



**BEFORE THE PUBLIC UTILITIES COMMISSION OF THE
STATE OF CALIFORNIA**

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Application of Southern California Edison
Company (U 338-E) for Approval of Energy
Efficiency Rolling Portfolio Business Plan.

A.17-01-013
(Filed January 17, 2017)

And Related Matters

A.17-01-014
A.17-01-015
A.17-01-016
A.17-01-017

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U 338-E) RESPONSES TO THE
REQUEST FOR SUPPLEMENTAL BUDGET AND RELATED INFORMATION**

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Dated: **June 12, 2017**

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I.

INTRODUCTION

Pursuant to the May 15, 2017 Email Ruling of the Administrative Law Judge Valerie U. Kao granting the request of Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Pacific Gas and Electric Company (PG&E), Southern California Gas Company, and Marin Clean Energy, San Francisco Bay Area Regional Energy Network, Southern California Regional Energy Network, and Tri-County Regional Energy Network), and The Utility Reform Network (TURN), together, the “Moving Parties” to submit certain responses to questions in Attachment A of the Scoping Memo and supplemental budget information by June 12, 2017, SCE submits the following supplemental budget and related information below.

The April 14, 2017 Scoping Memo directed “the business plan proponents to meet and confer with the interested parties to develop a standardized template for PA’s proposed

budgets.”¹ In response to this directive, the PAs held several meet and confer sessions with TURN and the Office of Ratepayer Advocates (ORA) and developed a common budget template (shown in Appendix A) as well as common budget-related questions to be answered by each PA (shown in Section II below) by June 12, 2017. SCE’s supplemental budget information in Section II below and in Appendix A is intended to provide the information in a manner that follows a format resulting from the meet-and-confer sessions with interested parties. SCE caveats that its budgets information below should be reviewed with a consideration that EE program administration will evolve under the new Rolling Portfolio structure, which include implementation of statewide programs and an expansion of third party programs to a minimum of 60% of SCE’s EE portfolio budget. Thus, the budget structures adopted in this proceeding should be flexible to allow PAs to perform their roles and responsibilities in the Rolling Portfolio EE market structure.

II.

NARRATIVE DESCRIPTION OF SCE’S ORGANIZATIONS

SUPPORTING ITS EE PORTFOLIO

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

In Request I.A., TURN/ORA ask for various information, including functions conducted by each organization, organization charts, staffing needs by organization, non-program functions performed by contractors, anticipated cost drivers, and explanation of forecasting cost method. SCE’s response to each item is provided below.

1. Functions Conducted by Each Organization

Multiple functions are performed to support SCE’s EE portfolio, including program management; engineering services; marketing; planning; compliance; contract management; and evaluation, measurement, and verification (EM&V). These functions

¹ Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judge, in A.17-01-013 et al, dated April 14, 2017, at p. 10.

are provided by various SCE organizations. To aid parties' understanding of which functions are performed by which SCE organizations, SCE included in Appendix B the function descriptions performed by each respective organization that supports its EE portfolio.

2. Management Structure and Organization Charts²

As described above, multiple SCE organizations support its EE portfolio, including SCE's Customer Programs and Services organization (CP&S), Business Customer Division (BCD), Customer Service Operations Division (CSOD), and Regulatory Affairs. SCE provides its organization chart for those organizations. In general, SCE's chief executive officer, president, and vice-presidents do not directly charge the EE balancing account. However, these positions have been included in the organization charts to show line-of-sight from SCE employees to executive management. In addition, certain other support organizations do not charge to the EE balancing account and have therefore been excluded from the attached documentation. These organizations include Finance, Legal, and Information Technology. Finally, the positions included in SCE's organization charts include SCE employees that charged to the EE balancing account during the first quarter of 2017. The organization charts exclude contingent workers, vacancies, and employees on leave of absence, interns, and service maintenance providers. See Appendix B for SCE's organization charts for those groups that support its EE portfolio.

² The provided organization charts provide SCE headcounts, which are represent the SCE employees that charged SCE's EE balancing account from January to March 2017. Headcount is different than "full time equivalent" or FTE employees. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. In addition, the headcount information in the organization charts represents SCE employees only, and does not include contingent workers, supplemental workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

3. Staffing Needs by Organization

Full Time Equivalents (FTEs) are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. In 2016, 392 FTEs supported SCE's EE portfolio. In 2018, SCE forecasts 377 FTEs to support its EE portfolio.

At this time, it is difficult for SCE to provide 2019 and 2020 forecast FTEs to supports its EE portfolio due to following factors:

1. The EE Potential & Goals Study is being updated that will result in a new PA savings goals.
2. Solicitation for new programs by third parties has not taken place yet, so the number and type of programs are unknown.
3. Implementation Plans associated with new programs are not completed. Implementation plans will determine final design of programs with detailed staffing needs.

See SCE's Response to Request I.B. and Appendix C for SCE's EE FTEs by functional group.

4. Non-Program Functions Performed by Contractors

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

1. Strategic planning support
2. Program and portfolio support
3. Regulatory support and other support, as necessary
4. Policy support
5. Project management support
6. Program planning and support
7. DSM program development and end-use analysis

8. Analysis of DSM valuation metrics, including relevant administrative, rebate cost, and per unit costs benchmarks
9. Engineering support or other technical services
10. Evaluation of major cost drivers to existing portfolio and an assessment of opportunities for modification
11. Identification of process efficiencies in existing operations, focusing on CP&S and CSOD, coordinating with ongoing CSOD work

SCE anticipates that in 2019 and 2010 contractors (e.g., advisory consultants) will perform functions similar to what they perform currently (described above), although functions associated with program planning will likely be utilized to a lesser extent as more programs are proposed, designed, and implemented by third parties.

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

The primary drivers of administrative and implementation costs for programs are the number and type of programs offered. SCE currently offers and reports on over 80 programs in its EE portfolio. Each program requires a certain level of staffing based on the program delivery method. For example, an upstream lighting program that targets large manufacturers will have minimal administrative and implementation costs. However, a downstream lighting program that targets many customers that require a high level of interaction between program staff, engineers, vendors and other program administrators will have high administrative and implementation costs. Other more complex or mass market programs will require sales and marketing support.

SCE incorporated significant efficiencies in its portfolio over the last two years. Future efficiencies are expected to be based on experience with new and innovative programs offered by third parties in the marketplace. Additionally, SCE anticipates that the new Statewide Administration of EE programs may yield additional efficiencies; however because the new Statewide Administration model has not yet been fully developed, SCE does not yet know exactly how administrative costs for these programs

will be affected. Also, SCE will be transitioning as much of its portfolio as possible to third parties to achieve the requirement that at least 60 percent of the portfolio be designed and delivered by third parties by the end of 2020. Without knowing what specific programs and delivery channels third parties will propose and SCE will ultimately select, it is difficult to forecast exactly how administrative and implementation costs will vary over time. SCE is also aware there are significant cost impacts in the marketplace that could place upward pressure on costs. For example, increasing review costs and declining measures have made it harder for vendors to deliver results. For these reasons, SCE assumed that its existing level of administrative and implementation efficiencies will persist over the forecast period. The anticipated major cost drivers of in-house cost changes are:

1. Number and type of programs funded
2. New 2018 revised savings goal based on the update to the Potential and Goals Study
3. Cost for new programs launched through Third-Party Solicitation process
4. Cost to administer Statewide programs
5. Legislative mandates that require new or increased funding to implement.
6. Number of data request or need for additional reporting requirements

6. Explanation of Method for Forecasting Costs

To arrive at the 2018-2025 budget forecasts, SCE adjusted its 2017 proposed budget and savings to reflect the increase or decrease in savings goals assigned by the Commission in D.15-10-028 and to incorporate the updated avoided costs. This was accomplished by using data, by sector, from the 2015 Potential and Goals Study to evaluate a sector's savings potential and adjusting the sector's corresponding budget needed to accomplish the projected savings values. Cost-effectiveness (Total Resource Cost (TRC) and Program Administrator Cost (PAC)) for 2018-2020 was calculated using the Cost Effectiveness Tool by modifying the inputs to reflect portfolio measure

optimization and the anticipated impact of new third-party designed and implemented programs. SCE's budget also includes the budget and estimated savings for the Southern California Regional Energy Network (SoCalREN).

For its 2017 budget, which is the baseline for the 2018-2025 budget, SCE optimized its demand-side management portfolio resulting in a 2017 proposed budget that is approximately \$22 million less than SCE's 2016 budget. The portfolio optimization process included activities such as: internal organizational and process changes to improve efficiency, simplifying and consolidating programs, eliminating or reducing non-cost-effective programs, adjusting incentive levels based on analytics, incorporating alternative incentives besides rebates (e.g. on-bill financing).

B. “Full-Time Equivalents” (FTEs) by Organization

In Request I.B., TURN/ORAs ask for SCE's FTEs by organization for 2016 or 2017 recorded, and “at least” 2018. SCE's FTEs supporting its EE portfolio is provided in Appendix C.

C. Costs by Functional Area of Management Structure

In Request I.C., TURN/ORAs ask for expenses broken out by functional area of management structure. See Appendix D for the requested information.

D. Cost Drivers Across the EE Organization

In Request I.D., TURN/ORAs ask for cost drivers across SCE's EE organization. Please see the discussion in Section A.5. above for the requested information.

E. Allocation of Labor and O&M Costs

All EE-related time for employee working on EE is tracked through internal orders or distributed cost centers (EE cost objects) that settle costs to internal orders, which are assigned to an account grouping for EE. The portion of an employee's time is allocated to those orders, and therefore “EE rates” (Public Purpose Programs), based on the time spent by the employee working on tasks related to the EE portfolio of programs. All time sheets for hourly employees and some salaried employees are approved by the employee's manager. For other salaried

employees, their time is allocated to EE cost objects on a pre-established basis determined by their manager based on the expected time to be spent on tasks related to EE for the year. These allocations are reviewed periodically and when employee's positions and responsibilities change. SCE's SAP system allows for timekeeping increments of 15 minutes. Time sheets and pre-established accounting for EE-related tasks described above is the basis for determining the appropriate EE and non-EE labor costs.

SCE labor costs charged against EE rates include paid time off but are not loaded with benefits. SCE's benefits burden is collected through GRC rates. However, SCE does include the benefits burden in its filings to be included for determining cost-effectiveness. They are currently reported and filed in the CPUC CEDARS system as a separate program.

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

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

III.

BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO AND RULING OF COMMISSIONER AND ADMINISTRATIVE LAW JUDGE

The Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges³ (Scoping Memo) requested certain information regarding SCE's proposed budgets (Attachment A). As such, SCE provides the information identified below:

³ See Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges, Application for Approval of Energy Efficiency Rolling Portfolio Business Plan, A.17-01-013 et al, April 14, 2017.

A. Energy Savings Targets and Expenditures

In Question I.C.8., the Assigned Commissioner and Administrative Law Judges (ALJs) requested “[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.” SCE has provided the requested information in Appendix E of this response.

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

In Question I.C.9., the Assigned Commissioner and ALJs requested of the Scoping Memo, the Assigned Commissioner and ALJs requested the following: “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.” SCE has provided the requested information in Appendix F of this response.

C. Solicitation Schedule

In Question I.C.10., the Assigned Commissioner and ALJs requested “[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). SCE has provided this requested information in Appendix G of this response.

Consistent with the Commission's direction, statewide program budgets will be determined by the funding PAs based on the savings potential in their respective service territories, Commission-approved goals, historical budgets, and their influence on overall portfolio cost-effectiveness. For existing statewide programs, the funding PAs will also use their

historic program budget levels to conduct statewide program solicitations. For new statewide programs, the budget will be determined based on each PA's overall portfolio cost-effectiveness analysis and the Commission-approved goals. These budgets will be adjusted and finalized by each PA, based on the results of the solicitations, to arrive at the annual statewide program budgets. Consistent with the Rolling Portfolio approach, the statewide program budgets may change over the life of the Business Plan.

Any budget updates will be presented in the annual budget advice letter.

D. Statewide Aggregate Budgets for Each Statewide Program

In Question I.C.14., the Assigned Commissioner and ALJs requested "What are the statewide aggregate budgets for each statewide program?" See Appendix H for the requested information.

IV.

CONCLUSION

SCE appreciates the opportunity to provide its supplemental budget and related information.

Respectfully submitted,

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Appendix A

Standardized Template for the Program Administrators' Proposed Budgets

A.17-01-013 et al.
Meet and Confer Process: Supplemental Budget Showing

Proposal by TURN and ORA
May 2, 2017

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

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

A.17-01-013 et al.
Meet and Confer Process: Supplemental Budget Showing

TABLE 6-3(a)
EP HEADCOUNT
NUMBER OF PLANNED POSITIONS

Line No.	Description	2014 Positions	2015 Forecast	2016 Forecast	2017 Forecast
1	EP Administrative Office	4	4	4	4
2	Energy Supply Management (ESM)	126	131	131	134
3	Renewable Energy (RE)	38	40	40	41
4	Energy Policy, Planning and Analysis (EPPA)	46	46	46	46
5	Value Based Reliability (VBR)	10	12	12	12
6	Energy Contract Management and Settlements (ECMS)	79	80	80	80
7	Energy Compliance and Reporting (ECR)	18	18	18	18
8	Total	321	331	331	335

(a) See WP Table 6-7, Exhibit (PG&E-5).

C. Table showing costs by functional area of management structure

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

D. Table showing cost drivers across the EE organization

- TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department.
- While this example pertains to departmental cost increases, in our case, cost increases or decreases would be attributed to major cost drivers.

TABLE 6-2(a)
EP COST INCREASE
2015-2017 EXPENSE BY COST DRIVER

Line No.	Description	Increase in Thousands of \$	Percent of Total Increase
1	Escalation	3,597	57
2	Portfolio Complexity	1,136	18
3	Regulatory Mandates	1,192	19
4	Process Improvements	400	6
5	Total	6,324	100

(a) See WP Table 6-6, Exhibit (PG&E-5).

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Meet and Confer Process: Supplemental Budget Showing

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

- 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.).
- Describe the method used to determine the proportion charged to EE balancing accounts for all employees who also do non-EE work.
- Identify the EE functions that are most likely to be performed by employees who also do non-EE work (e.g. Customer Account Representatives?)
- Are labor costs charged to EE fully loaded?
- 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.
- 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?
- Identify the EE O&M costs that are most likely to be spread to non-EE functions as well as EE, if any

A.17-01-013 et al.
Meet and Confer Process: Supplemental Budget Showing

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

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.

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.

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).”

- 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.10 Table.

Sector	2016 EE Portfolio Expenditures (\$Million)				2018 EE Portfolio Budget (\$Million)				2016 EE Portfolio Savings			2018 EE Portfolio Forecasted Savings		
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	M THERMS	KWH	KW	M THERMS
Residential														
Commercial														
Agricultural														
Industrial														
Public (GP)														
Cross Cutting*														
Total Sector Budget														
EM&V-PA														
EM&V-ED														
OBF - Loan Pool**														
BayREN														
MCE														
EE Total														

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Financing.

** 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.”¶

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- → 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. ¶

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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	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTPP and IEP; market potential study; integration w/ procurement planning; CPUC Demand Analysis Working Group
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research
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	

Functional Group	2016 EE Portfolio FTE	2018 EE Portfolio FTE
Policy, Strategy, and Regulatory Reporting Compliance		
Program Management		
Engineering Services		
Customer Application/Rebate/Incentive Processing		
Customer Project Inspections		
Portfolio Analytics		
EM&V		
ME&O		
Account Management / Sales		
IT		
Call Center		
Total		

||
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.¶

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Residential	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 Implementers Contracts		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		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		
		Facilities		
		Incentives--Core Programs		
		Incentives--Third Party Program		
	Non-Labor Total			
Residential Total				
	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 (state current applicable decision)
 - (3) LGP contracts that directly support the sector is included/not included in this item

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.¶

Appendix B

Supporting Information – Request I.A.

SCE Energy Efficiency Organization Charts

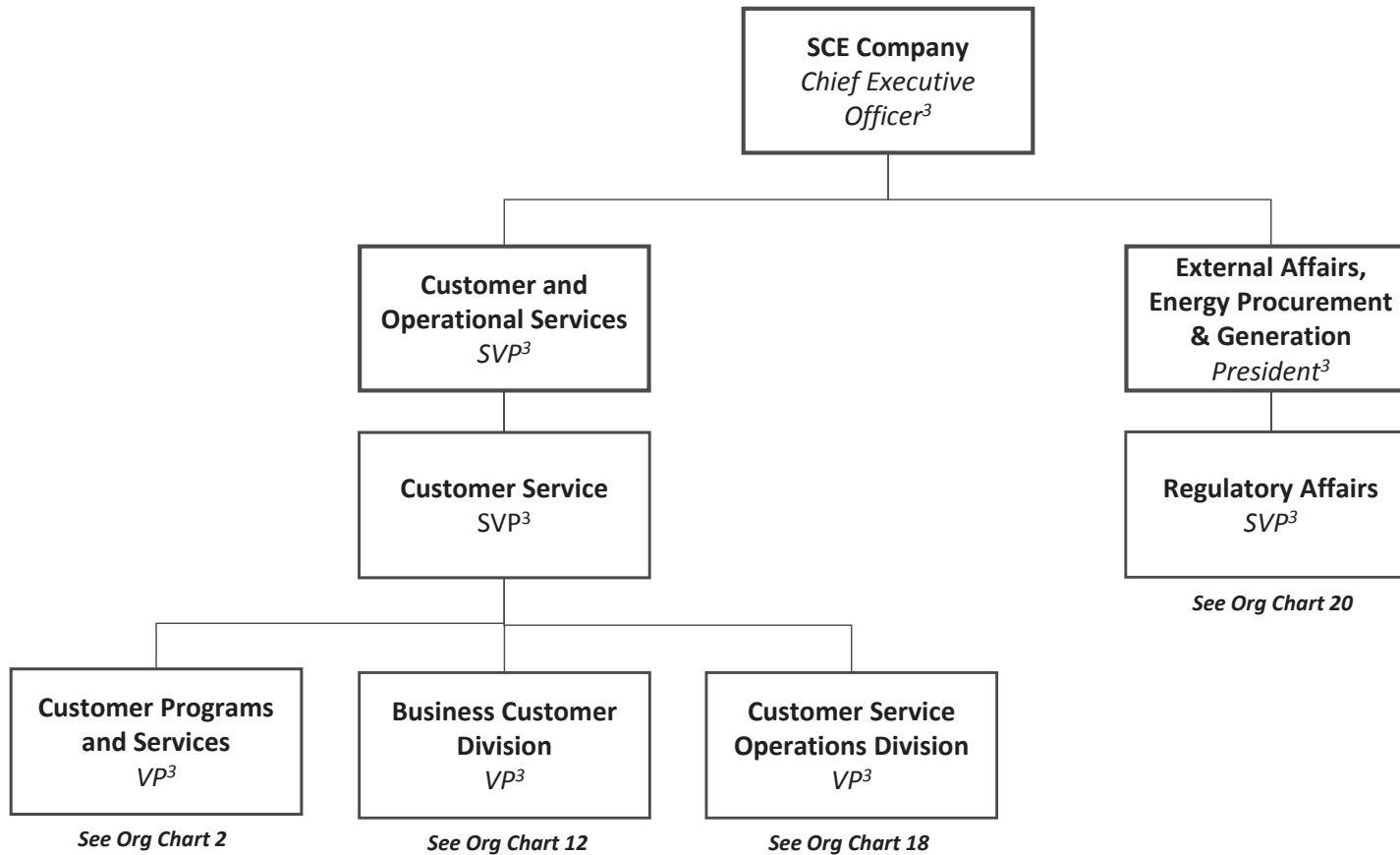
Supplemental Information Provided In Support of Application 17-01-013

Org Chart #	Organization Chart Description
1	Southern California Edison Company
2	Customer Programs and Services
3	Customer Programs and Services – DSM Program Management
4	Customer Programs and Services – DSM Program Management – Business DSM Programs
5	Customer Programs and Services – DSM Program Management – Residential DSM Programs
6	Customer Programs and Services – DSM Program Management – Public Sector DSM Programs
7	Customer Programs and Services – DSM Program Management – Engineering Services
8	Customer Programs and Services – DSM Program Management – DSM Operational & Technical Support
9	Customer Programs and Services – Product Development and Division Management
10	Customer Programs and Services – Customer Engagement
11	Customer Programs and Services – Information Governance & Analytics, Measurement & Evaluation
12	Business Customer Division
13	Business Customer Division – Commercial and Industrial
14	Business Customer Division – Government, Institution, Agriculture, & Water
15	Business Customer Division – Energy Analysis & Customer Outreach
16	Business Customer Division – Strategic Customer Solutions
17	Business Customer Division – BCD Operations
18	Customer Service Operations Division
19	Customer Service Operations Division – Customer Contact Center
20	Regulatory Affairs

Southern California Edison Company

Organization Chart Headcount: 526^{1,2}

SCE EE Organization Chart 1
 Supplemental Information Provided In
 Support of Application 17-01-013



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

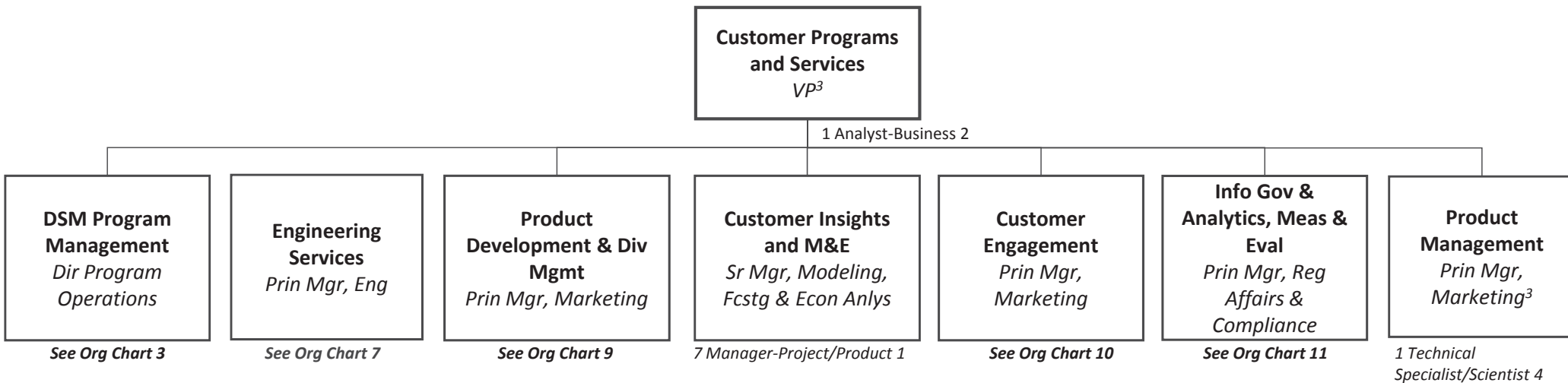
Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[i]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

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

Customer Programs & Services

SCE EE Organization Chart 2
 Supplemental Information Provided In
 Support of Application 17-01-013

Summary Function Description: Manages the DSM Program Management, Business DSM Programs, Product Development and Division Management, Customer Insights and Measurement & Evaluation, Customer Engagement, and Information Governance & Analytics, Measurement and Evaluation groups.
Organization Chart Headcount: 227^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[i]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

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

Customer Programs & Services

DSM Program Management

SCE EE Organization Chart 3

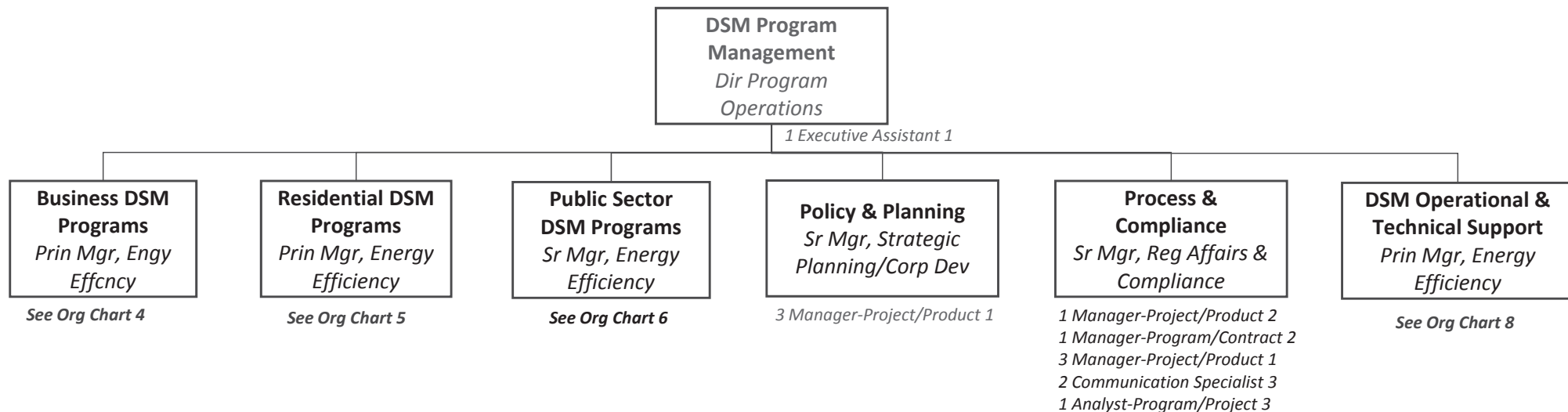
Supplemental Information Provided In Support of Application 17-01-013

Functional Category: Program Management and Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

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

Organization Chart Headcount: 116^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

Customer Programs & Services

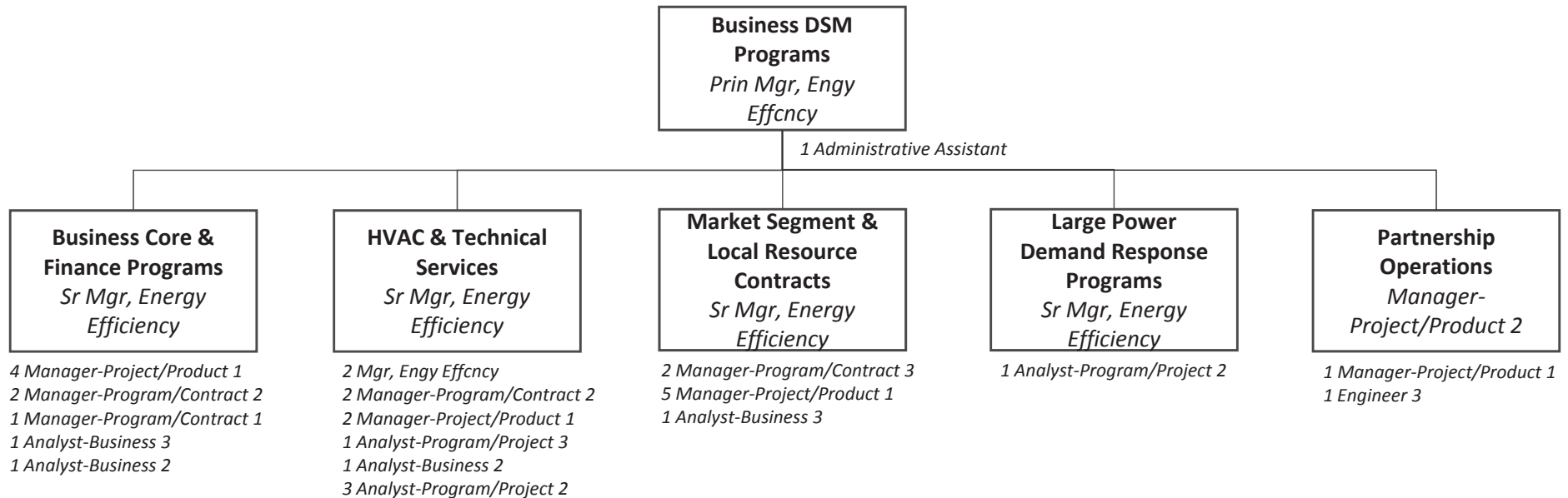
Business DSM Programs

Functional Category: Program Management and Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

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

Organization Chart Headcount: 38^{1, 2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

Customer Programs & Services

Residential DSM Programs

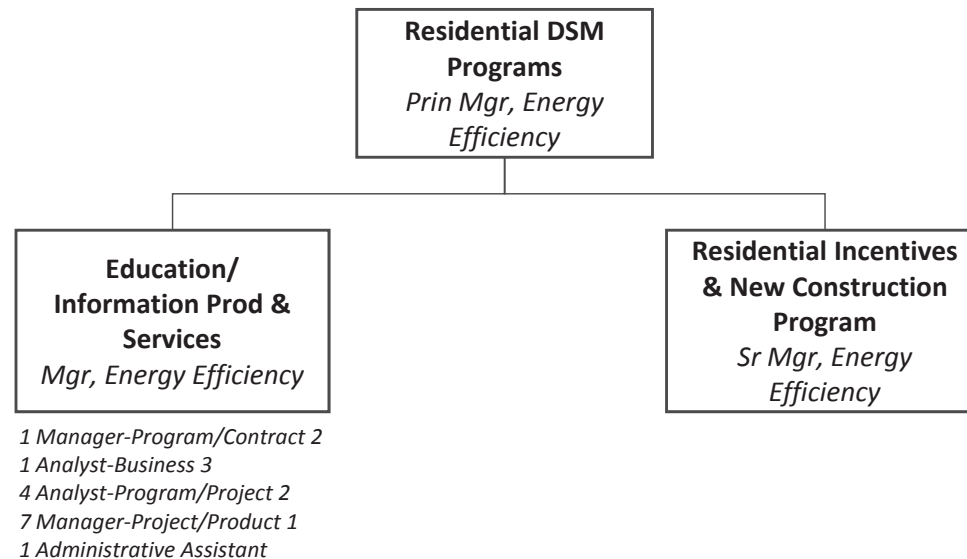
SCE EE Organization Chart 5
Supplemental Information Provided In
Support of Application 17-01-013

Functional Category: Program Management and Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

Summary Function Description: Manages Education and Information Products & Services and Residential Incentives & New Construction programs

Organization Chart Headcount: 17



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

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

Customer Programs & Services

Public Sector DSM Programs

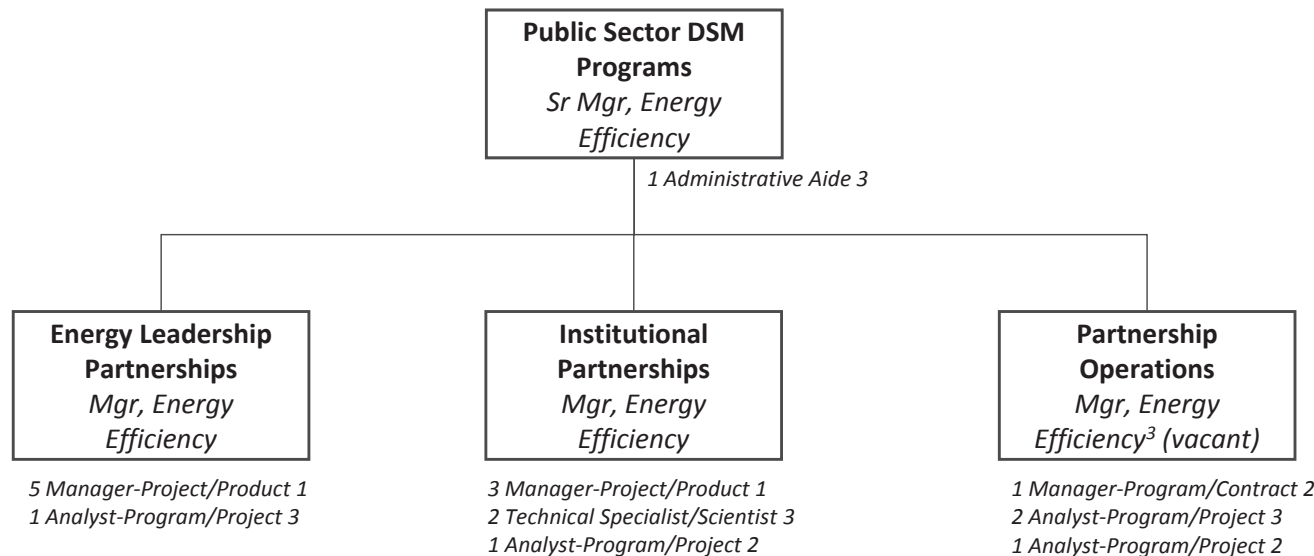
SCE EE Organization Chart 6
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Program Management and Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

Summary Function Description: Manages and operates SCE’s energy leadership and institutional partnership programs.

Organization Chart Headcount: 20^{1, 2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE’s entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that “[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category”.

Customer Programs & Services

Engineering Services

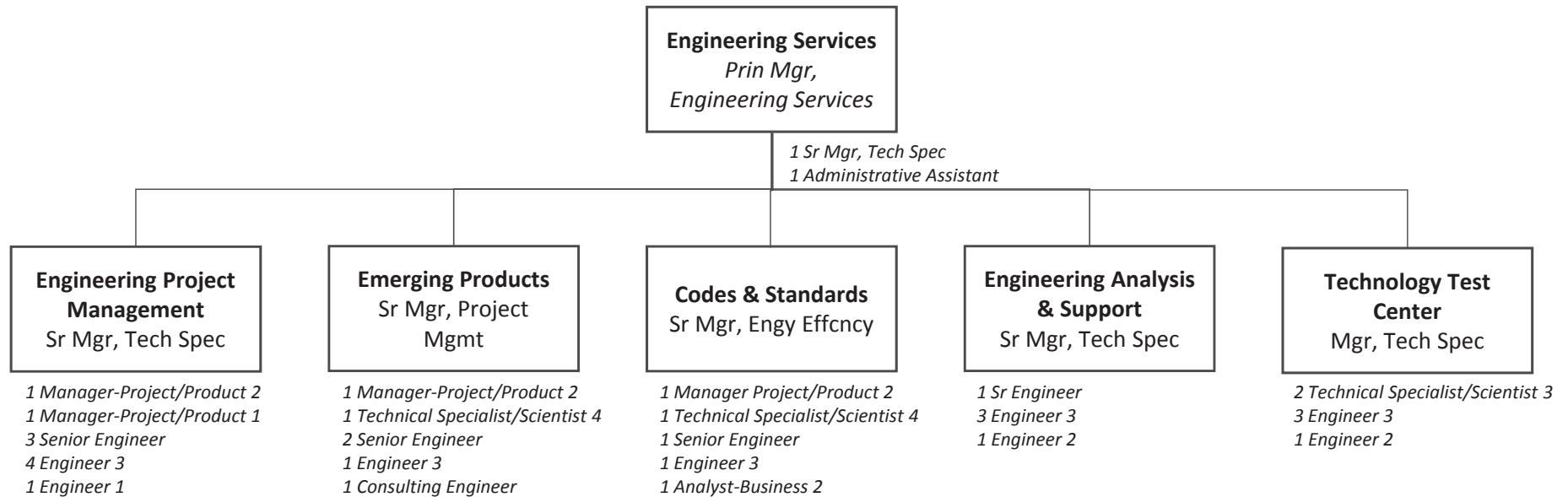
SCE EE Organization Chart 7
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Program Management and Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

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

Organization Chart Headcount: 40^{1, 2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE’s entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that “[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category”.

Customer Programs & Services

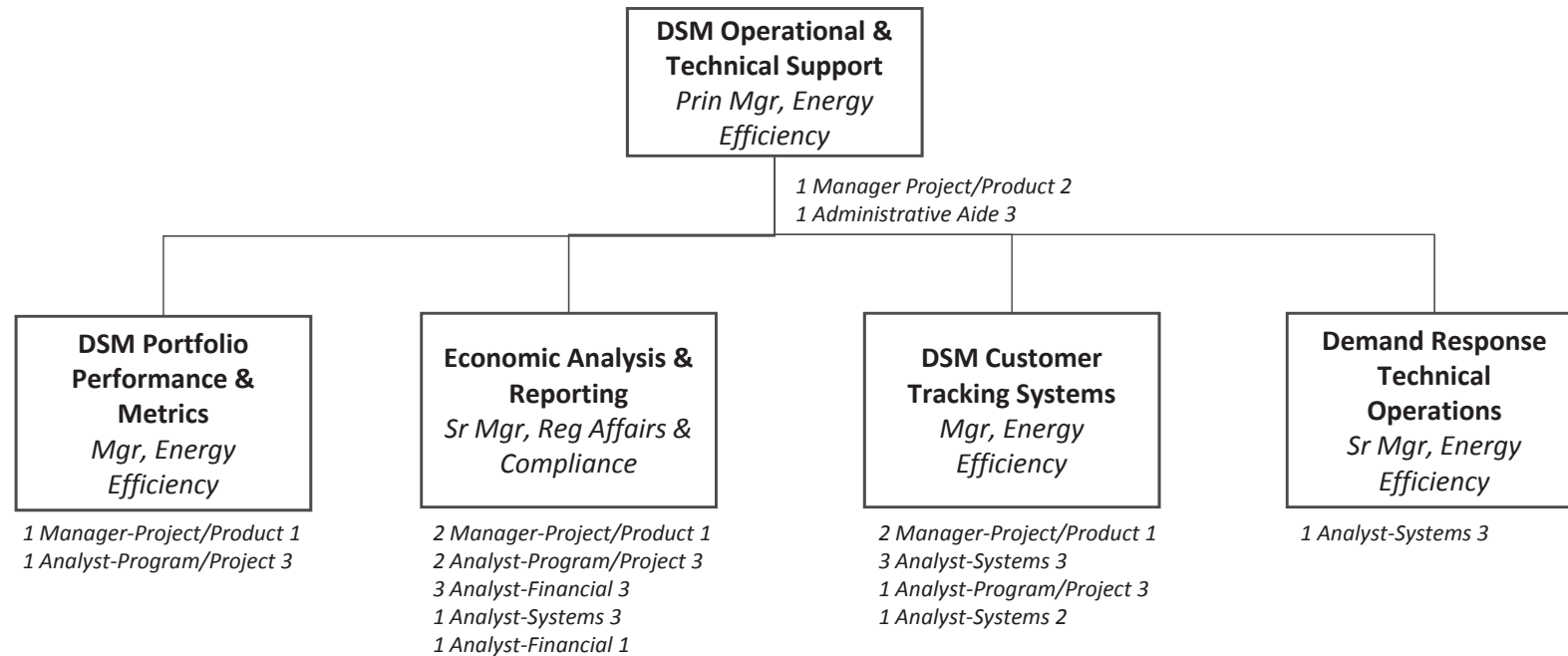
DSM Operational & Technical Support

Functional Category: Program Management and Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

Summary Function Description: Manages DSM portfolio performance and metrics, performs economic analyses and reporting, and operates DSM customer tracking systems

Organization Chart Headcount: 26



Customer Programs & Services

Product Development and Division Management

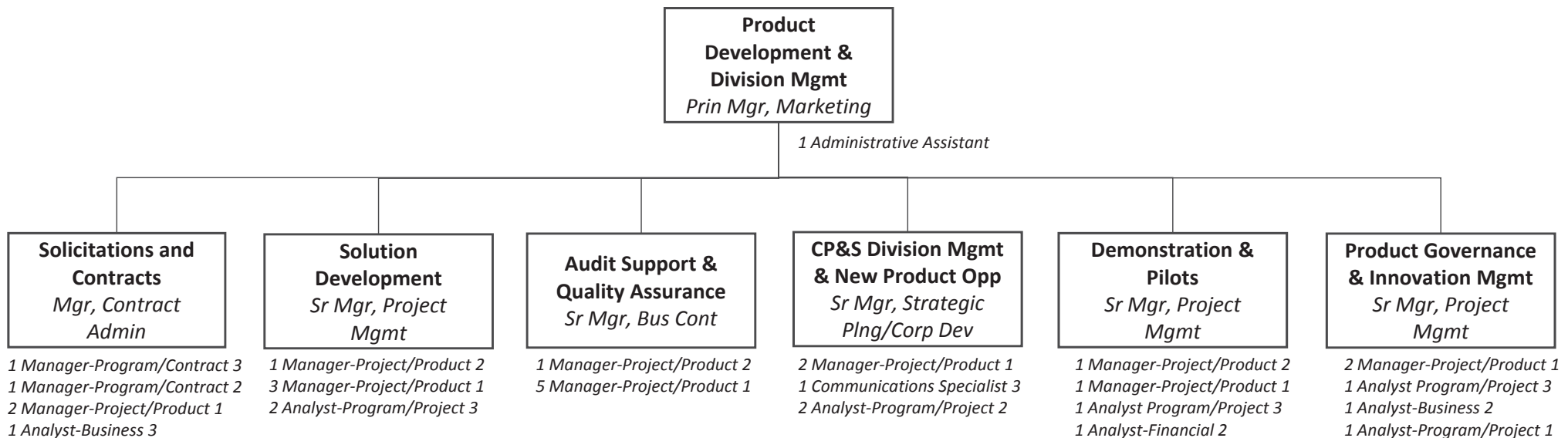
SCE EE Organization Chart 9
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Product Management

Detailed Definition: 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

Summary Function Description: Manages EE, DR, DG, and non-DSM product development, including solicitations and contracts, solutions development, new product opportunities, demonstration & pilots, and product governance & innovation management.

Organization Chart Headcount: 39^{1, 2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

Customer Programs & Services

Customer Engagement

SCE EE Organization Chart 10

Supplemental Information Provided In

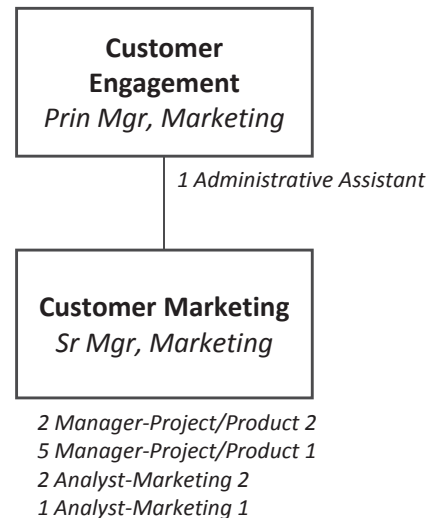
Support of Application 17-01-013

Functional Category: Marketing

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

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

Organization Chart Headcount: 13^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

Customer Programs & Services

Information Governance & Analytics, Measurement & Evaluation

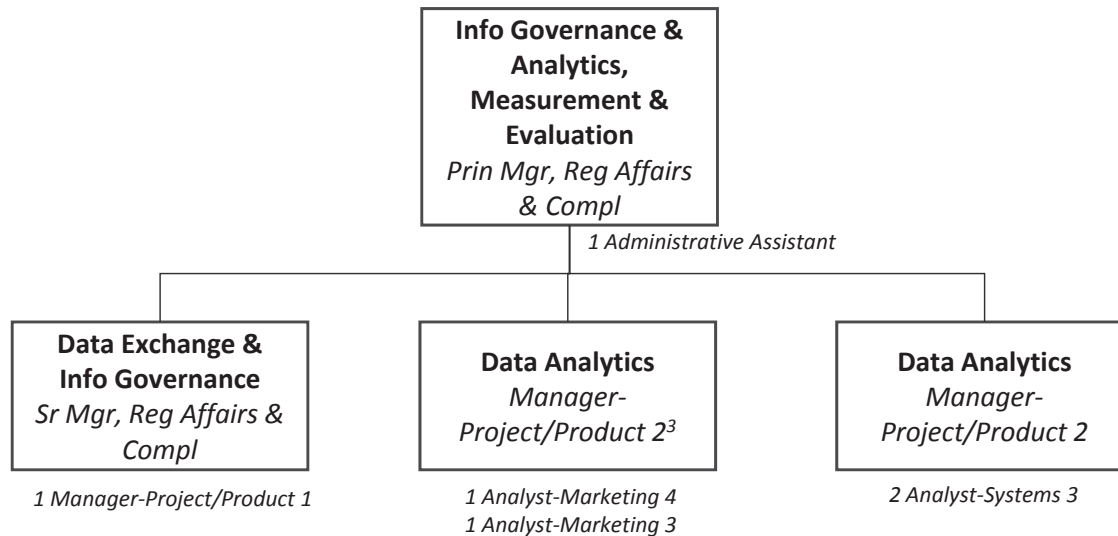
SCE EE Organization Chart 11
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Data Analytics

Detailed Definition: Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients ; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support ; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance

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

Organization Chart Headcount: 9^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE’s entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that “[i]ndividual[s] that charge to multiple functional categories should be counted once in each functional category”.

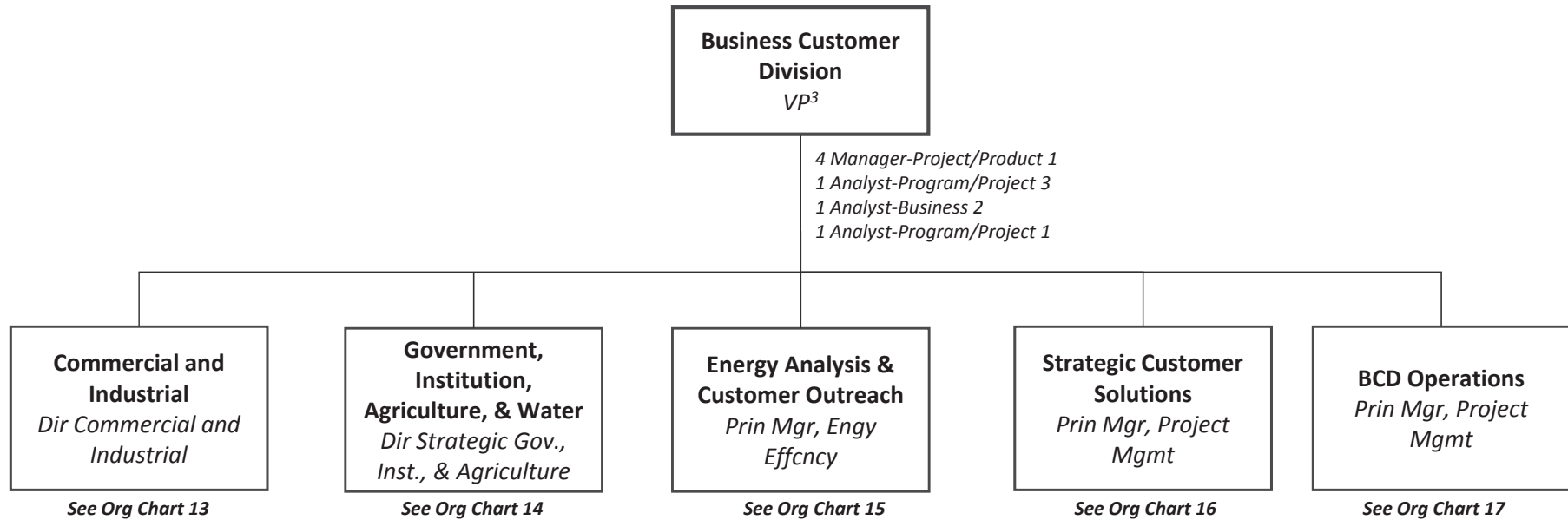
Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from “Organization Chart Headcount”.

Business Customer Division

SCE EE Organization Chart 12
 Supplemental Information Provided In
 Support of Application 17-01-013

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

Organization Chart Headcount: 204^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE’s entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that “[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category”.

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

Business Customer Division

Commercial and Industrial

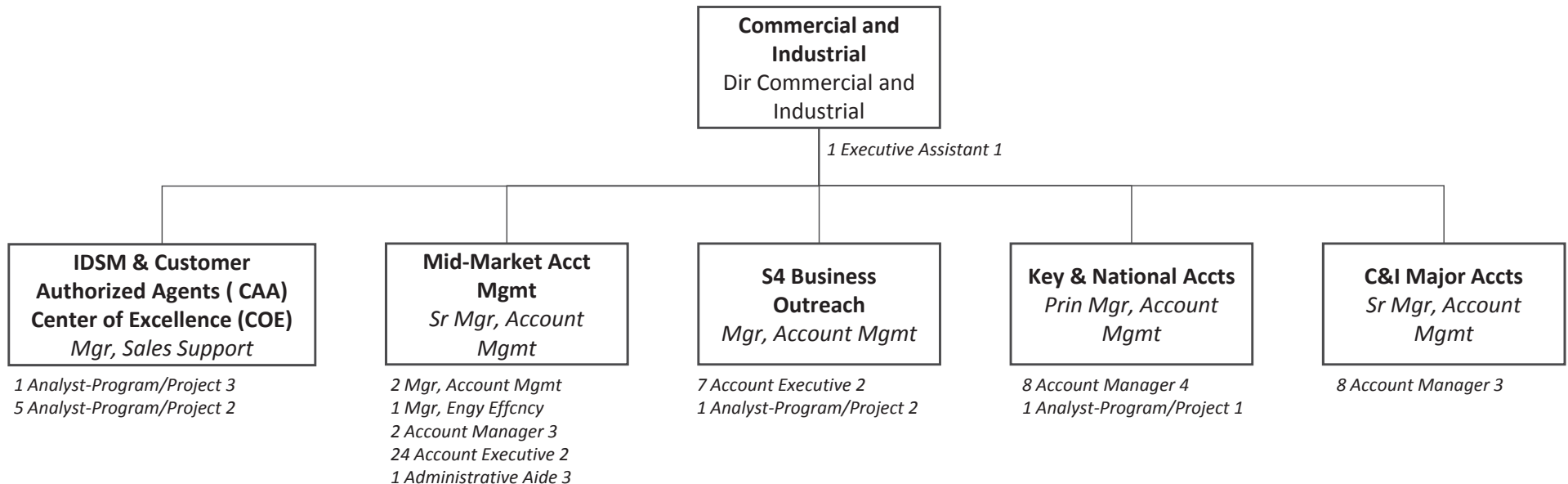
SCE EE Organization Chart 13
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Account Management

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

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

Organization Chart Headcount: 68^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

Business Customer Division

Government, Institution, Agriculture, & Water

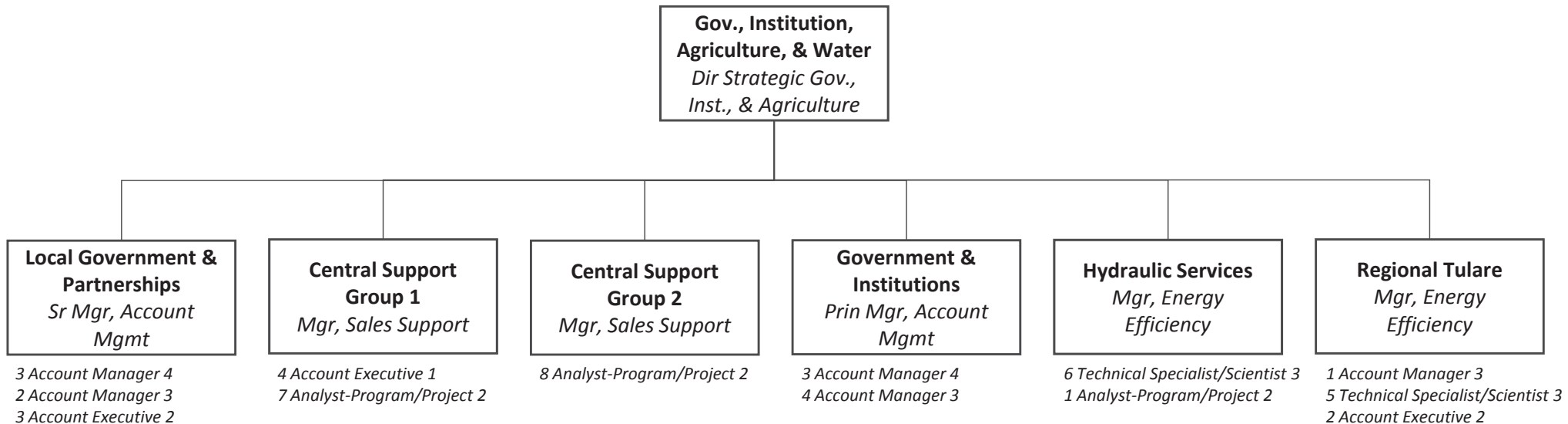
SCE EE Organization Chart 14
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Account Management

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

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

Organization Chart Headcount: 56.²



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE’s entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that “[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category”.

Business Customer Division

Energy Analysis & Customer Outreach

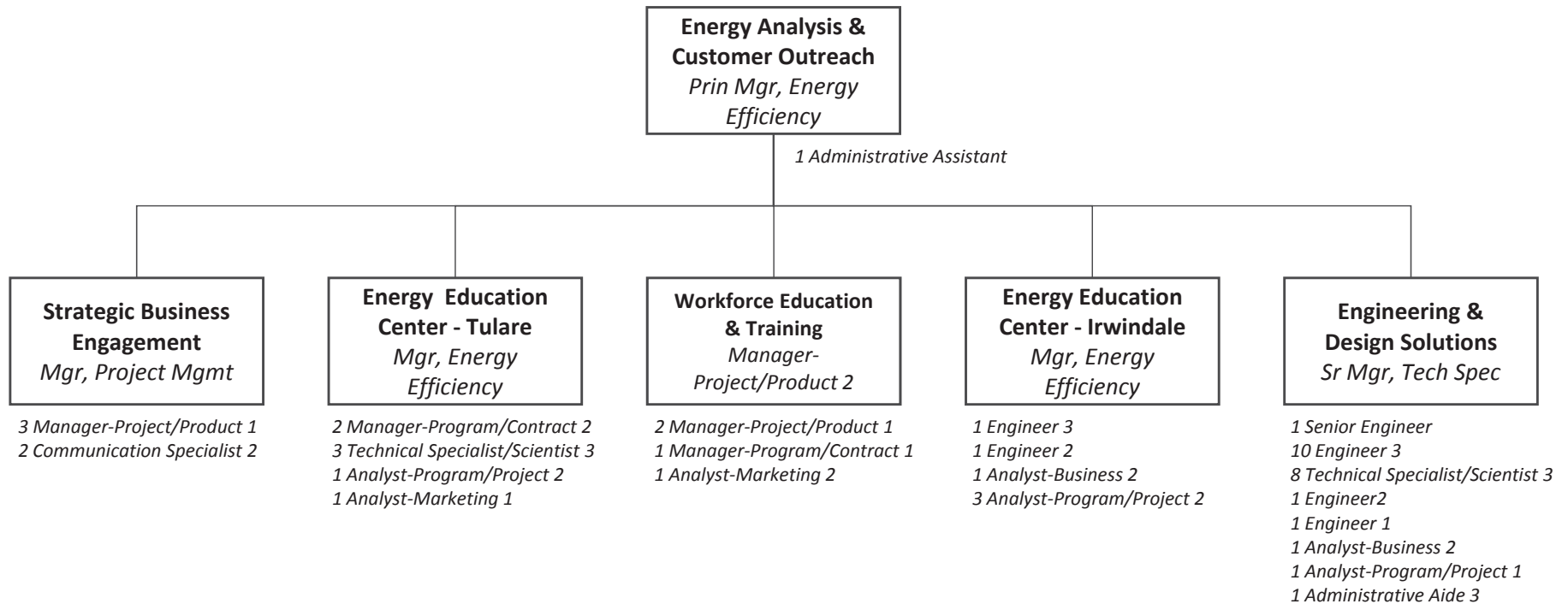
SCE EE Organization Chart 15
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Marketing

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

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

Organization Chart Headcount: 53^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE’s entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses “Organizational Chart Headcount” which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that “[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category”.

Business Customer Division

Strategic Customer Solutions

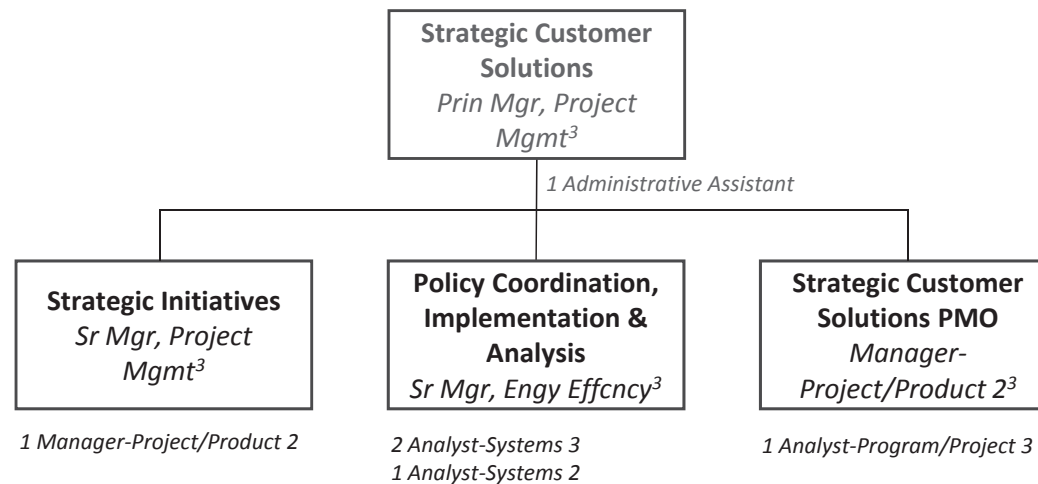
SCE EE Organization Chart 16
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Program Management & Delivery

Detailed Definition: Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking

Summary Function Description: Provides strategic customer solutions, including partnering with customers to identify and implement innovative ideas to meet their energy needs, enable customer choice by developing innovative and simple solutions, influence policy, and identify new opportunities to help better manage the grid of the future.

Organization Chart Headcount: 6^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORAs Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORA in data request ORA-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORA-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

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

Business Customer Division

BCD Operations

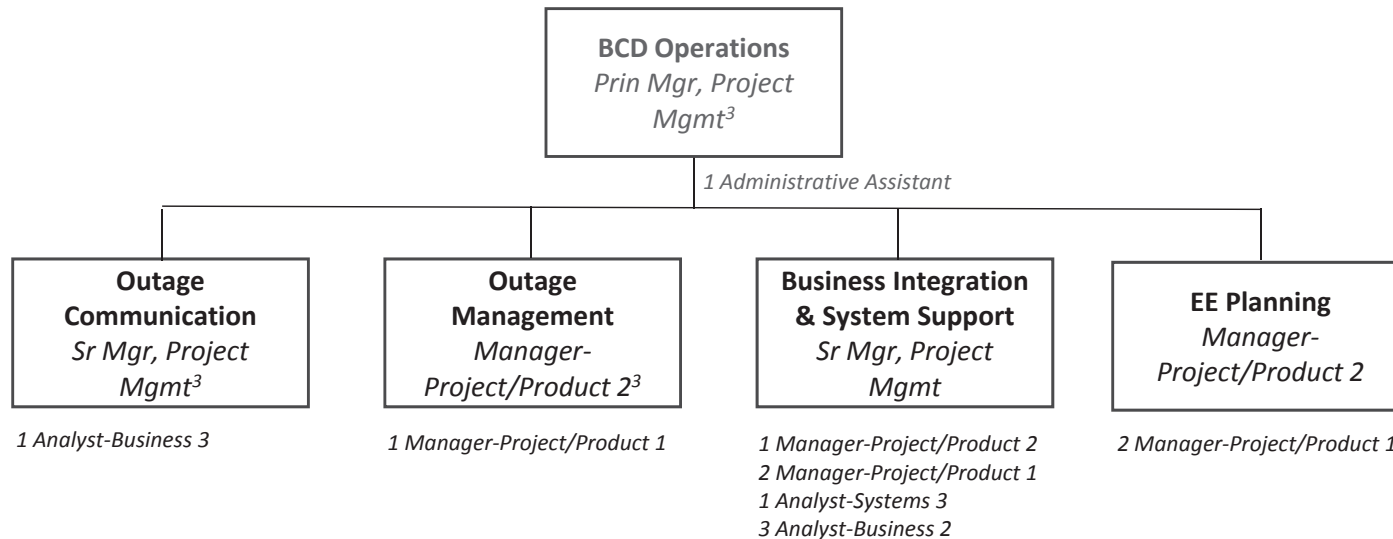
SCE EE Organization Chart 17
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Account Management

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

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

Organization Chart Headcount: 14^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

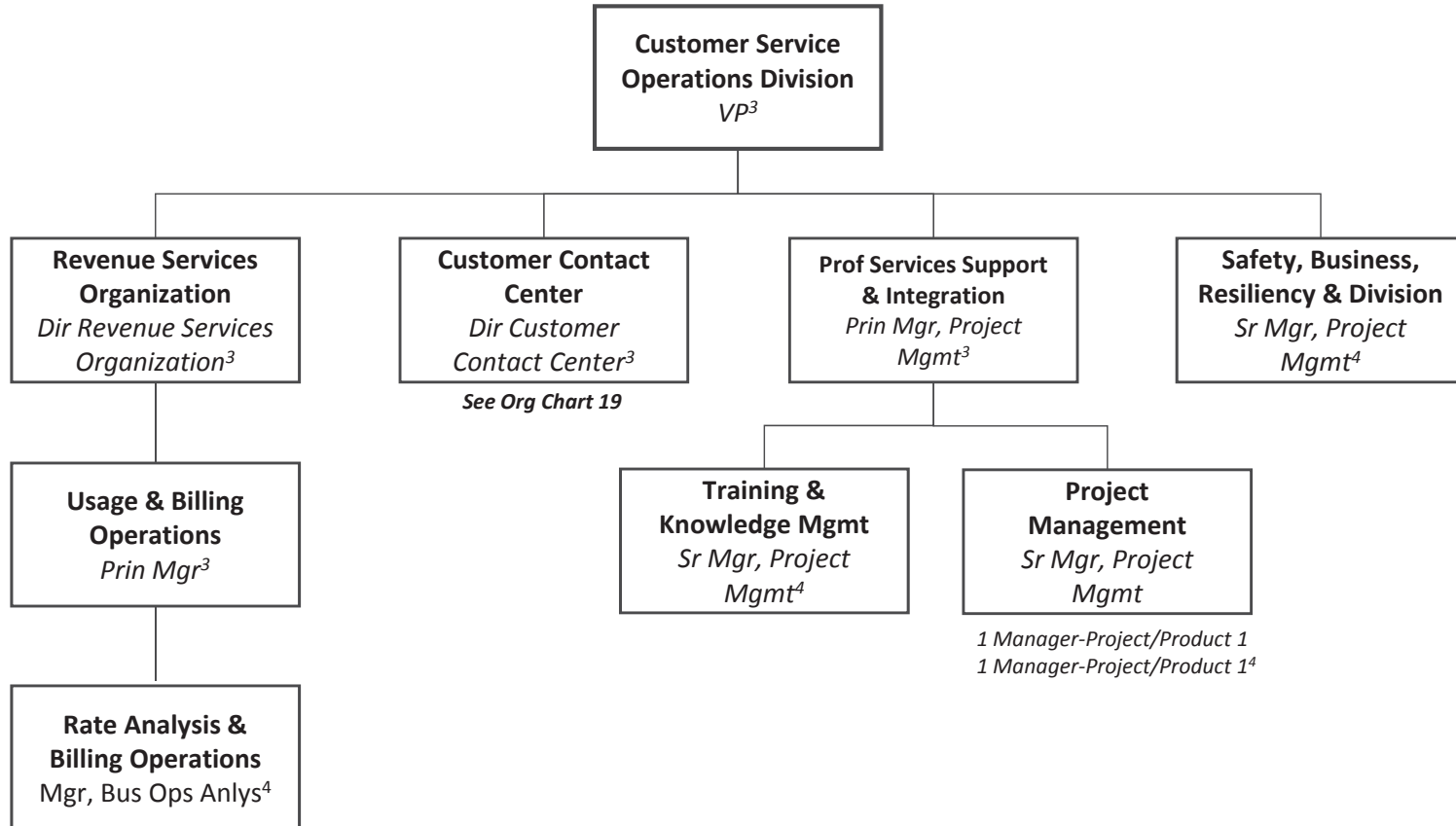
Note 3: Individual did not charge Energy Efficiency Balancing Account and has been excluded from "Organization Chart Headcount".

Customer Service Operations Division

SCE EE Organization Chart 18
 Supplemental Information Provided In
 Support of Application 17-01-013

Summary Function Description: This organization is responsible for executing the operational processes needed to satisfy Energy Efficiency (and other DSM) customers' inquiries and transactions. Functions include: inbound call support, application processing and inspections, training of EE frontline employees, and management of outsourced processing vendors.

Organization Chart Headcount: 85^{1,2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

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

Note 4: Individual charged Energy Efficiency Balancing Account through pre-established accounting. SCE is reviewing for appropriateness.

Customer Service Operations Division

Customer Contact Center

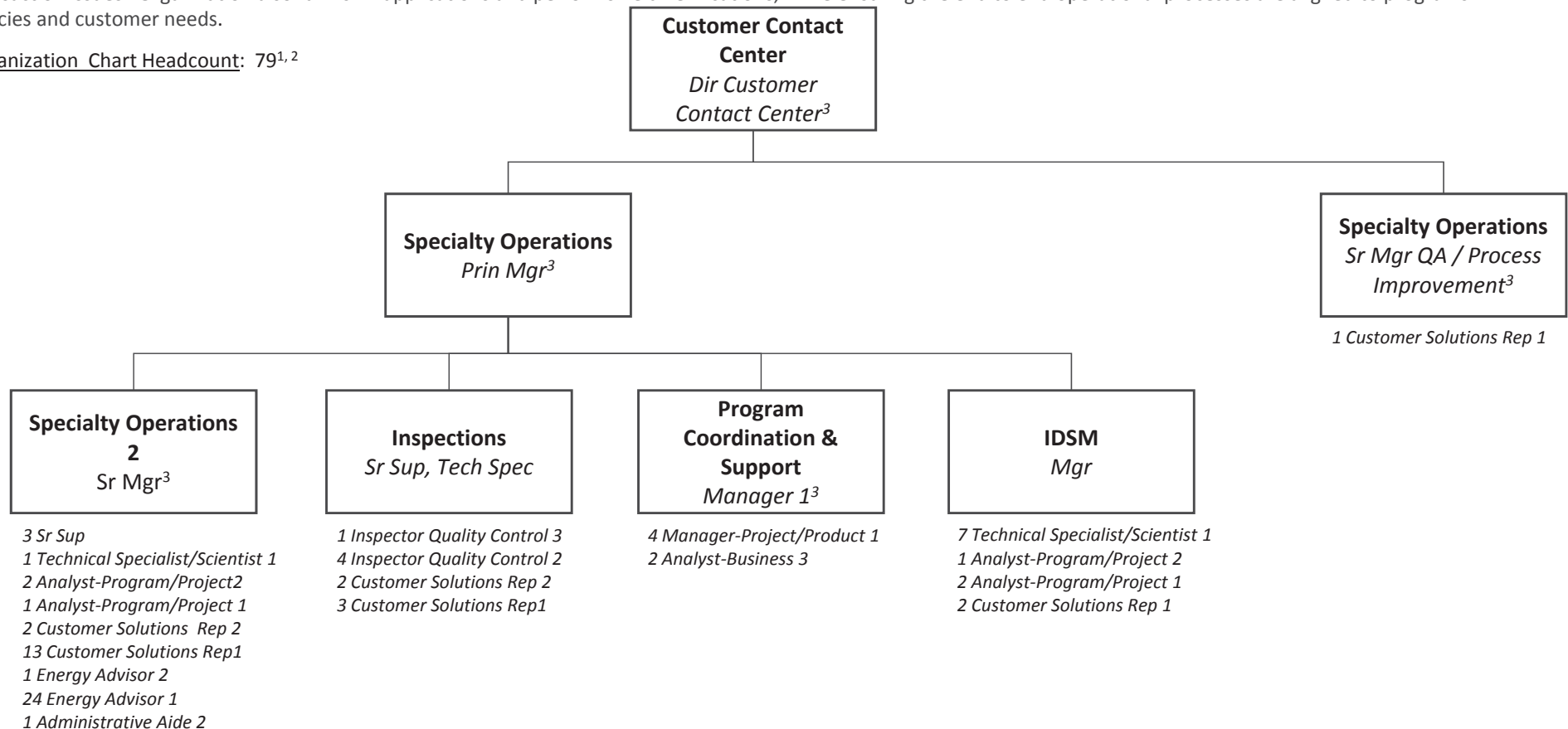
SCE EE Organization Chart 19
 Supplemental Information Provided In
 Support of Application 17-01-013

Functional Category: Call Center

Detailed Definition: Evaluates and resolves customer inquiries, issues, and problems, and ensures that appropriate action is taken to the satisfaction of the customer, Company, and/or CPUC in compliance with policies, procedures, tariff rules and rates. Designs, coordinates, implements, and manages programs designed to meet and/or address special needs.

Summary Function Description: Provides inbound and outbound call support for Energy Efficiency customers wishing to be informed of SCE's EE programs or resolve transaction issues. Organization also fulfills EE applications and performs field verifications, while ensuring the end to end operational processes are aligned to programs' policies and customer needs.

Organization Chart Headcount: 79^{1, 2}



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

Regulatory Affairs

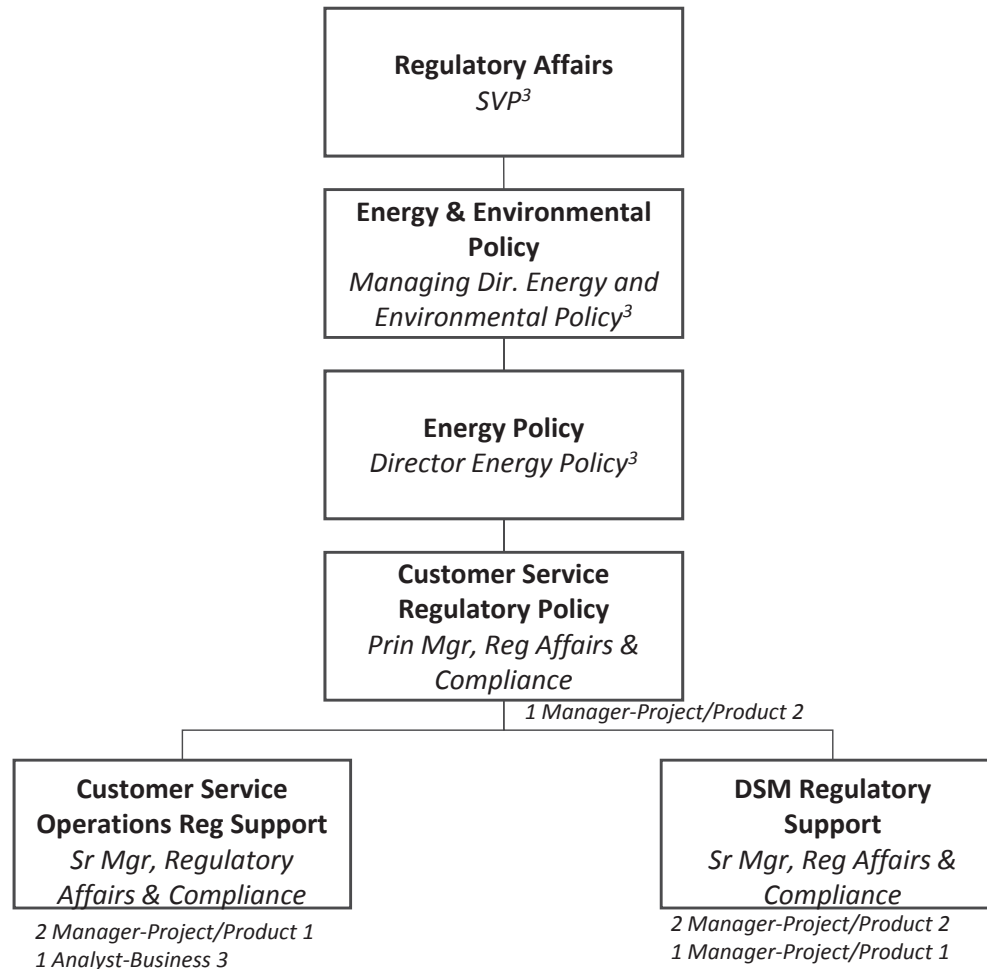
Functional Category: Company Regulatory Support

Detailed Definition: Case management for EE proceedings

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

Organization Chart Headcount: 10^{1,2}

SCE EE Organization Chart 20
Supplemental Information Provided In
Support of Application 17-01-013



Note 1: Data current as of first quarter 2017. Excludes contingent workers, vacancies, employees on leave of absence, interns, and service maintenance providers.

Note 2: SCE's entire response to TURN/ORR Supplemental Budget Showing includes three definitions involving employee counts: (1) Organization Chart Headcount, (2) Full-Time Equivalents (FTEs) and (3) headcounts as defined by ORR in data request ORR-A1701013-SCE003 (May 22, 2017). This organization chart uses "Organizational Chart Headcount" which includes any individuals that charged Energy Efficiency Balancing Account in first quarter 2017. FTEs are a unit of measure showing how many employees SCE has assuming all employees work a full-time schedule. Headcounts as defined by ORR-A1701013-SCE003 assume that "[I]ndividual[s] that charge to multiple functional categories should be counted once in each functional category".

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

Appendix C

Supporting Information – Request I.B.

Energy Efficiency Full Time Equivalent Headcount by Functional Group

Functional Group	2016 EE Portfolio FTE (Annual)	2016 EE Portfolio Head Count [1]	2018 EE Portfolio FTE
Policy, Strategy, and Regulatory Reporting Compliance	29	41	28
Program Management	117	150	113
Engineering Services [3]	53	64	52
Customer Application/Rebate/Incentive Processing	40	59	39
Customer Project Inspections	11	12	11
Portfolio Analytics	8	13	7
EM&V	8	18	8
ME&O	8	24	8
Account Management / Sales	95	179	88
IT	8	10	8
Call Center	16	39	15
Total	392	609	377

Notes:

[1] Average head count for the month of January and December 2016

[2] Per ORA Data Request - Individual that charges to multiple functional categories should be counted once in each functional category

[3] Engineering staff also charged labor directly to program

[4] 2018 FTE amounts were determined using historical 2016/17 FTE amounts and adjusting based on estimated 2018 budget amounts.

[5] 2018 FTE amounts are forecast and may change based on number and types of programs to be funded is determined and will be finalized once the 2018 Budget Advice filing is submitted and approved.

Appendix D

Supporting Information – Request I.C.

Energy Efficiency Costs by Functional Group

Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)	
Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 3.79	\$ 3.65	
	Program Management	\$ 13.84	\$ 12.93	
	Engineering services	\$ 5.50	\$ 5.18	
	Customer Application/Rebate/Incentive Processing	\$ 2.89	\$ 2.84	
	Customer Project Inspections	\$ 0.62	\$ 0.60	
	Portfolio Analytics (6)	\$ 2.03	\$ 1.83	
	ME&O (Local)	\$ 0.73	\$ 0.72	
	Account Management / Sales	\$ 11.71	\$ 11.45	
	IT	\$ 0.94	\$ 0.91	
	Call Center	\$ 0.51	\$ 0.49	
	Labor Total		\$ 42.56	\$ 40.60
	Non-Labor	Third-Party Implementers Contracts	\$ 11.86	\$ 17.07
		Local/Government Partnerships Contracts (3)	\$ 2.42	\$ 2.74
Other Contracts		\$ -	\$ -	
Policy, Strategy, and Regulatory Reporting Compliance		\$ 0.61	\$ 0.59	
Program Management		\$ 57.32	\$ 57.10	
Engineering services		\$ 0.93	\$ 0.90	
Customer Application/Rebate/Incentive Processing		\$ 0.13	\$ 0.13	
Customer Project Inspections		\$ -	\$ -	
Portfolio Analytics (6)		\$ 11.46	\$ 9.49	
ME&O (Local)		\$ 1.95	\$ 1.85	
Account Management / Sales		\$ 1.14	\$ 0.96	
IT		\$ 0.59	\$ 0.57	
Call Center		\$ 0.21	\$ 0.20	
Facilities		\$ -	\$ -	
Incentives--Core Programs		\$ 98.71	\$ 50.10	
Incentives--Third Party Program		\$ 46.11	\$ 68.00	
Non-Labor Total			\$ 233.46	\$ 209.69
		\$ 276.02	\$ 250.29	
Other (collected through GRC) (2)	Labor Overheads	\$ 18.00	\$ 17.26	

Notes:

- (1) Labor costs are already loaded with (state loaders covered by EE)
- (2) These costs are collected through GRC (state current applicable decision)
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
- (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.
- (6) Included expenditures for SCE and CPUC EM&V
- (7) Contract labor is included in non-labor costs
- (8) SCE did not incur any capital costs related to its 2016 EE portfolio expenditures. Furthermore, SCE did not forecast any capital costs in its 2018 EE portfolio budget.

Residential

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 1.24	\$ 1.21
		Program Management	\$ 2.40	\$ 2.35
		Engineering services	\$ 0.77	\$ 0.76
		Customer Application/Rebate/Incentive Processing	\$ 1.11	\$ 1.08
		Customer Project Inspections	\$ 0.25	\$ 0.25
		Portfolio Analytics	\$ 0.41	\$ 0.40
		ME&O (Local)	\$ 0.50	\$ 0.49
		Account Management / Sales	\$ 0.06	\$ 0.06
		IT	\$ 0.30	\$ 0.29
		Call Center	\$ 0.37	\$ 0.36
	Labor Total		\$ 7.40	\$ 7.25
	Non-Labor	Third-Party Implementers Contracts	\$ 1.08	\$ 5.18
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.18	\$ 0.17
		Program Management	\$ 9.29	\$ 9.10
		Engineering services	\$ 0.33	\$ 0.32
		Customer Application/Rebate/Incentive Processing	\$ 0.05	\$ 0.05
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.03	\$ 0.03
		ME&O (Local)	\$ 0.63	\$ 0.62
		Account Management / Sales	\$ 0.00	\$ 0.00
		IT	\$ 0.19	\$ 0.18
		Call Center	\$ 0.16	\$ 0.16
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ 61.69	\$ 17.32
		Incentives--Third Party Program	\$ 6.26	\$ 28.00
	Non-Labor Total		\$ 79.89	\$ 61.14
Residential Total			\$ 87.29	\$ 68.39
	Other (collected through GRC) (2)	Labor Overheads	\$ 3.21	\$ 3.08

Notes:

- (1) Labor costs are already loaded with (state loaders covered by EE)
- (2) These costs are collected through GRC (state current applicable decision)
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
- (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

Commercial

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Commercial [*]	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 1.52	\$ 1.32
		Program Management	\$ 3.68	\$ 3.20
		Engineering services	\$ 2.22	\$ 1.94
		Customer Application/Rebate/Incentive Processing	\$ 1.24	\$ 1.08
		Customer Project Inspections	\$ 0.32	\$ 0.28
		Portfolio Analytics	\$ 0.50	\$ 0.44
		ME&O (Local)	\$ 0.17	\$ 0.15
		Account Management / Sales	\$ 5.19	\$ 4.51
		IT	\$ 0.37	\$ 0.32
		Call Center	\$ 0.13	\$ 0.11
	Labor Total		\$ 15.34	\$ 13.34
	Non-Labor	Third-Party Implementers Contracts	\$ 6.26	\$ 4.79
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.27	\$ 0.24
		Program Management	\$ 16.68	\$ 14.51
		Engineering services	\$ 0.33	\$ 0.29
		Customer Application/Rebate/Incentive Processing	\$ 0.06	\$ 0.06
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.04	\$ 0.04
		ME&O (Local)	\$ 1.10	\$ 0.95
		Account Management / Sales	\$ 0.03	\$ 0.03
		IT	\$ 0.24	\$ 0.21
		Call Center	\$ 0.05	\$ 0.05
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ 27.71	\$ 20.90
		Incentives--Third Party Program	\$ 31.68	\$ 30.00
	Non-Labor Total		\$ 84.46	\$ 72.06
Commercial [*] Total			\$ 99.80	\$ 85.40
	Other (collected through GRC) (2)	Labor Overheads	\$ 6.56	\$ 5.67

[*] SCE classified On-Bill Finance program as a commercial sector program in its 2018-2025 EE Program Business Plan

- Notes:
- (1) Labor costs are already loaded with (state loaders covered by EE)
 - (2) These costs are collected through GRC (state current applicable decision)
 - (3) LGP contracts that directly support the sector is included/not included in this item
 - (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
 - (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

Industrial

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.36	\$ 0.50
		Program Management	\$ 0.87	\$ 1.22
		Engineering services	\$ 0.46	\$ 0.64
		Customer Application/Rebate/Incentive Processing	\$ 0.34	\$ 0.47
		Customer Project Inspections	\$ 0.05	\$ 0.07
		Portfolio Analytics	\$ 0.12	\$ 0.17
		ME&O (Local)	\$ 0.05	\$ 0.06
		Account Management / Sales	\$ 2.18	\$ 3.05
		IT	\$ 0.09	\$ 0.13
		Call Center	\$ -	\$ -
	Labor Total		\$ 4.51	\$ 6.31
	Non-Labor	Third-Party Implementers Contracts	\$ 3.24	\$ 5.94
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.06	\$ 0.08
		Program Management	\$ 0.91	\$ 1.27
		Engineering services	\$ 0.07	\$ 0.10
		Customer Application/Rebate/Incentive Processing	\$ 0.01	\$ 0.02
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.01	\$ 0.01
		ME&O (Local)	\$ 0.13	\$ 0.19
		Account Management / Sales	\$ 0.03	\$ 0.05
		IT	\$ 0.06	\$ 0.08
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ 1.75	\$ 3.59
		Incentives--Third Party Program	\$ 8.17	\$ 10.00
	Non-Labor Total		\$ 14.44	\$ 21.33
Industrial Total			\$ 18.95	\$ 27.64
	Other (collected through GRC) (2)	Labor Overheads	\$ 1.94	\$ 2.68

- Notes:
- (1) Labor costs are already loaded with (state loaders covered by EE)
 - (2) These costs are collected through GRC (state current applicable decision)
 - (3) LGP contracts that directly support the sector is included/not included in this item
 - (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
 - (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

Agriculture

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Agriculture	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.04	\$ 0.04
		Program Management	\$ 0.21	\$ 0.20
		Engineering services	\$ 0.86	\$ 0.85
		Customer Application/Rebate/Incentive Processing	\$ 0.06	\$ 0.06
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.01	\$ 0.01
		ME&O (Local)	\$ 0.01	\$ 0.01
		Account Management / Sales	\$ 1.03	\$ 1.01
		IT	\$ 0.01	\$ 0.01
		Call Center	\$ -	\$ -
	Labor Total		\$ 2.24	\$ 2.20
	Non-Labor	Third-Party Implementers Contracts	\$ -	\$ 0.05
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.01	\$ 0.01
		Program Management	\$ 0.51	\$ 0.50
		Engineering services	\$ 0.01	\$ 0.01
		Customer Application/Rebate/Incentive Processing	\$ 0.00	\$ 0.00
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.00	\$ 0.00
		ME&O (Local)	\$ 0.06	\$ 0.06
		Account Management / Sales	\$ 0.01	\$ 0.01
		IT	\$ 0.01	\$ 0.01
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ 1.25	\$ 0.26
		Incentives--Third Party Program	\$ -	\$ -
	Non-Labor Total		\$ 1.85	\$ 0.89
Agriculture Total			\$ 4.09	\$ 3.09
	Other (collected through GRC) (2)	Labor Overheads	\$ 0.89	\$ 0.93

Notes:

- (1) Labor costs are already loaded with (state loaders covered by EE)
- (2) These costs are collected through GRC (state current applicable decision)
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
- (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

Cross Cutting

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Cross Cutting [*]	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.34	\$ 0.28
		Program Management	\$ 4.30	\$ 3.52
		Engineering services	\$ 1.03	\$ 0.84
		Customer Application/Rebate/Incentive Processing	\$ 0.00	\$ 0.00
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.11	\$ 0.09
		ME&O (Local)	\$ 0.00	\$ 0.00
		Account Management / Sales	\$ 2.50	\$ 2.05
		IT	\$ 0.07	\$ 0.06
		Call Center	\$ -	\$ -
	Labor Total		\$ 8.35	\$ 6.85
	Non-Labor	Third-Party Implementers Contracts	\$ 1.28	\$ 1.10
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.06	\$ 0.05
		Program Management	\$ 12.87	\$ 10.55
		Engineering services	\$ 0.08	\$ 0.07
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.01	\$ 0.01
		ME&O (Local)	\$ 0.00	\$ 0.00
		Account Management / Sales	\$ 1.07	\$ 0.87
		IT	\$ 0.05	\$ 0.04
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ 0.01	\$ -
		Incentives--Third Party Program	\$ -	\$ -
	Non-Labor Total		\$ 15.43	\$ 12.70
Cross Cutting [*]	Total		\$ 23.78	\$ 19.55
	Other (collected through GRC) (2)	Labor Overheads	\$ 3.36	\$ 2.91

[*] SCE classified On-Bill Finance program as a commercial sector program in its 2018-2025 EE Program Business Plan

Notes:

- (1) Labor costs are already loaded with (state loaders covered by EE)
- (2) These costs are collected through GRC (state current applicable decision)
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
- (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

Public

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
Public	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.30	\$ 0.30
		Program Management	\$ 2.39	\$ 2.43
		Engineering services	\$ 0.15	\$ 0.15
		Customer Application/Rebate/Incentive Processing	\$ 0.14	\$ 0.14
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.10	\$ 0.10
		ME&O (Local)	\$ 0.01	\$ 0.01
		Account Management / Sales	\$ 0.77	\$ 0.78
		IT	\$ 0.10	\$ 0.10
		Call Center	\$ 0.02	\$ 0.02
	Labor Total		\$ 3.96	\$ 4.04
	Non-Labor	Third-Party Implementers Contracts	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ 2.42	\$ 2.74
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.05	\$ 0.05
		Program Management	\$ 3.83	\$ 3.90
		Engineering services	\$ 0.11	\$ 0.11
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.01	\$ 0.01
		ME&O (Local)	\$ 0.03	\$ 0.03
		Account Management / Sales	\$ 0.00	\$ 0.00
		IT	\$ 0.05	\$ 0.05
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ 6.30	\$ 8.03
		Incentives--Third Party Program	\$ -	\$ -
	Non-Labor Total		\$ 12.79	\$ 14.92
Public Total			\$ 16.75	\$ 18.96
	Other (collected through GRC) (2)	Labor Overheads	\$ 1.69	\$ 1.72

Notes:

- (1) Labor costs are already loaded with (state loaders covered by EE)
- (2) These costs are collected through GRC (state current applicable decision)
- (3) LGP contracts that directly support the sector is included/not included in this item
- (4) 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.
- (5) The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

Southern California Regional Energy Network

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
REN	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ 0.00	\$ 0.00
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
	Labor Total		\$ 0.00	\$ 0.00
	Non-Labor	Third-Party Implementers Contracts	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ 13.24	\$ 17.26
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ -	\$ -
		Incentives--Third Party Program	\$ -	\$ -
	Non-Labor Total		\$ 13.24	\$ 17.26
REN Total			\$ 13.24	\$ 17.26
	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 (state current applicable decision)
 - (3) LGP contracts that directly support the sector is included/not included in this item

EM&V

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)
EM&V	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ -	\$ -
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.77	\$ 0.62
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
	Labor Total		\$ 0.77	\$ 0.62
	Non-Labor	Third-Party Implementers Contracts	\$ -	\$ -
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ -	\$ -
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 11.36	\$ 9.40
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--Core Programs	\$ -	\$ -
		Incentives--Third Party Program	\$ -	\$ -
	Non-Labor Total		\$ 11.36	\$ 9.40
EM&V Total			\$ 12.13	\$ 10.01
	Other (collected through GRC) (2)	Labor Overheads	\$ 0.34	\$ 0.26

- Notes:
- (1) Labor costs are already loaded with (state loaders covered by EE)
 - (2) These costs are collected through GRC (state current applicable decision)
 - (3) LGP contracts that directly support the sector is included/not included in this item

Appendix E

Supporting Information – Response to Scoping Memo, Attachment A, Question C.8.

Energy Efficiency Costs and Savings Forecast by Sector

Sector [1]	2016 EE Portfolio Expenditures (\$Million)				2018 EE Portfolio Budget (\$Million)				2016 EE Portfolio Savings			2018 EE Portfolio Forecasted Savings		
	Labor [2]	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	M THERMS	KWH	KW	M THERMS
Residential	\$ 7.40	\$ 11.94	\$ 67.95	\$ 87.29	\$ 7.25	\$ 15.82	\$ 45.32	\$ 68.39	351,410,344	72,241		210,091,055	92,409	
Commercial [3]	\$ 15.34	\$ 22.19	\$ 59.39	\$ 96.92	\$ 13.34	\$ 21.16	\$ 50.90	\$ 85.40	215,961,921	43,949		270,505,278	46,069	
Agricultural	\$ 2.24	\$ 0.60	\$ 1.25	\$ 4.09	\$ 2.20	\$ 0.64	\$ 0.26	\$ 3.09	12,141,150	1,413		1,817,680	420	
Industrial	\$ 4.51	\$ 4.52	\$ 9.92	\$ 18.95	\$ 6.31	\$ 7.74	\$ 13.59	\$ 27.64	89,591,965	12,456		127,633,478	8,130	
Public (GP)	\$ 3.96	\$ 6.49	\$ 6.30	\$ 16.75	\$ 4.04	\$ 6.89	\$ 8.03	\$ 18.96	25,189,460	3,232		28,686,906	3,728	
Cross Cutting*	\$ 8.35	\$ 15.42	\$ 0.01	\$ 23.78	\$ 6.85	\$ 12.70	\$ -	\$ 19.55	754,183,218	147,609		451,881,957	110,486	
Sector Total	\$ 41.79	\$ 61.15	\$ 144.82	\$ 247.77	\$ 39.98	\$ 64.94	\$ 118.10	\$ 223.02	1,448,478,059	280,899		1,090,616,353	261,241	
EM&V-PA	\$ 0.77	\$ 0.31	\$ -	\$ 1.08	\$ 0.26	\$ 3.75	\$ -	\$ 4.00						
EM&V-ED	\$ -	\$ 11.05	\$ -	\$ 11.05	\$ -	\$ 6.01	\$ -	\$ 6.01						
OBF - Loan Pool**	\$ -	\$ 2.88	\$ -	\$ 2.88	\$ -	\$ -	\$ -	\$ -						
SCalREN	\$ 0.00	\$ 13.24	\$ -	\$ 13.24	\$ 0.00	\$ 17.26	\$ -	\$ 17.26	867,386	921		9,433,702	9,395	
BayREN				\$ -				\$ -						
MCE				\$ -				\$ -						
EE Total	\$ 42.56	\$ 88.63	\$ 144.82	\$ 276.02	\$ 40.24	\$ 91.95	\$ 118.10	\$ 250.29	1,449,345,445	281,820		1,100,050,055	270,636	

Notes:

[1] Sector mapping is based on SCE's 2018-2015 Business Plan program mapping. Used 2015 program sector mapping for program that does not exist in the 2018 Business Plan.

[2] Included other labor related expenses (ie. travel, mileage, etc)

[3] SCE classified On-Bill Finance program as a commercial sector program in its 2018-2025 EE Program Business Plan

[4] 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.

[5] The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Financing.

** 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.

Appendix F

Supporting Information – Response to Scoping Memo, Attachment A, Question C.9.

Energy Efficiency In-House Budget by Sector and Cross-Cutting

Sector [1]	2016 EE Portfolio Expenditures (\$Million)				2018 EE Portfolio Budget (\$Million)			
	Labor [2]	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total
Residential	\$ 7.40	\$ 11.94	\$ 67.95	\$ 87.29	\$ 7.25	\$ 15.82	\$ 45.32	\$ 68.39
Commercial [3]	\$ 15.34	\$ 22.19	\$ 59.39	\$ 96.92	\$ 13.34	\$ 21.16	\$ 50.90	\$ 85.40
Agricultural	\$ 2.24	\$ 0.60	\$ 1.25	\$ 4.09	\$ 2.20	\$ 0.64	\$ 0.26	\$ 3.09
Industrial	\$ 4.51	\$ 4.52	\$ 9.92	\$ 18.95	\$ 6.31	\$ 7.74	\$ 13.59	\$ 27.64
Public (GP)	\$ 3.96	\$ 6.49	\$ 6.30	\$ 16.75	\$ 4.04	\$ 6.89	\$ 8.03	\$ 18.96
Cross Cutting*	\$ 8.35	\$ 15.42	\$ 0.01	\$ 23.78	\$ 6.85	\$ 12.70	\$ -	\$ 19.55
Sector Total	\$ 41.79	\$ 61.15	\$ 144.82	\$ 247.77	\$ 39.98	\$ 64.94	\$ 118.10	\$ 223.02
EM&V-PA	\$ 0.77	\$ 0.31	\$ -	\$ 1.08	\$ 0.26	\$ 3.75	\$ -	\$ 4.00
EM&V-ED	\$ -	\$ 11.05	\$ -	\$ 11.05	\$ -	\$ 6.01	\$ -	\$ 6.01
OBF - Loan Pool**	\$ -	\$ 2.88	\$ -	\$ 2.88	\$ -	\$ -	\$ -	\$ -
SCaREN	\$ 0.00	\$ 13.24	\$ -	\$ 13.24	\$ 0.00	\$ 17.26	\$ -	\$ 17.26
BayREN				\$ -				\$ -
MCE				\$ -				\$ -
EE Total	\$ 42.56	\$ 88.63	\$ 144.82	\$ 276.02	\$ 40.24	\$ 91.95	\$ 118.10	\$ 250.29

Notes:

[1] Sector mapping is based on SCE's 2018-2015 Business Plan program mapping. Used 2015 program sector mapping for program that does not exist in the 2018 Business Plan.

[2] Included other labor related expenses, ie travel, mileage, etc.

[3] SCE classified On-Bill Finance program as a commercial sector program in its 2018-2025 EE Program Business Plan

[4] 2018 Forecast budget and savings per sector are from Appendix C of the SCE amended Business Plan.

[5] The 2018 split between Labor and Non-Labor cost by functional group are based on historical cost recorded during the 2016/17 timeframe and adjusted based on total sector budgets derived from 2018 CET outputs in appendix D of the SCE business Plan.

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Financing.

** 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.

Appendix G

Supporting Information – Response to Scoping Memo, Attachment A, Question C.10.

Solicitation Schedule

2017			
Q1	Q2	Q3	Q4(Assumes BP Approval)
			Requests for Abstract: Gather a broad spectrum of innovative third-party program ideas in the form of informational abstracts.
2018 (target 50% of portfolio budget)			
Q1	Q2	Q3	Q4
Request for Proposals <ul style="list-style-type: none"> • Commercial Sector • Industrial Sector • <i>Commercial New Construction Program</i> • Residential Sector • <i>Lighting Program</i> 	Request for Abstracts Gather ideas to fill portfolio gaps and provide an opportunity to introduce new innovative program designs not captured in prior RFPs	Request for Proposals <ul style="list-style-type: none"> • Public Sector • <i>Statewide Government & Institutional Partnerships Program</i> • <i>Water Infrastructure & System Efficiency Program</i> • <i>Electric Emerging Technologies Program.</i> 	Request for Abstracts Gather ideas to fill portfolio gaps and provide an opportunity to introduce new innovative program designs not captured in prior RFPs
2019 (target 60% of portfolio budget)			
Q1	Q2	Q3	Q4
Request for Proposals <ul style="list-style-type: none"> • Agricultural Sector 	Request for Abstracts Gather ideas to fill portfolio gaps and provide an opportunity to introduce new innovative program designs not captured in prior RFPs.	Request for Abstracts Gather ideas to fill portfolio gaps and provide an opportunity to introduce new innovative program designs not captured in prior RFPs	Request for Abstracts Gather ideas to fill portfolio gaps and provide an opportunity to introduce new innovative program designs not captured in prior RFPs
2020 (exceed 60% of portfolio budget)			
Q1	Q2	Q3	Q4
Request for Abstracts Gather ideas to fill portfolio gaps and provide	Request for Abstracts Gather ideas to fill portfolio gaps and provide	Request for Abstracts Gather ideas to fill portfolio gaps and provide	Request for Abstracts Gather ideas to fill portfolio gaps and provide
an opportunity to introduce new innovative program designs not captured in prior RFPs. <i>Potential contract refresh opportunity depending on vendor performance and program uptake.</i>	an opportunity to introduce new innovative program designs not captured in prior RFPs. <i>Potential contract refresh opportunity depending on vendor performance and program uptake</i>	an opportunity to introduce new innovative program designs not captured in prior RFPs. <i>Potential contract refresh opportunity depending on vendor performance and program uptake</i>	an opportunity to introduce new innovative program designs not captured in prior RFPs. <i>Potential contract refresh opportunity depending on vendor performance and program uptake.</i>
Notes 1. The timing or order for the sectors and programs delineated in the table above may change depending upon the information gathered through the request for abstracts (RFA), the date of the CPUC's approval of the business plan, or other factors. 2. Additional request for proposals (RFPs) may be conducted at any time in order to fill gaps in the portfolio, refresh contracts, or as a result of additional information gathered through the request for abstracts. 3. Request for abstracts may be held open continuously and may overlap with RFPs.			

Appendix H

**Supporting Information – Response to Scoping Memo, Attachment A,
Question C.14.**

Supporting Information – Response to Scoping Memo, Attachment A, Question C.14.

Note: SCE has not finalized the budgets associated with the solicitation of the Statewide Downstream Pilot Programs at this time; however, SCE assumes that budgets will be commensurate with those indicated by PG&E and has used those for planning purposes.

Statewide Program	Proposed Lead	2018 Budget (\$M)	2019 Budget (\$M)	2020 Budget (\$M)
State Government Partnership	PG&E	\$ 4.74	\$ 4.78	\$ 4.81
Codes and Standards Advocacy	PG&E	\$ 11.95	\$ 12.06	\$ 12.13
WE&T Connections	PG&E	\$ 4.08	\$ 4.09	\$ 4.10
WE&T Career & Workforce Readiness (downstream pilot)	PG&E	\$ 1.67	\$ 1.67	\$ 1.67
Indoor Agriculture (downstream pilot)	PG&E	TBD	TBD	TBD
Emerging Technologies--Electric	SCE	\$ 14.52	\$ 14.75	\$ 14.90
Lighting	SCE	\$ 16.82	\$ 13.35	\$ 13.37
Savings by Design	SCE	\$ 22.89	\$ 23.30	\$ 23.59
Government Institutional Partnerships	SCE	\$ 15.63	\$ 15.47	\$ 15.22
Water/Wastewater Pumping (downstream pilot)	SCE	\$ 5.25	\$ 5.26	\$ 5.28
Residential New Construction	SCG	\$ 13.37	\$ 19.11	\$ 9.41
Emerging Technologies--Gas	SCG	\$ 2.66	\$ 2.69	\$ 2.72
Food Service POS	SCG	\$ 5.42	\$ 5.66	\$ 5.78
Commercial Midstream Water Heaters	SCG	\$ 2.62	\$ 2.69	\$ 2.72
Commercial Upstream HVAC	SDG&E	\$ 30.29	\$ 30.98	\$ 31.44
Residential Upstream HVAC	SDG&E	\$ 1.86	\$ 1.98	\$ 2.06
Residential PLA	SDG&E	\$ 27.97	\$ 29.47	\$ 23.11
Residential HVAC QI/QM (downstream pilot)	SDG&E	\$ 6.85	\$ 7.32	\$ 7.86

Notes

*PG&E's amount does not include RPP

**SW budgets may be adjusted before and after the solicitation process based on portfolio needs and proposals received.