May 6, 2020

CA Public Utilities Commission Energy Division Attention: Tariff Unit 505 Van Ness Avenue, 4th Floor San Francisco, CA 94102-3298



MCE Advice Letter 49-E

Re: Request for Increased Budget under Marin Clean Energy's Commercial Upgrade Program for the 2021 Program Year

Pursuant to guidance from the California Public Utilities Commission ("CPUC" or "Commission"), Marin Clean Energy ("MCE") hereby submits it request for increased budget under MCE's Commercial Upgrade Program for the 2021 program year ("PY") as MCE Advice Letter ("AL") 49-E.

Tier Designation:

This AL has a Tier 2 designation.

Effective Date:

Pursuant to General Order ("G.O.") 96-B, MCE requests that this Tier 2 AL become effective on June 5, 2021, which is 30 calendar days from the date of this filing.

Background

MCE has been administering energy efficiency ("EE") funds under California Public Utilities Code ("Code") Section 381.1(a)-(d) since 2013. The Commission originally restricted MCE's EE programs to serving gaps in Investor Owned Utility ("IOU") programs and hard-to-reach markets. On January 17, 2017, MCE filed a Business Plan with the Commission that requested authorization to expand MCE's EE portfolio to include additional sectors and programmatic offerings. MCE proposed to offer programs in the following sectors: (1) Residential; (2) Commercial; (3) Industrial; (4) Agricultural; and (5) Workforce Education and Training ("WE&T"). On June 5, 2018, the Commission approved MCE's Business Plan in D.18-05-041.

¹ To date, MCE is the only community choice aggregator ("CCA") to have requested energy efficiency funding under Code Section 381.1(a)-(d).

² D.12-11-015 at pp.45-6.

³ See Application of Marin Clean Energy for Approval of its Energy Efficiency Business Plan (Application ("A.") 17-01-017) filed January 17, 2017.

⁴ D.18-05-041, OP 33 at p. 189.

The Business Plan established the maximum budget available for MCE for EE program activities for PYs 2018-2025.⁵ Furthermore, MCE submits Annual Budget Advice Letters ("ABAL") to the Commission to request approval of MCE's proposed EE budgets for the upcoming year. MCE submitted its ABAL for the PY 2021 timely to the Commission on September 1, 2020.⁶ The Commission disposed of MCE's ABAL on December 15, 2020, approving MCE's EE program activities and budget request for PY 2021.⁷

MCE's approved budget for the Commercial Upgrade Program for PY 2021 is \$3,010,541 which represented a significant budget increase in comparison to previous PYs. MCE noted that this budget increase was due to an expansion of the Commercial Upgrade Program in 2021, primarily rooted in the development of population-level normalized metered energy consumption ("NMEC") portfolios under a sub-program – the "Commercial Efficiency Market". Prompted by a protest on MCE's ABAL by the Small Business Utilities Advocates ("SBUA"), MCE provided additional information about the expansion of its Commercial Upgrade Program in its reply to the protest filed with the Commission on October 8, 2020. MCE noted that the expansion was rooted in the fact that at least three aggregators had shown interest in participating in the Commercial Efficiency Market sub-program. MCE expected additional expansion may be prudent based on program interest.

MCE's expectation of program expansion with the addition of the Commercial Efficiency Market has materialized. As of April 15, 2021, all funding allocated to the Commercial Efficiency Market has been fully subscribed and customer enrollment had to be paused until additional budget can be allocated.

Purpose

The purpose of this AL is to request a budget increase of \$4 million for the Commercial Efficiency Market sub-program under MCE's Commercial Upgrade Program for the 2021 PY. This AL provides additional details on program enrollment to date and describes the risks of not allocating additional budget to the program at this time.

Furthermore, this AL includes revised forecasts for the 2021 PY as modified from MCE's 2021 ABAL¹⁰ and updates the following program- and portfolio-level data for PY 2021:

- (1) Budgets;
- (2) Energy savings;
- (3) Cost effectiveness;

⁵ See Application of Marin Clean Energy for Approval of its Energy Efficiency Business Plan (Application ("A.") 17-01-017) filed January 17, 2017.

⁶ MCE AL 45-E, Marin Clean Energy's 2021 Energy Efficiency Annual Budget Advice Letter, September 1, 2020

⁷ Energy Division Advice Letter disposition of MCE AL 45-E, December 15, 2020.

⁸ Protest of Small Business Utility Advocated to the Energy Efficiency Annual Budget Advice Letters for Program Year 2021, October 1 at 6f.

⁹ Reply to Protests of MCE Advice Letter 45-E, October 8, 2020 at 9ff.

¹⁰ MCE AL 45-E, Marin Clean Energy's 2021 Energy Efficiency Annual Budget Advice Letter, September 1, 2020

In addition to this information, MCE's updates the following attachments:

- (1) Attachment 1: Marin Clean Energy Supplemental Budget Showing
- (2) Attachment 2: Marin Clean Energy Program Changes Explanation Tables
- (3) Attachment 3: Marin Clean Energy Budget and Savings True-up Tables

Discussion

A) Additional Budget for the Commercial Efficiency Market Sub-Program of the Commercial Upgrade Program

At the time of filing its 2021 ABAL, MCE was in the process of designing and contracting for a new population-level NMEC sub-program to the Commercial Upgrade Program – the Commercial Efficiency Market. The Commercial Efficiency Market leverages an aggregator driven, market-based program design. With no implementation contract in place, there was significant uncertainty in the market's interest in the program since the program design was novel. However, early feedback from the aggregator community was supportive enough to justify an expectation of growth, and MCE utilized this early feedback from aggregators to develop its initial budget forecast for the program in the 2021 ABAL.

The market interest and related growth has been more significant than anticipated. Since launching in December of 2020, the program has drawn strong interest. In a matter of months, the Commercial Efficiency Market has enrolled 10 participating aggregators – among them some of California's leading EE providers. As of April 1, the Commercial Efficiency Market is fully subscribed with additional interest that cannot be served under the existing budget. The interest in a market-driven model that rewards innovation and cost-effectiveness has exceeded expectations, and is a welcome outcome of an innovative, market-based program design.

The Commercial Efficiency Market has been designed as a resource program – and one that can scale easily based on interest and aggregators' capacity to deliver. Payments are made to aggregators based on the avoided cost value of a project, once participant costs and administration costs have been subtracted and the TRC remains above a 1.0. MCE intends to actively maintain the 1.0 TRC threshold for project payments for the remainder of the 2021 PY. MCE also provides revised cost effectiveness forecasts for the Commercial Upgrade Program in Table 3 below.

The Commercial Efficiency Market has been incorporated into the portfolio as an addition to the existing Commercial Upgrade Program which serves commercial customers via two implementation partners who focus separately on small and medium businesses ("SMBs") and large commercial customers. Aggregator enrollments to-date in the Commercial Efficiency Market demonstrate that the program will provide additional value and service to commercial customers within MCE's service area, by diversifying the technologies and interventions MCE is able to provide, and by engaging with a broader group of program partners to meet diverse customer needs.

It is timely for this sub-program to grow, given that MCE's Commercial Efficiency Market Program may be the first program that pays for performance on the avoided cost value of savings delivered. This aligns with the Commissions recent Proposed Decision in which the Commission introduces "Total System Benefits" ("TSB") as the new goal for EE portfolios moving forwards.¹¹

MCE is requesting a budget increase of \$4 million for the Commercial Efficiency Market sub-program under MCE's Commercial Upgrade Program for the 2021 PY. The additional budget request is based on a projection of avoided cost benefits that is forecasted to be generated by the potential projects identified by our ten participating aggregators. MCE will use the additional budget to expand the number of projects and energy savings that can be achieved under the Commercial Upgrade Program in PY 2021.

B) Commercial Efficiency Market Budget Request and Impacts on Goals and Cost Effectiveness of the Commercial Upgrade Program

MCE requests additional funding in support of the Commercial Efficiency Market sub-program under the Commercial Upgrade Program of \$4 million. Of the \$4 million requested, 81 percent is designated to incentives, 4 percent to admin, and 15 percent to direct implementation activity.

The following table provides details regarding the additional budget requested for the program. The budget for the other Commercial Upgrade Program sub-programs (i.e., the two implementers outside of the Commercial Efficiency Market sub-program) is not affected by this budget increase.

Table 1: Revised Budget for the Commercial Upgrade Program

	Budget per PY 2021	Additional Budget	Total Revised
	ABAL	Request	Budget PY 2021
Commercial	\$1,301,380	\$4,000,000	\$5,301,830
Efficiency Market			
Sub-Program			
Other Commercial	\$1,708,711	\$0	\$1,708,711
Upgrade Sub-			
Programs			
Total Commercial	\$3,010,541	\$4,000,000	\$7,010,541
Upgrade Program			

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¹¹ Proposed Decision, Assessment of Energy Efficiency Potential and Goals and Modification of Portfolio Approval and Oversight Process, April 16, 2021.

With the additional budget, MCE forecasts the following updated savings for the Commercial Upgrade Program:

Table 2: Revised Savings for the Commercial Upgrade Program

	Savings* per PY 2021 ABAL		Additional Forecasted Savings*		Total Revised Forecasted Savings*		d Savings*		
	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
Commercial	1,519,550	0	38,800	6,422,998	0	100,767	7,942,548	0	139,567
Efficiency									
Market Sub-									
Program									
Other	3,704,535	273	50,105	0	0	0	3,704,535	273	50,105
Commercial									
Upgrade Sub-									
Programs									
Total	5,224,085	273	88,905	6,422,998	0	100,767	11,647,083	273	189,672
Commercial									
Upgrade									
Program									

^{*} Savings are defined as First Year Net Savings

With the additional budget, MCE forecasts the following updated cost-effectiveness ("CE") ratios for the Commercial Upgrade Program:

Table 3: Revised Cost-Effectiveness Ratios for the Commercial Upgrade Program

	CE Ratios per PY 2021 ABAL		Revised C	EE Ratios
	TRC	PAC	TRC	PAC
Commercial Efficiency Market Sub- Program	0.96	1.22	1.05	1.31
Other Commercial Upgrade Sub- Programs	1.80	1.75	1.80	1.75
Total Commercial Upgrade Program	1.33	1.45	1.20	1.42

C) Impact of the Additional Budget Request on MCE's 2021 Portfolio Forecasts In the following, MCE updates the forecasted budgets, energy savings and cost-effectiveness calculations for its FE portfolio for PY 2021 due to the increased budget request for the

calculations for its EE portfolio for PY 2021 due to the increased budget request for the Commercial Upgrade Program.

(1) Budget

MCE proposed a 2021 EE portfolio budget of \$7.56 million in its 2021 ABAL. ¹² In this AL, MCE requests an additional budget of \$4 Million, leading to a total portfolio budget of \$11,563,643 for PY 2021. Table 2 provides an overview of MCE's updated 2021 forecasted portfolio budget, savings, and cost-effectiveness due to this increased budget request. ¹³

¹² MCE AL 45-E, Table 1

¹²

¹³ The net savings, TRC, and Program Administrator Cost ("PAC") forecast values exclude market effects

Table 4: MCE Revised 2021 Budget, Cost-Effectiveness, and Savings (Net) Forecasts

Sector	Program Year Budget	kWh	kW	Therms
				(MM)
Residential	\$2,733,236	6,333,145	59	0.06
Commercial	\$7,010,541	11,647,083	273	0.19
Industrial	\$871,077	1,359,837	33	0.13
Agriculture	\$468,195	863,147	112	0.01
Emerging Tech	\$0	n/a	n/a	n/a
Public	\$0	n/a	n/a	n/a
Codes and Standards	\$0	n/a	n/a	n/a
WE&T	\$361,481	n/a	n/a	n/a
Finance	\$0	n/a	n/a	n/a
OBF Loan Pool	\$0	n/a	n/a	n/a
Subtotal	\$11,444,530	20,203,211	477	0.40
	MCE Savings Target	8,380,475	484	0.55
	per PY 2019 ABAL			
	True-up			
	% of Savings Target	241%	99%	72%
MCE EM&V	\$119,112			
MCE Total 2021	\$11,563,643			
Spending Budget ¹⁴				
Uncommitted and	\$4,000,000			
Unspent Carryover				
Balance ¹⁵				
MCE Total Budget	\$7,563,643			
Request ¹⁶				
Authorized PY Budget	\$12,404,000			
Cap				
(D.18-05-041)				
Forecast 2021 TRC	1.09			
Forecast 2021 PAC	1.25			

¹⁴ Total proposed program year budget spending, including uncommitted unspent carryover.

¹⁵ The uncommitted and unspent carryover balance reflects the total unspent and uncommitted funds from all previous program years that will be used to offset the 2021 fund transfers. More detail on this number can be found in MCE's CEDARS filing. Because each ABAL is filed in Q3, this unspent uncommitted amount is an estimate for the year in which the ABAL is filed.

¹⁶ The amount of funds to be collected (budget recovery) for the Program Year.

MCE requests that Pacific Gas & Electric Company ("PG&E") adjust the quarterly budget transfers for PY 2021 as calculated below:

Table 5: Revised Fund Transfer from PG&E to MCE

Fuel Type	Revised Budget Transfer for PY 2021	Q1 Payment (complete)	Q2 Payment (complete)	Q3 Transfer Request	Q4 Transfer Request
Total Electric Budget	\$5,912,734	\$668,184.	\$668,184	\$2,288,183	\$2,288,184
Total Gas Budget ¹⁷	\$1,531,796	\$192,949	\$192,949	\$572,949	\$572,949
Subtotal	\$7,444,530	\$861,133	\$861,133	\$2,861,132	\$2,861,133
EM&V (one time transfer)	\$119,112	\$119,112	\$0	\$0	\$0
Total	\$7,563,643	\$980,245	\$861,133	\$2,861,132	\$2,861,133

In D.18-05-041, the Commission approved annual and total funding levels for MCE's EE portfolio for PYs 2018-2025 for each of MCE's proposed sectors. ¹⁸ The table below shows MCE's approved budget cap for PY 2021 per the Business Plan, the original budget request per the 2021 ABAL and the updated budget request per this AL for each of MCE's EE sectors.

Table 6: Budget Forecast and Annual Budget Cap for PY 2021

Year	Authorized Budget Cap	Authorized Portfolio	MCE Total 2021 (Requested)
	(per D.18-05-041)	Budget (per 2021 ABAL)	Spending Budget
2021	\$12,404,000	\$7,563,643	\$11,563,643

Table 7 shows MCE's budget forecasts and annual budget caps for the relevant program year and each remaining year of the approved business plan period. 19

¹⁷ Pursuant to OP 36 of D.18-05-041, gas budgets will be transferred to MCE on a quarterly basis.

¹⁸ D.18-05-041 at p. 112. The Commission approved a total budget for MCE of \$85,736,000 for PYs 2018-2025. This budget includes allocations for Evaluation Measurement and Verification ("EM &V").

¹⁹ The all-inclusive business plan budget forecasts, annual caps, and savings true-up tables is included as an attachment.

Table 7: Revised Budget Forecasts and Annual Budget Caps for 2021 and Remaining Years of Business Plan Period

Sector	2021	2022	2023	2024	2025	Total ²⁰
Residential	\$2,733,236	\$6,170,017	\$6,170,017	\$6,170,017	5,660,017	\$30,941,731
Commercial	\$7,010,541	\$2,934,922	\$2,934,922	\$2,934,922	\$3,251,922	\$17,804,713
Industrial	\$871,077	\$1,269,596	\$1,269,596	\$1,260,596	\$1,260,596	\$8,316,550
Agriculture	\$468,195	\$1,181,259	\$1,181,259	\$1,181,259	\$1,260,259	\$6,053,310
WE&T	\$361,481	\$346,667	\$346,667	\$346,667	\$346,667	\$2,094,815
Finance	\$0	\$0	\$0	\$0	\$0	\$18,524
Subtotal	\$11,444,530	11,902,460	\$12,091,865	\$11,902,460	\$11,779,460	\$69,229,643
EM&V	\$119,113	\$189,405	189,405	\$189,405	\$187,405	\$1,0195,469
Total Portfolio	\$11,563,643	\$12,091,865	\$12,091,865	\$12,091,865	\$11,966,865	\$70,325,111 ²¹
Program Year						
PA Budget						
Total	\$12,404,000	\$10,998,000	\$10,998,000	\$10,998,000	\$10,870,000	\$85,736,000
Authorized						
Portfolio PY						
Budget Cap						

(2) Energy Savings

With the proposed expansion of the Commercial Efficiency Market sub-program under the Commercial Upgrade Program, MCE expects that forecasted net energy savings will increase for the Commercial Upgrade Program to the levels outlined in the table below.

Table 8: Revised Program-Level Forecasted Net Energy Savings for 2021

Program	Program ID	Net kWh	Net kW	Net Therm
MF Comprehensive	MCE01	133,958	40	12,908
Commercial	MCE02	11,647,083	273	189,672
SF Comprehensive	MCE07	6,093,680	0	0
SF Direct Install	MCE08	105,507	19	51,318
Industrial	MCE10	1,359,837	33	129,523
Agricultural	MCE11	863,147	112	14,296
WE&T	MCE16	0	0	0
EM&V	MCE98	0	0	0
Total		20,203,211	477	397,717

²⁰ Total represents actual expenditures through 2020 plus budget forecasts for the remainder of the business plan period.

 $^{^{21}}$ Funding levels through 2025 do not exceed the overall funding amount authorized in D.18-05-041, which caps PAs' total spending for the period 2018-2025.

(3) Cost-Effectiveness

The impacts of the proposed expansion of the Commercial Efficiency Market sub-program under the Commercial Upgrade Program impacts MCE's forecasted program-, sector-, and portfolio-level TRC, PAC, and RIM without market effects for PY 2021 as follows.

Table 9: Revised Forecasted Program-Level TRC, PAC and RIM for PY 2021

	Program ID	TRC	PAC	RIM
Multifamily Comprehensive	MCE01	0.48	0.54	0.54
Commercial	MCE02	1.20	1.42	1.42
Single Family Comprehensive	MCE07	1.06	1.06	1.06
Single Family Direct Install	MCE08	0.31	0.31	0.31
Industrial	MCE10	1.86	2.27	2.27
Agricultural	MCE11	1.77	2.13	2.13
Workforce, Education and Training (WE&T)	MCE16	0.00	0.00	0.00
MCE EM&V	MCE98	0.00	0.00	0.00

Table 10: Revised Forecasted Sector-Level TRC and PAC for PY 2021

Sector	TRC	PAC	RIM
Residential	0.53	0.54	0.54
Agricultural	1.77	2.13	2.13
Commercial	1.20	1.42	1.42
Industrial	1.86	2.27	2.27
WE&T	0.00	0.00	0.00

Table 11: Revised Forecasted Portfolio TRC, PAC, and RIM for PY 2021

TRC	1.09
PAC	1.25
RIM	1.17

Conclusion

MCE respectfully requests that the Commission approve its request for increased budget under the Commercial Efficiency Market sub-program of the Commercial Upgrade Program of \$4 Million for PY 2021.

Upon disposition of this AL, MCE requests Pacific Gas and Electric Company ("PG&E") modify the quarterly fund transfers as outlined in Table 5 above.

Notice

A copy of this AL is being served on the official Commission service lists for Application 17-01-013, *et al.* and Rulemaking 13-11-005.

For changes to these service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at Process Office@cpuc.ca.gov.

Protests

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

CPUC, Energy Division Attention: Tariff Unit 505 Van Ness Avenue San Francisco, CA 94102

Email: EDTariffUnit@cpuc.ca.gov

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

In addition, protests and all other correspondence regarding this AL should also be transmitted electronically to the attention of:

Jana Kopyciok-Lande Senior Policy Analyst MARIN CLEAN ENERGY 1125 Tamalpais Ave. San Rafael, CA 94901 Phone: (415) 464-6044 Facsimile: (415) 459-8095

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There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

Correspondence

For questions, please contact Jana Kopyciok-Lande at (415) 464-6044 or by electronic mail at jkopyciok-lande@mceCleanEnergy.org.

/s/ Jana Kopyciok-Lande

Jana Kopyciok-Lande Senior Policy Analyst MARIN CLEAN ENERGY

ATTACHMENTS

- Attachment 1: Marin Clean Energy Supplemental Budget Showing
- Attachment 2: Marin Clean Energy Program Changes Explanation Tables
- Attachment 3: Marin Clean Energy Budget and Savings True-up Tables

cc: Service Lists: R.13-11-005; A17-01-013, et al.





California Public Utilities Commission

ADVICE LETTER UMMARY



LIVEROTOTIETT				
MUST BE COMPLETED BY UT	ILITY (Attach additional pages as needed)			
Company name/CPUC Utility No.:				
Utility type: ELC GAS WATER PLC HEAT	Contact Person: Phone #: E-mail: E-mail Disposition Notice to:			
EXPLANATION OF UTILITY TYPE ELC = Electric GAS = Gas WATER = Water PLC = Pipeline HEAT = Heat WATER = Water	(Date Submitted / Received Stamp by CPUC)			
Advice Letter (AL) #:	Tier Designation:			
Subject of AL:				
Keywords (choose from CPUC listing):				
AL Type: Monthly Quarterly Annu-				
if AL submitted in compliance with a Commissi	on order, indicate relevant Decision/Resolution #:			
Does AL replace a withdrawn or rejected AL?	f so, identify the prior AL:			
Summarize differences between the AL and th	e prior withdrawn or rejected AL:			
Confidential treatment requested? Yes	No			
If yes, specification of confidential information: Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:				
Resolution required? Yes No				
Requested effective date:	No. of tariff sheets:			
Estimated system annual revenue effect (%):				
Estimated system average rate effect (%):				
When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).				
Tariff schedules affected:				
Service affected and changes proposed ^{1:}				
Pending advice letters that revise the same tariff sheets:				

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

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Email: EDTariffUnit@cpuc.ca.gov

Name: Title:

Utility Name: Address: City:

State: Zip:

Telephone (xxx) xxx-xxxx: Facsimile (xxx) xxx-xxxx:

Email:

Name:

Title:

Utility Name: Address: City:

State: Zip:

Telephone (xxx) xxx-xxxx: Facsimile (xxx) xxx-xxxx:

Email:

ENERGY Advice Letter Keywords

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

Attachment 1: Marin Clean Energy Supplemental Budget Showing

Attachment 1: Marin Clean Energy Supplemental Budget Showing

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

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

1. Functions conducted by each department/organization MCE provides the following table to summarize the functions conducted by each in-house department based on the functional groups defined in the "Functions Definitions" in Appendix B.

Table 1: Functions Conducted by Departments Supporting MCE's EE Portfolio¹

Function	Customer Programs	Regulatory and Legislative Policy & Legal *	Technology & Analytics	Public Affairs *
Policy, Strategy, and Regulatory Reporting Compliance	X	x		
Program management	X			
Engineering Services				
Customer Application/Rebate and Incentive Processing	X			
Inspections				
Portfolio Analytics	X			
EM&V	X			
ME&O	X			X
Account Management / Sales				X
IT			X	
Call Center				
Incentives				

^{*} These departments do not recover costs from the energy efficiency program budget.

2. Management structure and organization chart MCE provides organizational charts for each department supporting the energy efficiency portfolio in Appendix A. These charts include the entire staff within

¹ These departments do not recover costs from the energy efficiency program budget.

each department even though only a subset of each team provides support to the energy efficiency portfolio. The management structure is represented on these organizational charts.

3. Staffing needs by department/organization

MCE's org charts are provided in Appendix A. MCE hired one Manager of Customer Programs in 2019 to support the energy efficiency portfolio. MCE does not anticipate hiring additional Customer Programs staff to support energy efficiency programs beyond what is provided in the organization chart. The staffing needs for the Customer Programs department and other departments at MCE may change in the future. Staff changes to other departments are unlikely to be driven by the need to support energy efficiency functions. As a result, MCE doesn't project long term growth in those departments related to supporting the energy efficiency portfolio.

4. Non-program functions currently performed by contractors MCE currently works with contractors to support program reporting and measurement and verification (M&V).

- 5. Anticipated drivers of in-house cost changes by department/organization MCE's in-house costs largely consist of staffing costs and since there are no further staffing changes planned for 2021, in-house cost should stay relatively steady.
- 6. Explanation of method for forecasting costs

 MCE's Customer Program team developed a bottom-up budget and savings forecast
 using portfolio costs from 2019 and 2020. Additionally, over the last five months, MCE
 tracked and assessed COVID-19 impacts on program operations to inform costs and
 savings forecasted in the 2021 Annual Budget Advice Letter ("ABAL").
- B. Table showing MCE's "Full-Time Equivalent" headcount by department/organization

MCE provides this table in Appendix B.

C. Table showing costs by functional area of management structure MCE provides this table in the: (1) Residential Budget Detail; (2) Commercial Budget Detail; (3) Industrial Budget Detail; (4) Agricultural Budget Detail; (5) and Cross-Cutting Budget Detail of Appendix C.

D. Table showing cost drivers across the EE organization MCE's 2021 budget request is 9% higher than its 2020 authorized budget. However, MCE expects to underspend its 2020 budget due to the COVID-19 pandemic.

E. Allocation of labor and O&M costs

MCE staff complete timesheets on which they designate the number of hours spent on EE activities. For employees who work on both EE and non-EE work, labor costs are billed proportionally based on hours recorded on staff timesheets for each activity.

The costs for the time spent on EE activities are reimbursed from the EE Programs Account. This account draws on the awarded energy efficiency budget. Costs from other departments that support MCE's EE portfolio are not reimbursed from the EE Programs Account. Those departments are fully supported from the General Operating Account (funded by generation service revenues).

Labor costs charged to EE are fully loaded. Benefit-related expenses for MCE employees who bill time to the EE program are paid from the EE Programs Account proportionate to the amount of time they spend on EE Programs. These costs are incorporated into the "fully-burdened" cost MCE charges to the EE reimbursable account as aforementioned.

Non-labor resources that support EE and non-EE activities are paid for entirely using non-EE funds from the General Operating Account (funded by generation services revenues). The only non-labor resources that are paid for with EE funds are those that exclusively support EE.

All O&M costs are paid for with non-EE funds from the General Operating Account (funded by generation service revenues), unless they exclusively support EE, in which case they are paid for using EE funds.

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."

MCE's Customer Program team developed a bottom-up budget and savings forecast using portfolio costs from 2019 and 2020. Additionally, over the last five months, MCE tracked and assessed COVID-19 impacts on program operations to inform costs and savings forecasted in the 2021 Annual Budget Advice Letter ("ABAL").

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."

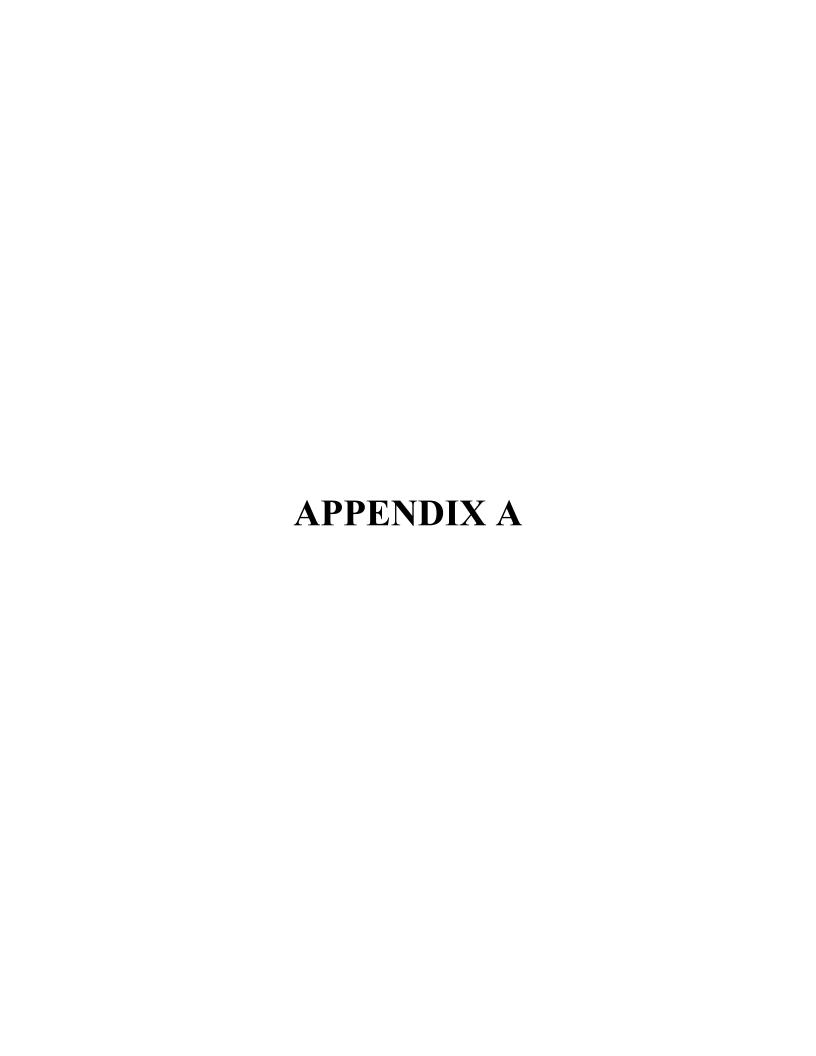
MCE has provided the request information in Appendix E. MCE developed a staffing budget based on our projected staffing needs. The distribution of staffing costs across budget categories for 2021 is based on the allocation in 2019 with some adjustments for areas in which we expect staff involvement to increase. The allocation of staffing costs for 2019 is based on staff estimations for the requested budget categories.

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)."

This question is not applicable to MCE.

III. Appendices

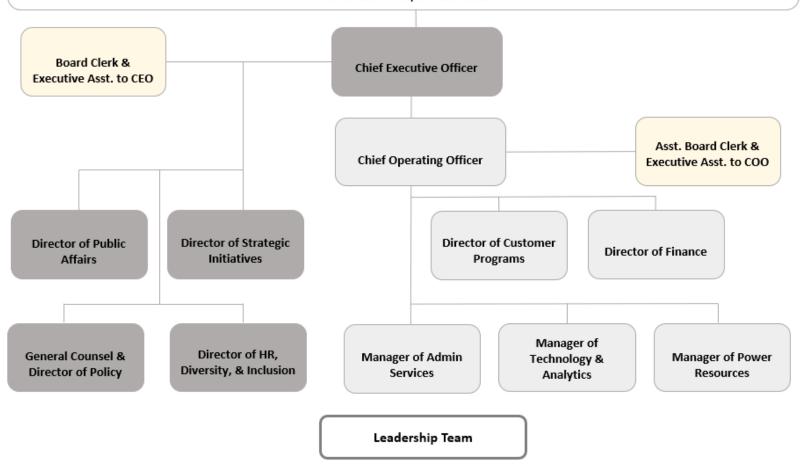


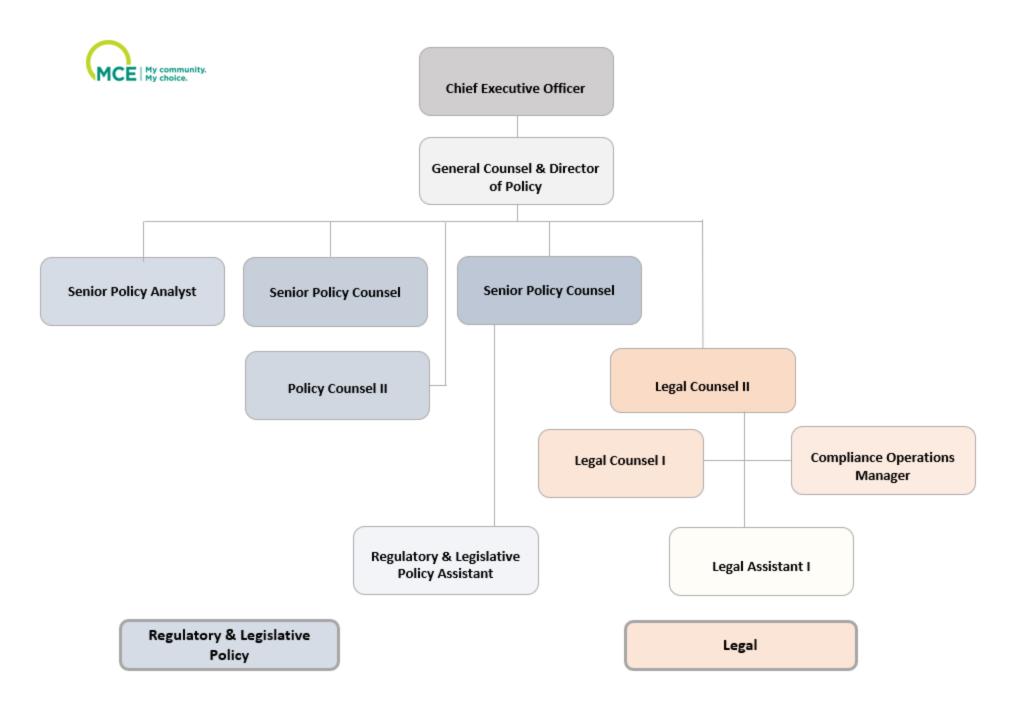
Appendix A: Supporting Information – Request I. A.



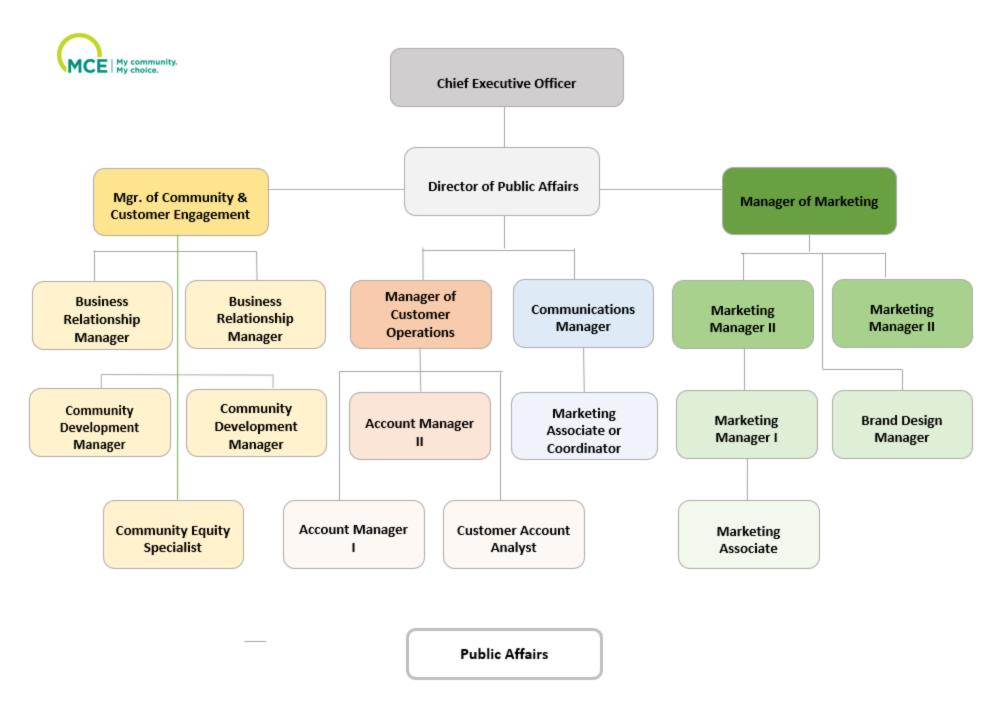
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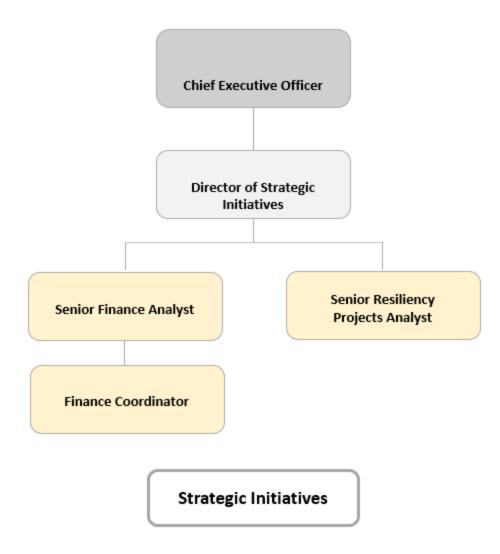




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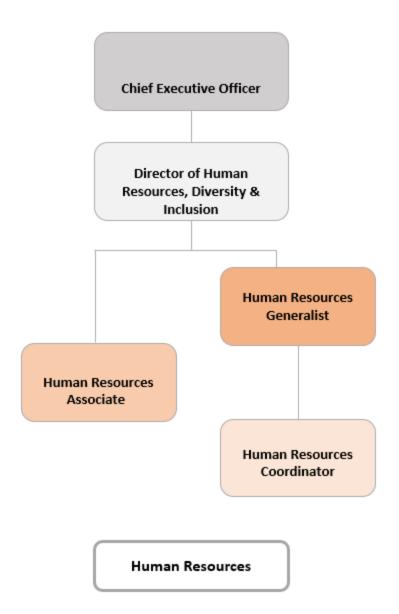




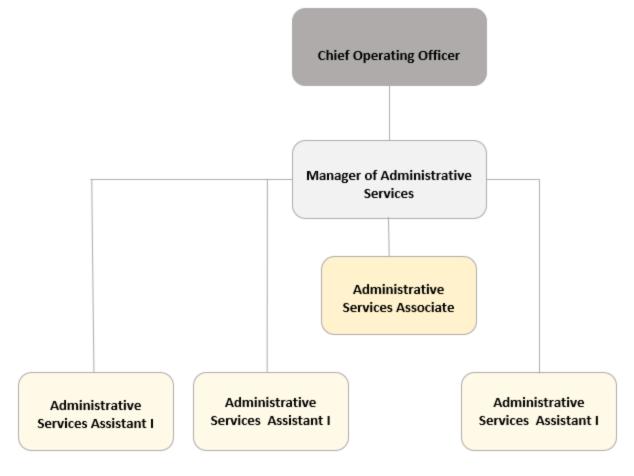


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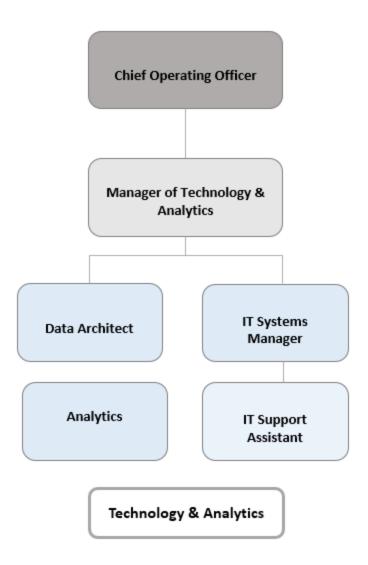




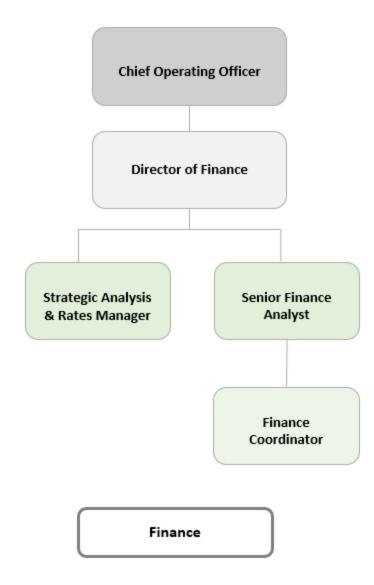


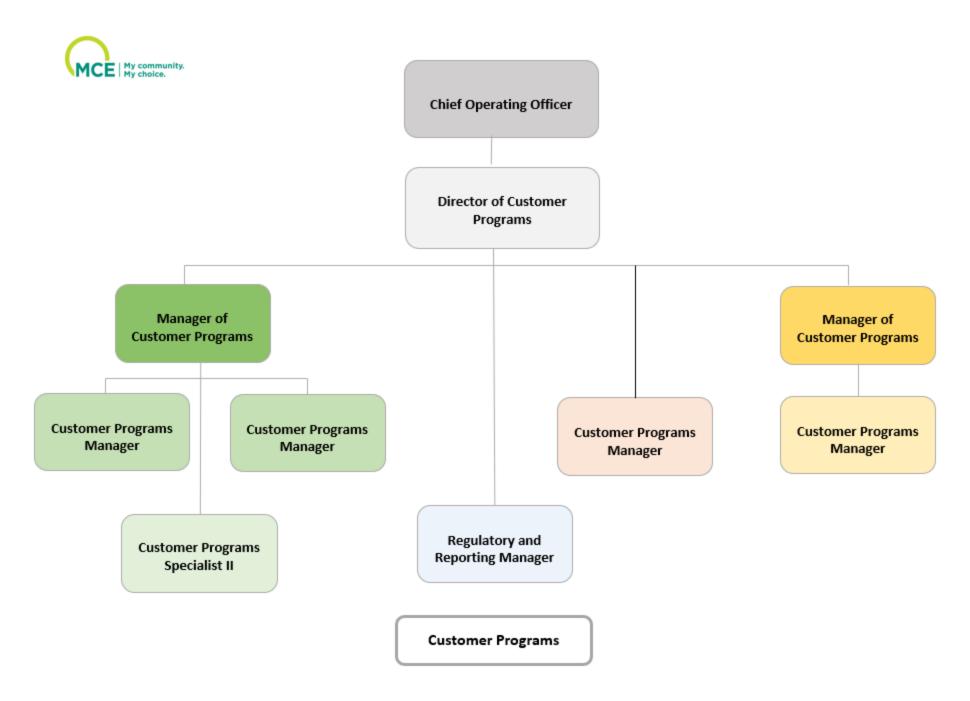
Administrative Services



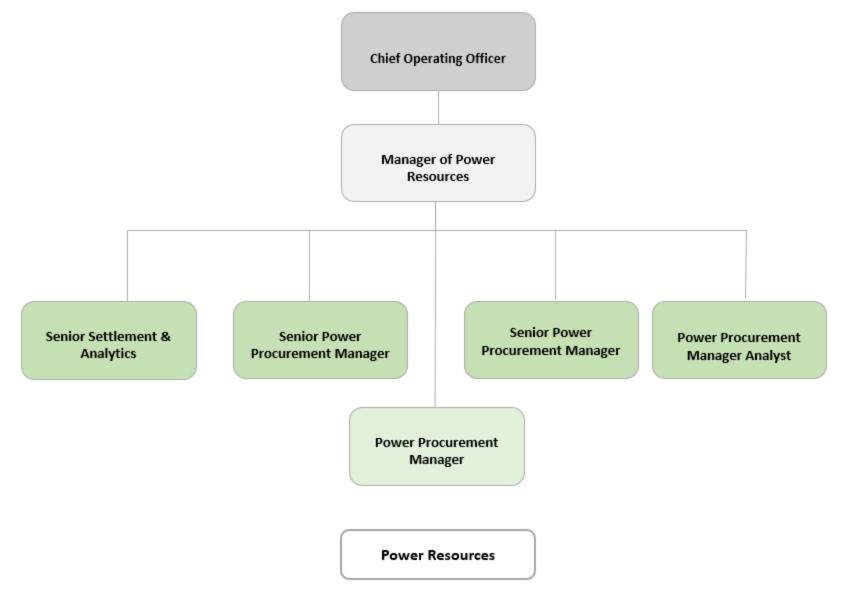














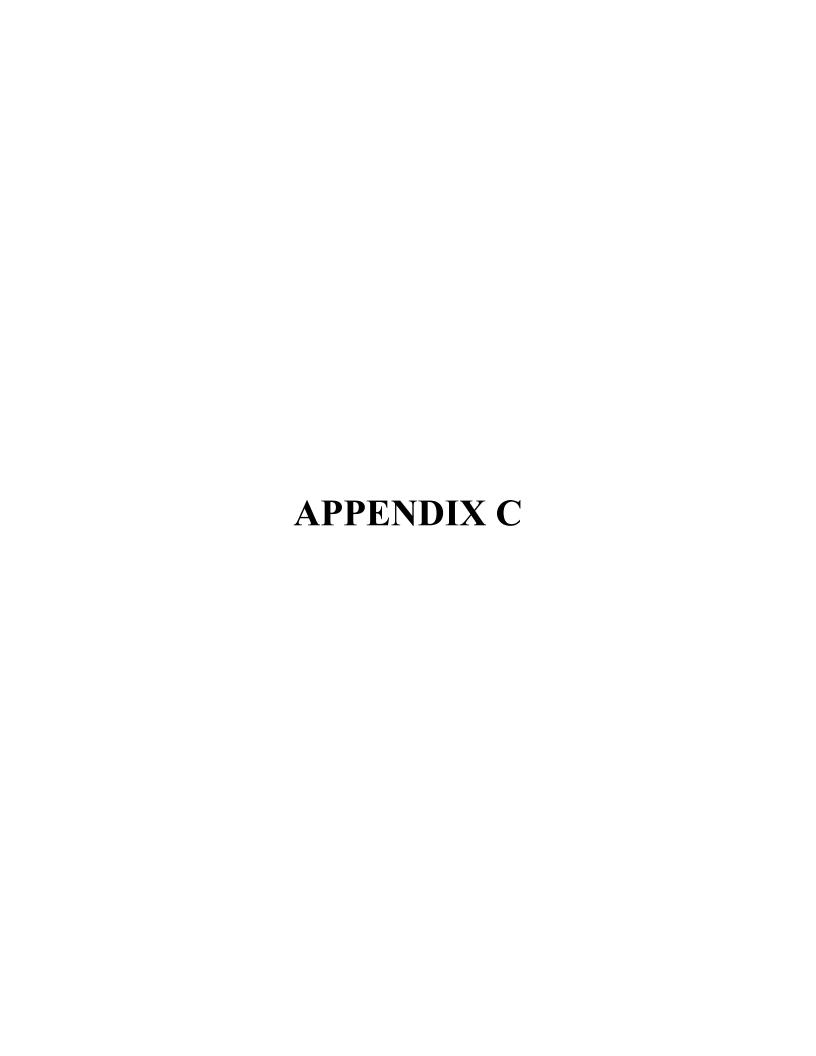
Appendix B: Supporting Information – Request I.B.

Functional Group	2018 EE Portfolio FTE	2020 EE Portfolio FTE
Policy, Strategy and Regulatory Reporting Compliance	1.09	1.53
Program Management	1.73	2.43
Engineering Services	-	-
Customer Application/Rebate/Incentive Processing	0.12	0.18
Customer Project Inspections	0.12	0.18
Portfolio Analytics	0.17	0.26
EM&V	0.11	0.14
ME&O	0.25	0.35
Account Management/Sales	-	-
IT	-	-
Call Center	-	-
Total	3.59	5.07

Aggregated Category	Definition	Functional Category	Detailed Definition
and Regulatory complia	Includes p olicy, 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	management admin costs for program design, program	Program Management & Delivery	
implementation, product and channel management for all sectors	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 MCE 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	Custom project support	Management of Emerging Products projects; Customized reviews; LCR/RFO support; Exante review management; Technical policy support; Technical assessments; Workpapers; Tool development; End use subject matter expertise
	workpaper development and pre/post sales project	Deemed workpapers	

	technical reviews and design assistance	Project management	
Customer Application/Rebat e and Incentive Processing	Costs associated with application management and rebate and incentive processing (deemed and custom)	Rebate & Application Processing	
Inspections	Costs associated with project inspections	Inspections	
Portfolio Analytics	Includes analytics support, including internal performance reporting and external reporting	Data analytics	Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance
EM&V	EM&V expenditures	EM&V Studies	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTPP and IEPR; market potential study; integration w/ procurement planning; CPUC Demand Analysis Working Group
ME&O	Costs associated with utility EE marketing; no	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization
statewide; focus on outsourced portion	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	



Appendix C: Supporting Information – Request I.C.

Residential

			2019 EE Portfolio	2021 E	E Portfolio Budget
Sector	Cost Element	Functional Group	Expenditures (\$Million)		(\$Million)
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.062	\$	0.080
		Program Management	\$ 0.185	\$	0.241
		Engineering services	\$ -	\$	-
		Customer Application/Rebate/Incentive Processing	\$ 0.031	\$	0.040
		Customer Project Inspections	\$ -	\$	-
		Portfolio Analytics	\$ 0.031	\$	0.040
		ME&O (Local)	\$ -	\$	-
		Account Management / Sales	\$ -	\$	-
		IT	\$ -	\$	-
		Call Center	\$ -	\$	-
	Labor Total		\$ 0.308	\$	0.401
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)			
		Local/Government Partnerships Contracts (3)	\$ -	s	-
		Other Contracts	\$ -	\$	-
		Program Implementation	\$ 0.498	\$	0.930
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.040	\$	0.075
		Program Management	\$ 0.125	S	0.233
		Engineering services	\$ -	\$	-
		Customer Application/Rebate/Incentive Processing	\$ 0.040	\$	0.075
		Customer Project Inspections	\$ -	\$	-
		Portfolio Analytics	\$ -	\$	-
		ME&O (Local)	\$ 0.001	S	0.001
		Account Management / Sales	\$ -	\$	-
		IT (4)	\$ -	S	-
		Call Center	\$ -	\$	-
		Facilities	s -	s	-
		Incentives(PA-implmeneted and Other Contracts Program Implementation) Prog	•	s	1.018
		IncentivesThird Party Program (as defined per D.16-08-019, OP 10)	\$ -	s	-
	Non-Labor Total		\$ 1.009	S	2.332
Residential T	otal		\$ 1.317	s	2.733
	Other (collected through GRC) (2)	Labor Overheads		Ĺ	
Notes:	(1) Labor costs are already loaded	with (state loaders covered by EE)			
	(2) These costs are collected throu				
		ort the sector is included/not included in this item			
	(4) IT Costs are included in " Polic	y, Strategy, and Regulatory Reporting Compliance".			

Commercial

		2019 EE Portfolio	20	021 EE Portfolio Budget						
Cost Element Function	onal Group	Expenditures (\$Millio	_	(\$Million)						
Labor(1) Policy,	Strategy, and Regulatory Reporting Compliance	\$ 0.	019 \$	0.062						
Progra	m Management	\$ 0.	057 \$	0.187						
Engine	ering services	\$	- \$	-						
Custor	mer Application/Rebate/Incentive Processing	\$ 0.	009 \$	0.031						
Custor	mer Project Inspections	\$	- \$	-						
Portfo	lio Analytics	\$ 0.	009 \$	0.031						
ME&O	(Local)	\$	- \$	-						
Accour	nt Management / Sales	\$	- \$	-						
IT		\$	- \$	-						
Call Ce	enter	\$	- \$	-						
Labor Total		\$ 0.	095 \$	0.312						
Non-Labor Third-F	Party Implementers Contracts (as defined per D.16-08-019, OP 10)									
	Government Partnerships Contracts (3)	\$	- \$	-						
Other	Contracts	\$	- \$	-						
Prog	ram Implementation	\$ 0.	236 \$	1.360						
	y, Strategy, and Regulatory Reporting Compliance	\$ 0.	010 \$	0.056						
	ram Management	\$ 0.	059 \$	0.340						
Engir	neering services	\$	- 5	-						
	omer Application/Rebate/Incentive Processing	\$ 0.	010 \$	0.056						
	omer Project Inspections	\$	- 5	-						
	folio Analytics	\$	- 5	-						
	O (Local)	\$ 0.	000 \$	0.001						
	unt Management / Sales		- 5	-						
IT (- 5							
	Center		- \$							
Facilit			- 5	-						
	ives(PA-impImeneted and Other Contracts Program Implementation) Programs	•	234 5	4.885						
	ives—Third Party Program (as defined per D.16-08-019, OP 10)		- 5			+				
Non-Labor Total		•	549 \$	6.698		+				
The same for the same same same same same same same sam			643 \$	7.011		+				
Other (collected through GRC) (2) Labor	Overheads	U.	5	7.511		+				
(1) Labor costs are already loaded with (state										
	2) These costs are collected through GRC D.16-06-054									
	3) LGP contracts that directly support the sector is included/not included in this item									
	(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".									
		Local Marketing (EE), SV	/-IDSM-IE	DSM. These are included in	Table 16 Cross Cut	tting.				
(3) LGP contracts that directly support the sec (4) IT Costs are included in "Policy, Stra (5) Under the previous program categories the	ctor is included/not included in this item stegy, and Regulatory Reporting Complian	Cutting: 3P-IDEEA, Local-IDSM-ME&O-I	Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW	Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-I	Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM. These are included in	Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM. These are included in Table 16 Cross Cut				

Industrial

			2019 EE Portfolio	2021 EE Portfolio Budget
Sector	Cost Element	Functional Group	Expenditures (\$Million)	(\$Million)
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.011	\$ 0.065
	2001(2)	Program Management	\$ 0.033	\$ 0.195
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 0.006	\$ 0.033
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.006	\$ 0.033
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	s -
	Labor Total		\$ 0.055	\$ 0.326
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		V 0.02.0
		Local/Government Partnerships Contracts (3)	\$ -	s -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 0.040	\$ 0.239
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.004	\$ 0.022
		Program Management	\$ 0.010	\$ 0.060
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 0.004	\$ 0.022
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 0.000	\$ 0.000
		Account Management / Sales	\$ -	\$ -
		IT (4)	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives(PA-implmeneted and Other Contracts Program Implementation) Programs	\$ -	\$ 0.201
		IncentivesThird Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ -
	Non-Labor Total		\$ 0.058	\$ 0.546
Industrial Total			\$ 0.113	\$ 0.871
	Other (collected through GRC) (2)	Labor Overheads		
Notes:	(1) Labor costs are already loaded w			
	(2) These costs are collected through			
		ort the sector is included/not included in this item trategy, and Regulatory Reporting Compliance".		

Agricultural

			2019 EE Portfolio	2021 EE Portfolio Budget
Sector	Cost Element	Functional Group	Expenditures (\$Million)	(\$Million)
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.012	\$ 0.038
		Program Management	\$ 0.037	\$ 0.115
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 0.006	\$ 0.019
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 0.006	\$ 0.019
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		ІТ	\$ -	\$ -
		Call Center	\$ -	\$ -
	Labor Total		\$ 0.061	\$ 0.191
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 0.021	\$ 0.067
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 0.003	\$ 0.009
		Program Management	\$ 0.005	\$ 0.017
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 0.003	\$ 0.009
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 0.000	\$ 0.000
		Account Management / Sales	\$ -	\$ -
		IT (4)	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives(PA-implmeneted and Other Contracts Program Implementation) Programs	\$ -	\$ 0.175
		IncentivesThird Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ -
	Non-Labor Total		\$ 0.033	\$ 0.277
Agricultural Tot	tal		\$ 0.094	\$ 0.468
	Other (collected through GRC) (2)	Labor Overheads		
Notes:	(1) Labor costs are already loaded w	ith (state loaders covered by EE)		
	(2) These costs are collected through			
		rt the sector is included/not included in this item		
	(4) IT Costs are included in " Po	licy, Strategy, and Regulatory Reporting Compliance".		

Public Sector

			2019 EE Portfolio	2021 EE Portfolio Budget
Sector	Cost Element	Functional Group	Expenditures (\$Million)	(\$Million)
Public Sector	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		
		П		
		Call Center		
	Labor Total			
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Program Implementation		
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT (4)		
		Call Center		
		Facilities		
		Incentives(PA-implmeneted and Other Contracts Program Implementation) Programs		
		IncentivesThird Party Program (as defined per D.16-08-019, OP 10)		
	Non-Labor Total			
Public Sector To	otal			
	Other (collected through GRC) (2)	Labor Overheads		
Notes:	(1) Labor costs are already loaded w			
	(2) These costs are collected through			
		rt the sector is included/not included in this item		
	(4) IT Costs are included in " Po	licy, Strategy, and Regulatory Reporting Compliance".		

Cross Cutting

			2019 EE Portfolio	2021EE Portfolio Budge
Sector	Cost Element	Functional Group	Expenditures (\$Million)	(\$Million)
Cross Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$	\$ 0.072
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
	Labor Total		\$ -	\$ 0.072
	Non-Labor	Third-Party Implementers Contracts (as defined per D. 16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ -	\$ 0.231
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ -	\$ 0.058
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -
		IT(4)	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives(PA-implmeneted and Other Contracts Program Implementation) Program	\$ -	\$ -
		IncentivesThird Party Program (as defined per D. 16-08-019, OP 10)	\$ -	\$ -
	Non-Labor Total		\$ -	\$ 0.289
Cross Cutting Total			\$ -	\$ 0.361
	Other (collected through GRC) (2)	Labor Overheads	<u> </u>	
Notes:	(1) Labor costs are already loaded w			
	(2) These costs are collected throug			
		ort the sector is included/not included in this item		
		Strategy, and Regulatory Reporting Compliance".	115001 1111 1 2	E) OLL IDOM IDOM
		gories the following programs were classified as Cross Cutting: 3P-IDEEA, Local-IDSM-	-ME&U-Local Marketing (E	:EJ, SW-IDSM-IDSM.
	These are included in Table 16 Cross	s Cutting. ified as Commercial with the elimination of Cross Cutting programs.		
	i riese trilee programs are now class	med as commercial with the elimination of cross cutting programs.		



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

Energy Savings Targets and Expenditures by Sector

		2019 E	E Portf	olio Exp	enditures	\$Mi	Ilion)		202	21 EE I	Portfolio	Budg	et (\$Millio	on)		2019 EE	Portfolio Sa	vings	2021 EE Portfoli	ed Savings	
Sector		Labor	(ex	Labor xcl. ntives)	Incentive	:5	Total		Labor	(n-Labor (excl. entives)	Inc	entives		Total	KWH	KW	MMTHERMS	KWH	KW	MMTHERMS
Residential	\$	0.31	\$	0.70	\$ 0.	31	\$ 1.32	\$	0.40	\$	1.31	\$	1.02	\$	2.73	506,753	19	124,124	6,333,145	59	0.06
Commercial	\$	0.09	\$	0.31	\$ 0.	23	\$ 0.64	\$	0.31	\$	1.81	\$	4.88	\$	7.01	1,005,902	211	(6,193)	11,647,083	273	0.19
Agricultural	\$	0.06	\$	0.03	\$ -		\$ 0.09	\$	0.19	\$	0.10	\$	0.18	\$	0.47	-	•	-	863,147	112	0.01
Industrial	\$	0.06	\$	0.06	\$ -		\$ 0.11	\$	0.33	\$	0.34	\$	0.20	\$	0.87	-	-	-	1,359,837	33	0.13
Public (GP)	\$	-	\$	-	\$ -		\$ -	\$	-	\$	-	\$	-	\$	-	-	1	-	-	-	-
Cross Cutting*	\$		\$	-	\$ -		\$ -	\$	0.07	\$	0.29	\$	-	\$	0.36	-	-	-	-	-	-
Total Sector Budget	\$	0.52	\$	1.11	\$ 0.	54	\$ 2.17	\$	1.30	\$	3.86	\$	6.28	\$	11.44	1,512,656	230	117,931	20,203,211	477	0.40
EM&V-PA	\$	-	\$	-	\$ -		\$ 0.10			\$	-	\$	-	\$	0.12	-	•	-	-	-	-
EM&V-ED	\$		\$	-	\$ -		\$ -			\$	-	\$	-		0.43	-	-	-	-	-	-
OBF - Loan Pool**	\$	-	\$	-	\$ -		\$ -	\$	-	\$	-	\$	-	\$	-	-	1	-	-	-	-
EE Total***		0.52		1.11	0.	54	2.26		1.30		3.86		6.28		12.00	1,512,656	230	117,931	20,203,211	477	0.40
Cross Cutting Sector	inc	ludes Code	s & Sta	ndards,	Emerging 1	ech	nologies, Wor	kfor	e Educatio	n & T	raining, (OBF a	dmin and	365	IDEA for 20	18 only.					

^{**} For SDG&E and SCG the loan pool is not part of the authorized EE portoflio budget and is collected and tracked trhough a separate balancing account.

^{***}Dounding Differences



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

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

	2019 E	E Po	rtfolio Exp	end	itures (\$Mi	llio	n)	202	21 E	E Portfolio	Budg	get (\$Millio	on)	
Sector	Labor		on-Labor (excl. centives)	In	centives		Total	Labor		on-Labor (excl. centives)	In	centives		Total
Residential	\$ 0.31	\$	0.70	\$	0.31	\$	1.32	\$ 0.40	\$	1.31	\$	1.02	\$	2.73
Commercial	\$ 0.09	\$	0.31	\$	0.23	\$	0.64	\$ 0.22	\$	1.28	\$	1.51	\$	3.01
Agricultural	\$ 0.06	\$	0.03	\$		\$	0.09	\$ 0.19	\$	0.10	\$	0.18	\$	0.47
Industrial	\$ 0.06	\$	0.06	\$		\$	0.11	\$ 0.33	\$	0.34	\$	0.20	\$	0.87
Public (GP)	\$ -	\$	-	\$		\$	-	\$ -	\$	-	\$	-	\$	-
Cross Cutting*	\$ -	\$	-	\$		\$	-	\$ 0.07	\$	0.29	\$	-	\$	0.36
Total Sector Budget	\$ 0.52	\$	1.11	\$	0.54	\$	2.17	\$ 1.21	\$	3.33	\$	2.90	\$	7.44
EM&V-PA	\$ -	\$	-	\$		\$	0.10		\$	-	\$	-	\$	0.12
EM&V-ED	\$ -	\$	-	\$	-	\$	-		\$	-	\$	-		0.43
OBF - Loan Pool**	\$ -	\$	-	\$	-	\$	-	\$ -	\$	-	\$	-	\$	-
EE Total***	0.52		1.11		0.54		2.26	1.21		3.33		2.90		8.00

Attachment 2: Marin Clean Energy Program Changes Explanation Tables

2021 Program Level Explanations

2021 Program Level Explanations												
PA justification	Third party implementer or Core	Statewide or Local	Programs to be closed with the disposition of 2021 ABAL	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
MCE decided to end this program in 2019 after the ABAL was filed due to the fact that MCE was not able to secure an updated contract with the existing implementer. Although MCE has a 2020 budget allocated to this program, there will be no expenditures.	x		MCE03 - Single Family Seasonal Savings	-100%	2.12	n/a	This program was not included in MCE's 2021 ABAL	\$ -	\$ 101,845	2016	12/31/2019	n/a
PA justification	Third party implementer or Core	Statewide	Programs to be closed upon completion of commitments	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
MCE will end this program in 2020 for several reasons. First, the program overlaps with MCE's existing Multifamily Comprehensive program and other Multifamily Direct Install programs already in the market. Secondly, the program is not cost effective as a result low participation, limited deemed measure offerings due to workpapers expiring, and COVID-19 impacts.	x		MCE05 - Multifamily Direct Install	-100%	0.00	MCE will continue to offer this program until December 2020 to honor program committments. MCE will provide the claimed TRC in next year's ABAL. As of 2020Q1, this program has a TRC of 0.07.	This program was not included in MCE's 2021 ABAL	\$ -	\$ 391,064	2019	12/31/2020	n/a
PA justification	Third party implementer or Core	Statewide	Programs with reduced budgets (>40% budget decrease), to continue in 2021	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
2019 and 2020 were program ramp up years for the Agricultural and Industrial Resource (AIR) program. Additionally, MCE has deployed cost savings strategies while maintaining a cost-effective forecast.	x		MCE10 - Industrial	-59%	0.00	0.00 as of 2020Q1	1.17	\$ 871,077	\$ 2,125,484	2019	n/a	a n/a
2019 and 2020 were program ramp up years for the Agricultural and Industrial Resource (AIR) program. Additionally, MCE has deployed cost savings strategies while maintaining a cost-effective forecast.	x		MCE11 - Agricultural	-32%	0.00	0.00 as of 2020Q1	1.12	\$ 468,195	\$ 687,463	2019	n/a	n/a
PA justification	Third party implementer or Core	Statewide	Programs with enhanced budget (>40% budget increase)	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004	up , or mark "NEW 3P" program if
Since launching in December of 2020, the program has drawn strong interest. In a matter of months, the Commercial Efficiency Market has enrolled 10 participating aggregators – among them some of California's leading energy efficiency providers – and as of April 1, has already committed the budget allocated to the sub-program to a pipeline of projects.	x		MCE02 - Commercial	375%	0.48	0.32 as of 2020 Q1	1.33	\$ 7,010,541	\$ 1,477,001	2016	5 n/a	n/a
With the discontinued Multifamily Direct Install program and new direct install measures available to implement in 2021, MCE is doubling down on it SF Residential Direct Install program.	x		MCE08 - Single Family Direct Install	124%	0.09	0.19 as of 2020Q1	0.31	\$ 1,577,832	\$ 704,976	2019	n/a	n/a
PA justification	Third party implementer or Core	Statewide	Programs that are new in 2021 MCE is not proposing any new programs for 2021.	% change	2019 Claimed TRC	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget \$ -	MM/YY program to start	MM/YY Program is due to sunset; and flag as "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004

Attachment 3: Marin Clean Energy Budget and Savings True-up Tables

	Annual Rolling Portfolio Budget Forecast - True-up														
Sector		2018**		2019		2020		2021		2022		2023	2024	2025	Total
Residential	\$	558,107	\$	1,317,213	\$	1,094,802	\$	2,733,236	\$	6,170,017	\$	6,170,017	\$ 6,170,017	\$ 5,660,017	\$ 29,873,425
Commercial	\$	617,207	\$	643,277	\$	1,015,506	\$	7,010,541	\$	2,934,922	\$	2,934,922	\$ 2,934,922	\$ 3,251,922	\$ 21,343,218
Industrial	\$	137,360	\$	113,244	\$	592,732	\$	871,077	\$	1,269,596	\$	1,269,596	\$ 1,269,596	\$ 1,260,596	\$ 6,783,798
Agriculture	\$	-	\$	93,618	\$	233,244	\$	468,195	\$	1,181,259	\$	1,181,259	\$ 1,181,259	\$ 1,260,259	\$ 5,599,090
Emerging Tech	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$ -	\$ -	\$ -
Public	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$ -	\$ -	\$ -
Codes and Standards	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$ -	\$ -	\$ -
WE&T	\$	-	\$	-	\$	118,326	\$	361,481	\$	346,667	\$	346,667	\$ 346,667	\$ 346,667	\$ 1,866,474
Finance	\$	18,524	\$	-	\$	-	\$	-	\$	-	\$	-	\$ -	\$ -	\$ 18,524
OBF Loan Pool	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$ -	\$ -	\$ -
Subtotal	\$	1,331,198	\$	2,167,352	\$	3,054,610	\$	11,444,530	\$	11,902,460	\$	11,902,460	\$ 11,902,460	\$ 11,779,460	\$ 65,484,528
EM&V	\$	16,590	\$	95,351	\$	25,622	\$	119,113	\$	189,405	\$	189,405	\$ 189,405	\$ 187,405	\$ 1,012,296
Total Portfolio Program Year PA Budget	\$	1,347,788	\$	2,262,703	\$	3,080,232	\$	11,563,643	\$	12,091,865	\$	12,091,865	\$ 12,091,865	\$ 11,966,865	\$ 66,496,824
Total Authorized Portfolio PY Budget Cap	\$	8,532,000	\$	8,532,000	\$	12,404,000	\$	12,404,000	\$	10,998,000	\$	10,998,000	\$ 10,998,000	\$ 10,870,000	\$ 85,736,000

^{*2018 - 2020} are actual expenditures. 2021 - 2025 are forecasted expenditures.

^{** &}quot;Reset" 2018 budget at or below 2018 annual budget approved in Business plan Decision. "True-up" years 2019-2025.

Annual Rolling Portfolio Savings Forecast - True-up (kWh)

Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	336,227	506,753	278,583	6,333,145	2,797,634	2,797,634	2,797,634	2,797,634
Commercial	823,364	1,005,902	1,746,234	11,647,083	4,246,583	4,246,583	4,246,583	4,246,583
Industrial	n/a	-	424,552	1,359,837	1,864,651	1,864,651	1,864,651	1,864,651
Agriculture	n/a	-	369,162	863,147	659,030	659,030	659,030	659,030
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Actual Portfolio Savings	1,161,609	1,514,674	2,820,550	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	1,846,948	5,852,476	11,442,395	20,203,211	n/a	n/a	n/a	n/a
CPUC Goal*	1,846,948	1,846,947	8,380,475	8,380,475	9,567,898	9,567,898	9,567,898	9,567,898
% of Goal*	63%	82%	34%	241%	n/a	n/a	n/a	n/a

^{*2018 - 2020} are actual savings. 2021 - 2025 are forecasted savings.

Annual Rolling Portfolio Savings Forecast - True-up (kW)

Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	27	19	4	59	236	236	236	236
Commercial	126	211	98	273	81	81	81	81
Industrial	n/a	-	8	33	59	59	59	59
Agriculture	n/a	-	-	112	78	78	78	78
Emerging Tech	n/a							
Public	n/a							
Codes and Standards	n/a							
WE&T	n/a							
Finance	n/a							
OBF Loan Pool	n/a							
Total Actual Portfolio Savings	153	230	110	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	349	592	539	477	n/a	n/a	n/a	n/a
CPUC Goal*	349	696	484	484	454	454	454	454
% of Goal*	44%	33%	23%	n/a	n/a	n/a	n/a	n/a

^{*2018 - 2020} are actual savings. 2021 - 2025 are forecasted savings.

Annual Rolling Portfolio Savings Forecast - True-up (therms)

Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	0.07	0.12	0.01	0.06	0.45	0.45	0.45	0.45
Commercial	(0.001)	(0.003)	0.08	0.19	0.01	0.01	0.01	0.01
Industrial	n/a	-	(0.001)	0.13	0.14	0.14	0.14	0.14
Agriculture	n/a	-	-	0.01	0.01	0.01	0.01	0.01
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Actual Portfolio Savings	0.07	0.12	0.09	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	0.07	0.40	0.55	0.40	n/a	n/a	n/a	n/a
CPUC Goal*	0.10	0.40	0.55	0.55	0.61	0.61	0.61	0.61
% of Goal*	70%	30%	17%	72%	n/a	n/a	n/a	n/a

^{*2018 - 2020} are actual savings. 2021 - 2025 are forecasted savings.