition	3,909,240	1,979,434	0	0	3,333,474	-	-	1,143	-	37,668,258	-	11,724	-	-
	Market Support	9,641,700	1,753,895	0	0	101,716	86	125,319	28	665	(1,917,423)	1,297,850	(603)	6,892	-
	Equity	13,057,919	1,132,454	0	0	429,473	117	75,469	130	401	(394,925)	784,174	(80)	4,164	-
	Codes & Standards	1,737,450	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,259,836	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	32,755,736	4,865,783	1	1	3,864,663	203	200,788	1,302	1,066	35,355,910	2,082,023	11,041	11,056	-
2026	Resource Acquisition	4,300,164	2,624,811	0	1	4,444,630	-	-	1,553	-	50,224,315	-	15,383	-	-
	Market Support	10,605,870	2,230,875	0	0	120,809	103	150,518	36	799	(2,313,397)	1,558,772	(712)	8,277	-
	Equity	14,363,712	1,312,645	0	0	425,165	124	85,231	135	453	(751,484)	885,427	(190)	4,702	-
	Codes & Standards	1,911,195	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,385,820	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	36,031,310	6,168,331	1	1	4,990,604	227	235,749	1,725	1,252	47,159,434	2,444,199	14,482	12,979	-
2027	Resource Acquisition	4,730,180	2,824,697	0	1	4,837,697	-	-	1,581	-	54,665,975	-	16,429	-	-
	Market Support	11,666,457	2,841,538	0	0	142,470	124	180,889	44	961	(2,799,664)	1,873,210	(835)	9,947	-
	Equity	15,800,083	1,494,065	0	0	411,346	130	93,743	133	498	(1,094,820)	974,327	(290)	5,174	-
	Codes & Standards	2,102,315	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,524,402	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	39,634,441	7,160,300	1	1	5,391,513	254	274,632	1,758	1,458	50,771,491	2,847,537	15,304	15,120	-
2028	Resource Acquisition	5,465,985	2,919,598	0	1	4,755,927	-	-	1,532	-	53,741,973	-	16,088	-	-
	Market Support	13,481,242	2,919,602	0	0	140,062	122	177,832	45	944	(2,752,342)	1,841,547	(839)	9,779	-
	Equity	18,257,874	1,531,603	0	0	404,392	128	92,157	128	489	(1,076,315)	957,859	(319)	5,086	-
	Codes & Standards	2,429,342	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,585,378	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	41,219,821	7,370,803	1	1	5,300,381	250	269,989	1,705	1,433	49,913,316	2,799,406	14,930	14,865	-
2029	Resource Acquisition	5,684,626	2,856,028	0	1	4,677,446	-	-	1,462	-	52,855,137	-	15,626	-	-
	Market Support	14,020,492	3,034,481	0	0	137,751	120	174,897	36	929	(2,706,924)	1,811,159	(834)	9,617	-
	Equity	18,988,189	1,589,395	0	0	397,720	126	90,637	109	481	(1,058,553)	942,052	(342)	5,002	-
	Codes & Standards	2,526,516	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,648,793	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	42,868,616	7,479,904	1	1	5,212,917	246	265,534	1,607	1,410	49,089,660	2,753,211	14,450	14,619	-
2030	Resource Acquisition	5,912,010	2,810,399	0	0	4,602,020	-	-	1,391	-	52,002,829	-	15,194	-	-
	Market Support	14,581,309	3,156,950	0	0	135,530	118	172,077	22	914	(2,663,274)	1,781,953	(826)	9,462	-
	Equity	19,747,715	1,653,217	0	0	391,307	124	89,175	91	473	(1,041,485)	926,861	(355)	4,921	-
	Codes & Standards	2,627,576	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,714,745	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	44,583,355	7,620,566	1	1	5,128,857	242	261,252	1,504	1,387	47,536,335	2,666,092	13,621	14,157	-
2031	Resource Acquisition	6,148,490	2,837,637	0	0	4,529,439	-	-	1,386	-	51,182,662	-	14,788	-	-
	Market Support	15,164,563	3,292,333	0	0	133,392	116	169,363	23	899	(2,621,270)	1,753,849	(809)	9,313	-
	Equity	20,537,626	1,722,899	0	0	385,135	122	87,769	92	466	(1,025,057)	912,243	(358)	4,844	-
	Codes & Standards	2,732,679	-	-	-	-	-	-	-	-	-	-	-	-	-
	EM&V	1,783,335	-	-	-	-	-	-	-	-	-	-	-	-	-
	TOTAL Portfolio	46,366,693	7,852,869	1	1	5,047,966	238	257,132	1,501	1,365	47,536,335	2,666,092	13,621	14,157	-
8-Yr Total	299,312,691	48,518,556	6	6	34,936,901	1,660	1,765,076	11,102	9,371	328,124,216	18,301,282	97,840	97,179	-	

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

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

		2024 Energy Efficiency Cap And Target Expenditure Projections						2025 Energy Efficiency Cap And Target Expenditure Projections					
		Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
Line	Budget Category	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 ⁴	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 ⁴	Cap %	Target %
1	Administrative Costs												
2	PA ¹	\$ -	\$ -	\$ -	0.0%	10.0%		\$ -	\$ -	\$ -	0.0%	10.0%	
3	Non-PA Third Party & Partnership ²	\$ -	\$ -	\$ -	0.0%		10.0%	\$ -	\$ -	\$ -	0.0%		10.0%
4	PA & Non-PA Target Exempt Programs ³	\$ 1,524,300	\$ -	\$ 1,524,300				\$ 3,149,590	\$ -	\$ 3,149,590			
5	Marketing and Outreach Costs ⁴												
6	Marketing & Outreach	\$ -	\$ 914,580	\$ 914,580	5.8%		6.0%	\$ -	\$ 1,511,532	\$ 1,511,532	9.5%		6.0%
7	Statewide Marketing & Outreach ⁵	\$ -	\$ -	\$ -				\$ -	\$ -	\$ -			
8	Direct Implementation Costs												
9	Direct Implementation (Incentives and Rebates)	\$ -	\$ -	\$ -				\$ -	\$ 11,324,236	\$ 11,324,236			
10	Direct Implementation (Non Incentives and Non Rebates)	\$ -	\$ 9,763,320	\$ 9,763,320	61.6%		20.0%	\$ -	\$ 9,226,838	\$ 9,226,838	58.2%		20.0%
11	Incentives and Non Rebates ³	\$ -	\$ 3,040,800	\$ 3,040,800				\$ -	\$ 6,283,704	\$ 6,283,704			
12	EM&V Costs (PA and Energy Division) ^{6,7}	\$ 609,720	\$ -	\$ 609,720	3.8%		4.0%	\$ 1,259,836	\$ -	\$ 1,259,836	3.8%		4.0%
12a	EM&V - PA	\$ 167,673	\$ -	\$ 167,673				\$ 346,455	\$ -	\$ 346,455			
12b	EM&V - ED	\$ 442,047	\$ -	\$ 442,047				\$ 913,381	\$ -	\$ 913,381			
13	Total Portfolio Budget (includes PA Program and EM&V Budget + SW ME&O) ⁸	\$ 2,134,020	\$ 13,718,700	\$ 15,852,720				\$ 4,409,426	\$ 28,346,310	\$ 32,755,736			
14	CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.18-08-019, OP 10)		\$ -	\$ -				\$ -	\$ -	\$ -			
15	PA Spending Budget Request (PA Program and EM&V + CEC AB 841) ⁹			\$ 15,852,720						\$ 32,755,736			
16	Total Third-Party Implementer Contracts + CEC AB 841 (as defined per D.16-08-019, OP 10 and D.21-01-xxx OP) ^{10,11}		\$ 13,718,700		86.5%		60.0%		\$ 28,346,310		86.5%		60.0%

Notes:

- 10% cap requirement based on D. 09-09-047 is set for IOU only.
- New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.
- Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
- Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
- Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter 4098-G/544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
- 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.
- The EM&V percentage is based on PA's total portfolio budget of \$X, which excludes SWME&O, RENs, CCAs and CEC AB 841. This is the Total in line 13, minus SWME&O in line 7.
- 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.
- IOU PA's 2021 Proposed Budget of \$X excludes SWME&O budget of \$Y and includes CEC AB 841 budgets of \$Z.
- IOU PA's percentage for Third-Party Implementer Contracts uses \$X as its denominator, which is IOU PA Subtotal including EM&V, but excluding SWME&O, REN, and CCA. This is the Total in line 13 15, minus SWME&O in line 7.
- IOU's Third-Party Implementer Contracts (as defined per D.18-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.

2026 Energy Efficiency Cap And Target Expenditure Projections				2027 Energy Efficiency Cap And Target Expenditure Projections							
Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
Non-Third Party Qualifying Costs (including PA costs and old definition SP/CP contracts that don't meet the new definition)	Third Party Qualifying Costs ² (Including SW)	Total Portfolio	Percent of Budget ¹	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old definition SP/CP contracts that don't meet the new definition)	Third Party Qualifying Costs ² (Including SW)	Total Portfolio	Percent of Budget ¹	Cap %	Target %
\$ -	\$ -	\$ -	0.0%	10.0%		\$ -	\$ -	\$ -	0.0%	10.0%	
\$ 3,464,549	\$ -	\$ 3,464,549	0.0%		10.0%	\$ 3,811,004	\$ -	\$ 3,811,004	0.0%		10.0%
\$ -	\$ 1,547,776	\$ 1,547,776	9.8%		6.0%	\$ -	\$ 1,712,945	\$ 1,712,945	10.8%		6.0%
\$ -	\$ -	\$ -				\$ -	\$ -	\$ -			
\$ -	\$ 13,903,840	\$ 13,903,840				\$ -	\$ 16,267,533	\$ 16,267,533			
\$ -	\$ 8,753,066	\$ 8,753,066	55.2%		20.0%	\$ -	\$ 8,693,312	\$ 8,693,312	54.8%		20.0%
\$ -	\$ 6,976,259	\$ 6,976,259				\$ -	\$ 7,625,245	\$ 7,625,245			
\$ 1,385,820	\$ -	\$ 1,385,820	3.8%		4.0%	\$ 1,524,402	\$ -	\$ 1,524,402	3.8%		4.0%
\$ 381,101	\$ -	\$ 381,101				\$ 419,211	\$ -	\$ 419,211			
\$ 1,004,720	\$ -	\$ 1,004,720				\$ 1,105,191	\$ -	\$ 1,105,191			
\$ 4,850,369	\$ 31,180,941	\$ 36,031,310				\$ 5,335,406	\$ 34,299,035	\$ 39,634,441			
\$ -	\$ -	\$ -				\$ -	\$ -	\$ -			
	\$ 36,031,310						\$ 39,634,441				
\$ -	\$ 31,180,941		86.5%		60.0%	\$ -	\$ 34,299,035		86.5%		60.0%

Pa Name:	SDREN
Budget Year:	2024-2031

FUNCTION DEFINITIONS

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and regulatory support	Planning & Compliance	DSM Goal Planning; lead legislative review/positioning; policy support on reg proceedings; portfolio optimization; end use-market strategy; DSM lead for PRP, DRP, ES; locational targeting; audit support; SOX certifications; developing control plans; developing action plans; continuous monitoring; inspections; program/product QA/QC; decision compliance oversight/tracking; data requests; policies & procedures
		Company Regulatory Support	Case management for EE proceedings
Program management	Includes labor, contracts, admin costs for program design, program implementation, product and channel management for all sectors	Program Management & Delivery	Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking
		Product Management	Manage end-to-end new products and services (P&S) intake, evaluation, and launch process; develop and facilitate P&S governance teams, coordination of all sub-process owners, stakeholders, and technical resources required to evaluate and launch new products; evaluate and launch new services and 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
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 EM&V Forecasting	Program and product review; manage evaluation studies EE lead for LTPP and LEPK, market potential study, integration w/ procurement planning, CPUC Customer Programs, Products, and Services marketing, Digital Product Development, Digital Content & Optimization
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research
Account Management / Sales	Costs associated with account rep energy efficiency sales functions	Account Management	
IT	IT project specific costs and regular O&M	IT - project specific	Projects and minor enhancements. Includes project management/business integration ("PMO/BID"). Excluded: maintenance (which SCE defines as when something goes down, normal batch processing, verifying interfaces, etc.).
		IT - regular O&M	
Call Center	Costs associated with call center staff fielding EE program questions	Call Center	
Incentives	Costs of rebate and incentive payments to customers	Incentives	

Pa Name:
Budget Year:
PORTFOLIO STAFFING

SDREN
2024-2027

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

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

¶

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

¶

¶

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

¶

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

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

Sector	2020 EE Portfolio Expenditures				2024 EE Portfolio Budget				2025 EE Portfolio Budget				Labor
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	
Residential				\$ -	\$ 472,018	\$ 3,980,982	\$ -	\$ 4,453,000	\$ 960,765	\$ 2,899,219	\$ 5,340,017	\$ 9,200,000	\$ 1,051,187
Commercial				\$ -	\$ 470,428	\$ 3,967,572	\$ -	\$ 4,438,000	\$ 961,384	\$ 4,155,632	\$ 4,052,784	\$ 9,169,800	\$ 1,045,374
Industrial				\$ -			\$ -	\$ -			\$ -	\$ -	
Agricultural				\$ -			\$ -	\$ -			\$ -	\$ -	
Public				\$ -	\$ 314,396	\$ 2,651,604	\$ -	\$ 2,966,000	\$ 636,807	\$ 3,559,858	\$ 1,931,435	\$ 6,128,100	\$ 712,803
Cross Cutting*				\$ -	\$ 358,916	\$ 3,027,084	\$ -	\$ 3,386,000	\$ 741,788	\$ 6,256,212	\$ -	\$ 6,998,000	\$ 809,962
Total Sector Budget	\$ -	\$ -	\$ -	\$ -	\$ 1,615,758	\$ 13,627,242	\$ -	\$ 15,243,000	\$ 3,300,744	\$ 16,870,921	\$ 11,324,236	\$ 31,495,900	\$ 3,619,327
EM&V-PA				\$ -	\$ 167,673	\$ -	\$ -	\$ 167,673	\$ -	\$ 346,455	\$ -	\$ 346,455	\$ -
EM&V-ED				\$ -	\$ 442,047	\$ -	\$ -	\$ 442,047	\$ -	\$ 913,381	\$ -	\$ 913,381	\$ -
OBF - Loan Pool**				\$ -			\$ -	\$ -			\$ -	\$ -	
PA Spending Budget Request	\$ -	\$ -	\$ -	\$ -	\$ 1,615,758	\$ 14,236,962	\$ -	\$ 15,852,720	\$ 3,300,744	\$ 18,130,757	\$ 11,324,236	\$ 32,755,736	\$ 3,619,327

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

A. - Attachment A, Question C.8
 "Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable / facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness."
 • TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
 • Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.8 Table.

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

Sector	Cost Element	Functional Group	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 111,325	\$ 230,000	\$ 253,000	\$ 278,300
		Program Management	\$ 333,975	\$ 690,000	\$ 759,000	\$ 834,900
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 26,718	\$ 40,765	\$ 39,188	\$ 43,717
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 472,018	\$ 960,765	\$ 1,051,187	\$ 1,156,917
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 3,740,520	\$ 2,532,333	\$ 2,425,821	\$ 2,256,608
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 240,462	\$ 366,886	\$ 352,688	\$ 393,457
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs		\$ 5,340,017	\$ 6,290,304	\$ 7,325,018
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 3,980,982.000	\$ 8,239,235.400	\$ 9,068,812.520	\$ 9,975,082.674
Residential Total			\$ 4,453,000.000	\$ 9,200,000.000	\$ 10,120,000.000	\$ 11,132,000.000
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 4,453,000.00	\$ 9,200,000.00	\$ 10,120,000.00	\$ 11,132,000.00

- Notes:
- (1) Labor costs are already loaded with (state loaders covered by EE) \$ 267,180
 - (2) These costs are collected through GRC D.16-06-054
 - (3) LGP contracts that directly support the sector is included/not included in this item
 - (4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

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

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

B. → Attachment A, Question C.9

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

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

Sector	Cost Element	Functional Group	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 110,950	\$ 229,245	\$ 252,170	\$ 277,386
		Program Management	\$ 332,850	\$ 687,736	\$ 756,509	\$ 832,159
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 26,628	\$ 44,403	\$ 36,695	\$ 47,803
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 470,428	\$ 961,384	\$ 1,045,374	\$ 1,157,349
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 3,727,920	\$ 3,756,007	\$ 3,533,903	\$ 3,640,489
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 239,652	\$ 399,625	\$ 330,257	\$ 430,226
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs		\$ 4,052,784	\$ 5,177,247	\$ 5,867,394
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 3,967,572	\$ 8,208,416	\$ 9,041,406	\$ 9,938,109
Commercial Total (5)			\$ 4,438,000	\$ 9,169,800	\$ 10,086,780	\$ 11,095,458
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 4,438,000.00	\$ 9,169,800.00	\$ 10,086,780.00	\$ 11,095,458.00

Notes:

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

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

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

B. → Attachment-A, Question C.9¶

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

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

Sector	Cost Element	Functional Group	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)				
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ -	\$ -	\$ -	\$ -
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation				
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)				
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs				
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ -	\$ -	\$ -	\$ -
Industrial Total (5)			\$ -	\$ -	\$ -	\$ -
	Other (collected through GRC) (2)	Labor Overheads				
			\$ -	\$ -	\$ -	\$ -

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

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

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

B. → Attachment A, Question C.9

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

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

Sector	Cost Element	Functional Group	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)				
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ -	\$ -	\$ -	\$ -
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation				
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)				
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs				
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ -	\$ -	\$ -	\$ -
	Agricultural Total (5)		\$ -	\$ -	\$ -	\$ -
	Other (collected through GRC) (2)	Labor Overheads				
			\$ -	\$ -	\$ -	\$ -

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

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

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

B. → Attachment A, Question C.9

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

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

Sector	Cost Element	Functional Group	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 74,150.000	\$ 153,202.417	\$ 168,522.695	\$ 185,375.117
		Program Management	\$ 222,450.000	\$ 459,607.252	\$ 505,568.086	\$ 556,125.351
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 17,796.000	\$ 23,997.300	\$ 38,712.500	\$ 31,022.527
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 314,396.000	\$ 636,806.969	\$ 712,803.281	\$ 772,522.995
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 2,491,440.000	\$ 3,343,882.000	\$ 3,243,405.000	\$ 3,288,154.100
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 160,164.000	\$ 215,975.700	\$ 348,412.500	\$ 279,202.743
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs		\$ 1,931,435.331	\$ 2,436,289.219	\$ 3,075,121.162
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 2,651,604.000	\$ 5,491,293.031	\$ 6,028,106.719	\$ 6,642,478.005
Public Sector Total (5)			\$ 2,966,000.000	\$ 6,128,100.000	\$ 6,740,910.000	\$ 7,415,001.000
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 2,966,000.00	\$ 6,128,100.00	\$ 6,740,910.00	\$ 7,415,001.00

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

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

¶

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

B. → Attachment A, Question C.9¶

¶

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

¶

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

Sector	Cost Element	Functional Group	2024 EE Portfolio Budget	2025 EE Portfolio Budget	2026 EE Portfolio Budget	2027 EE Portfolio Budget
Cross-Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 84,650.000	\$ 174,950.000	\$ 192,445.000	\$ 211,689.100
		Program Management	\$ 253,950.000	\$ 524,850.000	\$ 577,335.000	\$ 635,067.300
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 20,316.000	\$ 41,988.000	\$ 40,182.400	\$ 48,751.660
		Account Management / Sales				
		IT				
		Call Center				
	Labor Total		\$ 358,916.000	\$ 741,788.000	\$ 809,962.400	\$ 895,508.060
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)				
		Local/Government Partnerships Contracts (3)				
		Other Contracts				
		Program Implementation	\$ 2,844,240.000	\$ 5,878,320.000	\$ 6,526,196.000	\$ 7,133,307.000
		Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management				
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)	\$ 182,844.000	\$ 377,892.000	\$ 361,641.600	\$ 438,764.940
		Account Management / Sales				
		IT (4)				
		Call Center				
		Facilities				
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs				
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)				
	Non-Labor Total		\$ 3,027,084.000	\$ 6,256,212.000	\$ 6,887,837.600	\$ 7,572,071.940
Cross-Cutting Total (5)			\$ 3,386,000.000	\$ 6,998,000.000	\$ 7,697,800.000	\$ 8,467,580.000
	Other (collected through GRC) (2)	Labor Overheads				
			\$ 3,386,000.00	\$ 6,998,000.00	\$ 7,697,800.00	\$ 8,467,580.00

Notes:

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

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

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

B. → Attachment A, Question C.9¶

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

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

Pa Name: SDREN

Budget Year: 2024-2027

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

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

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

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

Pa Name: SDREN
Budget Year: 2024-2027

SDREN Unique Value Metrics

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

Pa Name: SDREN
 Budget Year: 2024-2027

Program Segmentation Justification (Attachment A from D. 23.06.055)

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

SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	The number of local government Reach Codes implemented (this is a joint IOU and REN effort)
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size (number of the target audience) by sector. (M) Number of training activities
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size (number of the target audience) by sector. (M) Number of participants
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Increase in code compliance knowledge pre/post training
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number and percent of jurisdictions with staff participating in an Energy Policy Forum
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number and percent of jurisdictions with staff participating in an Energy Policy Forum
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Number and percent of jurisdictions receiving Energy Policy technical assistance.
SDREN	Codes & Standards	SDREN-01-CS-CSS	C&S	C&S	This program is designed to improve compliance with existing codes and standards, helps local governments develop ordinances that exceed statewide minimum requirements and will coordinate with other programs and entities to support the state's policy goals.	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support	Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Percent of total WE&T program participants that meet the definition of disadvantaged worker
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support	Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Count of equity target participants in market support segment, by sector
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support	Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Percent of participation relative to eligible target population for curriculum
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support	Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Number of unique participants by sector that complete training
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support	Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Ratio of ratepayer funds expended to private capital leveraged by sector
SDREN	Energy Pathways Program	SDREN-01-WET-EPP	WE&T	Market Support	Increase awareness and build accessible pathways for youth to enter the green workforce, build long-lasting careers, and form a robust professional network.	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support	Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Percent of total WE&T program participants that meet the definition of disadvantaged worker
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support	Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Count of equity target participants in market support segment, by sector
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support	Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Percent of participation relative to eligible target population for curriculum
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support	Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Number of unique participants by sector that complete training
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support	Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training
SDREN	Workforce Training & Capacity Building	SDREN-02-WET-BRC	WE&T	Market Support	Build capacity in the region by working directly with employers to increase opportunities for education, training, certifications, mentorship, and job connections for energy job acquisition.	Number of partners by type and purposes
SDREN	Climate Resilience Leadership	SDREN-01-PUB-CRL	Public	Market Support	Build capacity for public agency participants through education, training, and technical services and instill EE as a best practice. These goals are in alignment with the Commission MS objective to support long term success of the EE market.	Savings (lifecycle net kWh, kWh, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex ante with gross and net for all measures, with ex post where available

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

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

ATTACHMENT B

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

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

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

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Attachment B

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

BACKGROUND:

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

Beginning with the annual budget advice letters due on September 3, 2019, the program administrators must include updated budget estimates in the same format as the supplemental budget information filed in this proceeding on June 12, 2017.

Therefore, consistent with this Commission direction, this narrative and the accompanying *SDREN's Energy Efficiency 2024-2031 Application Tables, Pursuant To Energy Division Template, Tables 9 through 16*, SDREN provides the following information in Attachment B.

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

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

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

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

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

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

1. Functions conducted by each department/organization

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

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

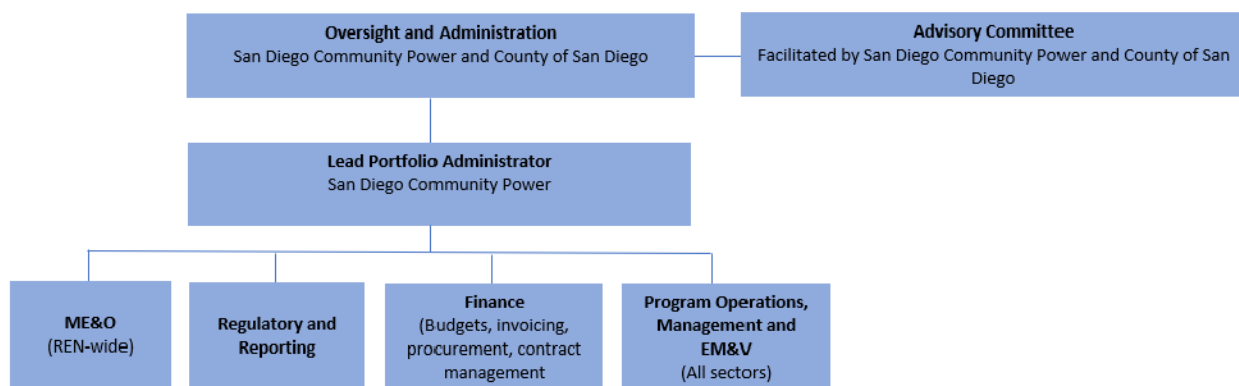
2. Energy Efficiency Management Structure and Org Chart

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

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

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

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



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

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

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

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

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

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

6. Explanation of method for forecasting costs

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

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

7. For forecast years, 2024-2027.

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

C. Table showing costs by functional area of management structure

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

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

9. Identify any capital costs

SDREN will have no capital costs.

D. Table showing cost drivers across the EE organization

10. Narrative of cost drivers in place of a table

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

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

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

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

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

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

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

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

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

This is not applicable to SDREN.

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

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

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

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

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

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

A. Attachment-A, Question C.8

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

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

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

B. Attachment-A, Question C.9

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

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

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

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

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

C. Attachment-A, Question C.10

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

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

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