

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

**FILED**

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Application of Southern California Edison  
Company (U338E) for Approval of Energy  
Efficiency Rolling Portfolio Business Plan.

Application 17-01-013  
(Filed January 17, 2017)

And Related Matters.

Application 17-01-014  
Application 17-01-015  
Application 17-01-016  
Application 17-01-017

**SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (CPUC #940)  
ENERGY EFFICIENCY BUSINESS PLAN SUPPLEMENTAL BUDGET  
INFORMATION**

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For the Southern California Regional Energy  
Network

June 12, 2017

## **I. INTRODUCTION**

Pursuant to Rule 11.1 of the California Public Utilities Commission (“Commission”) Rules of Practice and Procedure, and in accordance with the *Assigned Commissioners and Administrative Law Judge’s Scoping Memo and Ruling*, issued April 14, 2017 (“Joint Ruling”),<sup>1</sup> the County of Los Angeles (LA County) on behalf of the Southern California Regional Energy Network (SoCalREN), respectfully submits supplemental budget information on the SoCalREN Energy Efficiency Rolling Portfolio Business Plan as requested per the Joint Ruling. These responses address the “meet and confer” process suggested by question C.9 in Attachment A of the Joint Ruling.<sup>2</sup>

As part of the “meet and confer” process suggested by question C.9 in Attachment A of the Joint Ruling, the program administrators (PAs) proposed three basic but important principles to guide the consideration of any supplemental budget showing. These principles were based on The Utility Reform Network (TURN) early comment that TURN and the Office of Ratepayer Advocates (ORA) were seeking PA budget information to understand how PAs operate their energy efficiency (EE) programs. This clarification would serve as a prelude to considering cost containment measures, and how EE program administration would evolve along with the changes in EE market structure under the Rolling Portfolio decisions. PA administrative organizations will evolve as non-IOU programs (CCAs and RENs), statewide programs and the minimum 60% third party programs are in place and EE programs are being administered under a more or less permanent structure. IOU and non-IOU PAs provide their EE budget information through the meet and confer process with the following understanding:

1. Adopted budgets should be indicative of expected PA activities until the Rolling Portfolio EE market structure has reached a steady state. Budget allocation for administrative functions should be flexible to accommodate process improvements as well.
2. The PAs must retain flexibility to manage their EE programs and costs to achieve maximum efficiencies. That is, PAs may adjust in-house EE organizational structure, including staffing level and budgets, without prior Commission or Commission staff approval so long as changes are transparent and documented, so that this information can inform future review of proposed administrative budgets.
3. All PAs should provide the same level of budget transparency. The same budget template will be used to describe the administrative costs of all EE PAs. Any non-IOU PA that cannot provide information in the requested format should provide equivalent information and any necessary explanation.

## **II. DESCRIPTION OF IN-HOUSE EE ORGANIZATIONAL STRUCTURE & ASSOCIATED COSTS**

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

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<sup>1</sup> *Assigned Commissioner’s and Administrative Law Judge Scoping Memo and Ruling* (Joint Ruling), A.17-01-013, dated April 14, 2017.

<sup>2</sup> *Ibid.*

SoCalREN is currently administered and managed by the County of Los Angeles Internal Services Department (ISD). Within LA County ISD there are three departments that support the administration and management of SoCalREN. These departments include:

- County Office of Sustainability (COS):
  - Environmental Initiatives Division
  - Energy Management Division
  - COS Planning & Administration
- Information Technology Service
  - Shared Services Branch Internet Development
- Administration & Finance Service
  - Finance

These departments work as shared services between LA County's workforce of more than 100,000 employees in over 40 County Departments, and the County's government and community initiatives portfolio (including the Regional Energy Network). These departments are further described in detail below.

***1) Functions conducted by each department/organization***

County Office of Sustainability. The LA County Office of Sustainability (COS) is comprised of two divisions (the Energy Management Division (EMD) and the Environmental Initiatives Division (EID)), and coordinates energy efficiency, climate action, conservation, and sustainability programs to decrease utilization and maximize the efficient use of natural resources. Some initiatives that this office supports include: climate mitigation, energy efficiency, land-use planning, alternative fuels and transportation.

COS was originally formed to respond to legislation, regulation and policy related to Climate Change and to serve as a central programmatic agency for coordination of Energy Efficiency, Conservation and Sustainability Programs within the County, its facilities and the region. COS develops and implements programs and projects that impact and benefit the constituents of Los Angeles County, for instance: the Southern California Regional Energy Network, Environmental Service Center, and websites such as SolarMap.LACounty.gov and Green.LACounty.gov. In addition, COS is playing an important role in coordinating and implementing Energy and Environmental initiatives,<sup>3</sup> County Green Building programs, and Climate Action activities for the State, region and all County departments.

Between the two COS Divisions, EID works internally with County departments and also represents the County in local and statewide organizations to promote energy efficiency, sustainability, climate action planning, related regulatory and legislative review and advisement, and environmental programs and policies. These efforts are supported through various funding sources, such as grants and utility ratepayer programs.

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<sup>3</sup> In 2016, the County created a Chief Sustainability Officer under the County Executive's Office, to focus on sustainability policy and master-planning. This Office administers development of the County's Community Choice Aggregation agency.

EMD supports the County and ISD by providing energy management services to County Departments, municipalities, and other districts and agencies. Services include utility support, energy efficiency projects, monitoring of building management systems, procurement of electricity, natural gas and water, and the operation of power plants. The Division is comprised of four sections, Power Plants, Energy Efficiency Projects, Energy Support Services, and Energy Management Systems (EEMIS).

Information Technology Service. ISD Information Technology Services (ITS) delivers reliable and secure solutions to support Los Angeles County's technology needs. Providing services to a workforce of more than 80,000 employees in over 40 County Departments, the department safeguards and support mission-critical systems, networks and data. ITS comprehensive information technology shared services include: application development and maintenance, data center operations, telecommunications support, countywide email solutions and cloud computing services.

Administration & Finance Service. ISD's Administration and Finance Service provides legal, procurement, compliance, and oversight services to EID Programs, including the SoCalREN. In addition, these units assist our business partners and customers in making informed decisions by providing essential information, timely payments and billings and budgetary allocations (including vendor payment inquiry, employment opportunities and employment verification).

## **2) Management structure and organization chart**

Please see LA County's ISD organization chart and management structure in Appendix A. Organizations that specifically provide support to SoCalREN are highlighted in yellow.

## **3) 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.**

Currently LA County does not allocate staff *exclusively* to the SoCalREN. As described above, departments supporting the SoCalREN also support a vast amount of other initiatives as well as county departments, and attribution of time is meticulously tracked through program/project billing identification numbers. Current staff that do directly support SoCalREN specifically include: the Acting General Manager County Office of Sustainability, the Environmental Initiatives Division Manager, Climate Policies Manager, and COS Planning & Administration Section Manager within the COS department. The staff represented in those positions have each worked more than a decade in energy portfolios, U.S. Department of Energy programs, Regional Energy Networks, and utility partnerships, and actively participated in legislative review and regulatory proceedings at the CPUC, the California Energy Commission. As needed, LA County deploys program coordinators and other staff to support administrative logistics, outreach and education, and billing and records functions.

LA County currently has a vacant position for a director of COS. LA County anticipates filling this position in the future but expects that this will have no impact in relation to the administration and management costs of SoCalREN. The department of COS does retain the flexibility to manage their EE programs and costs to achieve maximum efficiencies. The

department of COS may adjust its organizational structure, including staffing level to continue support the administration of SoCalREN.

**4) *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.***

To date, SoCalREN program administration, design, and implementation is currently outsourced to third parties that have been selected through a competitive bidding process by LA County, the Administrator of SoCalREN. SoCalREN does not currently nor anticipate in the near term contracting for “non-program” functions. Non-program, contract and billing, and some support functions were conducted by LA County ISD services, with statistically miniscule financial impact on SoCalREN.

As part of a recent program-by-program and Portfolio-wide performance assessment of the SoCalREN, LA County has taken in-house (and will continue to exercise) greater Portfolio planning, oversight, management, and performance tracking. This is an integral part of LA County's pivot to an energy-savings-centric, cost-conscious, and performance-based approach for the SoCalREN. This deeper engagement will reflect somewhat higher LA County administration costs, but these costs net positive against efficiencies and reduced costs of outside consultants. This impact will, however, be economically-scaled and not impact implementation.

Notwithstanding the above, the SoCalREN does plan to continue to outsource program administration, design, and implementation. Current contracts are not due to be renewed by the county until 2020. The intent is to continue to outsource virtually all components of program implementation in the future, pursuant to strict, comprehensive local government and statewide procurement and contracting requirements. LA County is, presently, considering a more dynamic procurement process, however, that may include pay-for-performance, Request for Abstracts, and other bidding approaches that enhance implementation competitiveness and performance. These outsourcing strategies will provide administrative, operational, and implementation efficiencies for the SoCalREN and alleviate cost burdens to ratepayer funds.

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

As stated in previous comments SoCalREN does anticipate some cost shifts, mainly in Program oversight and management, from outside consultants to LA County, to enhance positive, performance-based administration and implementation of energy efficiency programs. These impacts are being scaled to result in a net-zero or positive-savings impact on overall portfolio costs against outcomes.

**6) *Explanation of method for forecasting costs***

Although SoCalREN does not anticipate immediate, significant in-house cost changes by LA County ISD department, we note that in-house and external costs for goods and personal services are, by their nature, dynamic and customary cost increases will likely occur over time in the administration and implementation of its energy efficiency programs. In anticipation of these increases, SoCalREN factored in a simple 2% increase in funding per year to account for program cost increases typically incurred over a contract's cycle such as cost of labor and

materials. This methodology was determined to be the most prudent and cautionary at the time of filing. Conversely, SoCalREN will reevaluate its budgets over time to respond to market changes, lessons learned, and regulatory directives. These anticipated costs are reflected in the proposed budgets of SoCalREN’s EE Business Plan filing.

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

TURN and ORA have requested a table similar to the table provided in PG&E’s 2017 General Rate Case (GRC) addressing its Energy Procurement department Full Time Equivalent (FTE) headcount. They have requested for 2016 or 2017 “recorded” positions, depending on what’s most appropriate for the PA, or both, if that provides the most clarity. And would like the table to include as well forecast years, for at least 2018.

Table 1 below is provided in response to ORA and TURN’s request.

**Table 1. SoCalREN’s FTE headcount by department/organization<sup>4,5</sup>**

Functional Group	2016 EE Portfolio FTE	2018 EE Portfolio FTE
Policy, Strategy, and Regulatory Reporting Compliance	0.8	1
Program Management	2.25	3.0
Engineering Services	0	0
Customer Application/Rebate/Incentive Processing	0.1	0.1
Customer Project Inspections	0	0
Portfolio Analytics	0.25	0.25
EM&V	0	0
ME&O	0.5	0.25
Account Management / Sales	0.25	0.1
IT	0.1	0.1
Call Center	0.1	0.5
<b>Total</b>	<b>4.35</b>	<b>5.30</b>

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

Please see Tables 2 through 6 below which provides SoCalREN’s costs by functional area of management structure.

**Table 2. SoCalREN’s Residential Sector Costs by Labor and Non-Labor Cost Elements**

<sup>4</sup> Please note SoCalREN FTE needs may change over time and these changes can be made without reporting or seeking CPUC approval.

<sup>5</sup> Full-time equivalent (FTE) is a unit that indicates the workload of an employed person (or student) in a way that makes workloads or class loads comparable across various contexts.

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	0.310843	0.158900		
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)				
		Account Management / Sales				
		IT				
		Call Center				
		<b>Labor Total</b>		<b>0.310843</b>	<b>0.158900</b>	
		Non-Labor	Third-Party Implementers Contracts		5.251749	4.086000
			Local/Government Partnerships Contracts (3)			
			Other Contracts			
			Policy, Strategy, and Regulatory Reporting Compliance		0.585341	0.295100
			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		3.434484	2.000000		
<b>Non-Labor Total</b>		<b>9.271574</b>	<b>6.381100</b>			
<b>Residential Total</b>		<b>9.582417</b>	<b>6.540000</b>			
	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					

**Table 3. SoCalREN’s Public Sector Costs by Labor and Non-Labor Cost Elements**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)		
Public	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance				
		Program Management	0.250657	0.396760		
		Engineering services				
		Customer Application/Rebate/Incentive Processing				
		Customer Project Inspections				
		Portfolio Analytics				
		ME&O (Local)				
		Account Management / Sales				
		IT				
		Call Center				
		<b>Labor Total</b>		<b>0.250657</b>	<b>0.396760</b>	
		Non-Labor	Third-Party Implementers Contracts		8.222850	10.202400
			Local/Government Partnerships Contracts (3)			
			Other Contracts			
			Policy, Strategy, and Regulatory Reporting Compliance		0.301262	0.736840
			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					
<b>Non-Labor Total</b>		<b>8.524112</b>	<b>10.939240</b>			
<b>Public Total</b>		<b>8.774769</b>	<b>11.336000</b>			
	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					

**Table 4. SoCalREN’s Cross-Cutting – Finance Costs by Labor and Non-Labor Cost Elements**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)	
Cross Cutting - Financing	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	0.042558	0.076300	
			Engineering services		
			Customer Application/Rebate/Incentive Processing		
			Customer Project Inspections		
			Portfolio Analytics		
			ME&O (Local)		
			Account Management / Sales		
			IT		
			Call Center		
		<b>Labor Total</b>		<b>0.042558</b>	<b>0.076300</b>
		Non-Labor	Third-Party Implementers Contracts	0.562073	0.962000
	Loan Loss Reserves			1.000000	
			Other Contracts		
			Policy, Strategy, and Regulatory Reporting Compliance	0.064790	0.141700
			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			
	<b>Non-Labor Total</b>		<b>0.626863</b>	<b>2.103700</b>	
	<b>Cross Cutting -Financing Total</b>		<b>0.669421</b>	<b>2.180000</b>	
	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				

**Table 5. SoCalREN’s Cross-Cutting – C&S Costs by Labor and Non-Labor Cost Elements**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)	
Cross Cutting - C&S	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management		0.050000	
			Engineering services		
			Customer Application/Rebate/Incentive Processing		
			Customer Project Inspections		
			Portfolio Analytics		
			ME&O (Local)		
			Account Management / Sales		
			IT		
			Call Center		
		<b>Labor Total</b>		<b>-</b>	<b>0.050000</b>
		Non-Labor	Third-Party Implementers Contracts		0.989100
	Local/Government Partnerships Contracts (3)				
			Other Contracts		
			Policy, Strategy, and Regulatory Reporting Compliance		0.050900
			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			
	<b>Non-Labor Total</b>		<b>-</b>	<b>1.040000</b>	
	<b>Cross Cutting - C&amp;S Total</b>		<b>-</b>	<b>1.090000</b>	
	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				

**Table 6. SoCalREN’s Cross-Cutting – WE&T Costs by Labor and Non-Labor Cost Elements**

Sector	Cost Element	Functional Group	2016 EE Portfolio Expenditures (\$Million)	2018 EE Portfolio Budget (\$Million)	
Cross Cutting - WE&T	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management	0.019296	0.016000	
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT			
		Call Center			
		<b>Labor Total</b>		<b>0.019296</b>	<b>0.016000</b>
		Non-Labor	Third-Party Implementers Contracts	0.164515	0.596000
	Local/Government Partnerships Contracts (3)				
			Other Contracts		
			Policy, Strategy, and Regulatory Reporting Compliance	0.035834	0.042000
			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			
	<b>Non-Labor Total</b>		<b>0.200349</b>	<b>0.638000</b>	
<b>Cross Cutting - WE&amp;T Total</b>			<b>0.219645</b>	<b>0.654000</b>	
	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				

**D. Table showing cost drivers across the EE organization**

Since SoCalREN’s inception, cost drivers such as commodity prices or regulatory mandates have not been tracked. However through the energy efficiency business plan exercise, SoCalREN has found the need for increased regulatory and policy support as well as a need for increased coverage across a variety of proceedings. As the CPUC moves to a more integrated approach to planning, energy efficiency administrators will need to be engaged in activities that assist the CPUC is meeting state legislation and the arduous task of integrated resource planning. SoCalREN will make an effort to begin to track these costs and evaluate different cost drivers in an effort to optimize administration and ensure implementation of the REN is done with the utmost efficiency.

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

- 1) 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.).*

SoCalREN as a non-IOU PA does not have applicable GRC costs or rates. However, LA County ISD who administrates and manages SoCalREN utilizes a daily “timesheet” and program/projects code menu that all employees use to track activities and the respective times allocated to those activities. Activities and time spent supporting those can easily be tracked by initiative as well as by county departments.

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

As a non-IOU PA, this question is not applicable to SoCalREN.

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

As mentioned previously in Section II A, SoCalREN is supported by a few of the departments within LA County ISD and these departments act as shared services and support more than 100,000 employees in 40 county departments as well as a multitude of county initiatives. Below is a list of some of the EE functions currently performed by LA County ISD department who also support non-EE county initiatives:

- County Office of Sustainability (COS):
  - Environmental Initiatives Division: program management and oversight, policy, strategy, and regulatory reporting compliance;
  - Energy Management Division: program management and oversight;
  - COS Planning & Administration: contract management and billing and invoicing;
- Information Technology Service
  - Shared Services Branch Internet Development: website and software support
- Administration & Finance Service
  - Finance: payroll services, vendor management;

**4) Are labor costs charged to EE fully loaded?**

Yes, loaded LA County rates that would apply to EE Labor charges include the following:

- ISD-County Office of Sustainability Overhead
- Top Step Variance<sup>6</sup>
- Employee Benefits
  - Salaries & Wages
  - County Employee Retirement (Pension)
  - Workers' Compensation
  - Flexible Benefits Plan
  - Thrift Plan (Horizons)
  - Other Employee Benefits
  - Retiree Health Insurance
  - FICA (OASDI)
  - Dependent Care Spending Account
  - Disability Benefits
  - Dental Insurance
  - Health Insurance
  - Life Insurance
  - Unemployment Insurance

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<sup>6</sup> Ratio of actual salaries to budgeted salaries. As per LA County HR policy, salaries are budgeted at maximum rates, although employees may be at lower step salaries.

– Savings Plan

- 5) *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.*

As a non-IOU PA, this question is not applicable to SoCalREN.

- 6) *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?*

SoCalREN program administration, design, and implementation is currently outsourced to third parties. SoCalREN non-labor resources and attributing costs are only allocated to EE activities as dictated by Decision (D.)12-11-015.<sup>7</sup> Currently, all SoCalREN non-labor resource allocations only support EE activities.

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

As a non-IOU PA, this question is not applicable to SoCalREN.

### III. 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.**

Please see Table B-1 in appendix B for SoCalREN's table summarizing energy savings targets, and expenditures by sector.

- 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.**

Please see tables 2 through 6 above which provides SoCalREN's costs by functional area of management structure.

- 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).**

SoCalREN anticipates a few request for proposals (RFPs) and request for abstracts (RFAs) in the early quarters of 2018. These anticipated solicitation strategies will assist SoCalREN in enhancing its current and future portfolio. In the future, SoCalREN will look to evaluate its

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<sup>7</sup> D.12-11-015, p. 94.

programs and strategies on an annual basis. Based on its annual evaluation SoCalREN will look to further optimize its portfolio and may solicit additional RFAs or RFPs.

Figure 1 below is provided in response to ORA and TURN’s request.

**Figure 1. LA County SoCalREN Implementation Strategy**

2018			
Q1	Q2	Q3	Q4
<ul style="list-style-type: none"> <li>▪ RFP Multifamily Sector Programs</li> <li>▪ RFP Public Sector Programs</li> <li>▪ RFA for Financial Services</li> </ul>	<ul style="list-style-type: none"> <li>▪ RFA for Residential Sector</li> </ul>		
2019			
Q1	Q2	Q3	Q4
2020			
Q1	Q2	Q3	Q4
Mid-Long Term (2021-2025)			
Q1	Q2	Q3	Q4

**IV. CONCLUSION**

SoCalREN appreciates the opportunity to provide supplemental budget information regarding its Energy Efficiency Rolling Portfolio Business Plan and respectfully requests the Commission consider SoCalREN’s Motion for Approval of its Energy Efficiency Rolling Portfolio Business Plan based on the responses provided.

Respectfully submitted,

/s/ Demetra J. McBride

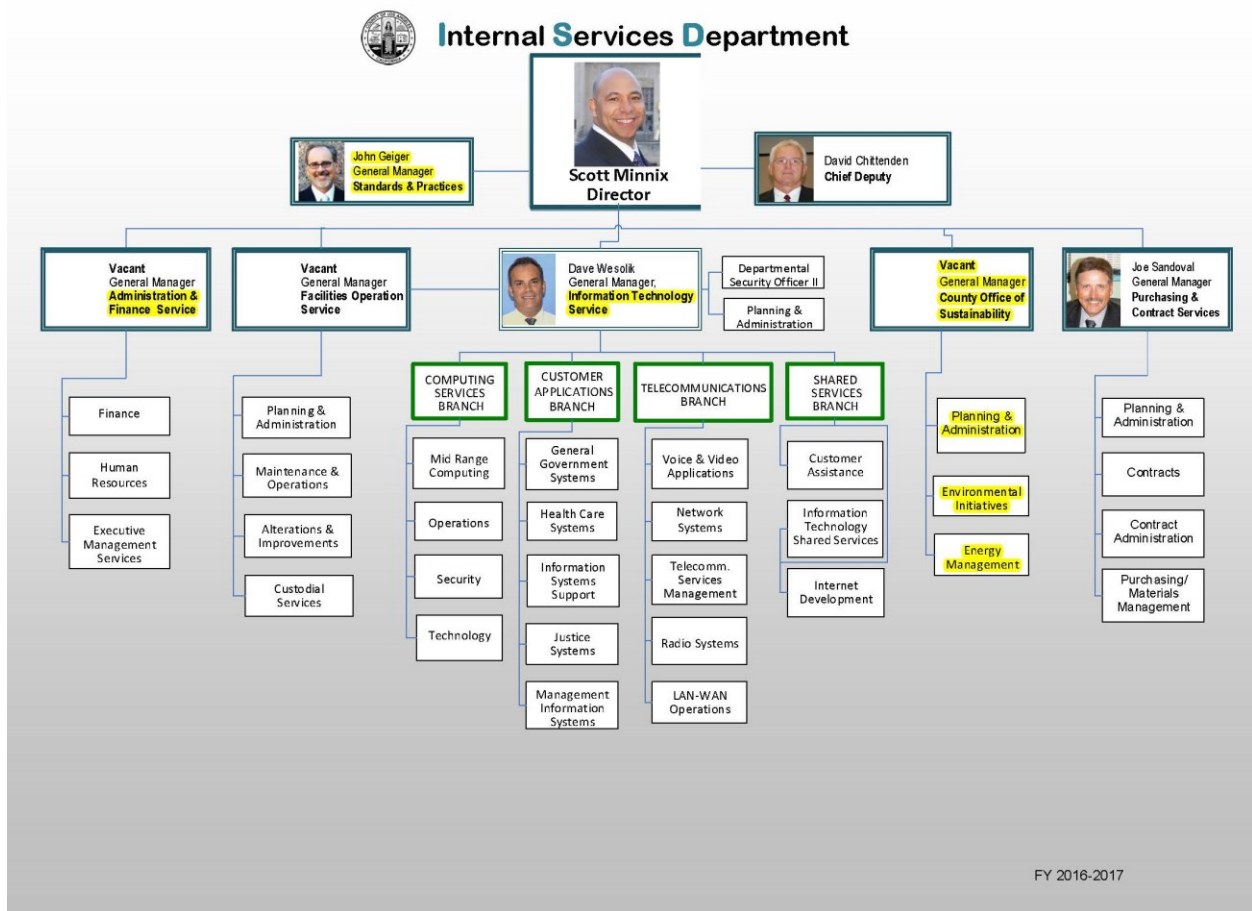
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For the Southern California Regional  
 Energy Network

June 12, 2017

**APPENDIX A**

**County of Los Angeles Internal Services Department Organization  
Chart and Management Structure**



## **APPENDIX B**

### **SoCalREN Energy Savings Targets, and Expenditures by Sector**

