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MEMORANDUM

TO: Local Government Sustainable Energy Coalition
FROM: Jody London
DATE: December 8, 2009
SUBJECT: Utility Advice Letters Implementing Decision on 2010-2012 Energy Efficiency Programs

This memo summarizes the advice letters filed November 23, 2009 by the investor-owned utilities, indicating how they have adjusted their 2010-2012 energy efficiency programs to meet the guidelines imposed by the California Public Utilities (“CPUC”) in Decision 09-09-047. As you recall, that decision imposed several caps and other spending restrictions, and trimmed about \$1 billion statewide from the utilities’ requested budgets. This memo also recommends brief comments be filed this Friday, December 11, on the advice letters. In general, there is not a lot of detail on individual partnerships, so I rely on you to let me know if there are specific issues we should raise in our December 11 comments.

What’s In the Advice Letters?

The advice letters mainly affirm for the CPUC that the utilities followed the CPUC’s directions on how to adjust budgets and other elements of the 2010-2012 program. My analysis is focused primarily on the local government programs, particularly the partnerships. The utilities appear to have followed the CPUC instructions on administrative costs, and have limited their own administrative costs to 10%, and the local government administrative costs also to 10% (separate from the utility administrative costs). Among the four investor-owned utilities, PG&E provides the most information about how specific sub-program budgets have been modified, but even that is not sufficient to truly evaluate what is going on with specific programs or partnerships. Attached to this memo are excerpts from each utility’s Advice Letters that affect local governments.

PG&E:

PG&E appears to have made most of its adjustments to its local government programs by decreasing funds available for the Innovator Pilot program. The Government Partnerships line item, which includes Institutional Partnerships and Local Government Partnerships, as well as the Green Communities and Innovator Pilot programs, has been cut by \$32 million. Those of you tracking the Innovator Pilot solicitation, which is designed to help PG&E meet *Energy Efficiency Strategic Plan* goals, know that it has been cut from an original amount of \$32 million to \$4.5 million. At a meeting last week on local governments and *Strategic Plan* goals, PG&E’s lead local government staff person told the group that this was intentional in order to meet CPUC objectives. PG&E assures the CPUC in its advice letter that it is still putting \$164 million toward *Strategic Plan* support across all programs. The net effect on the Total Resource Cost

test of the many changes PG&E made to its budget, beyond the local government category, is to increase the TRC from 1.15 to 1.24.

Southern California Edison:

Southern California Edison's ("SCE") advice letter is extremely vague, providing less detail than the other utilities. The best information I have on how SCE has modified its local government partnerships is a conversation I had with Nancy Jenkins, SCE's senior manager for local government partnerships. In response to a question I posed to the group at large at last week's meeting on the *Strategic Plan*, Jenkins told me that SCE had not modified its local government partnerships at all. Later she told me offline that she was slightly mistaken, that SCE actually had reduced the marketing funds in the partnership programs. I reminded Jenkins of the LGSEC's concern, expressed in comments to the CPUC, that SCE's partnership model relies on local governments performing marketing and outreach activities, so reducing our ability to perform those function impacts our likelihood of success. Jenkins resisted my suggestion that perhaps SCE should be modifying its partnership model. The only indication that SCE might have cut funds to local governments is where it lists \$5 million cuts to both marketing activities and "IOU outreach" activities, for a total \$10 million reduction. These are aggregate numbers not broken out by program.

Southern California Gas and San Diego Gas & Electric:

The Sempra utilities continue to not charge any savings to local government partnerships. At the same meeting last week, Sempra indicated it has not made any changes to local government partnership budgets.

Recommendation for Comments

I believe we should file brief comments this Friday that address the following points. I believe the CPUC just wants to make sure nothing is horribly wrong, and get the programs moving. At this point it is too late for any wholesale changes, but we may be able to influence discrete areas.

- Our ongoing interest in working with the CPUC and the utilities to our mutual benefit.
- Any information you can provide from the "real world" about the status of negotiations, the likelihood of programs starting on or close to January 1, and so on.
- PG&E's reduction in funds for *Strategic Plan* activities. The CPUC will not achieve its long-term goals if it does not provide sufficient funding to achieve them.
- The vagueness of SCE's filing, and our inability to ascertain where any cuts to local government programs have been made. Any details that you all can provide from your own experience will be most helpful.

Please provide your thoughts to me as soon as possible. I will aim to have a draft of these comments to you by Wednesday.





TABLE 2
2010-2012 ADOPTED BUDGET COMPARED TO PG&E'S JULY 2 PROPOSED BUDGET
(\$MILLIONS)

Line No.	Program/Cost Element	Jul-09	Compliance	Change
		Requested 2009-2011 Budget	AL Proposed 2010-2012 Budget	
1a	Residential	\$187.5	\$165.8	(\$21.7)
1b	Residential Whole House (a)	\$4.0	\$46.0	\$42.0
1c	Residential Basic Lighting Program (a)	\$60.0	\$30.0	(\$30.0)
1d	Residential Advanced Lighting Program (a)	\$22.1	\$33.3	\$11.2
1e	Third Parties – Residential	\$12.3	\$14.1	\$1.8
2a	Commercial	\$182.9	\$165.7	(\$17.3)
2b	Third Parties – Commercial	\$163.8	\$165.6	\$1.8
3a	Industrial	\$98.3	\$76.3	(\$22.0)
3b	Third Parties – Industrial	\$85.4	\$84.6	(\$0.8)
4a	Agricultural	\$77.0	\$58.2	(\$18.8)
4b	Third Parties – Agriculture	\$19.7	\$23.2	\$3.5
5	New Construction	\$51.8	\$38.5	(\$13.3)
6	Lighting Market Transformation	\$0.4	\$0.5	\$0.0
7a	HVAC	\$90.1	\$57.2	(\$32.9)
7b	Third Parties – HVAC	\$0.9	\$1.5	\$0.6
8	Codes and Standards	\$19.0	\$19.6	\$0.6
9	Emerging Technologies	\$46.6	\$23.2	(\$23.4)
10a	Workforce Education and Training	\$46.9	\$41.2	(\$5.8)
10b	Third Parties - WE&T	\$3.3	\$3.3	\$0.0
11	Statewide Marketing Education and Outreach	\$24.9	\$24.9	\$0.0
12	Statewide DSM Coordination and Integration	\$1.2	\$1.2	\$0.0
13	Local DSM Coordination and Integration	\$7.3	\$7.3	\$0.0
14a	Government Partnerships (b)	\$199.5	\$167.5	(\$32.0)
14b	GP – SW Coordinator (a)	\$0.0	\$0.2	\$0.2
15	Third Parties – Reserve (a)	\$44.9	\$0.0	(\$44.9)
16	Zero Net Pilots	\$30.7	\$7.6	(\$23.1)
17a	On-Bill Financing Program (a)	\$19.6	\$9.3	(\$10.2)
17b	On-Bill Financing Revolving Loan Pool (a)	\$9.9	\$18.5	\$8.6
18	EM&V Expense (a)	\$112.2	\$53.5	(\$58.7)
19	EM&V Capital RRQ (a)	\$8.8	\$0.0	(\$8.8)
20	Zero Net Lab/Demo Home/Other Capital RRQ (a)	\$1.8	\$0.0	(\$1.8)
21	Total	\$1,632.9	\$1,338.0	(\$294.9)

comment by ALJ Ruling on November 20, 2009, Energy Division and IOUs agreed to an initial minimum allocation of 15%, or \$8.02 million for PG&E, to support necessary IOU EM&V activities until such time as the Commission issues a final EM&V decision and budget. See also Attachment 6: Appendix A, Table 5.1.

- (a) These changes are dictated by specific directives in D. 09-09-047.
- (b) Includes Institutional Partnerships, Local Government Partnerships, Green Communities and Innovator Pilots.

b) Balancing Budget Caps, Targets and Support for Strategic Plan

Table 3 summarizes the \$295 million reduction by budget category illustrating where the reductions were made in light of the budget caps, targets and other directives. PG&E found it necessary to reduce program budgets and/or reallocate budget from one program to another. In every case, PG&E sought to maintain the spirit of the EE Decision and the Strategic Plan by keeping administrative costs within the 10 percent cap, while aiming for the highest possible Total Resource Cost (TRC) and energy savings for the overall portfolio. As illustrated in Table 3, the highest percentage reduction of costs (excluding EM&V) has occurred in the Administrative category.

The EE Decision (at OP 13) directs IOUs to not unduly reduce Strategic Plan non-administrative costs as compared to resource program direct implementation non-incentive costs. Despite necessary reductions, PG&E's portfolio still provides \$164 million in support of the Strategic Plan including \$18.5 million for the OBF revolving loan pool. This is comparable to the level of support PG&E provided in its July 2009 filing of 12 percent of the total portfolio. The reduction to such programs as Emerging Technologies still represents a significant and substantial increase (on the magnitude of double) from current spending. As authorized by the EE Decision, PG&E will consider mid-cycle augmentation of funding for successful programs, as needed.

TABLE 3
SUMMARY OF BUDGET CHANGES FROM JULY 2009 FILING BY COST CATEGORY
(\$MILLIONS)

Line No.	Program/Cost Element	Admin	Marketing	Direct Implementation Non-Incentives	Direct Implementation Incentives	EM&V	Total Change
1a	Residential	(\$3.9)	(\$11.2)	(\$3.8)	(\$2.8)		(\$21.7)
1b	Residential Whole House (a)	\$2.4	\$0.1	\$39.5	\$0.0		\$42.0
1c	Residential Basic Lighting Program	(\$2.0)	(\$8.0)	(\$2.7)	(\$17.3)		(\$30.0)
1d	Residential Advanced Lighting Program	\$0.8	\$0.2	\$2.1	\$8.1		\$11.2
1e	Third Parties – Residential	(\$0.5)	\$0.0	\$2.3	\$0.0		\$1.8
2a	Commercial	(\$21.4)	(\$0.5)	\$7.0	(\$2.3)		(\$17.3)
2b	Third Parties – Commercial	(\$11.9)	(\$1.2)	\$12.9	\$2.0		\$1.8
3a	Industrial	(\$2.7)	(\$1.4)	(\$2.6)	(\$15.3)		(\$22.0)
3b	Third Parties – Industrial	(\$0.9)	(\$0.2)	\$1.7	(\$1.4)		(\$0.8)
4a	Agricultural	(\$3.6)	(\$2.1)	(\$4.3)	(\$8.7)		(\$18.8)
4b	Third Parties – Agricultural	(\$0.6)	\$0.0	\$4.1	\$0.0		\$3.5
5	New Construction	(\$3.4)	(\$2.3)	(\$0.4)	(\$7.1)		(\$13.3)
6	Lighting Market Transformation	(\$0.2)	\$0.0	\$0.2	\$0.0		\$0.0
7a	HVAC	(\$2.6)	(\$1.0)	(\$6.0)	(\$23.2)		(\$32.9)
7b	Third Parties - HVAC	(\$0.0)	\$0.0	\$0.7	\$0.0		\$0.6
8	Codes and Standards	(\$0.2)	\$0.0	\$0.8	\$0.0		\$0.6
9	Emerging Technologies	(\$5.1)	(\$1.8)	(\$16.5)	\$0.0		(\$23.4)
10a	Workforce Education and Training	(\$2.7)	\$0.0	(\$3.1)	\$0.0		(\$5.8)
10b	Third Parties - WE&T	(\$0.3)	\$0.0	\$0.3	\$0.0		\$0.0
11	Statewide Marketing Education and Outreach	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
12	Statewide DSM Coordination and Integration	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
13	Local DSM Coordination and Integration	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
14a	Government Partnerships (b)	(\$20.3)	(\$1.7)	(\$2.9)	(\$7.2)		(\$32.0)
14b	GP – SW Coordinator	\$0.0	\$0.0	\$0.2	\$0.0		\$0.2
15	Third Parties - Reserve	(\$4.1)	\$0.0	(\$13.3)	(\$27.4)		(\$44.9)
16	Zero Net Pilots	(\$1.1)	\$0.0	(\$21.9)	\$0.0		(\$23.1)
17a	On-Bill Financing Program	(\$5.9)	(\$0.4)	(\$3.9)	\$0.0		(\$10.2)
17b	On-Bill Financing Revolving Loan Pool	\$0.0	\$0.0	\$8.6	\$0.0		\$8.6
18	EM&V Expense	\$0.0	\$0.0	\$0.0	\$0.0	(\$58.7)	(\$58.7)
19	EM&V Capital RRQ	\$0.0	\$0.0	\$0.0	\$0.0	(\$8.8)	(\$8.8)
20	Zero Net Lab/Demo Home/Other Capital RRQ	\$0.0	\$0.0	(\$1.8)	\$0.0	\$0.0	(\$1.8)
21	Total Change	(\$90.2)	(\$31.7)	(\$3.1)	(\$102.5)	(\$67.4)	(\$294.9)
22	Percentage Change	(36.8%)	(23.2%)	(0.6%)	(17.2%) (c)	(55.8%)	(18.1%)

- (a) A portion of direct implementation costs may be allocated to incentives once the Whole House program implementation plan advice letter to be filed by December 15, 2009, is approved.
- (b) Includes Institutional Partnerships, Local Government Partnerships, Green Communities and Innovator Pilots.
- (c) The Direct Implementation Incentive reduction would be 9.7% percent excluding mandated reductions in Basic Lighting (\$30M) and Third Party Reserve (\$27M).

All expenses resulting from this advice letter will be recorded and recovered through the EE balancing accounts and have been broken out in accordance with the allowable costs categories as clarified in the Energy Division memo dated October 22, 2009, shown in Attachment 2. A more detailed breakdown is shown in Attachment 6, Appendix C – Program Budget Workbook.

As shown in Table 4, these changes result in an overall portfolio that meets or is under the caps and targets with one exception. The **portfolio direct implementation cost**, including that for government partnerships and third parties, for delivery of resource programs is **28 percent of the total portfolio, rather than 20 percent target**. This is partially due to the increase in costs included in this category by the EE Decision, including the increase to PG&E's Residential Whole House sub-program funding (\$39.5M). Further, **third party and government partnership direct implementation costs are included in the 20 percent target. If these costs were excluded, PG&E's direct implementation program delivery non-incentives would be 13 percent of the total budget.**

**TABLE 4
SUMMARY OF TOTAL BUDGET BY COST CATEGORY
(\$MILLIONS)**

Line No.	Program/Cost Element	Table 6 from D.09- 09-047	Compliance AL	% of Budget	Budget Cap/Target
1	Administration – PG&E	\$134.0	\$118.3	8.8%	10%
2	Administration – 3P/GP		\$36.7		n/a
3	Local Marketing including 3P/GP	\$80.0	\$79.9	6.0%	6%
4	SW Marketing	\$25.0	\$24.9		n/a
5	Direct Implementation – Program Delivery Non-Incentives	\$275.0	\$373.0	27.9%	20%
6	Direct Implementation – Incentive		\$493.7		n/a
7	Direct Implementation – Non- Incentives Programs (a)	\$198.3	\$158.0		n/a
8	EM&V		\$53.5	4.0%	4%
9	Total Budget		\$1,338.0		



Program/Element	Membership dues	IOU Labor - Program Management	IOU Employee Expense (outside of Travel & Conference)	Facility Related Cost	Equipment Transportation	IT Support & Services	Supply Management (Procurement department charge back)	Human Resources	Travel and Conference Cost	Miscellaneous - General costs such as postage, office machine repairs, office supplies	Third Party Administrative Cost	Partners Administrative Cost	IOU Overhead (G&A for Administrative) ¹	Total
Private College Campus Housing	\$ -	\$ 126,113	\$ -	\$ -	\$ -	\$ 29,597	\$ 5,025	\$ -	\$ -	\$ (448)	\$ 65,029	\$ -	\$ -	\$ 284,170
Automatic Energy Rating for Schools	\$ -	\$ 179,700	\$ 7,500	\$ -	\$ -	\$ -	\$ 6,796	\$ -	\$ -	\$ 6,306	\$ 93,948	\$ -	\$ -	\$ 89,983
Sustainable Communities	\$ 31,401	\$ 929,227	\$ 54,450	\$ -	\$ 42,778	\$ 57,000	\$ 43,883	\$ -	\$ 157,500	\$ 185,340	\$ 692,802	\$ -	\$ -	\$ 2,548,763
Residential Energy Efficiency Program														
Advanced Consumer Lighting Program	\$ 60,000	\$ 534,231	\$ 37,500	\$ 5,580	\$ -	\$ 339,425	\$ 19,884	\$ -	\$ 33,186	\$ 20,678	\$ -	\$ -	\$ -	\$ 2,357,835
Appliance Recycling	\$ -	\$ 429,300	\$ 9,900	\$ -	\$ 13,500	\$ 144,000	\$ 173,295	\$ -	\$ 20,655	\$ 14,843	\$ 22,500	\$ -	\$ -	\$ 2,035,746
Residential Lighting Incentive Program for Basic CFLs	\$ 60,000	\$ 194,800	\$ 34,500	\$ 3,878	\$ -	\$ 208,926	\$ 3,549	\$ -	\$ 27,925	\$ 14,798	\$ -	\$ -	\$ -	\$ 1,701,161
Bus & Cons Electronic	\$ -	\$ 52,000	\$ 10,500	\$ -	\$ -	\$ 52,500	\$ 20,970	\$ -	\$ 23,000	\$ 16,844	\$ -	\$ -	\$ -	\$ 607,968
Home Energy Efficiency Survey Program	\$ -	\$ 517,250	\$ 9,500	\$ -	\$ -	\$ 45,000	\$ 27,630	\$ -	\$ 15,000	\$ 12,295	\$ 625,586	\$ -	\$ -	\$ 360,667
Multifamily Energy Efficiency Rebate Program	\$ 10,500	\$ 115,900	\$ 10,500	\$ -	\$ -	\$ 159,000	\$ 6,541	\$ -	\$ 29,574	\$ 12,782	\$ 5,263	\$ -	\$ -	\$ 2,270,303
Home Energy Efficiency Rebate Program	\$ 3,000	\$ 159,700	\$ 13,500	\$ -	\$ -	\$ 234,000	\$ 29,362	\$ -	\$ 66,000	\$ 120,316	\$ -	\$ -	\$ -	\$ 1,340,766
Whole House Prescriptive Program	\$ -	\$ 420,856	\$ 22,500	\$ -	\$ -	\$ 375,000	\$ 250,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ 1,804,837
Comprehensive Home Performance	\$ -	\$ 384,500	\$ 4,500	\$ -	\$ -	\$ 9,200	\$ 13,866	\$ -	\$ 5,400	\$ 1,824	\$ 176,498	\$ -	\$ -	\$ 175,331
On Line Buying Guide	\$ -	\$ 34,800	\$ 3,000	\$ -	\$ -	\$ 3,000	\$ 5,064	\$ -	\$ 27,000	\$ 9,214	\$ -	\$ -	\$ -	\$ 70,839
Community Language Efficiency Outreach	\$ -	\$ 184,100	\$ 4,500	\$ -	\$ -	\$ 3,000	\$ 16,802	\$ -	\$ 24,000	\$ 3,275	\$ 507,193	\$ -	\$ -	\$ 203,500
Comprehensive Manufactured Home	\$ -	\$ 508,200	\$ 11,750	\$ -	\$ -	\$ 114,000	\$ 47,080	\$ -	\$ 9,000	\$ 13,661	\$ 274,213	\$ -	\$ -	\$ 570,317
Efficient Affordable Home	\$ -	\$ 384,500	\$ 4,500	\$ -	\$ -	\$ 9,200	\$ 4,068	\$ -	\$ 6,000	\$ 3,683	\$ 64,080	\$ -	\$ -	\$ 79,280
Energy Leader Partnership Program														
Strategic Planning	\$ -	\$ 60,326	\$ 12,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 299,910	\$ -	\$ -	\$ 10,545,373	\$ 1,624,722
Palm Desert	\$ -	\$ 11,574	\$ 2,500	\$ -	\$ -	\$ 60,000	\$ 3,426	\$ -	\$ 7,750	\$ 78,180	\$ -	\$ -	\$ 109,400	\$ 173,018
City of Beaumont Energy Leader Partnership	\$ -	\$ 36,830	\$ 9,000	\$ 186	\$ -	\$ 13,125	\$ 41	\$ -	\$ 6,750	\$ 4,194	\$ -	\$ -	\$ 67,208	\$ 29,289
Community Energy Leader Partnership	\$ -	\$ 112,467	\$ 12,000	\$ -	\$ -	\$ 18,000	\$ 831	\$ -	\$ 11,100	\$ 4,596	\$ -	\$ -	\$ 802,595	\$ 198,310
Desert Cities Energy Leader Partnership	\$ -	\$ 43,279	\$ 9,000	\$ 313	\$ -	\$ 21,500	\$ 1,541	\$ -	\$ 11,250	\$ 6,569	\$ -	\$ -	\$ 188,098	\$ 75,294
Eastern Sierra Energy Leader Partnership	\$ -	\$ 37,130	\$ 12,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 8,284	\$ -	\$ -	\$ 116,884	\$ 48,717
Energy Leader Partnership Program	\$ -	\$ 162,112	\$ -	\$ 375	\$ -	\$ 15,000	\$ 791	\$ -	\$ 27,783	\$ 808	\$ -	\$ -	\$ 748,887	\$ 286,811
Energy Leader Partnership Strategic Support	\$ -	\$ 32,880	\$ 9,000	\$ 375	\$ -	\$ 16,125	\$ 41	\$ -	\$ 13,500	\$ 8,116	\$ -	\$ -	\$ 88,500	\$ 49,951
Kern County Energy Leader Partnership	\$ -	\$ 88,712	\$ 9,000	\$ -	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 7,175	\$ -	\$ -	\$ 350,329	\$ 134,801
City of Long Beach Energy Leader Partnership	\$ -	\$ 63,475	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 8,394	\$ -	\$ -	\$ 239,741	\$ 94,298
Orange County Cities Energy Leader Partnership	\$ -	\$ 66,199	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 8,554	\$ -	\$ -	\$ 291,905	\$ 113,028
City of Redlands Energy Leader Partnership	\$ -	\$ 30,123	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 7,722	\$ -	\$ -	\$ 97,302	\$ 40,659
City of Ridgecrest Energy Leader Partnership	\$ -	\$ 36,830	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 8,126	\$ -	\$ -	\$ 96,430	\$ 40,053
San Gabriel Valley Energy Leader Partnership	\$ -	\$ 66,199	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 2,291	\$ -	\$ 13,500	\$ 7,202	\$ -	\$ -	\$ 243,380	\$ 101,612
City of Santa Ana Energy Leader Partnership	\$ -	\$ 66,199	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 8,317	\$ -	\$ -	\$ 246,498	\$ 94,680
City of Simi Valley Energy Leader Partnership	\$ -	\$ 30,545	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 191	\$ -	\$ 13,500	\$ 8,324	\$ -	\$ -	\$ 32,434	\$ 19,888
South Bay Energy Leader Partnership	\$ -	\$ 95,067	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 6,121	\$ -	\$ 13,500	\$ 8,268	\$ -	\$ -	\$ 389,615	\$ 151,313
South Santa Barbara County Energy Leader Partnership	\$ -	\$ 96,167	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 806	\$ -	\$ 13,500	\$ 8,860	\$ -	\$ -	\$ 385,305	\$ 150,527
City of South Gate Energy Leader Partnership	\$ -	\$ 30,123	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 7,722	\$ -	\$ -	\$ 97,302	\$ 40,659
San Joaquin Valley Energy Leader Partnership	\$ -	\$ 66,799	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 41	\$ -	\$ 13,500	\$ 7,740	\$ -	\$ -	\$ 276,953	\$ 113,457
Ventura County Energy Leader Partnership	\$ -	\$ 115,921	\$ 9,000	\$ 375	\$ -	\$ 24,000	\$ 798	\$ -	\$ 13,500	\$ 7,977	\$ -	\$ -	\$ 655,793	\$ 242,466
Institutional and Government Core Energy Efficiency Partnership Program														
California Community Colleges Energy Efficiency Partners	\$ -	\$ 112,085	\$ 17,400	\$ 1,500	\$ -	\$ 32,000	\$ 5,127	\$ -	\$ 30,000	\$ 29,467	\$ -	\$ -	\$ 250,000	\$ 624,953
California Department of Corrections and Rehabilitation Et	\$ -	\$ 131,886	\$ 11,400	\$ 1,500	\$ -	\$ 32,000	\$ 2,210	\$ -	\$ 30,000	\$ 19,848	\$ -	\$ -	\$ 150,000	\$ 177,363
Institutional and Government Core Energy Efficiency Partn	\$ -	\$ 114,466	\$ 13,800	\$ 1,500	\$ -	\$ 31,000	\$ 3,219	\$ -	\$ 28,000	\$ 23,164	\$ -	\$ -	\$ -	\$ 206,952
County of Los Angeles Energy Efficiency Partnership	\$ -	\$ 97,066	\$ 11,400	\$ 1,500	\$ -	\$ 32,000	\$ 2,750	\$ -	\$ 24,000	\$ 9,895	\$ -	\$ -	\$ -	\$ 164,247
County of Riverside Energy Efficiency Partnership	\$ -	\$ 144,413	\$ 11,400	\$ 1,500	\$ -	\$ 32,000	\$ 3,678	\$ -	\$ 32,000	\$ 8,471	\$ -	\$ -	\$ -	\$ 113,395
County of San Bernardino Energy Efficiency Partnership	\$ -	\$ 79,666	\$ 6,600	\$ 1,500	\$ -	\$ 27,000	\$ 2,250	\$ -	\$ 24,000	\$ 8,742	\$ -	\$ -	\$ -	\$ 136,221
State of California Energy Efficiency Partnership	\$ -	\$ 194,132	\$ 11,400	\$ 1,500	\$ -	\$ 32,000	\$ 3,209	\$ -	\$ 30,000	\$ 20,846	\$ -	\$ -	\$ 100,000	\$ 186,617
UC/CSU Energy Efficiency Partnership	\$ -	\$ 97,066	\$ 17,400	\$ 1,500	\$ -	\$ 32,000	\$ 7,218	\$ -	\$ 30,000	\$ 29,574	\$ -	\$ -	\$ 500,000	\$ 725,560
SW Lighting Market Transformation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 160,276	\$ -	\$ -	\$ -	\$ 43,118
SWM&O	\$ -	\$ 84,255	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 84,255
Integrated DSM	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 149,531	\$ 1,050,000	\$ -	\$ -	\$ 51,707
Integrated Mkt	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 693	\$ -	\$ -	\$ -	\$ 464,020
Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 324	\$ -	\$ -	\$ -	\$ 120,959
MEU	\$ -	\$ 17,400	\$ 16,500	\$ -	\$ -	\$ 6,000	\$ 13,963	\$ -	\$ 16,500	\$ 5,769	\$ -	\$ -	\$ -	\$ 145,355
Total	\$ 523,989	\$ 20,264,091	\$ 1,014,857	\$ 36,393	\$ 1,205,678	\$ 5,073,979	\$ 3,318,301	\$ -	\$ 3,294,647	\$ 3,066,114	\$ 15,952,046	\$ 17,068,930	\$ 54,389,523	\$ 125,208,548

Footnote
 1 - IOU G&A includes following activities:
 Accounting & audit support
 Regulatory support
 Data request
 Strategic Planning administrative & workshops
 Oversight of Contracts
 Reporting database and system development
 EE Operation management support

Table 3.5 - SCE Partnership Programs

Program Name	Proposed Contract Budget ¹	Energy Savings (Gross kWh) ²	Demand Reduction (Gross kW) ²	Gas Savings (Gross Therms) ²
SCE-L-004 - Energy Leader Partnership Program				
Energy Leader Partnership Program	\$ 4,115,581	10,813,206	2,446	-
City of Beaumont Energy Leader Partnership	\$ 352,673	992,263	226	-
City of Long Beach Energy Leader Partnership	\$ 1,307,060	3,656,726	786	-
City of Redlands Energy Leader Partnership	\$ 533,723	1,491,183	337	-
City of Ridgecrest Energy Leader Partnership	\$ 528,352	1,476,251	343	-
City of Santa Ana Energy Leader Partnership	\$ 1,352,098	3,777,666	836	-
City of Simi Valley Energy Leader Partnership	\$ 175,835	495,834	115	-
City of South Gate Energy Leader Partnership	\$ 533,723	1,491,183	330	-
Community Energy Leader Partnership	\$ 2,852,676	7,965,064	1,764	-
Desert Cities Energy Leader Partnership	\$ 1,063,087	2,984,783	624	-
Eastern Sierra Energy Leader Partnership	\$ 640,428	1,789,397	485	-
Energy Leader Partnership Strategic Support	\$ 770,220	-	-	-
Kern County Energy Leader Partnership	\$ 1,922,502	5,371,327	1,222	-
Orange County Cities Energy Leader Partnership	\$ 1,601,169	4,473,555	961	-
Palm Desert Demonstration Partnership	\$ 3,469,167	10,355,113	3,036	-
San Gabriel Valley Energy Leader Partnership	\$ 1,415,238	3,971,729	920	-
San Joaquin Valley Energy Leader Partnership	\$ 1,606,084	4,476,469	1,018	-
South Bay Energy Leader Partnership	\$ 2,140,726	5,980,790	1,324	-
South Santa Barbara County Energy Leader Partnership	\$ 2,117,491	5,954,417	1,279	-
Ventura County Energy Leader Partnership	\$ 3,526,510	9,920,092	2,131	-
Local Government Strategic Planning Pilot Program	\$ 29,456,350	-	-	-
SCE-L-005 - Institutional and Government Core Energy Efficiency Partnership				
Institutional and Government Core Energy Efficiency Partnership	\$ 3,031,860	10,884,376	1,665	-
California Community Colleges Energy Efficiency Partnership	\$ 10,802,358	39,426,292	5,774	-
California Department of Corrections and Rehabilitation Energy Efficiency Partnership	\$ 2,679,280	7,688,089	1,141	-
County of Los Angeles Energy Efficiency Partnership	\$ 2,658,559	8,188,096	1,140	-
County of Riverside Energy Efficiency Partnership	\$ 1,478,700	3,015,967	534	-
County of San Bernardino Energy Efficiency Partnership	\$ 2,133,559	6,466,335	1,259	-
State of California Energy Efficiency Partnership	\$ 2,700,000	7,982,776	1,184	-
UC/CSU Energy Efficiency Partnership	\$ 12,747,280	46,016,901	6,705	-
Total SCE Partnership Portfolio	\$ 99,712,288	217,105,878	39,587	-

¹ Budget does not include SCE's administrative cost.

² Includes impacts from installations in years 2013 through 2016 to capture those projects committed (funds reserved) in the 2010-2012 program cycle, however are not installed until 2013-2016.

³ Budget includes the total Palm Desert Partnership amount, which includes SCE's administrative cost.



Market Sector	Program #	Main Program Name / Sub-Programs	Estimated Overhead Costs (General & Administration) - IOU	Estimated Other Administration Costs - IOU	Estimated Administrative Costs - IOU Contractors	Total Administrative Cost (Actual)	Estimated Marketing & Outreach (IOU)	Estimated Marketing & Outreach (IOU Contractors)	Total Marketing & Outreach (Actual)
		3P Non-Residential							
		#3P-NRes3 - Small Industrial Facility Upgrades	\$ 1,050.00	\$ 120,293.84	\$ -	\$ 121,343.84	\$ 7,371.82	\$ -	\$ 7,371.82
Agricultural Programs		Agricultural Programs							
		SW Agricultural							
		#SW-AgA - Calculated	\$ 147,091.33	\$ 334,471.52	\$ 25,200.00	\$ 506,762.85	\$ 424,593.25	\$ -	\$ 424,593.25
		#SW-AgB - Deemed	\$ 88,394.74	\$ 166,549.88	\$ 10,800.00	\$ 265,744.62	\$ 747,689.64	\$ -	\$ 747,689.64
		#SW-AgC - Nonresidential Audits	\$ 8,530.78	\$ 13,038.12	\$ 2,300.00	\$ 23,868.90	\$ 19,154.98	\$ -	\$ 19,154.98
		#SW-AgD - Pump Test & Repair	\$ 12,892.32	\$ 21,936.20	\$ 3,000.00	\$ 37,828.51	\$ 19,735.65	\$ -	\$ 19,735.65
	#SW-AgE - Continuous Energy Improvement	\$ 3,058.23	\$ 6,129.88	\$ -	\$ 9,188.11	\$ 9,000.00	\$ -	\$ 9,000.00	
LGP		Local Government Partnership Programs							
		Local Government Partnerships							
		#LGovP01 - LA County IOU Partnership	\$ 31,896.18	\$ 163,781.24	\$ -	\$ 195,677.42	\$ 38,693.45	\$ -	\$ 38,693.45
		#LGovP02 - Kern County Energy Watch Partnership	\$ 15,640.30	\$ 89,104.79	\$ 21,000.00	\$ 125,745.09	\$ 59,549.43	\$ -	\$ 59,549.43
		#LGovP03 - Riverside County Partnership	\$ 21,758.48	\$ 167,444.69	\$ -	\$ 189,203.17	\$ 26,446.17	\$ -	\$ 26,446.17
		#LGovP04 - San Bernardino County IOU Partnership	\$ 21,444.09	\$ 124,352.41	\$ -	\$ 145,796.49	\$ 26,446.17	\$ -	\$ 26,446.17
		#LGovP05 - Santa Barbara County IOU Partnership	\$ 17,128.15	\$ 104,824.52	\$ 18,000.00	\$ 139,952.67	\$ 40,446.17	\$ -	\$ 40,446.17
		#LGovP06 - SBCCOG Partnership	\$ 22,745.16	\$ 86,426.90	\$ 30,000.00	\$ 139,172.06	\$ 41,752.72	\$ -	\$ 41,752.72
		#LGovP07 - San Luis Obispo County Partnership	\$ 16,076.02	\$ 105,603.95	\$ 24,000.00	\$ 145,679.96	\$ 39,446.17	\$ -	\$ 39,446.17
		#LGovP08 - Tulare Cnty-Visalia Energy Watch Prtnr	\$ 14,627.81	\$ 74,209.32	\$ 24,000.00	\$ 112,837.13	\$ 41,752.72	\$ -	\$ 41,752.72
		#LGovP09 - Orange County Cities Partnership	\$ 19,914.98	\$ 78,173.12	\$ -	\$ 98,088.11	\$ 58,552.72	\$ -	\$ 58,552.72
		#LGovP10 - ILG IOU Partnership	\$ 21,849.53	\$ 95,137.44	\$ -	\$ 116,986.97	\$ 147,000.00	\$ -	\$ 147,000.00
		#LGovP11 - Community Energy Partnership	\$ 18,679.53	\$ 109,740.60	\$ -	\$ 128,420.13	\$ 25,352.72	\$ -	\$ 25,352.72
		#LGovP12 - Desert Cities Partnership	\$ 4,214.23	\$ 23,282.41	\$ -	\$ 27,496.64	\$ 12,000.00	\$ -	\$ 12,000.00
		#LGovP13 - VCREA Sub-Program Partnership	\$ 24,761.48	\$ 106,471.86	\$ 30,000.00	\$ 161,233.34	\$ 122,693.45	\$ -	\$ 122,693.45
		#LGovP14 - Palm Desert IOU Pilot Partnership	\$ 20,768.33	\$ 65,336.43	\$ 61,500.00	\$ 147,604.77	\$ 118,231.42	\$ -	\$ 118,231.42
		Local Institutional Partnerships							
		#L-InstP01 - CA Depart of Corrections Partnership	\$ 41,521.20	\$ 176,457.36	\$ -	\$ 217,978.56	\$ 188,342.93	\$ -	\$ 188,342.93
		#L-InstP02 - CA Community College Partnership	\$ 54,895.23	\$ 264,747.51	\$ -	\$ 319,642.73	\$ 192,925.23	\$ -	\$ 192,925.23
		#L-InstP03 - UC/CSU/IOU Partnership	\$ 72,489.76	\$ 294,414.83	\$ -	\$ 366,904.59	\$ 292,612.23	\$ -	\$ 292,612.23
	#L-InstP04 - State of California /IOU Partnership	\$ 43,629.70	\$ 189,920.10	\$ -	\$ 233,549.80	\$ 188,343.00	\$ -	\$ 188,343.00	
Codes and Standards		Codes and Standards							
		Codes & Standards Program #1							
		#SW-C&SA - Building Standards Advocacy	\$ 40,728.42	\$ 61,662.17	\$ -	\$ 102,390.59	\$ -	\$ -	\$ -
		#SW-C&SB - Appliance Standards Advocacy	\$ 12,894.76	\$ 22,652.34	\$ -	\$ 35,547.10	\$ -	\$ -	\$ -
		#SW-C&SC - Compliance Training	\$ 32,249.97	\$ 53,439.75	\$ -	\$ 85,689.72	\$ -	\$ -	\$ -
		#SW-C&SD - Reach Codes	\$ 4,911.86	\$ 5,133.00	\$ -	\$ 10,044.86	\$ -	\$ -	\$ -
Emerging Technology Programs		Emerging Technologies Program							
		Total ET Program							
		#SW-ETA - Assessments	\$ 179,390.97	\$ 603,979.14	\$ -	\$ 783,370.11	\$ 18,000.00	\$ -	\$ 18,000.00
		Scaled Field Placement							
		Demonstration / Showcasing							
		Market and Behavioral Studies							
		Technology Supply Side Efforts							
		Incubation							
WE&T Program		Workforce, Education & Training							
		SW Workforce Education & Training							
		#SW-WE&TA - Strategic Planning & Implementation	\$ 36,000.00	\$ -	\$ -	\$ 36,000.00	\$ -	\$ -	\$ -
		#SW-WE&TB - WE&T Centers	\$ 470,433.74	\$ 2,238,522.68	\$ 16,000.00	\$ 2,724,956.42	\$ 302,268.00	\$ -	\$ 302,268.00
	#SW-WE&TC - WE&T Connections	\$ 61,041.49	\$ 125,574.72	\$ -	\$ 186,616.20	\$ -	\$ -	\$ -	



2010 - 2012 IOU Strategic Planning Program Budget											
<p><i>Note:</i> Data indicated as "estimated" represent forecasts of budgets. Data indicated as "Actual" represents accurate budget totals.</p>											
			1	2	3	4	5	6	7	8	
Market Sector	Program #	Main Program Name / Sub-Programs	Estimated Overhead Costs (General & Administration) - IOU	Estimated Other Administration Costs - IOU	Estimated Administrative Costs - IOU Contractors	Total Administrative Cost (Actual)	Estimated Marketing & Outreach (IOU)	Estimated Marketing & Outreach (IOU Contractors)	Total Marketing & Outreach (Actual)	Estimated TOTAL Direct Implementation - Customer Education & Training	
Industrial Programs	Industrial Programs										
		SW Industrial									
		SW-IndA - Calculated	\$ 81,544.59	\$ 138,778.19	\$ -	\$ 220,322.77	\$ 164,576.80	\$ -	\$ 164,576.80	\$ 45,000.00	
		SW-IndB - Deemed	\$ 68,032.51	\$ 120,076.88	\$ -	\$ 188,109.38	\$ 118,726.80	\$ -	\$ 118,726.80	\$ 90,000.00	
		SW-IndC - Nonresidential Audits	\$ 30,012.12	\$ 54,013.78	\$ -	\$ 84,025.90	\$ 26,363.40	\$ -	\$ 26,363.40	\$ 13,500.00	
		SW-IndD - Continuous Energy Improvement	\$ 36,875.89	\$ 49,766.60	\$ -	\$ 86,642.49	\$ 38,363.40	\$ -	\$ 38,363.40	\$ 20,250.00	
		3P Non-Residential									
	3P-NRes12 - Comprehensive Industrial Energy Effic	\$ 300.00	\$ 79,370.65	\$ -	\$ 79,670.65	\$ -	\$ -	\$ -	\$ -		
Agricultural Programs	Agricultural Programs										
		SW Agricultural									
		SW-AgA - Calculated	\$ 27,539.57	\$ 43,131.69	\$ -	\$ 70,671.25	\$ 7,840.75	\$ -	\$ 7,840.75	\$ 22,500.00	
		SW-AgB - Deemed	\$ 28,873.52	\$ 90,288.35	\$ -	\$ 119,161.86	\$ 9,090.72	\$ -	\$ 9,090.72	\$ 22,500.00	
		SW-AgC - Nonresidential Audits	\$ 11,569.94	\$ 18,417.81	\$ -	\$ 29,987.75	\$ 9,772.68	\$ -	\$ 9,772.68	\$ 60,000.00	
		SW-AgD - Pump Test & Repair	\$ 20,881.03	\$ 50,962.42	\$ -	\$ 71,843.45	\$ 18,863.40	\$ -	\$ 18,863.40	\$ 22,500.00	
		SW-AgE - Continuous Energy Improvement	\$ 11,786.48	\$ 17,852.21	\$ -	\$ 29,638.68	\$ 27,772.68	\$ -	\$ 27,772.68	\$ 6,000.00	
LGP	Local Government Partnership Programs										
		Local Government Partnerships									
		LGovP01 - City of Chula Vista Partnership	\$ 348,131.89	\$ 383,454.58	\$ -	\$ 731,586.47	\$ 1,244,472.00	\$ -	\$ 1,244,472.00	\$ 1,418,469.00	
		LGovP02 - City of San Diego Partnership	\$ 357,051.69	\$ 387,357.10	\$ -	\$ 744,408.78	\$ 252,123.00	\$ -	\$ 252,123.00	\$ 2,302,257.00	
		LGovP03 - County of San Diego Partnership	\$ 249,244.15	\$ 239,624.23	\$ 819,263.19	\$ 1,308,131.57	\$ 435,544.50	\$ -	\$ 435,544.50	\$ 1,331,085.00	
		LGovP04 - City of San Juan Capistrano Partnership	\$ 28,361.72	\$ 62,599.10	\$ 350,000.00	\$ 440,960.82	\$ 55,949.25	\$ -	\$ 55,949.25	\$ 73,108.00	
		LGovP05 - Port of San Diego Partnership	\$ 109,598.70	\$ 141,154.81	\$ -	\$ 250,753.51	\$ 221,582.25	\$ -	\$ 221,582.25	\$ 283,950.00	
		LGovP06 - SANDAG Partnership	\$ 105,045.02	\$ 126,530.56	\$ 671,812.42	\$ 903,388.01	\$ 350,085.25	\$ -	\$ 350,085.25	\$ 835,466.00	
		LGovP07 - ICLEI Partnership	\$ 23,490.43	\$ 33,928.50	\$ 400,000.00	\$ 457,418.93	\$ 10,437.00	\$ -	\$ 10,437.00	\$ 2,149.00	
		LGovP08 - New Cities Partnership	\$ 42,877.43	\$ 154,267.02	\$ 523,809.51	\$ 720,953.96	\$ 52,194.00	\$ -	\$ 52,194.00	\$ 13,815.00	
		Local Institutional Partnerships									
		L-InstP01 - CA Depart of Corrections Partnership	\$ 36,363.09	\$ 176,517.36	\$ -	\$ 212,880.45	\$ 155,981.87	\$ -	\$ 155,981.87	\$ 14,841.91	
		L-InstP02 - CA Community College Partnership	\$ 58,257.41	\$ 248,804.82	\$ 120,000.00	\$ 427,062.23	\$ 181,806.63	\$ -	\$ 181,806.63	\$ 7,500.00	
		L-InstP03 - UC/CSU/IOU Partnership	\$ 116,853.94	\$ 283,350.18	\$ -	\$ 400,204.12	\$ 314,236.07	\$ -	\$ 314,236.07	\$ 21,969.24	
		L-InstP04 - State of California /IOU Partnership	\$ 40,457.47	\$ 189,980.10	\$ -	\$ 230,437.57	\$ 154,237.83	\$ -	\$ 154,237.83	\$ 14,415.00	
		L-InstP05 - University of San Diego Partnership	\$ 35,655.56	\$ 57,079.46	\$ 623,794.21	\$ 716,529.23	\$ 14,204.25	\$ -	\$ 14,204.25	\$ -	
		L-InstP06 - San Diego Cnty Water Auth Partnership	\$ 56,481.37	\$ 149,284.46	\$ 461,651.35	\$ 667,417.17	\$ 166,398.25	\$ -	\$ 166,398.25	\$ 13,815.00	
	Codes and Standards	Codes and Standards									
			Codes & Standards Program #1								
			SW-C&SA - Building Standards Advocacy	\$ 108,785.90	\$ 51,583.80	\$ -	\$ 160,369.70	\$ -	\$ -	\$ -	\$ -
			SW-C&SB - Appliance Standards Advocacy	\$ 31,606.49	\$ 10,193.40	\$ -	\$ 41,799.89	\$ -	\$ -	\$ -	\$ -
			SW-C&SC - Compliance Training	\$ 70,178.39	\$ 19,760.40	\$ -	\$ 89,938.79	\$ -	\$ -	\$ -	\$ -
			SW-C&SD Reach Codes	\$ 54,419.08	\$ 2,313.00	\$ -	\$ 56,732.08	\$ -	\$ -	\$ -	\$ -
Emerging Technology Programs	Emerging Technologies Program										
		Total ET Program									
		SW-ETA - Assessments	\$ 390,897.80	\$ 561,863.94	\$ -	\$ 952,761.74	\$ 174,000.00	\$ -	\$ 174,000.00	\$ -	