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INTERNAL SERVICES DEPARTMENT

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ADOPTED

BOARD OF SUPERVISORS
COUNTY OF LOS ANGELES

December 18, 2018

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, California 90012

28 December 18, 2018

CELIA ZAVALA
EXECUTIVE OFFICER

ACCEPT \$154.8 MILLION IN FUNDING THROUGH THE CALIFORNIA PUBLIC UTILITIES COMMISSION FOR CALENDAR YEARS 2019 THROUGH 2025 FOR THE ENERGY EFFICIENCY PORTFOLIO OF PROGRAMS UNDER THE SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK; AUTHORIZE THE DIRECTOR OF THE INTERNAL SERVICES DEPARTMENT TO EXECUTE CONTRACTUAL DOCUMENTS WITH CONTRACTORS AND OTHER PUBLIC ENTITIES TO IMPLEMENT, CONTINUE, AND ADMINISTER SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK PROGRAMS (ALL SUPERVISORIAL DISTRICTS - 3 VOTES)

SUBJECT

Request your Board to accept \$154. 8 million from Southern California Edison (SCE) and Southern California Gas (SGC) through the California Public Utilities Commission (CPUC), for calendar years (CY) 2019 through 2025, for implementation, continuation, and/or administration of the portfolio of energy efficiency programs, which are administered by the County through the Internal Services Department (ISD).

IT IS RECOMMENDED THAT THE BOARD:

1. Accept \$154.78 million through the CPUC from SCE and SCG for CY 2019 through 2025 to implement, continue and administer the Southern California Regional Energy Network (SoCalREN) Portfolio of energy efficiency programs;
2. Delegate authority to the Director of ISD to execute contractual agreements with contractors and other public agencies to implement, continue and administer the SoCalREN Portfolio of energy efficiency programs; and

3. Delegate authority to the Director of ISD to execute Amendment Seven to the Budgets and Programs Agreement with SCE and SCG, the same or substantially similar to Attachment 1: Amendment Seven.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

The SoCalREN is a consortium of public agencies in SCE and SCG territories, including those within all or portions of the following counties: Los Angeles, Orange, Ventura, Santa Barbara, Riverside, San Bernardino, Kern, Tulare, Inyo, Mono, and small portions of Kings and Fresno. The SoCalREN offers a portfolio of energy efficiency programs that are administered by the County of Los Angeles through ISD's Energy and Environmental Services (EES).

ISD will provide the Board an annual summary report which will detail the SoCalREN Portfolio on a program-by-program basis and outlines new programs and performance of existing programs, similar to Attachment 2: SoCalREN 2017 Programs & Results

Implementation of Strategic Plan Goals

These actions support Goal III.3 (Pursuing operational effectiveness, fiscal responsibility and accountability) by obtaining external funding to promote environmentally responsible practices. These actions also support Goal II.3 (Making environmental sustainability our daily reality) by providing a program that promotes energy efficiency and conservation, and enhances health and sustainable practices in the County.

Under the SoCalREN Portfolio, ISD has overseen and managed the implementation of various energy upgrade programs in different building sectors, including: single family and multi-family residential; non-residential; various public agencies; residential and non-residential Property Assessed Clean Energy (PACE) Program; low-income and Disadvantaged Communities Programs; energy data mapping and analytics; and in the County's facility infrastructure. The programs provide a wide range of support, including: funding for energy measures installed in County facilities; private-sector building-project rebates and incentives; technical support and project financing for private and public-sector building upgrades; energy-sector workforce training; region-wide climate-action planning; marketing and outreach, and public energy-education.

FISCAL IMPACT/FINANCING

There will be no impact to the County General Fund, because all SoCalREN activities utilize the funding from the CPUC. The Utilities Fiscal Year (FY) 2018-19 adopted budget includes \$24.3 million in funding. Requests for future FY activities will be submitted with the annual utility budget request.

ISD will use approximately 10% of the funding for staff to administer the agreements with SCE and the SCG to help administer and implement the programs. Where funding may be distributed to other jurisdictions for program promotion or sub-regional coordination, ISD will execute Memoranda of Understanding or sub-agreements with those jurisdictions to disburse the funds.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

The SoCalREN programs were first approved for funding by the CPUC in 2013. Since then the County has applied for and received the funding for the continuation of the SoCalREN Programs on an annual basis. Your Board most recently accepted this annual CPUC funding on January 30, 2018 for CY 2018.

On June 5, 2018, CPUC adopted a Rolling Portfolio model for energy efficiency funding for CY years 2018 through 2025, which secures the County seven years of SoCalREN funding. This Board Letter is requesting your Board's approval to accept this funding from the CPUC through CY 2025, which is roughly \$22 million per year. The County is required to submit to the CPUC an annual report on the performance and budgets of SoCalREN programs, which it will also submit to your Board annually.

The CPUC has designated SCG as the Fiscal Agent in the administration of the SoCalREN funds to the County. To continue to accept these funds through CY2025, it is requested that your Board delegate authority to ISD to execute an amendment to the existing Agreement with SCG, which will be approved as-to-form by County Counsel.

Most programs offered by the SoCalREN are implemented by third-party contractors who are selected after a transparent and competitive solicitation process utilizing ISD's Energy Support Services Master Agreement (ESSMA).

ENVIRONMENTAL DOCUMENTATION

On the January 14, 2013, your Board found that the scope of work in these programs met the criteria set forth in Section 15308 of the State CEQA Guidelines and Class 8 of the County's Environmental Document Reporting Procedures and Guidelines, Appendix G, in that it is an action taken by a regulatory agency, as authorized by State law, to assure the maintenance, restoration, enhancement, or protection of the environment where the regulatory process involves procedures for protection of the environment. The scope of work is within the class of projects that has been determined not to have a significant effect on the environment. In addition, there are no cumulative impacts, unusual circumstances, or other limiting factors that would make the exemption.

CONTRACTING PROCESS

On January 15, 2013, your Board delegated authority to the Director of ISD to enter into the 2013-2014 Energy Efficiency Programs and Budgets Agreement (the "Agreement"), and to execute any amendments thereto, as well as all other required documents with SCE and SCG. Per that delegated authority, ISD executed amendments for continuation of the SoCalREN portfolio into each subsequent calendar year. Currently the SoCalREN is operating under Amendment Six to the Agreement for calendar year 2018.

The County, SCE, and SCG are in the process of finalizing a proposed Amendment Seven to the Agreement for CY 2019-2025.

A substantial portion of the activities under the Portfolio in the past have been performed by third-party contractors and sub-contractors under the County's ESSMA.

As part of the delegated authority sought by the Director of ISD, we anticipate that there may be increases and /or decreases in the amounts budgeted under the work orders for any given contractor. The Agreement with the SCE and SCG does not designate or require any given contractor for any given program. Additionally, the Agreement allows for certain fund shifting between and among programs.

IMPACT ON CURRENT SERVICES (OR PROJECTS)

Approval of these actions supports the energy efficiency portfolio of programs initiated by the County using ARRA and past CPUC funds. These programs will continue to reduce greenhouse gases, reduce total energy use, support underserved communities in the form of incentive and workforce training programs, and improve energy efficiency throughout the County in a cohesive and comprehensive manner. Also, the SoCalREN Portfolio advances and facilitates goals, actions, and objectives already identified under the County Chief Sustainability Officer's framework for a Regional Sustainability Master Plan. Acceptance and use of the offered funds will support programs throughout the region and will continue to help the County, the Southern California Region, and the State of California achieve the worthy public goals of creating substantial, sustainable, and measurable energy savings, green jobs, and economic stimulus benefits.

CONCLUSION

Upon Board approval, please return three individually certified copies of the adopted Board Letter and two signed Resolutions to ISD.

Respectfully submitted,



SCOTT MINNIX
Director

SM:SH:ML:sg

Enclosures

- c: Executive Office, Board of Supervisor
- Chief Executive Office
- County Office of Sustainability
- County Counsel

**Amendment
Seven to the
2013-2014 Energy Efficiency
Programs and Budgets Agreement**

This *Amendment Seven to the 2013-2014 Energy Efficiency Programs and Budgets Agreement* is made and entered into as of December 31, 2017, by and among

The County of Los Angeles (the "County"), a political subdivision of the State of California, individually and on behalf of the Southern California Regional Energy Network (the "SoCalREN") as its fiscal agent; and

Southern California Gas Company ("SoCalGas"), a California investor-owned utility and a California corporation, with its principal place of business in Los Angeles, California, and a wholly owned subsidiary of Sempra Energy, a California Corporation; and

Southern California Edison Company ("Edison"), a California investor-owned utility and a California corporation, with its principal place of business in Rosemead, California, a wholly owned subsidiary of Edison International, a California corporation;

RECITALS

R1. Effective as of January 15, 2013, the County, SoCalGas, and Edison entered into the *2013-2014 Energy Efficiency Programs and Budgets Agreement* (as amended by Amendment One, Amendment Two, Amendment Three, Amendment Four, and Amendment Five, the "2013-2014 Programs Agreement"). When doing so, the County's Board of Supervisors delegated authority to the Director of the County's Internal Services Department to approve and execute any amendments to the 2013-2014 Programs Agreement.

R2. Effective as of February 1, 2013, the parties entered into Amendment One to the 2013-2014 Programs Agreement ("Amendment One").

R3. Effective as of July 14, 2013, the parties entered into Amendment Two to the 2013-2014 Programs Agreement ("Amendment Two").

R4. On October 24, 2014, the California Public Utilities Commission (the "Commission"), issued its *Decision Establishing Energy Efficiency Savings Goals and Approving 2015 Energy Efficiency Programs and Budgets*, D. 14-10-046 (the "2015 Decision").

R5. In the 2015 Decision, the Commission approved a portfolio of energy efficiency programs and budgets, including those of the County, SoCalGas, and Edison, that are "largely a carry-forward of prior portfolios" under the 2013-2014 Programs Agreement with the intent that 2015 would be "year three" of a 2013-2015 portfolio."

R6. On December 12, 2014, the parties entered into Amendment Three to the 2013-14 Programs Agreement ("Amendment Three") to continue the 2015 Programs of the County.

R7. On October 28, 2015, the Commission issued its Decision for Energy Efficiency Goals for 2016 and Beyond and Energy Efficiency Rolling Portfolio Mechanics (the "D.15-10-028") which authorizes the EE rolling portfolio mechanics for 2016 and beyond, continuation of energy efficiency programs including the 2016 Programs of the County, SoCalGas and Edison, and explains that annual Advice Letter filings will propose detailed budgets for cost recovery, transfer and contracting purposes.

R8. On December 14, 2015, the parties entered into Amendment Four to the 2013-14 Programs Agreement (“Amendment Four”) to continue the 2016 Programs of the County.

R9. On November 28, 2016, the parties entered into Amendment Five to the 2013-14 Programs Agreement (“Amendment Five”) to continue the 2017 Programs of the County;

R10. On November 28, 2017, the parties entered into Amendment Six to the 2013-14 Programs Agreement (“Amendment Five”) to continue the 2018 Programs of the County;

R7. On May 31, 2018, the Commission issued its Decision for Energy Efficiency Goals for 2016 and Beyond and Energy Efficiency Rolling Portfolio Mechanics (the “D.15-10-028”) which authorizes the EE rolling portfolio mechanics to run between 2018-2025, continuation of energy efficiency programs including the 2016 Programs of the County, SoCalGas and Edison, and explains that annual Advice Letter filings will propose detailed budgets for cost recovery, transfer and contracting purposes

R11. In accordance with Section 3.5 of the 2013-2014 Programs Agreement, the Parties now desire to amend the 2013-2014 Programs Agreement to comply with the funding and extension as set forth in the 2018 Decision and the D. 15-10-028.

NOW, THEREFORE, the County, SoCalGas, and Edison further agree as follows:

1.0 DOCUMENTS

1.1 This amendment, along with the Exhibit A, B, C, C1, H and K listed in Section 1.2 below, collectively form and are referred to throughout and hereinafter as the “Amendment Seven.”

1.2 The following Exhibits supersede and replace those with corresponding names and letters from the 2013-2014 Programs Agreement:

Exhibit A Residential Sector Statement of Work

Exhibit B Public Sector Statement of Work

Exhibit C Financing Sector Statement of Work

Exhibit C1 Workforce Development, Education and Training Sector Statement of Work

Exhibit H County and Sub-Contractors Time & Material Fully Burdened Hourly Rate Schedule 2018

Exhibit K Delineation of Geographic Territory Boundaries for SoCalRen Program Implementation

1.3 This Amendment Seven is incorporated into and made a part of the 2013-2014 Programs Agreement, as previously amended, supersedes any previous agreements, written or oral, and all communications among the Parties relating to the subject matter contained within Amendment Seven.

1.4 The 2013-2014 Programs Agreement, as amended, and this Amendment Seven are collectively referred to as the “Programs Agreement.”

1.4 Unless otherwise specifically defined in this Amendment Seven, terms with the initial letter capitalized shall have the specific meaning as defined in the Programs Agreement.

2.0 AMENDMENT TO THE MAXIMUM CONTRACT SUM

2.1 Section 4.1 and 4.2 of the 2013-2014 Programs Agreement, as subsequently amended, are hereby replaced in their entirety as follows:

4.1 The Maximum Contract Sum from 2013 through 2025 committed to this Programs Agreement from the Utilities to the County is up to two hundred eighty one million, eight hundred thirty three thousand, three hundred twenty-eight dollars (\$281, 833,328). Edison hereby commits up to one hundred ninety seven million, two hundred eighty three thousand, three hundred twenty eight dollars (\$197,283,328), and SoCalGas hereby commits up to eighty four million, five hundred forty nine thousand, nine hundred ninety eight dollars (\$84,549,998).

4.2 Except as otherwise set forth in the Statement of Works (SOWs), or in future CPUC directives,

and with the modified fund-shifting rules established in D.15-10-028,¹ which eliminated the requirement to seek Commission authorization to fund-shift, the County has the sole discretion to re-allocate, amongst and between the SOWs, the budget amount it deems appropriate for each of the three Programs annually. In addition, the County will, as directed in D.15-10-028,² track annual fund shifts within the CPUC's online tool and report updated budgets in the County's annual budget filings. The County will timely inform Utilities of any fund shifting in accordance with this Section 4.2. The Commission authorized amount allocated for each of the three sub-programs for 2013-15, 2016, 2017 and 2018 is shown in tables below:

2.2 Section 4.4 of the 2013-2014 Programs Agreement, which was added in Amendment Five, is hereby deleted and replaced with the following:

4.4 Notwithstanding the foregoing, the Parties acknowledge that the Commission in the 2015 Decision authorized the use of a "Maximum Contract Amount" for each year after 2015 at the 2015 annual funding levels reflected in Exhibit L. On May 31, 2018 the Commission approved the SoCalREN Energy Efficiency Rolling Portfolio Business Plan for 2018 -2025 ("SoCalREN Business Plan"). The 2018-2025 budget is reflected in Exhibit L of this Amendment Seven.

3. AMENDMENT TO THE TERM AND TERMINATION

Section 17.1 and 17.2 of the 2013-2014 Programs Agreement are hereby amended as follows:

17.1 Term. The term of this Programs Agreement shall be from the Effective Date until March 31, 2026, unless terminated earlier as provided in this Section, provided however that all Work and services shall be completed by the dates specified in the Statement of Work or December 31, 2025, whichever is earlier. The 90-day period following December 31, 2025 shall be for administrative purposes only.

17.2 If the County possesses unspent funding authorized by the Commission after July 1, 2026, including moneys repaid pursuant to financing terms, such funds shall be returned to ratepayers unless otherwise directed by the Commission.

4. OTHER PROVISIONS

Except as set forth in this Amendment Seven, all other terms and conditions of the 2013-2014 Programs Agreement remain unchanged and in full force and effect.

5. AUTHORIZATION WARRANTIES

- a. The County represents and warrants that the person executing this Amendment Seven for the County is an authorized agent who has actual authority to bind the County to each

and every term, condition, and obligation of this Amendment Seven , and that all requirements of the County have been fulfilled to provide such actual authority.

- b. SoCalGas represents and warrants that the person executing this Amendment Seven for SoCalGas is an authorized agent who has actual authority to bind the SoCalGas to each and every term, condition, and obligation of this Amendment Seven and that all requirements of the SoCalGas have been fulfilled to provide such actual authority.
- c. Edison represents and warrants that the person executing this Amendment Seven is an authorized agent for Edison, and has the actual authority to bind the Edison to each and every term, condition, and obligation of this Amendment Seven , and that all requirements of Edison have been fulfilled to provide such actual authority.

[SIGNATURE PAGE TO FOLLOW]

DRAFT

IN WITNESS WHEREOF, So. CalGas and Edison hereby each execute this Programs Agreement, and the County of Los Angeles, by order of Its Board of Supervisors has caused this Programs Agreement to be executed on Its behalf by the Director of the Internal Services Department

EDISON:

SO CAL GAS:

By _____
SVP Customer Service

By _____
VP – Customer Solutions

COUNTY:

By _____
Scott Minnix
Director
Internal Services Department

APPROVED AS TO FORM:
MARK J. SALADINO
County Counsel

By _____
Patrice Salseda
Senior Deputy County Counsel

**SOUTHERN CALIFORNIA REGIONAL ENERGY
NETWORK (SOCALREN) PROGRAMS
AGREEMENT EXHIBIT A**

Statement of Work – Residential Sector Programs, 2019-2025

SOCALREN RESIDENTIAL MULTIFAMILY PROGRAM (SCR-RES-A1)

SOCALREN RESIDENTIAL COMMUNITY COORDINATOR (SCR-RES-A2)

I. Summary

SCR-RES-A1	Multifamily Program	\$45,505,000
SCR-RES-A2	Residential Community Coordinator	\$4,486,000

II. SCR-RES-A1– Multifamily Program

Goals and Objects

The SoCalREN’s Multifamily Program provides audit and improvement incentives to building owners for comprehensive energy efficiency upgrades to qualifying structures of at least four units. The SoCalREN Multifamily Program offers a tiered promotion strategy designed to stimulate multi-measure 4 upgrades. The program was developed as a flexible turnkey solution, composed of technical assistance, advanced building audits, program implementation, and construction/installation incentives.

Statement of Work

III. The Work shall consist of the all tasks described in the SoCalREN Program Implementation Plan (PIP) approved by the California Public Utilities Commission (CPUC) in D.12-1-015. All work shall be done in compliance with the most recent, CPUC-approved PIP, Joint Cooperation Memo, and SoCalREN Annual Budget Advice Letter.

IV. SCR-RES-A2 - Residential Community Coordinator

Goals and Objectives

The SoCalREN Residential Community Coordinator is a companion program to the SoCalREN Multifamily program and will assist the hard-to-reach multifamily market by providing a variety of services to help this targeted segment overcome the traditional barriers to completing building energy upgrades. Through the Residential Community Coordinator program, SoCalREN plans to increase the number and deepen the existing partnerships with Community Based Organizations (CBOs) to engage hard-to-reach multifamily stakeholders. This program plan will include hosting EE workshops through CBOs, showcasing events for apartment and multi-unit complexes that have undergone upgrades, community-level energy consultative services, and will assist building management to develop “playbooks” at project “close out” so that energy-efficient operations can continue and persist over time.

Statement of Work

The details of the SoCalREN Residential Community Coordinator program will be further described in an Implementation Plan, as required in CPUC Decision (D).18-05-041. All work shall be done in compliance with the most recent, CPUC-approved PIP, Joint Cooperation Memo, and Annual Budget Advice Letter.

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SOCALREN) PROGRAMS AGREEMENT EXHIBIT B

Statement of Work – Residential Sector Programs, 2019-2025

SOCALREN PUBLIC AGENCY ENERGY EFFICIENCY (EE) PROJECT DELIVERY PROGRAM (SCR-PUBL-B1)

SOCALREN PUBLIC AGENCY EE DISTRIBUTED ENERGY RESOURCE (DER) DISADVANTAGED COMMUNITIES (DAC)
PROJECT DELIVERY PROGRAM (SCR-PUBL-B2)

SOCALREN PUBLIC AGENCY NORMALIZED METERED ENERGY CONSUMPTION (NMEC) PROGRAM (SCR-PUBL-B3)

I. Summary

SCR-PUBL-B1	Public Agency Energy Efficiency Project Delivery Program	\$49,092,000
SCR-PUBL-B2	Public Agency DER DAC Program	\$21,163,000
SCR-PUBL-B3	Public Agency NMEC Program	\$15,706,000

II. SCR-PUBL-B1 – Public Agency Energy Efficiency Project Delivery Program

Goals and Objects

The SoCalREN Public Agency Energy Efficiency Project Delivery Program offers services to identify and complete Public Sector projects that are customized to meet the unique needs of each agency. The program provides objective, third-party expertise to help agencies implement the best measures to maximize energy cost savings. All savings attribution goes to SCE and SoCalGas, because the SoCal REN Public Agency EE Project Delivery (PD) Program is a non-resource program that funnels projects through utility core and third-party programs. In addition, the SoCalREN's EE PD program assists in the development and sharing of tools through peer-to-peer network to inspire local energy action.

Statement of Work

The Work shall consist of the all tasks described in the SoCalREN Program Implementation Plan (PIP) approved by the California Public Utilities Commission (CPUC) in Decision (D).12-1-015. All work shall be done in compliance with the most recent, CPUC-approved Implementation Plan, Joint Cooperation Memo, and SoCalREN Annual Budget Advice Letter.

III. SCR-PUBL-B2 –Public Agency DER DAC Project Delivery Program

Goals and Objectives

The SoCalREN Public Agency DER DAC program is in development and plans to launch in Q1 2019. The program will provide Distributed Energy Resources (DER) audits, analysis, and project recommendation services, to achieve deeper energy savings and greater energy self-reliance through renewable generation, energy storage, and sophisticated energy management systems as well as greater water efficiency savings.

Statement of Work

The work shall consist of the following tasks:

- The design of a DER DAC services portfolio to include integration of energy storage, demand response, energy management, and water efficiency optimization for public agencies.
- Develop a process protocol of integrating DER activities into the program's one-stop process.
- Develop the specific strategies, tools, and templates and integrate best industry standards into a project delivery manual.
- Identify the technical expertise required for each of the DER resource areas and assist public agencies manage a competitive process to assemble the best team of expert consultants and practitioners.
- Build public agency expertise networks through training and development workshops related to best practices protocols across all DER energy service areas so this can be leveraged to assist current and potential SoCalREN enrolled public agencies.
- THE DER DAC program details will be further described in an Implementation Plan, as required in D.18-05-041. All work shall be done in compliance with the most recent, CPUC-approved Implementation Plan, Joint Cooperation Memo, and Annual Budget Advice Letter.

IV. SCR-PUBL-B3 –Public Agency NMEC Program

Goals and Objectives

The SoCalREN Public Agency NMEC Program plans to launch in Q1 2019. It will target projects that were previously identified by the SoCalREN EE PD program but were not pursued by agencies due to incentive or funding barriers. These public agencies will have an alternative to the existing utility incentive projects while pursuing stranded potential in their exterior lighting and buildings. This program will be a resource program, so EE savings from these projects will contribute to SoCalREN program goals and cost-effectiveness calculations.

The NMEC program objectives include: ensuring savings persistence, reducing multi-measure project complexity, and improving completion timelines in the public sector. The NMEC program will also explore performance-based methods in the public sector, achieve a minimum of 10% energy savings overall, and develop new program and method expertise.

Statement of Work

The work shall consist of providing public agencies with the following:

- NMEC technical assistance
- NMEC financial analysis services
- A full-service, streamlined project delivery process within CPUC NMEC guidelines that will go through the Custom Measure and Project Archive (CMPA) process.

The details of the SoCalREN NMEC program will be further described in an Implementation Plan, as required in D.18-05-041 All work shall be done in compliance with the most recent, CPUC-approved Implementation Plan, Joint Cooperation Memo, and Annual Budget Advice Letter.

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SOCALREN) PROGRAMS AGREEMENT EXHIBIT C

Statement of Work – Residential Sector Programs, 2019-2025

SOCALREN MULTIFAMILY LOAN LOSS RESERVE (LLR) PROGRAM (SCR-FIN-C1)

SOCALREN PUBLIC AGENCY REVOLVING LOAN (SCR-FIN-A2)

I. Summary

SCR-FIN-C1	Multifamily Loan Loss Reserve Program	\$13,186,000
SCR-FIN-C2	Revolving Loan Fund Program	\$3,344,000

II. SCR-FIN-C1– Multifamily Loan Loss Reserve Program

Goals and Objects

The SoCalREN Multifamily LLR Program will be utilized to entice potential financial institutional partners to offer products for multifamily energy efficiency financing. The LLR program will be limited to multifamily property owners who are actively seeking a “whole-building” retrofit. SoCalREN’s LLR will primarily target customers with the most need and who are hard to reach, and properties within Disadvantaged Communities (DACs).

Statement of Work

The details of the SoCalREN LLR program will be further described in an Implementation Plan, as required in California Public Utilities Commission (CPUC) Decision (D).18-05-041. All work shall be done in compliance with the most recent, CPUC-approved Implementation Plan, Joint Cooperation Memo, and Annual Budget Advice Letter.

III. SCR-FIN-C2– Revolving Loan Fund Program

Goals and Objectives

The SoCalREN Revolving Loan Fund (RLF) Program will serve as a companion to the Public Agency Energy Efficiency Project Delivery Program of the SoCalREN Portfolio (SCR-PUBL-B1). The SoCalREN RLF is designed to support upgrades of public agency buildings and facilities with an emphasis on supporting projects that serve DACs. Financing through the RLF Program is designed to be a catalyst for accelerating project implementation. Loans serve as short-term construction financing and help under primarily two scenarios: bridge financing for approved On-Bill Financing (OBF) provided by the utility after project completion and bridge financing for approved but un-budgeted agency projects that would otherwise wait for budget allocation.

Statement of Work

The details of the SoCalREN RLF program will be further described in an Implementation Plan, as required in D.18-05-041. All work shall be done in compliance with the most recent, CPUC-approved Implementation Plan, Joint Cooperation Memo, and Annual Budget Advice Letter.

**SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
(SOCALREN) PROGRAMS AGREEMENT EXHIBIT D**

Statement of Work – Workforce Education and Training, 2019-2025

SOCALREN WORKFORCE EDUCATION & TRAINING (WET) PROGRAM (SCR-WET-D1)

I. Summary

SCR-WET-D1	SoCalREN’s Workforce Education and Training Program	\$2,693,000
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II. SCR-WET-D1– SoCalREN’s Workforce Education and Training Program

Goals and Objectives

The SoCalREN WET Program is designed to increase the skills of and job opportunities for entry level, incumbent, and disadvantaged workers, at all levels of the energy efficiency industry. The program develops Southern California’s workforce infrastructure through partnerships with community based training organizations, K-12 and higher educational institutions, apprenticeship programs, and workforce investment boards.

Statement of Work

The work will be done in accordance with the SoCalREN WE&T Implementation Plan, filed with the California Public Utilities Commission (CPUC) on October 2, 2018. The program will be administered in compliance with the latest CPUC-approved Implementation, Joint Cooperation Memo, and SoCalREN Annual Budget Advice Letter.

**PROGRAMS AGREEMENT
EXHIBIT K**

**DELINEATION OF GEOGRAPHIC BOUNDARIES FOR SOCALREN
PROGRAM IMPLEMENTATION**

Sub-Programs	LA County	Joint SCE/SCG	Joint IOU (SCE or SCG) and POU
Residential:			
SCR-RES-1		X	
SCR-RES-2		X	
Public:			
SCR-PUBL-1		X	X
SCR-PUBL-2		X	X
SCR-PUBL-3		X	X
Financing:			
SCR-FIN-1		X	X
SCR-FIN-2		X	

**PROGRAMS AGREEMENT
EXHIBIT H**

The County and Sub-contractors Time & Materials Fully Burdened Hourly Rate Schedule

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
LAC – Administrative Manager XV, ISD	-	-	-	-	-	226.58 226.58
LAC – Administrative Manager XIII, ISD	-	-	-	-	-	195.73 195.73
LAC – Section Manager, Administration	106	106	128.06	132.46	141.15	152.58 143.24
LAC – Section Manager, Facilities Ops	-	-	141.68	146.57	156.16	168.78 158.47
LAC – Administrative Services Manager I	-	-	95.97	99.28	105.79	107.34 114.33
LAC – Administrative Services Manager II	-	-	-	-	114.75	124.02 116.43
LAC - Program Manager I	76.5	76.5	76.5	86.0494	90.35	100 93
LAC - Program Manager II	85.47	85.47	90.14	96.1414	102.44	110.76 103.96
LAC - Facilities Project Manager I	77.5	77.5	102.48	102.48	116.45	125.02 118.17
LAC - Facilities Project Manager II	-	-	-	122.72	130.76	141.37 134
LAC - Admin Assistant III	50.32	50.32	78.86	81.3032	86.63	93.64 87.91
LAC - Accountant III	67.8	67.8	55.57	58.76	61.12	67.71 63.67
LAC- Account Clerk II	34.09	34.09	36.21	37.02	38.49	42.61 40.10
LAC – Senior Finance Analyst	187.27	187.27	187.27	202	220	230 220
LAC – Finance Analyst	155.26	155.26	155.26	164	175	185 175

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Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
LAC - Intermediate Clerk	31.5	31.5	42.49	43.80	46.64	47.31 50.38
LAC - Management Fellow	87.45	87.45	87.45	90.58	99.86	101.29 97.24
LAC – Staff Assistant III	-	-	77.32	79.72	84.94	86.20 91.81
LAC – Principal Application Developer	-	-	137.84	142.54	149.74	167.32 157.33
LAC – Senior Application Developer	-	-	130	120.25	126.31	132.74 138.57
LAC – Principal Geographic Info Syst Analyst	-	-	-	-	-	167.32 157.33
LAC – Geographic Info Syst Analyst	-	-	-	-	-	123.54 116.18
LAC – Application Developer I	-	-	096.41	99.69	104.73	117.01 110.04
LAC – Senior Information Technology Aide	-	-	62.85	64.81	69.05	74.64 70.08
LAC – Special Assistant, ISD	-	-	-	-	-	109.92 103.19
LAC – Senior Information Systems Analyst						135.2
Community Development Commission – Project Manager (Development Specialist)	53.44	56.65	56.65	58	60.90	82.09
Community Development Commission – Program Manager	-	-	-	-	103.95	119.45
Community Development Commission - Manager	90.43	95.86	95.86	99	103.95	103.95
Community Development Commission – Construction Manager	95	100.7	100.7	116	121.80	150

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Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Community Development Commission – Project Supervisor	-	-	-	-	-	90.39
Community Development Commission – Administrative Assistant	-	-	-	-	-	48.93
Community Development Commission – CMD Inspector						116
Partner (Attorney)	395	395	395	395	395	-
Hawkins - Associate (Attorney)	350	350	350	395	400	-
Vanir - Sustainability Program Manager	95	95	130	135.20	-	-
Vanir - Grant Administrator	85	85	85	88.40	-	-
Vanir - Sustainability Associate	75	75	105	109.20	-	-
Vanir – Resource Manager	75	75	85	88.40	88.40	-
Vanir – Document Control Analyst	-	-	-	67.60	-	-
LGC - CS Worker	-	17	17	18	21	23
ICF Resources, L.L.C. – Senior Vice President	-	-	495	495	495	495
ICF Resources, L.L.C. – Project Director	-	-	410	410	410	410
ICF Resources, L.L.C. – Program Administrator	-	-	250	250	250	250
ICF Resources, L.L.C. – Admin Assistant	-	-	45.40	45.40	45.40	45.40
ICF Resources, L.L.C. – Vice President EE	-	-	410	410	410	410
ICF Resources, L.L.C. – Vice President Dist. Energy Resources	-	-	460	460	460	460
ICF Resources, L.L.C. – Principal	-	-	340	340	340	340

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
ICF Resources, L.L.C. – Senior Technical Director	-	-	335	335	335	335
ICF Resources, L.L.C. – Technical Director	-	-	260	260	260	260
ICF Resources, L.L.C. – Manager II	-	-	250	250	250	250
ICF Resources, L.L.C. – Manager I	-	-	220	220	220	220
ICF Resources, L.L.C. – Manager	-	-	195	195	195	195
ICF Resources, L.L.C. – Senior Technical Specialist	-	-	167.50	167.50	167.50	167.50
ICF Resources, L.L.C. – Technical Specialist	-	-	150	150	150	150
ICF Resources, L.L.C. – Senior Engineer	-	-	235	235	235	235
ICF Resources, L.L.C. - Engineer	-	-	195	195	195	195
ICF Resources, L.L.C. – Junior Engineer	-	-	167.50	167.50	167.50	167.50
ICF Resources, L.L.C. – Senior Associate	-	-	137.50	137.50	137.50	137.50
ICF Resources, L.L.C. - Associate	-	-	117.50	117.50	117.50	117.50
ICF Resources, L.L.C. – Junior Associate	-	-	97.50	97.50	97.50	97.50
ICF Resources, L.L.C. – Senior Analyst	-	-	92.50	92.50	92.50	92.50
ICF Resources, L.L.C. - Analyst	-	-	87.50	87.50	87.50	87.50
ICF Resources, L.L.C. – Junior Analyst	-	-	75	75	75	75
ICF Resources, L.L.C. – Research Assistant	-	-	65	65	65	65
Bevilacqua Knight, Inc. - Officer-In-Charge	268	268	268	268	270	-
Bevilacqua Knight, Inc. – Principal	243	243	243	243	250	-
Bevilacqua Knight, Inc. – Director	201	210	210	210	215	-

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Bevilacqua Knight, Inc. – Senior Program Manager	160	160	160	169	175	-
Bevilacqua Knight, Inc. – Program Manager	139	139	148	148	150	-
Bevilacqua Knight, Inc. – Senior Engineer	153	153	161	165	175	-
Bevilacqua Knight, Inc. – Engineer	132	132	135	145	150	-
Bevilacqua Knight, Inc. – Senior Program Consultant	120	120	134	134	138	-
Bevilacqua Knight, Inc. – Program Consultant	103	106	112	116	118	-
Bevilacqua Knight, Inc. – Senior Program Coordinator	89	89	93	93	96	-
Bevilacqua Knight, Inc. – Program Coordinator	78	78	80	82	85	-
Bevilacqua Knight, Inc. – Junior Program Coordinator	53	57	64	70	73	-
Bevilacqua Knight, Inc. – Senior Technical Writer	103	103	108	115	118	-
Bevilacqua Knight, Inc. – Technical Writer	82	82	85	85	88	-
Bevilacqua Knight, Inc. – Business Manager	132	132	137	137	145	-
Bevilacqua Knight, Inc. – Art Director	110	110	115	115	118	-
Bevilacqua Knight, Inc. – Executive Assistant	82	82	86	98	102	-

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Bevilacqua Knight, Inc. – Administrative Assistant	68	68	70	70	73	-
Bevilacqua Knight, Inc. – Program Assistant	-	-	55	70	73	-
RHA - Director	-	-	-	-	-	185
RHA – Program Manager	145	145	145	145	145	145
RHA - Engineering Support Technician	135	135	135	135	135	135
RHA - Field Supervisor	125	125	125	127.50	127.50	127.50
RHA - Mentor	115	115	115	115	115	115
RHA - Lead Energy Field Technician	110	110	110	115	115	115
RHA - Analyst	110	110	110	117.50	117.50	117.50
RHA – Energy Field Technician	95	95	95	105	105	105
RHA - Program Coordinator	75	75	75	75	75	75
RHA – Call Center Representative	-	-	-	50	50	50
BSW – Partner	375	375	375	375	375	375
BSW – Controller	375	375	375	375	-	375
BSW – Manager	175	175	175	175	210	175
BSW – Supervisor	95	95	95	95	150	95
BSW – Staff Accountant	50	50	50	60	90	55
San Gabriel Valley Council of Governments - Assistant Executive Director	-	-	-	-	135.82	135.82
San Gabriel Valley Council of Governments - Management Analyst	-	-	-	-	70.75	70.75

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
San Gabriel Valley Council of Governments – Senior Management Analyst	-	-	-	-	-	106.12
San Gabriel Valley Economic Partnership - Director of PACE Programs	-	-	-	-	61.25	61.25
San Gabriel Valley Economic Partnership – Accounting Specialist	-	-	-	-	28	28
San Gabriel Valley Economic Partnership - Intern	-	-	-	-	46.86	46.86
The Energy Coalition – Principal	250	250	250	250	265	265
The Energy Coalition - Financial Manager	250	250	250	250	250	250
The Energy Coalition – Program Director/ Assistant Director	200	200	200	200	210	210
The Energy Coalition – Senior Marketing Designer/PR	175	175	175	175	175	175
The Energy Coalition – Senior Program Manager	150	150	150	150	170	170
The Energy Coalition – Controller	-	-	-	-	-	200
The Energy Coalition – Program Manager	-	-	-	-	-	160
The Energy Coalition - Senior Technical Support	150	150	150	150	170	170
The Energy Coalition - Financial Analyst	-	-	-	-	-	150
The Energy Coalition – Accountant	150	150	150	150	160	160
The Energy Coalition - Technical Support	125	125	125	125	160	160
The Energy Coalition – Project Manager	125	125	125	125	130	130

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
The Energy Coalition – Project Coordinator	90	90	90	90	95	95
The Energy Coalition – Project Administration	65	65	65	70	75	75
The Energy Coalition - Analyst	-	-	-	-	-	125
The Energy Coalition – Administrative Assistant	-	-	-	-	-	150
Renewable Funding – Executive	245.01	252.36	252.36	-	-	-
Renewable Funding – Operations Director	158.33	163.08	163.08	-	-	-
Renewable Funding – Program Director	158.33	163.08	163.08	-	-	-
Renewable Funding – Program Manager	140.23	144.44	144.44	-	-	-
Renewable Funding – Technology Director	158.33	163.08	163.08	-	-	-
Renewable Funding – Technology Manager	140.23	144.44	144.44	-	-	-
Renewable Funding – Project Manager	128.11	131.95	131.95	-	-	-
Renewable Funding – Finance Manager	140.23	144.44	144.44	-	-	-
Build It Green – Director	175	175	175	200	175	175
Build It Green – Senior Program Manager	125	125	125	140	138	138
Build It Green –Project/Program Manager	110	110	110	125	120	120
Build It Green (ICF) –Senior Associate	-	-	-	-	95	95
Build It Green – Associate	90	90	90	100	100	-

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Build It Green (ICF) – Associate	-	-	-	-	72	72
Build It Green – Assistant	70	70	70	80	80	-
ReNewAll - Principal/PACE Specialist	150	165	169.13	-	-	-
ReNewAll - Energy Efficiency Project Development Specialist	110	130	133.25	-	-	-
ReNewAll - Energy Efficiency Contracting Specialist	70	80	82	-	-	-
ReNewAll - Energy Efficiency Audit Specialist	64	75	76.88	-	-	-
ReNewAll - Assistant	-	70	71.75	-	-	-
O'Rorke - Principal	180	180	180	180	-	-
O'Rorke - Director	180	180	180	180	-	-
O'Rorke - Supervisor	162	162	162	162	-	-
O'Rorke - Graphic Designer	150	150	150	150	-	-
O'Rorke - Manager	125	125	125	125	-	-
O'Rorke - Executive	125	125	125	125	-	-
O'Rorke - Production Artist	100	100	100	100	-	-
O'Rorke - Coordinator	75	75	75	75	-	-
O'Rorke - Intern	-	-	-	-	-	-
crmOrbit - Chief Operating Officer	300	300	300	300	300	-
crmOrbit - Senior Project Manager	275	275	275	275	275	-
crmOrbit - Senior Architect	300	300	300	300	300	-
crmOrbit - Senior Developer	225	225	225	225	225	-
crmOrbit - Developer	175	175	175	175	175	-

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
crmOrbit – Web Developer	175	175	175	175	175	-
Hartman Energy Strategies - Consultant	200	200	200	200	200	-
Hartman Energy Strategies – Executive Assistant	-	-	-	-	50	-
Hartman Energy Strategies – Project Manager	-	-	-	-	25	-
MMB – Principal	-	-	-	-	164	-
NAM – Principal	-	-	195	195	195	195
NAM – Senior Program Manager	-	-	180	180	180	180
NAM – Senior Engineer	-	-	175	175	175	175
NAM – Project Manager	-	-	140	140	140	140
NAM – Staff Engineer	-	-	130	130	130	130
NAM – Administration	-	-	70	70	70	70
PFM – Managing Director	-	-	-	-	375	-375
PFM – Director	-	-	-	-	340	-340
PFM – Senior Managing Consultant	-	-	-	-	300	-300
PFM – Senior Analyst	-	-	-	-	250	-250
PFM – Analyst	-	-	-	-	200	-200
PSD – Principal	-	-	-	-	207	-207
PSD – Sr. Engineer	-	-	-	-	185	185-
PSD – Engineer	-	-	-	-	165	-165
PSD – Director Software	-	-	-	-	185	-185
PSD – Sr. Project Manager	-	-	-	-	175	-175
PSD – Project Manager	-	-	-	-	150	-150

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
PSD – Sr. Program Manager	-	-	-	-	165	165
PSD – Developer	-	-	-	-	150	150
PSD – Admin Support	-	-	-	-	65	65
Lincus (TEC) – Officer/Principal/Sr. Consultant	-	-	207	219	230	230 242
Lincus (TEC) – Director/Executive Team Coordinator	-	-	174	183	192	192 201
Lincus (TEC) – Engineering Manager	-	-	161	170	178	178 187
Lincus (TEC) – Project/Program Manager III	-	-	161	169	178	178 186
Lincus (TEC) – Project/Program Manager II	-	-	145	152	160	160 168
Lincus (TEC) – Project/Program Manager I	-	-	138	145	152	152 160
Lincus (TEC) – Engineer/Program/Marketing Analyst III	-	-	135	141	148	148 156
Lincus (TEC) – Engineer/Program/Marketing Analyst II	-	-	122	128	135	135 141
Lincus (TEC) – Engineer/Program/Marketing Analyst I	-	-	110	115	121	121 127
Lincus (TEC) – Administrative Support /Accounting	-	-	65	68	72	72 75
Lincus (ICF) – Engineering Manager/Project/Program Manager III	-	-	<u>161</u>	<u>169</u>	<u>178</u>	<u>178</u>
Lincus (ICF) – Project/Program Manager II	-	-	<u>145</u>	<u>152</u>	<u>160</u>	<u>160</u>

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Lincus (ICF) – Project/Program Manager I	-	-	138	145	152	152
Lincus (ICF) – Engineer/Program/Marketing Analyst III	-	-	135	141	148	148
Lincus (ICF) – Engineer/Program/Marketing Analyst II	-	-	122	128	135	135
Lincus (ICF) – Engineer/Program/Marketing Analyst I	-	-	110	115	121	121
EnerNoc – Vice President	-	-	290	290	290	-
EnerNoc – Senior Director	-	-	270	270	270	-
EnerNoc – Director	-	-	240	240	240	-
EnerNoc – Senior Manager	-	-	225	225	225	-
EnerNoc – Manager	-	-	210	210	210	-
EnerNoc – Principal Project Manager 2	-	-	225	225	225	-
EnerNoc – Principal Project Manager 1	-	-	210	210	210	-
EnerNoc – Senior Project Manager	-	-	195	195	195	-
EnerNoc – Project Manager 2	-	-	170	170	170	-
EnerNoc – Project Manager 1	-	-	160	160	160	-
EnerNoc – Principal Program / Portfolio Manager	-	-	225	225	225	-
EnerNoc – Senior Program / Portfolio Manager	-	-	210	210	210	-
EnerNoc – Program / Portfolio Manager 2	-	-	195	195	195	-

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
EnerNoc – Program / Portfolio Manager 1	-	-	170	170	170	-
EnerNoc – Associate Program / Portfolio Manager	-	-	160	160	160	-
EnerNoc – Principal Engineer / Energy Analyst	-	-	215	215	215	-
EnerNoc – Senior Engineer / Energy Analyst	-	-	200	200	200	-
EnerNoc – Engineer / Energy Analyst 2	-	-	190	190	190	-
EnerNoc – Engineer / Energy Analyst 1	-	-	165	165	165	-
EnerNoc – Associate Engineer / Energy Analyst	-	-	140	140	140	-
EnerNoc – Principal Technician / Analyst 2	-	-	190	190	190	-
EnerNoc – Principal Technician / Analyst 1	-	-	175	175	175	-
EnerNoc – Senior Technician / Analyst	-	-	160	160	160	-
EnerNoc – Technician / Analyst 2	-	-	145	145	145	-
EnerNoc – Technician / Analyst 1	-	-	130	130	130	-
EnerNoc – Associate Technician / Analyst	-	-	115	115	115	-
EnerNoc – Senior Consultant	-	-	210	210	210	-
EnerNoc – Technical Consultant	-	-	180	180	180	-
EnerNoc – Administrative / Intern	-	-	85	85	85	-
CleaResults – Director	-	-	182	182	182	182

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
CleaResults – Technical Director	-	-	200	200	200	200
CleaResults – Project Manager	-	-	139	139	139	209
CleaResults- Program Manager	-	-	-	139	139	195 144
CleaResults – Principal	-	-	209	209	209	209
CleaResults – Senior Director	-	-	195	195	195	195
CleaResults – Senior Manager	-	-	172	172	172	172
CleaResults – Senior Manager Operations	-	-	172	172	172	172
CleaResults – Manager	-	-	163	163	163	163
CleaResults – Senior Project Manager	-	-	155	155	155	155
CleaResults – Project Coordinator	-	-	113	113	113	113
CleaResults – Project Associate III	-	-	125	125	125	125
CleaResults – Project Associate II	-	-	113	113	113	113
CleaResults – Project Associate I	-	-	95	95	95	95
CleaResults – Program Consultant	-	-	116	116	116	116
CleaResults – Program Specialist	-	-	87	87	87	87
CleaResults – Project Assistant I	-	-	53	53	53	53
CleaResults – Project Assistant II	-	-	66	66	66	66
CleaResults – Project Assistant III	-	-	82	82	82	82
CleaResults – Program Coordinator	-	-	76	76	76	76
CleaResults – Field QC Inspector	-	-	68	68	68	68
CleaResults - Filed QB Inspector	-	-	-	68	68	68
CleaResults – Senior Manager Engineering	-	-	172	172	172	172

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
CleaResults – Senior Energy Engineer	-	-	167	167	167	167
CleaResults – Senior Engineer I	-	-	169	169	169	169
CleaResults – Senior Engineer II	-	-	187	187	187	187
CleaResults – Engineer I	-	-	111	111	111	111
CleaResults – Engineer II	-	-	132	132	132	132
CleaResults – Engineer III	-	-	153	153	153	153
ClearResults – Energy Engineer	-	-	130	130	130	130
ClearResults – Analyst I (Programs) & (F&A)	-	-	97	97	97	97
ClearResults – Analyst II (Programs) & (F&A)	-	-	115	115	115	115
ClearResults – Analyst III (Programs) & (F&A)	-	-	134	134	134	134
ClearResults – Analyst I (P&A)	-	-	97	97	97	97
ClearResults – Analyst II (P&A)	-	-	115	115	115	115
Nam ClearResults – Analyst III(P&A)	-	-	134	134	134	134
ClearResults – Senior Analyst I (P&A)	-	-	145	145	145	145
ClearResults – Senior Analyst II (P&A)	-	-	160	160	160	160
CleaResults – Director (P&A)	-	-	182	182	182	182
Dudek- Project Manager	-	-	-	195	205	205
Dudek- Engineer III/Techician III	-	-	-	150	160	160
Dudek- Principal Engineer II	-	-	-	225	230	230
Dudek- Project Engineer IV	-	-	-	165	170	170
Dudek- Clerical Administration <u>1</u>	-	-	-	75	85	85

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Dudek- Project Engineer I	-	-	-	120	130	130
Dudek- Senior Engineer I	-	-	-	175	180	180
Dudek- Senior Engineer II	-	-	-	-	190	190
TRC – Principal	-	-	245	245	245	245
TRC – Engineer Manager (Senior Account Exec)	-	-	175	175	175	175
TRC – Program Manager	-	-	170	170	170	170
TRC – Project Manager	-	-	140	140	140	140
TRC – Engineer 5	-	-	160	160	160	160
TRC – Engineer 4	-	-	140	140	140	140
TRC – Engineer 3	-	-	130	130	130	130
TRC – Engineer 2	-	-	120	120	120	120
TRC – Engineer 1	-	-	110	110	110	110
TRC – Level 3 Technician Project Technician 3	-	-	90	90	90	90
TRC – Project Technician 2 Level 2 Technician	-	-	90	90	90	90
TRC – Project Technician 1 Level 1 Technician	-	-	80	80	80	80
TRC – Admin Assistant	-	-	75	75	75	75
k W Engineering – Principal	-	-	212	212	212	212
k W Engineering k W –Director	-	-	193	193	193	193
k W Engineering k W –Project Manager	-	-	177	177	177	177
k W Engineering k W –Senior Engineer II/Consultant II	-	-	166	166	166	166

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
kW Engineering –Senior Engineer/Consultant	-	-	161	161	161	161
kW Engineering –Project Engineer	-	-	154	154	154	154
kW Engineering – Engineer/Consultant	-	-	148	148	148	148
kW Engineering –Technician/Intern	-	-	85	85	85	85
kW Engineering –Administrative	-	-	62	62	62	62
AESC- Principal Engineer	-	-	217	221	225	225
AESC - Engineering Manager /Program Manager	-	-	170	173	176	176
AESC- Senior Engineer/ Senior Project Manager	-	-	155	158	161	161
AESC – Staff Engineer/ Senior Project Manager	-	-	130	133	136	136
AESC- Engineer/Analyst	-	-	118	120	122	122
AESC - Associate Engineer	-	-	95	97	99	99
AESC - Administrator	-	-	80	82	84	84
CSE – Principal/Executive	-	-	-	-	220	231
CSE – Senior Manager	-	-	-	-	150	157.50
CSE – Program Manager	-	-	-	-	105	110.25
CSE – Analyst	-	-	-	-	99	103.95
CSE – Administrative Assistant	-	-	-	-	75	78.75
Optibiz – Program Manager	-	-	-	-	150	
Emerald Cities - Project Executive	-	-	-	-	215	225.75
Emerald Cities - Project Manager	-	-	-	-	180	189

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Emerald Cities - Program Coordinator	-	-	-	-	90	94.50
Emerald Cities - Small Business Outreach Coordinator	-	-	-	-	90	94.50
Emerald Cities - Labor Compliance Specialist	-	-	-	-	75	78.75
Emerald Cities - Local Worker Hiring Coordinator	-	-	-	-	95	99.75
Enpowered Solutions – Vice President						290
Enpowered Solutions – Senior Director						270
Enpowered Solutions - Director	-	-	-	-	240	240
Enpowered Solutions – Senior Manager						225
Enpowered Solutions – Manager						210
Enpowered Solutions – Principal Program/Portfolio Manager						225
Enpowered Solutions – Senior Program/Portfolio Manager						210
Enpowered Solutions – Program/Portfolio Manager 2						195
Enpowered Solutions – Program/Portfolio Manager 1						170
Enpowered Solutions – Associate Program/Portfolio Manager						160
Enpowered Solutions – Principal Engineer/Energy Analyst						215
Enpowered Solutions – Principal Project Manager 2	-	-	-	-	225	225

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Empowered Solutions – Principal Project Manager 1	-	-	-	-	210	210
Empowered Solutions – Senior Project Manager	-	-	-	-	195	195
Empowered Solutions – Engineer/Energy Analyst 1	-	-	-	-	165	165
Empowered Solutions - Engineer / Energy Analyst 2	-	-	-	-	190	190
Empowered Solutions - Senior Engineer / Energy Analyst	-	-	-	-	200	200
Empowered Solutions - Associate Engineer / Energy Analyst	-	-	-	-	140	140
Empowered Solutions - Associate Engineer / Energy Analyst	-	-	-	-	160	160
Empowered Solutions – Principal Technician/Analyst 2						190
Empowered Solutions – Principal Technician/Analyst 1						175
Empowered Solutions - Senior Technician / Analyst	-	-	-	-	160	160
Empowered Solutions - Technician / Analyst 2						145
Empowered Solutions - Technician / Analyst 1						130
Empowered Solutions – Associate Technician/Analyst						115

Implementer Job Function	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)	*Fully Burdened Hourly Rate (Max)
	2013	2014	2015	2016	2017	2018
	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)	(\$/Hour)
Empowered Solutions – Project Manager 2						170
Empowered Solutions – Project Manager 1						160
Empowered Solutions – Senior Consultant						210
Empowered Solutions – Technical Consultant						180
Empowered Solutions – Administrative/Intern						85
EnergyRSC-Owner/Manager						76
Tyrrell & Associates - President						150
Average rate for all County and Sub-contractor's Staff						

*County and Sub-contracted Work shall be charged at the hourly rates actually paid by the County, not to exceed the hourly rates set forth in the Programs Agreement for Work performed by the County or Sub-contractors. The County shall provide Sub-contractor invoices for any County's invoice that includes Sub-contractor costs.

Exhibit L - SoCalREN 2013-2025 Program/Sector Approved Budgets

2013-15 REN Program	Edison	SoCALGas	Total
EUC	\$ 22,212,858.50	\$ 9,519,796.50	\$ 31,732,655.00
Financing	\$ 5,836,425.00	\$ 2,501,325.00	\$ 8,337,750.00
SoCalREC	\$ 17,416,646.10	\$ 7,464,276.90	\$ 24,880,923.00
2013-15 REN Total	\$ 45,465,929.60	\$ 19,485,398.40	\$ 64,951,328.00

2016 REN Program	Edison	SoCALGas	Total
EUC	\$ 7,404,286.40	\$ 3,173,265.60	\$ 10,577,552.00
Financing	\$ 1,945,475.00	\$ 833,775.00	\$ 2,779,250.00
SoCalREC	\$ 5,805,938.60	\$ 2,488,259.40	\$ 8,294,198.00
2016 REN Total	\$ 15,155,700.00	\$ 6,495,300.00	\$ 21,651,000.00

2017 REN Program	Edison	SoCALGas	Total
EUC	\$ 7,404,286.40	\$ 3,173,265.60	\$ 10,577,552.00
Financing	\$ 1,945,475.00	\$ 833,775.00	\$ 2,779,250.00
SoCalREC	\$ 5,805,938.60	\$ 2,488,259.40	\$ 8,294,198.00
2017 REN Total	\$ 15,155,700.00	\$ 6,495,300.00	\$ 21,651,000.00

2018 Sectors	Edison	SoCALGas	Total
Residential	\$ 4,578,000.00	\$ 1,962,000.00	\$ 6,540,000.00
Public	\$ 6,870,500.00	\$ 2,944,500.00	\$ 9,815,000.00
Financing	\$ 1,526,000.00	\$ 654,000.00	\$ 2,180,000.00
WE&T	\$ 180,600.00	\$ 77,400.00	\$ 258,000.00
2018 REN Total	\$ 13,155,100.00	\$ 5,637,900.00	\$ 18,793,000.00

2019 Sectors	Edison	SoCALGas	Total
Residential	\$ 4,669,700.00	\$ 2,001,300.00	\$ 6,671,000.00
Public	\$ 8,094,100.00	\$ 3,468,900.00	\$ 11,563,000.00
Financing	\$ 1,556,800.00	\$ 667,200.00	\$ 2,224,000.00
WE&T	\$ 198,800.00	\$ 85,200.00	\$ 284,000.00
2019 REN Total	\$ 14,519,400.00	\$ 6,222,600.00	\$ 20,742,000.00

2020 Sectors	Edison	SoCALGas	Total
Residential	\$ 4,762,800.00	\$ 2,041,200.00	\$ 6,804,000.00

Public	\$ 8,255,800.00	\$ 3,538,200.00	\$ 11,794,000.00
Financing	\$ 1,587,600.00	\$ 680,400.00	\$ 2,268,000.00
WE&T	\$ 218,400.00	\$ 93,600.00	\$ 312,000.00
2020 REN Total	\$ 14,824,600.00	\$ 6,353,400.00	\$ 21,178,000.00

2021 Sectors	Edison	SoCALGas	Total
Residential	\$ 4,858,000.00	\$ 2,082,000.00	\$ 6,940,000.00
Public	\$ 8,421,000.00	\$ 3,609,000.00	\$ 12,030,000.00
Financing	\$ 1,619,100.00	\$ 693,900.00	\$ 2,313,000.00
WE&T	\$ 240,100.00	\$ 102,900.00	\$ 343,000.00
2021 REN Total	\$ 15,138,200.00	\$ 6,487,800.00	\$ 21,626,000.00

2022 Sectors	Edison	SoCALGas	Total
Residential	\$ 4,955,300.00	\$ 2,123,700.00	\$ 7,079,000.00
Public	\$ 8,589,000.00	\$ 3,681,000.00	\$ 12,270,000.00
Financing	\$ 1,652,000.00	\$ 708,000.00	\$ 2,360,000.00
WE&T	\$ 264,600.00	\$ 113,400.00	\$ 378,000.00
2022 REN Total	\$ 15,460,900.00	\$ 6,626,100.00	\$ 22,087,000.00

2023 Sectors	Edison	SoCALGas	Total
Residential	\$ 5,054,700.00	\$ 2,166,300.00	\$ 7,221,000.00
Public	\$ 8,761,200.00	\$ 3,754,800.00	\$ 12,516,000.00
Financing	\$ 1,684,900.00	\$ 722,100.00	\$ 2,407,000.00
WE&T	\$ 291,200.00	\$ 124,800.00	\$ 416,000.00
2023 REN Total	\$ 15,792,000.00	\$ 6,768,000.00	\$ 22,560,000.00

2024 Sectors	Edison	SoCALGas	Total
Residential	\$ 5,155,500.00	\$ 2,209,500.00	\$ 7,365,000.00
Public	\$ 8,936,200.00	\$ 3,829,800.00	\$ 12,766,000.00
Financing	\$ 1,718,500.00	\$ 736,500.00	\$ 2,455,000.00
WE&T	\$ 319,900.00	\$ 137,100.00	\$ 457,000.00
2024 REN Total	\$ 16,130,100.00	\$ 6,912,900.00	\$ 23,043,000.00

2025 Sectors	Edison	SoCALGas	Total
Residential	\$ 5,258,400.00	\$ 2,253,600.00	\$ 7,512,000.00
Public	\$ 9,115,400.00	\$ 3,906,600.00	\$ 13,022,000.00
Financing	\$ 1,752,800.00	\$ 751,200.00	\$ 2,504,000.00
WE&T	\$ 352,100.00	\$ 150,900.00	\$ 503,000.00
2025 REN Total	\$ 16,478,700.00	\$ 7,062,300.00	\$ 23,541,000.00

REN Total \$ 182,138,129.60 \$ 78,059,198.40 \$ 260,197,328.00



Southern California REGIONAL ENERGY NETWORK



Portfolio of **ENERGY EFFICIENCY PROGRAMS**



Agencies Enrolled in the SoCalREN

COUNTIES: County of Los Angeles • County of Orange • County of Santa Barbara

CITIES: City of Alhambra • City of Arcadia • City of Barstow • City of Beaumont • City of Beverly Hills • City of Brea • City of Buena Park • City of California City • City of Camarillo • City of Carpinteria • City of Chino Hills • City of Claremont • City of Corona • City of Costa Mesa • City of Covina • City of Culver City • City of Downey • City of Duarte • City of Fontana • City of Fullerton • City of Garden Grove • City of Hesperia • City of Highland • City of Huntington Beach • City of Irvine • City of Laguna Niguel • City of Long Beach • City of Laguna Woods • City of La Habra • City of La Palma • City of La Puente • City of Lynwood • City of Maywood • City of Mission Viejo • City of Monrovia • City of Montclair • City of Monterey Park • City of Moreno Valley • City of Murrieta • City of Newport Beach • City of Norwalk • City of Orange • City of Oxnard • City of Palmdale • City of Perris • City of Placentia • City of Pomona • City of Rancho Cucamonga • City of Rancho Mirage • City of Rancho Santa Margarita • City of Redlands • City of Rialto • City of San Bernardino • City of Santa Ana • City of Santa Barbara • City of Santa Monica • City of Santa Paula • City of Signal Hill • City of Simi Valley • City of South Pasadena • City of Temecula • City of Temple City • City of Thousand Oaks • City of Ventura • City of Visalia • City of West Covina • City of West Hollywood • City of Whittier • City of Yorba Linda

WATER AGENCIES: Carpinteria Sanitary District • City of Los Angeles Bureau of Sanitation • Coachella Valley Water District • Cucamonga Valley Water District • Eastern Municipal Water District • Goleta Sanitary District • Idyllwild Water District • Inland Empire Utilities Agency • Jurupa Community Services District • Lake Arrowhead Community Services District • Las Virgenes Municipal Water District • Ojai Valley Sanitary District • Orange County Sanitation District • Running Springs Water District • United Water Conservation District • Western Municipal Water District • Western Riverside County Regional Wastewater Authority • Yucaipa Valley Water District

OTHER AGENCIES: Bridges Charter School • Conejo Recreation and Parks District • Conejo Valley School District • Los Angeles Department of Tourism • Los Angeles General Services Department • North Net Training Center • Orange Unified School District • Oxnard Union High School District • Rio School District • San Gabriel Valley Council of Governments • San Gabriel Valley Economic Partnership • The Port of Hueneme, Oxnard Harbor District • University of California, Los Angeles • Ventura Unified School District



WELCOME

County of Los Angeles
Internal Services Department

Commissions, Ratepayers, and Colleagues:

We're pleased to present this 2017 Annual Report on behalf of the SoCalREN.

It's been a dynamic year—leading with assessment, progressing into action, and closing with remarkable and unprecedented performance that exceeded ambitious expectations. Strategy and planning for the 2018–2025 Rolling Portfolio cycle have been at the forefront, with efforts directed toward even greater environmental, social, and economic returns to be delivered from REN programs and leveraged assets to the community.

This year's potent transition is captured in the following pages, along with a preview of Rolling Portfolio objectives.

John L. Geiger
Standards & Practices,
General Manager

Demetra J. McBride
Environmental Initiatives,
Division Manager

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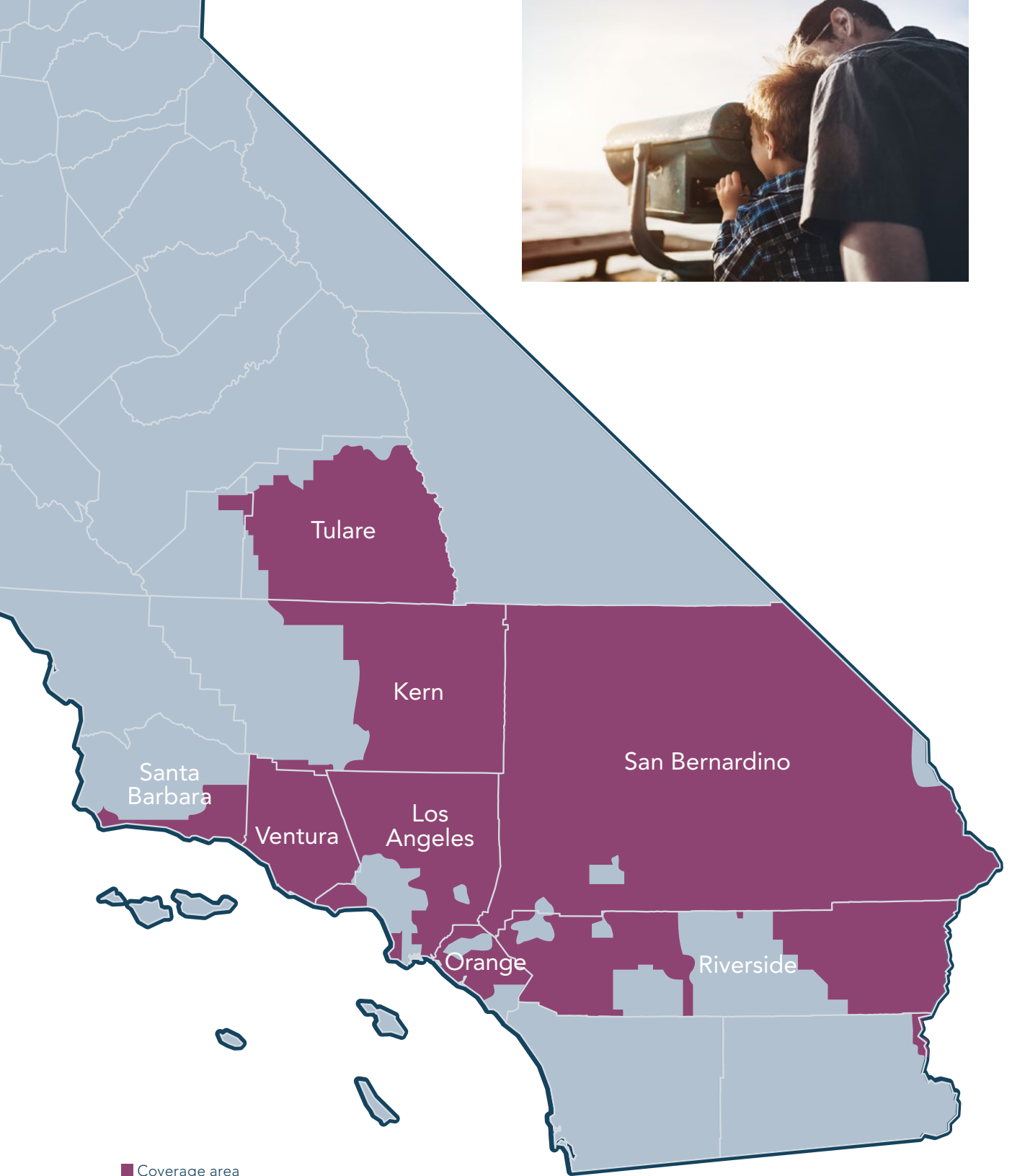
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SoCalREN COVERAGE AREA

The Southern California Regional Energy Network (SoCalREN) serves residents, businesses, and public agencies throughout the areas served by Southern California Edison (SCE) and SoCalGas®.





■ Coverage area



Interior lighting upgrades at a municipal basketball court in Palmdale.

EXECUTIVE SUMMARY

The County of Los Angeles administers and manages the Southern California Regional Energy Network (SoCalREN), including the design and implementation of public agency facilities upgrades, single-family and multifamily residential retrofit, Codes and Standards, Energy Equity, Workforce Education and Training, and energy efficiency behavioral transformation programs.

The SoCalREN undertook aggressive actions throughout 2017 to optimize implementation and outcomes for the 2017 Portfolio. These actions were also designed to position the Portfolio for transition from customary two-year cycles to a California Public Utilities Commission (CPUC) Energy Efficiency Rolling Portfolio that will establish funding and potential for eight years (2018–2025).

Key indicators of improvement and performance optimization in 2017 include:

- An **increase of 2100%** in Multifamily Program energy savings
- A nearly **300% increase** in Public Agency Program energy savings
- Cost-Effectiveness improvement of **nearly 300%**
- Streamlined administrative and marketing costs

- Success in training and establishing **Minority and Disadvantaged Enterprise Businesses** and individuals
- Overall Portfolio share of approximately **38% in Disadvantaged Communities**
- Active regulatory participation that secured and increased opportunities for government Program Administrators (RENs and Community Choice Energy Authorities)
- Enhanced relationship-building, collaboration, and coordination with SCE and SoCalGas

To achieve these improvements in 2017, the SoCalREN:

- ✓ Conducted and commissioned program performance assessments
- ✓ Implemented corrective adjustments to Resource Programs (programs that produce direct energy savings)
- ✓ Restructured Portfolio management and administration
- ✓ Retired redundant or non-performing activities and effected permitted funds shifts into programs that produce direct energy savings; specifically, the Residential Loan Loss Reserve, Water-Energy Nexus, Regional Energy Project Tracking and Permitting (CEPMS), and Green Building Labeling Programs.



“ What I like best about my Home Upgrade is breathing cleaner air since I have asthma.”

Homeowner in Norwalk

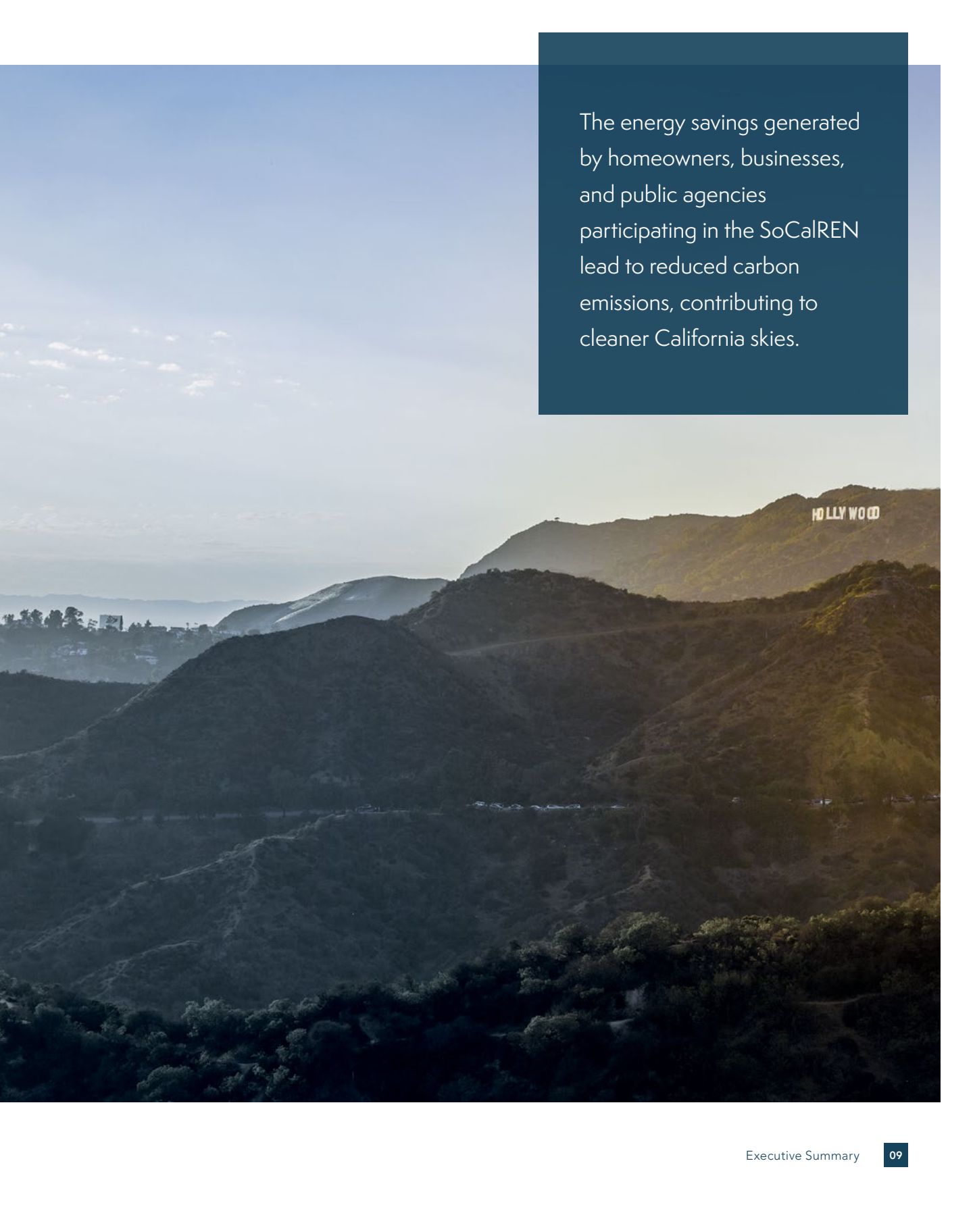


- ✓ Integrated the Public Agency Marketing, Education and Training, and Aggregated Regional Procurement Programs into the Public Agency Program. Through this integration and assimilation, the SoCalREN realized efficiency and budget savings in the avoidance of duplicate or redundant administration and other implementation costs.
- ✓ Required third-party implementers to account by project, to track and improve program cost/kWh to reduce consumption
- ✓ Implemented Quality Assurance/Quality Control (QA/QC) measures and routine measurability-accountability reviews with third-party implementers

The SoCalREN also engaged the CPUC, its Energy Division, and the Office of Ratepayer Advocates to aggressively evaluate its programs, mine Commission concerns and constructive criticism, and to report progress. This dialogue has been essential to the rigor of the SoCalREN's self-examination and the maturation necessary to fix the RENs as enduring Program Administrators in the State's Energy Efficiency Portfolio.

As a result of these initiatives, the SoCalREN Portfolio is evolving, maturing, and self-optimizing, with further near-term enhancements and actions summarized in this Annual Report as Rolling Portfolio Key Objectives.





The energy savings generated by homeowners, businesses, and public agencies participating in the SoCalREN lead to reduced carbon emissions, contributing to cleaner California skies.

SoCalREN PORTFOLIO OF PROGRAMS

MULTIFAMILY
UPGRADES

SINGLE-FAMILY
IMPROVEMENTS



WATER

MITIGATION
GHG EMISSIONS

ENERGY EFFICIENCY INCENTIVES

EFFICIENCY

REDUCING
EMISSIONS

COMMUNITY
BENEFITS

SUSTAINABILITY

CLEAN ENERGY
SOLUTIONS

SoCalREN PROGRAM STRUCTURE



The Southern California Regional Energy Network (SoCalREN) comprises a portfolio of sub-programs that provide residential, financial, and public agency services encouraging and supporting energy conservation.

When the California Public Utilities Commission (CPUC) authorized the SoCalREN, Commission policies and accounting structure defined the REN as a single program under existing Southern California Edison (SCE) and SoCalGas® portfolios. The sub-programs that compose the SoCalREN were designed locally to meet the needs of residents and businesses located within the coverage area (see pages 4 and 5 to view a map of the SoCalREN coverage area).

The following section takes a detailed look at these sub-programs and the services they provide to residents, businesses, and public agencies. In addition to a summary of the services provided by each sub-program, information on budgets and savings achievements are detailed.

CPUC Classifications as Related to the SoCalREN

All energy efficiency programs authorized under the CPUC, including the SoCalREN's sub-programs, are classified by both type and sector.

Resource programs claim energy savings and provide financial incentives, usually at a measure level. These programs are typically referred to as Deemed or Custom



LED street light upgrade in The City of Orange

incentive programs, with the stated intention of driving participants to pursue a higher level of energy savings above code than they would have completed were an incentive not available.

Non-Resource programs do not claim energy savings directly; rather, such programs typically influence customers to pursue energy efficiency opportunities. For example, a non-resource financing program could provide the participant with the means to proceed with a project that would go on to claim energy savings through an established resource program.

Each resource or non-resource program is further categorized into one of six sectors:

- Agricultural
- Commercial
- Cross-Cutting
- Industrial
- Public
- Residential

The sub-programs offered through the SoCalREN are a mixture of resource and non-resource programs covering three of the six sectors: Residential, Public, and Financing (Cross-Cutting). The SoCalREN does not address the three remaining sectors, as they were not part of the SoCalREN's original filing.

Prior to implementation, all programs must have an approved Program Implementation Plan (PIP) on file with the CPUC. The PIP provides transparent details on each program's design and intent, and is available to the public upon request. The Program Profiles featured in this report provide a high-level summary of the information covered by each sub-program's PIP.





Improvements to the SoCalREN During 2017

Throughout 2017, the SoCalREN took a number of aggressive actions to optimize implementation and outcomes for the 2017 portfolio, and also to make necessary strategic changes in preparation for the Rolling Portfolio that begins in 2018. These changes include:

- Closing redundant or non-performing activities, refining spending levels for “soft impact” programs, and shifting funding into programs that produce energy savings
 - Closed the Water-Energy Nexus Program
 - Closed the Regional Energy Project Tracking and Permitting (CEPMS) Program
 - Closed the Green Building Labeling Program
 - Closed the Residential Loan Loss Reserve Program
 - Moved the Aggregated Regional Procurement and Marketing, Outreach, Education, and Training Programs under the existing Integrated Whole Building Retrofit (Public Agency) Program
- Performing strategic outreach to take the Multifamily Program project pipeline from weak to fully subscribed with a waitlist for participation
- Taking over under-performing programs and driving energy upgrade projects

“ The rebate was a big help in financing the upgrade.”

Homeowner in Whittier





Public Agency Program outreach event

- Implementing Quality Assurance/Quality Control (QA/QC) measures in consultant/vendor billing
- Preparing optimization strategies for rebidding the SoCalREN portfolio, including:
 - Pay-for-performance procurement
 - Replacing single-implementer program contracts with a more competitive multiple-implementer procurement
 - Pivoting toward a measurability standard, embedding programs with actual energy savings targets
 - Developing competitive 2018 pilot proposals, designed for scalability and replicability
 - Containing investment in “soft impact” programs
 - Working with the CPUC to arrive at a reasonable yet responsible cost-effectiveness methodology and targets for SoCalREN

The SoCalREN continues to enhance the portfolio of programs offered based on market conditions, customer feedback, CPUC feedback, and necessary innovation to drive customers to pursue energy efficiency projects far above and beyond existing building codes. The 2018 SoCalREN Business Plan strives to offer additional resource programs, innovative financing options, and programs to help address “to code” stranded savings. These current and future efforts anchor the SoCalREN’s position as a continuously evolving Program Administrator focused on the CPUC’s goals of cost-effectiveness and success.

The data on the following pages (kwh, kw, therms, etc.) contains the best available data forecasted and information available at the time of publication. All data is subject to minor changes based on actual final savings claims with the CPUC and all data will be finalized in the CPUC Annual Report submitted in 2018.



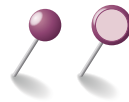
SoCalREN PROJECT LOCATIONS



Residential



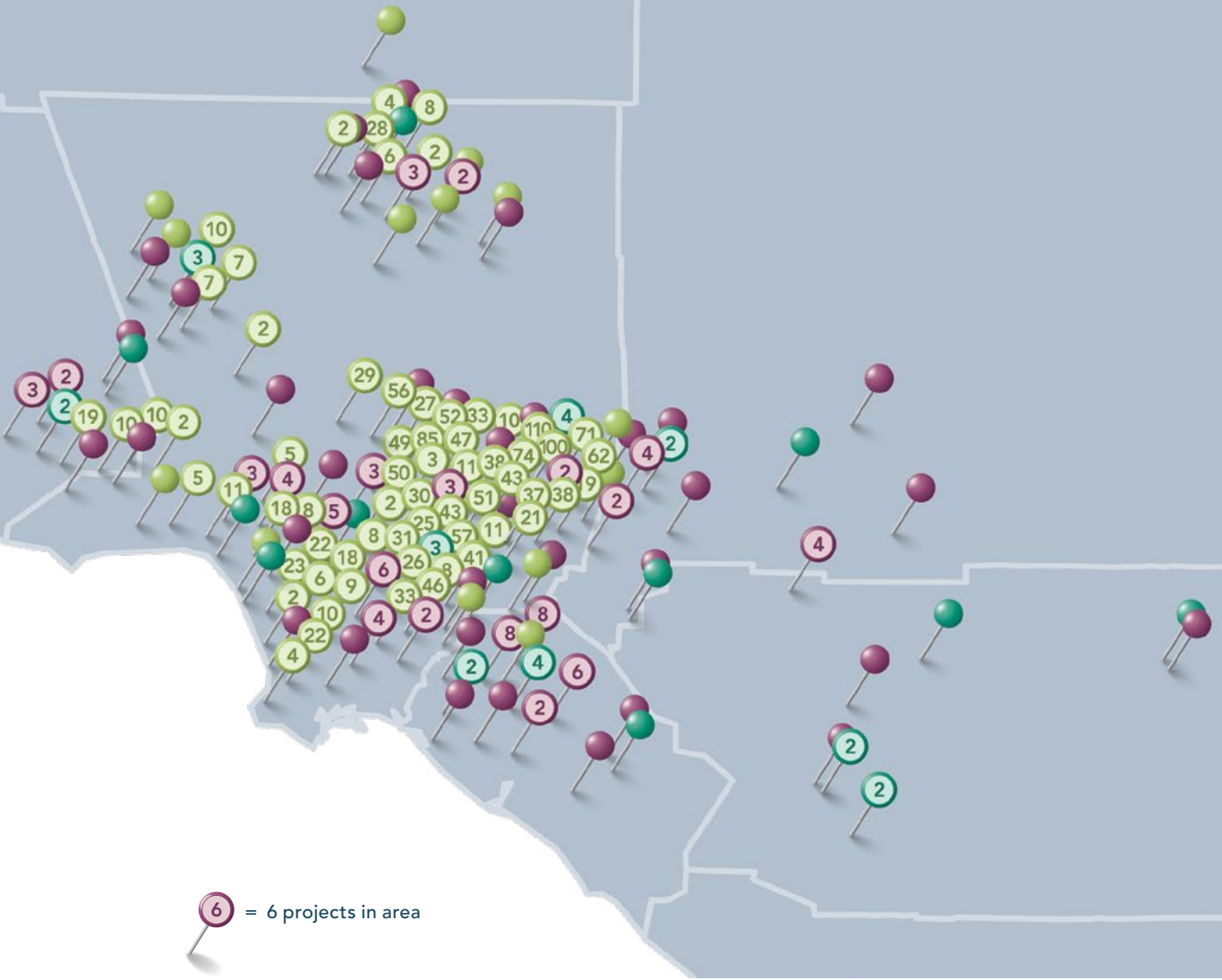
Multifamily



Public Agencies

- Includes:**
- City Halls/Civic Centers
 - Parks
 - Public Services
 - Schools/Libraries
 - Street Lighting
 - Water/Wastewater
 - Other

3
↑
Tulare County



6 = 6 projects in area



Customer home
in Claremont

ENERGY UPGRADE CALIFORNIA[®] HOME UPGRADE (FLEX PATH)

Annual Budget



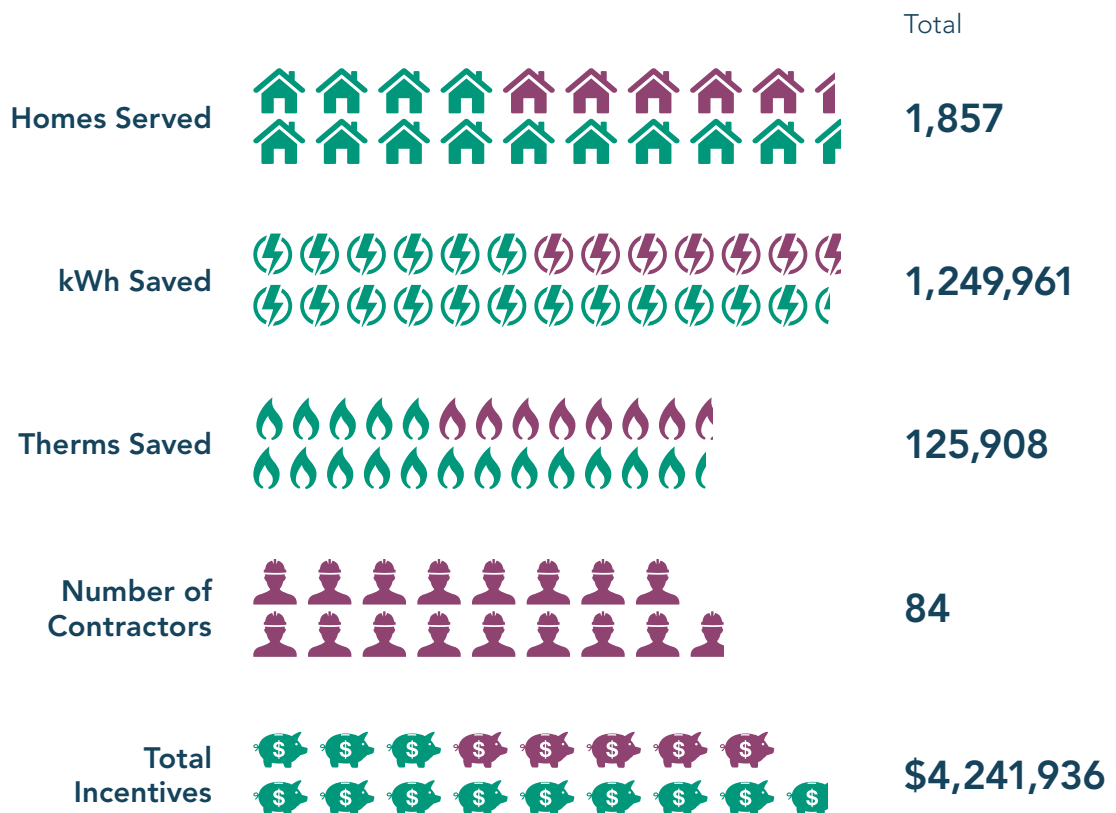
Implementation
\$772,325

+

Incentives
\$1,534,829

=

Total
\$2,307,154





635.06 kWh/Home
Average Savings



1.08 kW/Home
Average Savings



77.14 Therms/Home
Average Savings

Both Home Upgrade and Flex Path encourage single-family homeowners to take the first step toward a more energy-efficient future by providing financial incentives on qualifying high-efficiency retrofits and measures, including heating and cooling equipment, insulation, and windows.

The Flex Path Residential program was developed during and carried over from the federal 2010–12 stimulus of the American Recovery and Reinvestment Act, or ARRA. Home Upgrade is a second-generation entry point retrofit program, redesigned from its ARRA-based predecessor. Both programs were created to demystify home energy efficiency improvements for property owners, and to drive the whole-home approach, as opposed to incremental single energy efficiency measures.

From a list of eligible measures, participants work with a Participating Contractor to select a combination of preferred measures, earning up to \$3,000 in incentives. This prescriptive approach gives homeowners freedom to undertake multiple upgrades over time and according to their specific needs. Owner-occupied single-family detached homes are eligible under these programs, and work must be performed by a trained, qualified, and certified Home Upgrade Participating Contractor.

Home Upgrade is the result of CPUC facilitation of a statewide stakeholder group to address one of the Portfolio's

most challenging sectors—the Residential market—which has continuously stymied Program Administrators with high implementation costs and modest impact. Despite this significant collaborative effort, Home Upgrade has struggled in the market as a basic-level upgrade option burdened with design constraints and complex documentation requirements; this has suppressed interest by contractors as well as homeowners.

As a result, the SoCalREN has endeavored to improve Residential performance through marketing, outreach, and contractor relationships, and to bundle the Home Upgrade Program as a Residential energy efficiency option, along with Residential PACE, and the utilities' Advanced Home Upgrade offering.

In 2017, the SoCalREN assessed a wide variety of Residential Programs, and has developed scenarios, modified program designs, a “hybridized” proposal, and leveraged partnerships with the potential to increase the performance and cost-effectiveness of the Single-Family Residential market.



MULTIFAMILY PROGRAM

Annual Budget



Implementation
\$1,412,500

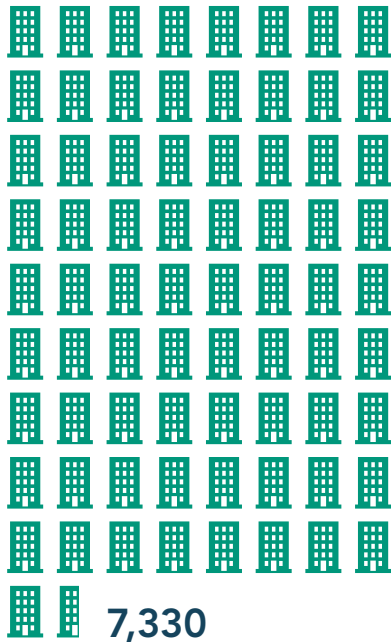
+

Incentives
\$6,823,159

=

Total
\$8,235,659

Multifamily Units Served



189,067
Therms Savings



6,902,890
kWh Savings

Average Energy Savings per Project

21%
Life of Program



32%
2017



\$125,985
Average Incentive
per Project



\$7+ Million
Total Incentives
Since Program
Inception

The Multifamily Program provides audit incentives and retrofit rebates to building owners and managers to promote whole-building upgrades, with an emphasis on driving building improvements in underserved neighborhoods and Disadvantaged Communities.

Building owners can earn Multifamily Program incentives for comprehensive energy efficiency upgrades to qualifying structures of at least four units (although the Program's footprint to date is dominated by medium-sized buildings between 12 and 563 units). Projects must install at least three energy efficiency measures and achieve a minimum 10% improvement over existing conditions.

The SoCalREN Multifamily Program offers a tiered promotion strategy designed to stimulate multi-measure upgrades. The Program was originally developed as a flexible turnkey solution, composed of technical assistance, advanced building audits, program implementation, and construction/installation incentives. While the basic assumptions were sound, over time the Program migrated to an audit-incentive program that did not convert building audits into corrective upgrades. Actual energy savings were weak compared to investment, evidenced by the 2016 Multifamily score of .3 Total Resource Cost calculation (TRC is the process by which the CPUC measures program cost-effectiveness, with a Portfolio-wide goal of 1.00 to 1.25).

In February 2017, the County's Office of Energy + Environment (OEE) launched a series of comprehensive performance assessments, on a program-by-program basis, to identify corrections that would drive down administrative costs and increase energy savings. A resulting series of design adjustments and redesign measures were folded into the original Multifamily Program, incorporating a number of strategies similar to pay-for-performance standards and models. By May 2017, the Program attained a fully subscribed pipeline, and substantial project waitlist. Current year-end calculations demonstrate a 2100% increase in kWh savings in 2017, with a projected Program TRC of 1.25.

2017 Strategic Program Development

Since February 2017, the SoCalREN Program Administrators have assessed additional enhancements to the Program, which will be integrated into the 2018 Rolling Portfolio launch. Also, the Administrators are considering market segmentation strategies, additional targeted marketing tactics, and the potential for a focus on multifamily rental buildings.





WORKFORCE DEVELOPMENT PROGRAM

Annual Budget



Implementation
\$150,000

+

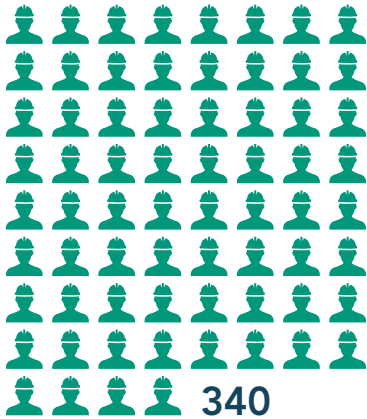
Incentives
\$0

=

Total
\$150,000

Total Enrollment

in Architecture Construction
Engineering Students (ACES)



Participating Schools



8



\$74,768
Internship Dollars Earned
by ACES Students

The Workforce Development Program was launched as a support system to provide training, tools, and opportunity to minority participants across the region, focusing on energy and water efficiency measures and installations. In 2018, the Program looks to work with the CPUC to expand offerings that reflect the State’s future plans to reinvent the “grid,” deploy microgrids, and approach energy efficiency from an integrated approach of distributed generation (with combined measures and technologies, including energy efficiency, renewables, battery storage, electrification of transportation, and automated systems).

The Workforce Development Program was launched in 2014 to drive and generate upstream and downstream impacts through energy sector skills training and certifications for minority participants and focused deployment in underserved areas. The SoCalREN’s key implementer in this initiative, Emerald Cities Collaborative (ECC), serves to facilitate the participation of under-represented individuals and businesses in the energy efficiency sector through workforce and business development and capacity building.

These efforts are leveraged from previous activities to build upon the workforce development infrastructure and alignment, to remove barriers to participation that commonly occur among Disadvantaged Communities, and to support a pathway from pre-apprenticeship training to apprenticeship. The Program also reaches beyond training and apprenticeship, to forge continued capacity building support for small, minority contractors through an E-Contractor Academy Program.

The implementation of the Local Worker Hiring Program (LWHP) for energy efficiency projects awarded by the County of Los Angeles Internal Services Department helps establish the foundation for the expansion of the LWHP within the SoCalREN. Expansion of the LWHP supports a skilled, diverse workforce to deliver greater energy savings, and broadens choice and opportunity among underserved communities and resident workforce.





“ The Program helped us grow to what we are today. We are still researching ways to grow and make a positive impact on our community by continuing to hire a diverse workforce.”

Liz Perez, President of GC Green

To ensure compliance with the LWHP provisions and to report on the inclusion of under-represented individuals performing energy efficiency project work, ECC continues to provide contractor training on how to use LCP Tracker, an online certified payroll system, and share its best practices and strategies for local worker inclusion.

2017 Strategic Program Development

The County's SoCalREN Administrator is working with ECC to identify more aggressive social, economic, employment, and equity goals for this Program. The Program may also diversify stakeholders in the Program, and establish new tangible, measurable, and accountable targets for performance and outcomes with the expectation that the Program is capable of delivering not only direct benefits, but a suite of cascading co-benefits as well (e.g., expanded training with tools and software, education and training in the future design of fully-integrated microgrids, and opportunities in both the private and public sector). Through early discussions with the CPUC, the OEE is exploring the potential to expand the training scope of this Program to anticipate greater employment opportunity not simply in energy efficiency, but in electrification, microgrids, and distributed generation installations and systems.





INTEGRATED COMPREHENSIVE WHOLE BUILDING RETROFITS (PUBLIC AGENCY PROGRAM)

Annual Budget

	Implementation \$3,328,601	+	Incentives \$0	=	Total \$3,328,601
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504
Jobs Created



104
Participating
Agencies

Participating Agencies:

Counties



3

Cities



69

Water Agencies



18

Other Agencies



14



42.5 Million
kWh Savings



1,757
kW Savings



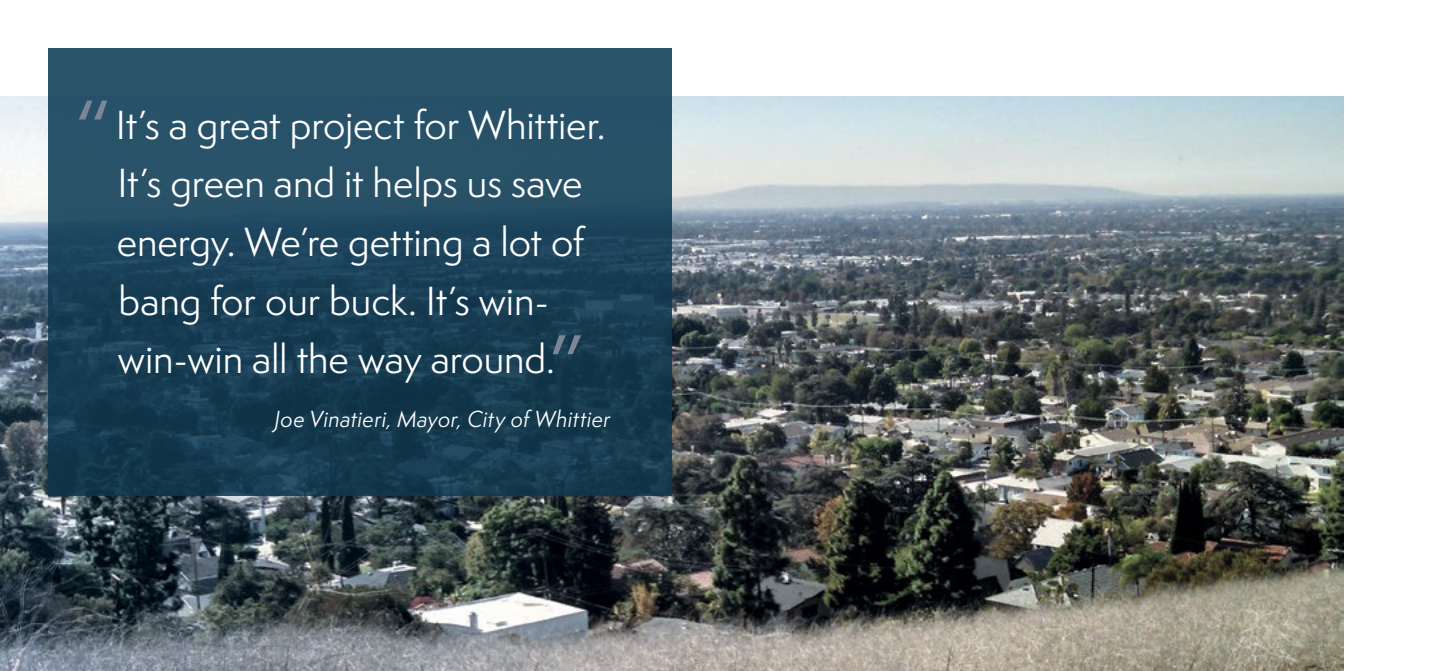
80,417
Therms Savings

The technical support, financial assistance, and project management expertise from start to finish provided to districts and local governments through the SoCalREN Public Agency Program has led to the implementation of 209 energy and/or water efficiency projects in public facilities and sites throughout Southern California. In the 2017 calendar year, the Program exceeded its 2016 performance, serving 102 local governments and districts, completing 100 energy and/or water efficiency projects, and, producing nearly 30 Million kWh in energy savings. Moreover, approximately 60% of the Program's participating cities are underserved and Disadvantaged Communities.

The SoCalREN's Public Agency Program is the first fully-integrated, turnkey program serving public agency, district, and local government facilities and buildings. The Program was designed to fill substantial gaps in existing programs (such as Local Government Partnerships), and to address deep inconsistencies and gaps governments face in the technical, design, implementation and financing resources, and expertise necessary to build and implement meaningful energy efficiency plans for buildings and sites. This offering couples the upgrade program with building performance benchmarking and reporting, and offers a demonstration framework for expansion of energy performance and management reporting. The Public Agency Program was further expanded in 2016, through integration of an Aggregated Regional Procurement element.

The SoCalREN offers customized, comprehensive technical support services to public agencies to enable them to implement deeper and more cost-effective energy upgrades and energy management practices. The Program is now available on a supra-regional basis, with participating





“ It’s a great project for Whittier. It’s green and it helps us save energy. We’re getting a lot of bang for our buck. It’s win-win-win all the way around.”

Joe Vinatieri, Mayor, City of Whittier

facilities throughout 104 cities, counties, water agencies, special districts, and school districts.

More specifically, the Program offers a full spectrum of turnkey services, including:

- Customized guidebooks and templates for energy efficiency measures, tailored for local government needs
- Technical support, featuring a Local Government Needs Assessment Study (whole building approach), building audits, use of energy information (Enterprise Energy Management Information Systems, or EEMIS) and building performance management systems, and remote auditing software tools
- Facilitated procurement processes and best practices
- Enrollment in joint and bulk purchasing, supported by qualified vendor lists
- Direct support in identifying and accessing financing options, including available credits and incentives
- Design/install engineering that leverages aggregated measures to drive down project costs and return economics, and to create building-specific pro-formas that demonstrate advantages of deep retrofit implementation strategies
- Growing resource library of case studies and best practices, supplemented by Program Project studies





RESIDENTIAL MARKETING, EDUCATION, AND OUTREACH

Annual Budget



Implementation
\$1,636,372

+

Incentives
\$0

=

Total
\$1,636,372

Homeowner
Events



13

Local
Community
Events



38



23
Assessment Vouchers
Submitted

Resulting in



9,559
kWh Savings

and



2,165
Therms Savings

The Residential Marketing and Outreach Program informs property owners, building contractors, and other stakeholders about the SoCalREN's energy efficiency offerings, using direct outreach, events, and a variety of media tools.

Marketing, Education, and Outreach (ME&O) is an essential component of nearly all CPUC Energy Efficiency Programs. Under the SoCalREN portfolio, there are several ME&O tracks, including one uniquely designed to promote both Single-family and Multifamily (Residential) SoCalREN programs.

Residential ME&O includes:

- Engagement and Facilitation Events (key stakeholders, working groups)
- Community Events and Outreach, including tabling opportunities at regional conferences, home shows, and forums
- Home Upgrade Advisor and Call Center
- Stakeholder Newsletter
- Social Media and Websites
- Special Promotions and Municipal Partnerships
- Marketing tools such as vouchers, coupons, and competitions (Marketing Champions)

ME&O programs are traditionally classified as non-resource programs, activities that do not result in specific and measurable energy savings. Instead, ME&O has been conventionally designed and implemented to raise awareness and influence behavior.

Beginning in 2018, the SoCalREN will allocate certain ME&O funding for deployment of greater analytics that will identify probability, compatibility, and capability targets. Our goal is to evolve ME&O from awareness-building to a call-to-action agenda, by piloting tactics and strategies that can be measured and reliably linked to retrofits and upgrades, and to define circumstances where ME&O might be measured as a quasi-resource activity. This is a modal shift from the opportunistic to the strategic.





LOW-INCOME SINGLE-FAMILY PROGRAM

Annual Budget



Implementation
\$350,000

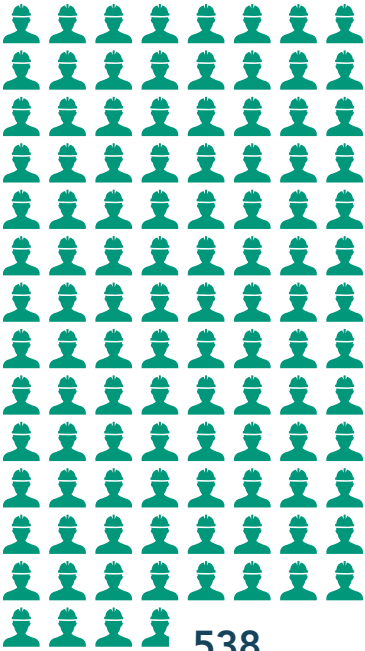
+

Incentives
\$0

=

Total
\$350,000

Contractors Trained



Presented to



25
Attendees

at the Community Development Block
Grant county-wide rehabilitation program.



32,000
Prospective Applicants
Educated on the Program

This Low-Income Single-Family Program educates Community Development Commission participants about home energy efficiency opportunities and trains contractors who work with low-income homeowners.

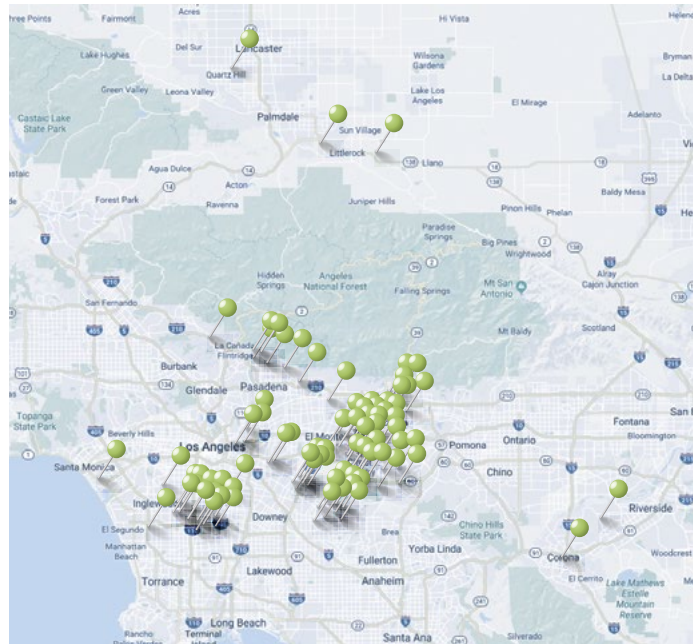
The Low-Income Single-Family retrofit program works primarily with the Community Development Commission (CDC) of the County of Los Angeles to develop and implement business processes that connect CDC participants with Energy Upgrade California® Home Upgrade incentives and high-quality Participating Contractors. The program educates potential participants and coordinates requirements. In 2016, the Program expanded to coordinate with additional local governments within the SoCalREN coverage area.

Another objective of the Program is to educate and train residential building retrofit and rehabilitation contractors from the CPUC Home Upgrade Program and cross-leverage their training and capacities to programs that serve low-income homeowners. Dual program training is expected to lead to the same comprehensive upgrades in low-income homes that occur in standard Home Upgrade residences.

2017 Strategic Program Development

Program objectives may be more fully served through certain strategic adjustments. For example, the County's

SoCalREN Administrator is working to assess whether more robust outcomes can be realized through leveraging of this Program with the Workforce Development Program, to expand the eligible building stock for Low-Income Multifamily Buildings, and to cross-leverage this offering with other federal and local incentive and grant programs focused on Disadvantaged Communities. In addition, the SoCalREN Administrator will seek opportunities to supplement County affordable housing initiatives with options under this Program to promote healthy homes and reduced utility costs.





COMMERCIAL PACE

Annual Budget



Implementation
\$705,750

+

Incentives
\$0

=

Total
\$705,750



\$24.6+ Million
Financing



3.5 Million
kWh Savings



1.3 Million
Square Feet of Improved Space



5.5 Million
Gallons of Water Saved

SoCalREN promotes alternative financing mechanisms, including Commercial PACE (Property Assessed Clean Energy), to stimulate a wider, regional footprint for energy and water efficiency, renewable energy, automated building performance systems, and other measures in the commercial building sector. PACE provides a source of financing, secured by bonds, which is payable over the useful life of the building energy improvements, as a separate line item on Los Angeles County property tax rolls.

In 2017, the OEE commissioned an independent assessment of the County's Commercial PACE Program, together with a comparative analysis against state and national Commercial PACE Programs. These efforts focus on remedies and program design cures with the potential to invigorate Commercial PACE as a retrofit financing option and to capture presently stranded energy savings opportunities.

The Commercial PACE Program serves a class of eligible properties which includes commercial, industrial, agricultural, non-profit, and multifamily buildings with five or more units. Commercial PACE is available in 87 out of 88 incorporated cities, and all unincorporated regions in the County of Los Angeles.

Since active implementation began in 2013, the Commercial PACE mechanism has been used to fund nearly \$25 Million in comprehensive building retrofits. Notwithstanding strong early interest and uptake, Commercial PACE Programs in the County and across the nation yield modest outcomes. In general, the current County

of Los Angeles Commercial PACE option is not competitive compared with other available forms of financing for commercial building owners, and the process is overly-complex and time-consuming. The model does, however, have clear advantages. For example, the PACE assessment is not carried on the books as debt, but as an operating expense, and can mitigate the split incentive tension in commercial and residential rental properties.¹



¹ The “split incentive” challenge arises where building owners are responsible for the cost of building improvements that benefit commercial and residential customers (such as energy efficiency retrofits), but the tenants uniquely benefit, e.g., in the form of lower energy costs.



2017 Strategic Program Development

During 2017, the OEE worked to identify and mitigate program and market barriers, and also launched efforts to develop deeper, more active regional relationships that might serve as a demonstration model for neutralizing defects in the conventional Commercial PACE model:

1. The County commissioned a third-party assessment of the Commercial PACE Program, with the goal of identifying administrative, programmatic, financial, marketing, contractor, and technical barriers that prevent more dynamic uptake. In brief, stronger uptake of the Program is hindered primarily by high transaction and debt-service costs, an overly-bureaucratic and time-consuming process, and disproportionate impact on operating costs without clear identification of counter-balance benefits.
2. Recommendations have been developed, beginning with organizational alignment, to mitigate or overcome barriers. These include folding the County's community-facing energy programs (including PACE) under a joint powers authority, streamlining and/or removing direct bonding obligations, building specialized training and resources for participating contractors, and enrolling PACE Projects on an aggregation (rather than a single project) basis.

3. The SoCalREN expanded the regional relationships pilot (with the San Gabriel Valley Council of Governments) to engage more jurisdictions. Direct outreach was performed to specific end-user groups (e.g., commercial building owners and managers, and investment/banking interests) along with leveraging parallel programs administered by the OEE.

Assuming implementation of the above recommendations, as well as other design adjustments and cross-leveraging opportunities, goals for 2018 include:

- Create a resources library and toolkit for commercial contractors
- Establish alternative external bonding options
- Develop an aggregation subscription system
- Launch mid-stream optimization offerings (joint procurement of equipment to gain economies-of-scale discounts)
- Cross-cut data collection with the AB 802 and U.S. Department of Energy benchmarking/market project
- Work with lending institutions to pilot PACE as part of the commercial capital stack, focused on energy efficiency retrofits and retrocommissioning





CONTRACTOR OUTREACH AND TRAINING PROGRAM

Annual Budget

	Implementation \$507,125	+	Incentives \$0	=	Total \$507,125
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\$502,992

Matching Funds
Disbursed to Contractors
for Co-Op Marketing



490

Energy Efficiency Field Kits
Distributed to Contractors

Contractors Trained



129

One-on-One Training Sessions



61

The Contractor Outreach and Training Program facilitates contractor professional development through enrollment and participation in the SoCalREN portfolio of programs with a comprehensive menu of training opportunities supported by technical and marketing resources.

The SoCalREN Contractor Outreach and Training Program was developed out of pre-2013 County projects financed under the U.S. Department of Energy’s Better Buildings Program and the Energy Efficiency Community Block Grant Program, and was subsequently expanded to integrate contractor training and enrollment in the CPUC’s Energy Upgrade California Home Upgrade program.

In addition to training and program recruitment, the SoCalREN Contractor slate includes marketing and outreach support—from promotions, collateral, and Program data and information, to training on energy efficiency messaging and outreach to the public. The Program includes an HVAC component, which offers project incentives, contractor events and networking, special marketing channels and resources for contractors, specialized training, and distribution of Energy Efficiency Field Kits to Participating Contractors. In addition, the SoCalREN hosts training and mentoring opportunities that support contractors in broadening their business models to include other energy offerings such as PACE.

SoCalREN maintains a strong network of Energy Upgrade California Home Upgrade Participating Contractors registered through the SoCalREN Contractor Portal. Account

Managers and Administrators provided education on energy efficiency upgrades so that contractors can deliver clear, actionable information to customers. Contractor outreach and training supports each single-family program, and every program supports the same contractor pool.

Throughout 2017, the County’s SoCalREN Program Administrator engaged a number of local/regional workforce development, training, and economic, jobs, and technical stimulus institutions to facilitate the transition of Program funds to performance measures and strategies that are measurable and provide improved results.





REGIONAL ENERGY PROJECT AND CLIMATE/ENERGY PLANNING PROGRAM

Annual Budget



Implementation
\$395,120

+

Incentives
\$0

=

Total
\$395,120



Processed dataset
of more than
27,000,000
addresses.



Database server that hosts
and processes over
1 billion
records.

Aggregated utility consumption data by:

Neighborhoods



335

Cities



225

Councils of Governments



6

Counties



7

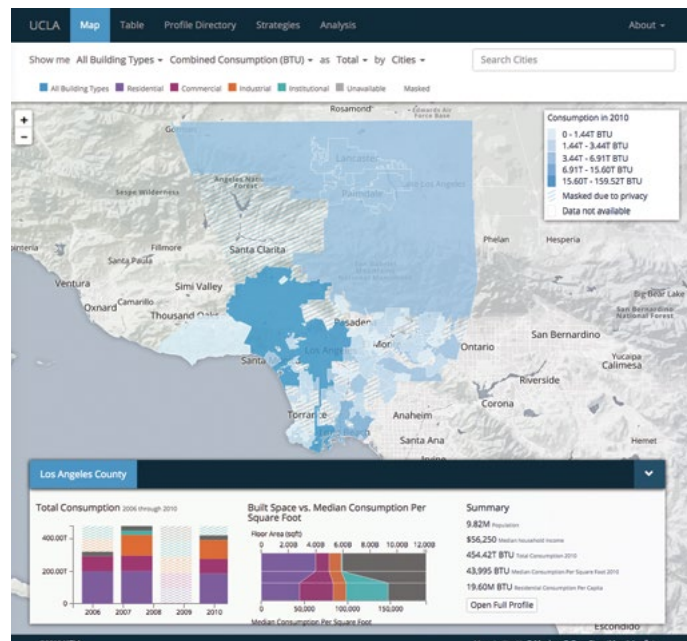
The SoCalREN Portfolio originated and funded a unique and innovative software system—the Los Angeles Energy Atlas—that not only measures energy use and intensity, but is also capable of downscaling from County to neighborhood levels. The Energy Atlas is also designed to cross-link with other information systems to produce energy profiles that support targeted, effective energy efficiency strategies and programs, performance over time, and reliable analysis and reporting.

The Regional Energy Project and Climate/Energy Planning Program was initially developed through the County's ARRA-funded energy programs and formally launched under the SoCalREN's original 2013-2014 Energy Efficiency Portfolio (filed August 2012) in a collaboration with the California Center for Sustainable Communities (CCSC) of the University of California, Los Angeles (UCLA). After two years of data collection and input, the Program produced the Los Angeles Energy Atlas, one of the largest disaggregated sources of building energy data available in the nation.

This innovative software resource was designed to incorporate a wide number of geographic and political data in order to better understand relationships and human drivers of energy use and energy efficiency adoption.

Currently, the Energy Atlas tracks approximately 35 million accounts, mapping energy consumption via kWh, therms, BTUs, as well as associated greenhouse gas (GHG) emissions. In addition to the SoCalREN, users include:

- Individual cities, districts, and offices
- Regional Assembly and Senate offices
- Private-sector consultants
- Academic institutions
- State agencies such as the Strategic Growth Council and the California Energy Commission



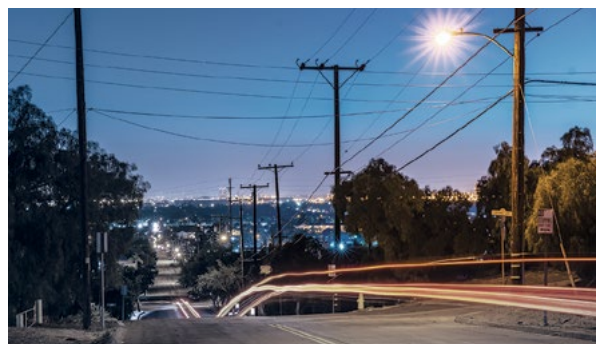
- The Governor’s Office of Planning and Research
- Councils of Governments (COGs)
- Transportation and congestion management districts
- The Air Quality Management District (AQMD)
- Non-profit institutions

The interactive website currently displays building energy consumption at the neighborhood, city, COG, and L.A. County levels from 2006–2010. In 2016, the CCSC expanded Energy Atlas coverage beyond Los Angeles County to include six additional counties in Southern California, and also updated years of available energy data from 2011–2014. We are currently working to update and standardize reporting protocols across the full service territory through 2015.

Customer-level energy consumption data links to parcel data, census information, L.A. County rooftop solar potential data, CalEnviroScreen 2.0, and other relevant data sources. The Energy Atlas displays energy consumption and related characteristics across time and geography to better enable

decision makers and stakeholders to view energy consumption and conservation strategies. The Energy Atlas includes a map display of L.A. County energy consumption, profiles of energy consumption based on geography, analysis, and strategies for conservation and efficiency. Energy Atlas data also contributes to ongoing research efforts spanning utility grid vulnerabilities, questions of energy efficiency, and advanced energy communities within the County of Los Angeles.

Based on the diverse applications, utility, and reliability of the Energy Atlas, a coalition of local government stakeholders presented a statewide administration model application to the CPUC, predicated upon expansion of the Energy Atlas to capture energy consumption data across the State. The SoCalREN is also working with CCSC to develop a broader 2.0 data field repository that can be used to project and assess impacts of geographic and land development profiles, electrification, and energy efficiency resiliency planning. Among other uses, Energy Atlas 2.0 data diversification and analytics offer a support-spectrum—primarily to the energy sector but also potentially serving cross-cutting sectors—to the County’s Regional Sustainability Master Plan.

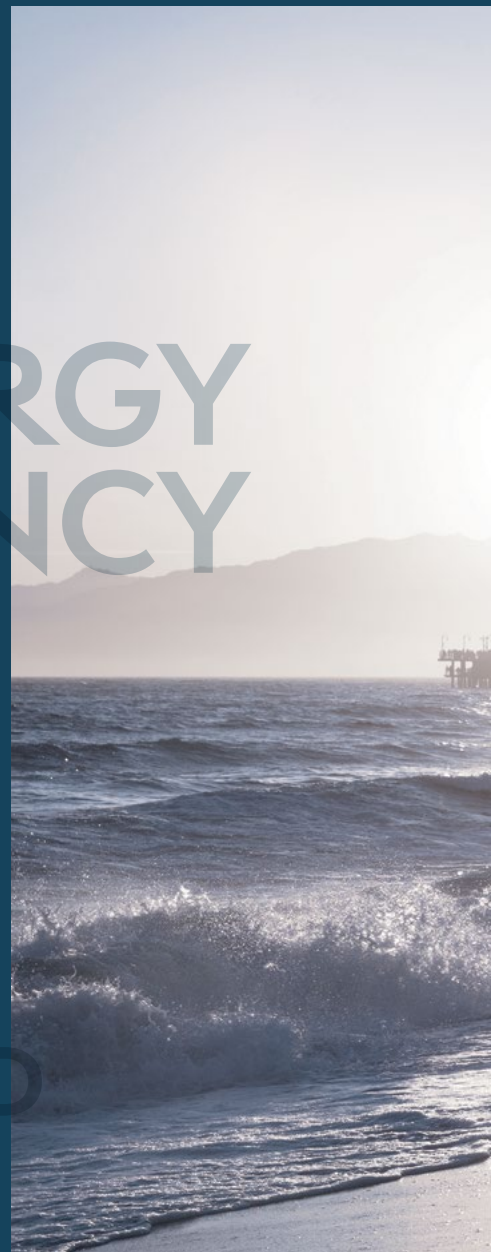




SUCCESS STORIES

ENERGY
EFFICIENCY

SERVING
DISADVANTAGED
COMMUNITIES



UPGRADED GOVERNMENT BUILDINGS



ENERGY
MANAGEMENT
SYSTEMS

TRAINING
AND
JOBS

REDUCING
ENERGY USE



SUCCESS STORY: CITY OF CLAREMONT



Established **1887**



Incorporated **1907**



Population **36,059**



Area (Sq. Mi.) **14.14**



County of
Los Angeles
Supervisor
District **1st District**



Collectively, the projects completed to date have resulted in more than:



\$40,000+
Annual Cost Savings



380,000 kWh
Annual Energy Savings



We have avoided **90+** metric tons of CO₂ (GHG reduction),

which is equivalent to taking **20** cars off the road.



The City of Claremont enrolled in the SoCalREN Public Agency Program in late 2014, acknowledging a commitment to work with strategic partners to achieve energy reduction targets outlined in their City Sustainability Plan. Having already established a vision for community leadership, the City was ready to take action to identify and implement energy efficiency projects. The SoCalREN provided the City with the tools and expertise needed to get the job done.

Just this year, the City of Claremont completed two efficiency projects leveraging the SoCalREN's services, including:

- A city-wide LED streetlight retrofit
- Exterior lighting retrofits at several high-use community facilities such as the Alexander Hughes Community Center, Youth Activity Center, Taylor Reception Hall, Police Department, and Metrolink Station (pictured below)

For these and all energy efficiency projects the City of Claremont will enjoy enhanced utility incentives for energy savings achieved, due to their participation in the San Gabriel Valley Energy Wise Partnership. The dedicated project management and technical expertise provided by the SoCalREN have complemented Partnership offerings to drive implementation of smart energy strategies, and the results are winning praise from city staff and community members alike.

According to the project leads within the City, improved nighttime visibility is a widely recognized benefit by residents in areas where LED streetlight retrofits have

occurred. Staff working late and early shifts at multiple City facilities have also reported positive feedback after completion of outdoor area lighting upgrades.

The City will enjoy additional operational benefits from improved illumination, such as greater reliability from LED technologies and reduced maintenance. For years to come, completed projects will continue to help the City save on energy costs while progressing toward its greenhouse gas reduction goal. The City team has commented that these lighting retrofits have paved the way for more complex projects, and they would like the SoCalREN's assistance to conduct deeper evaluation of individual facilities, including City Hall, to identify additional energy saving opportunities.





SUCCESS STORY: CITY OF CULVER CITY



Incorporated **1917**



Population **39,364**



Area (Sq. Mi.) **5.14**



County of
Los Angeles
Supervisor
District **2nd District**



Collectively, the projects completed to date have resulted in more than:



\$140,000+
Annual Cost Savings



27
Jobs Created



1 Million kWh
Annual Energy Savings



32,800
Therms Annual Savings



We have avoided **300+** metric tons of CO₂ (GHG reduction),

which is equivalent to taking **65** cars off the road.



As one of the first agencies to enroll in the SoCalREN Public Agency Program in 2013, the City of Culver City has shown consistent leadership and a commitment to energy efficiency by implementing a variety of lighting and mechanical projects.

The City has completed 14 projects to date including:

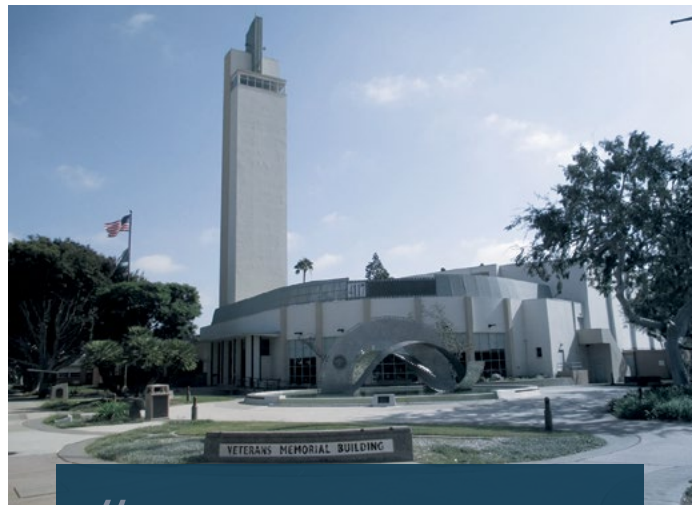
- A boiler replacement at The Culver City Municipal Plunge (aquatic center)
- LED lighting retrofits and the installation of an Energy Management System (EMS) at the Police Department, City Hall, Veterans Memorial building, Senior Center, and Transportation Center
- Optimization of HVAC equipment at the Police Department and City Hall
- More than 1,400 streetlights have been replaced throughout the City

The EMS is designed to reduce energy consumption and improve reliability through optimization of heating and cooling systems at these facilities. This project has been highly anticipated by City maintenance staff who, in the past, were constantly running to various buildings in an attempt to monitor and control HVAC equipment. They can now adjust systems remotely through a central dashboard.

The City has further demonstrated leadership through participation in the Westside Cities Partnership, which earns them additional incentive payments through utility programs for energy savings

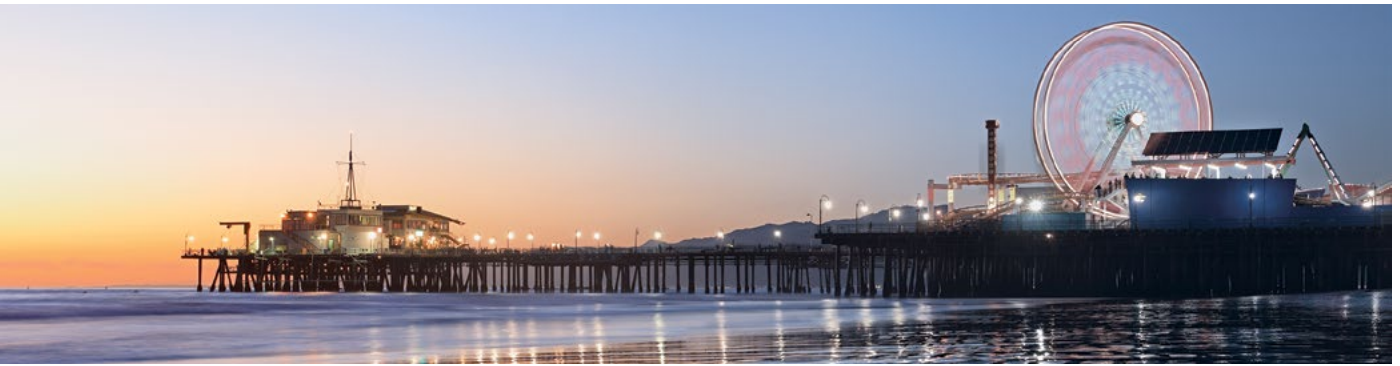
achieved. Looking to the future, the City is taking a holistic approach to developing their energy efficiency strategy.

Through action, the City has shown commitment to being environmental stewards of their community. The SoCalREN is proud to provide continued support to their dedicated team.



“ [W]e would have not gotten this far this fast in such a cost-effective manner without SoCalREN’s guidance and technical assistance every step of the way. . . . [T]he SoCalREN Public Agency Program is a fantastic program to assist local governments in energy efficiency that will pay dividends for years to come. ”

Charles Herbertson, Public Works Director/City Engineer, Culver City



SUCCESS STORY: CITY OF SANTA MONICA



Established **1769**



Incorporated **1886**



Population **92,478**



Area (Sq. Mi.) **8.42**



County of
Los Angeles
Supervisor
District **3rd District**



Collectively, the projects completed to date have resulted in more than:



\$166,420
Annual Cost Savings



10
Jobs Created



1.5 Million
kWh Annual Energy Savings



We have avoided **400** metric tons of CO₂ (GHG reduction),

which is equivalent to taking
86 cars off the road.



Santa Monica has long championed innovative sustainable leadership, adopting aggressive goals for reducing energy and water resource consumption and increasing efficiency, as well as increasing citywide use of renewable energy and alternative fuels. Since the City's enrollment in the SoCalREN in 2013, the Program has worked with the City to support their aggressive energy reduction goals through multiple energy efficiency projects.

The projects identified through the technical services offered by the SoCalREN include:

- Mechanical project optimizing parking garage exhaust system at the Ken Edwards Center
- Interior LED lighting retrofit at the Big Blue Bus facility
- City-wide LED street lighting retrofits
- Underwater and outdoor lighting improvements at the Santa Monica Swim Center
- LED lighting upgrade projects currently planned for beach parking lots, various public parking structures, and public parks

By implementing these projects, the City is benefiting through reduced maintenance and operating costs. In addition, increasing the quality of street, parking and park lighting can lead to improved safety and reduction in crime.

The savings generated from projects implemented by the City were instrumental in assisting Santa Monica in achieving the

Platinum level within the Westside Cities Energy Leader Partnership. Santa Monica was recognized for reducing overall municipal energy use by 20% since 2006. On the horizon, the City has the goal of retrofitting their library to achieve zero net energy, and is also currently pursuing 12 additional lighting projects at beaches, parks, and parking structures, with expected annual savings of 1.1 million kWh and nearly \$150,000 in energy costs.

Since enrolling in the Program and completing several projects, the community has reached out and expressed their positive feedback relating to the improved lighting quality provided by the new LED street light fixtures. Community members expressed that they can "see more" and feel safer due to the quality of light from new fixtures.





SUCCESS STORY: CITY OF LONG BEACH



Incorporated **1897**



Population **470,130**



Area (Sq. Mi.) **50.32**



County of
Los Angeles
Supervisor
District **4th District**



Collectively, the projects completed to date have resulted in more than:



125
Jobs Created



\$1.2 million
Annual Cost Savings



8.6 Million kWh
Annual Energy Savings



We will save **\$15 Million** over the life of the street lights.



We have avoided **2,000** metric tons of CO₂ (GHG reduction),

which is equivalent to taking **400** cars off the road.



Since enrolling in the SoCalREN Public Agency Program in 2013, the City of Long Beach has taken great strides to move toward energy-efficient solutions that are more resilient and ultimately better for the health of the economy and its residents.

The City recognizes that clean energy and energy efficiency not only mean reducing energy consumption, but also protecting the environment, fostering a safe community, saving money, and improving public health. Working in partnership with the SoCalREN, Long Beach has identified significant opportunities for reducing energy use by focusing on street, parking lot, and park lighting at several facilities. Impressively, the street lighting project is the fourth largest street lighting retrofit on the West Coast.

- Removal of High Pressure Sodium (HPS) streetlights and replacement with LEDs
- Updates to a total of more than 25,000 street lights throughout the City
- Improved lighting around the City and at key locations such as the Airport Parking and multiple beach parking lots
- Upgrades to both standard cobra head streetlights and decorative fixtures

A small portion of the street lights were funded by a Long Beach Port Mitigation Grant, and the remaining streetlights were funded by incentives and 0% interest loans from the local electric utility. Through the City's participation in the Energy Leader

Partnership, they were able to secure enhanced incentives to cover a significant portion of the project cost.

The street light projects have contributed to the City of Long Beach's goal of reducing greenhouse gas emissions, but have also played a major part in improving overall community safety. The Long Beach Police Department will benefit from the ability to install adjustable controls on the new LED lights, unlike the old high pressure sodium lights. This will allow the Department to manage and increase the lighting remotely as needed. This, in turn, will increase the effectiveness of the Police Department and contribute to public safety.





SUCCESS STORY: CITY OF PALMDALE



Established **1886**



Incorporated **1962**



Population **157,356**



Area (Sq. Mi.) **106.21**



County of Los Angeles
Supervisor District **5th District**



Collectively, the projects completed to date have resulted in more than:



\$151,759
Annual Cost Savings



29%
Energy Reduction



1.3 Million kWh
Annual Energy Savings



20
Jobs Created



We have avoided **325** metric tons of CO₂ (GHG reduction),

which is equivalent to taking **69** cars off the road.



The City of Palmdale has made significant progress in its quest to become more energy-efficient since joining SoCalREN four years ago. The positive impact of its energy efficiency work with the Public Agency Program cannot be understated, and has benefited the City and community in multiple aspects including annual energy cost savings, improved outdoor environment and health, and increased safety.

The City has completed four projects:

- A two-phase LED street lighting retrofit project
- An exterior lighting retrofit project at three parks
- A mechanical project at six community swimming pools
- An interior lighting project at four facilities

Each project benefits Palmdale in a unique way. The park lighting retrofit project created a safer climate for park visitors and the lighting project at four facilities improved lighting quality for indoor users.

The street lighting upgrade project provided immediate energy and cost savings. In fact, the City was so pleased that it will be working with the Program to upgrade an additional 17,000 street lights, leveraging assistance to apply for and track incentives and On-Bill Financing, in addition to project management support.

Thanks to new variable frequency drives (VFDs) installed as part of the mechanical project at six community swimming pools, the City was able to develop a controls

strategy, allowing it to meet required water turnover rates for public pools while still realizing energy savings.

Throughout its experience with the Program, the City has commented that it sees the project team as an extension of its staff. This successful collaboration has caught attention beyond the City, as Palmdale was recently awarded the 2017 “Best Use of Technology” accolade from the High Desert Branch of the American Public Works Association (APWA) for the lighting and mechanical projects described above.

“ With our limited staff, the projects wouldn’t have happened without the SoCalREN Public Agency Program’s help.”

Ben Lucha, Environmental and Technology Manager, City of Palmdale





SUCCESS STORY: CITY OF SANTA BARBARA



Established **1782**



Incorporated **1850**



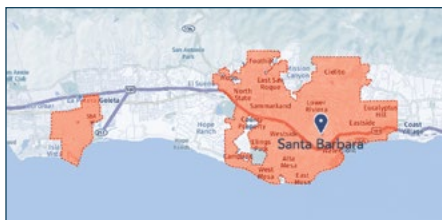
Population **91,930**



Area (Sq. Mi.) **19.49**



Location **County of Santa Barbara**



Collectively, the projects completed to date have resulted in more than:



\$80,000
Annual Cost Savings



700,000
kWh Annual Energy Savings



We have avoided **512** metric tons of CO₂ (GHG reduction),

which is equivalent to taking **110** cars off the road.



The City of Santa Barbara enrolled in the SoCalREN Public Agency Program in June of 2014. Since this time, the City has been able to steadily increase both the number and the complexity of energy efficiency projects.

After implementing a series of smaller lighting projects as a proof of concept, the City enthusiastically moved forward with several complex parking garage and street lighting projects that have resulted in tremendous energy and cost savings. Building upon this success, the City has agreed to expedite existing efficiency plans and engage new departments in an effort to advance toward aggressive energy saving goals recently set by the City Council.

During 2017, the City completed eight projects that include:

- A variety of street lighting updates
- Lighting retrofits at the Santa Barbara Municipal Tennis Center
- Parking garage lighting retrofits at Downtown/Civic Center
- Exterior lighting retrofit at the Cater Municipal Water Treatment Plant

As the Program's partnership with the agency continues to expand, additional support for the City's water and community services departments, specifically targeting water system pumping and other operational efficiencies, are currently being targeted for the near future.

Since enrolling in SoCalREN, the City of Santa Barbara has implemented projects that have provided the community with safer street lighting, better living conditions, and improved operations and maintenance. The City has found great value in participating in the SoCalREN Public Agency Program which is easily identifiable by their committed actions toward being environmental stewards of their community.





SUCCESS STORY: CONEJO VALLEY UNIFIED SCHOOL DISTRICT



Established **1974**



Location **County of Ventura**



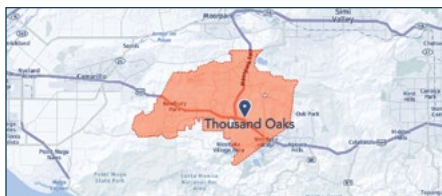
Superintendent **Mark W. McLaughlin, Ed.D.**



Students **18,900**



District Offices **Thousand Oaks**



Collectively, the projects completed to date have resulted in more than:



\$437,500
Annual Cost Savings



55
Jobs Created



3.6 Million
kWh Annual Energy Savings



We have avoided **945** metric tons of CO₂ (GHG reduction), which is equivalent to taking **202** cars off the road.



After enrolling in late 2013, the Conejo Valley Unified School District (CVUSD) worked alongside the SoCalREN Public Agency Program to identify and implement several energy efficiency projects.

CVUSD is benefiting from the positive impacts these energy efficiency projects have had on their facilities, as well as the people who inhabit them—including the nearly 19,000 students currently enrolled. By implementing efficiency upgrades, the District models smart energy behaviors while creating a learning environment where students and teachers can thrive.

CVUSD relied on the expertise of SoCalREN to help them identify qualifying measures and secure funding allocated by Proposition 39, a State program to fund energy efficiency improvements in California schools. CVUSD has chosen to pursue an even broader efficiency goal, implementing projects beyond their Proposition 39 allocation. Completed and planned projects throughout the District include:

- A range of mechanical and lighting projects at five different CVUSD campuses
- Central plant replacements at Los Cerritos Middle School and Thousand Oaks High School

At the Middle School, the 45-year-old system is inefficient and unable to meet the comfort needs of students and staff. Most system components will be replaced, including the boilers, chillers, and energy management system (EMS). The end result

will be a more efficient system that reduces the need for maintenance and emergency repairs, and more comfortable buildings that provide a better learning environment.

The District has commented that the Program has assisted in ways they never imagined possible.

“ [T]hey have exceeded all my expectations and then some. They have become not only an integral component of our energy management team, but an extremely valuable asset to the school district as well. Their level of expertise and professionalism has been unsurpassed. . . . They have done significant amounts of work on our behalf that has resulted in substantial savings of both energy and money. ”

*Rick Freed,
Energy Educator/Manager, CVUSD*





SUCCESS STORY: CUCAMONGA VALLEY WATER DISTRICT



Established **1955**



Serves (Customers) **190,000**



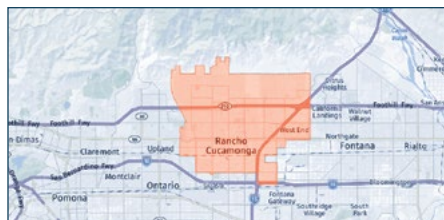
Location **County of San Bernardino**



District Offices **Rancho Cucamonga**



Service Area (Sq. Mi.) **42**



Collectively, the projects completed to date have resulted in more than:



\$158,000
Utility Incentives



1.7 Million
kWh Annual Energy Savings



We have avoided **1,321** metric tons of CO₂ (GHG reduction),

which is equivalent to taking **283** cars off the road.



Cucamonga Valley Water District (CVWD) has been able to achieve significant levels of energy savings since enrolling with the SoCalREN Public Agency Program in October of 2014. CVWD is a retail water provider serving City of Rancho Cucamonga, portions of the cities of Upland, Ontario and Fontana, and some unincorporated areas of San Bernardino County.

In taking action to complete a total of nine energy efficiency projects, the resulting environmental impacts are an influential catalyst that inspires other similar agencies to take action to move their communities into a greener and healthier direction. Through SoCalREN, CVWD is serving their community with shared benefits such as greater service reliability, reduced energy costs, and reduced greenhouse gas emissions.

CVWD accomplished an unparalleled level of energy savings and significantly reduced operational budgets by leveraging services through a partnership created between the SoCalREN and Water Infrastructure System Efficiency (WISSETM), a Southern California Edison third-party program. By leveraging multiple programs to incorporate energy efficiency improvements within their facilities, the upgrades were completed in only nine months from start to finish.

The projects included water pumping upgrades and sequencing optimization of 47 booster pumps and nine well pumps located throughout the CVWD water distribution system.

The procurement and construction approach used in the pump upgrades project is now being replicated at other water agencies with similar projects with support from the SoCalREN.



“ The SoCalREN Public Agency Program provided engineering services, project management, and the resources needed to streamline CVWD’s energy efficiency projects from start to finish. ”

*Mike Maestas,
Water Production Manager, CVWD*

ROLLING PORTFOLIO KEY OBJECTIVES



The SoCalREN used the 2017 calendar year to make administrative, programmatic, and operational changes designed to reform the Portfolio toward aggressive goals and energy savings.

As earlier noted, we phased out programs and program elements that had either fully realized objectives or, in the alternative, did not demonstrate credible potential to reach certain goals. In addition, we fundamentally changed the administration and management of the Portfolio, even to the extent of releasing an implementer of several programs. The County's Office of Energy + Environment has taken a direct role in day-to-day oversight and direction, and now works closely with productive and effective implementers. Together with these high-performing implementers, and supported by deeper collaboration with the incumbent regional Investor-Owned Utilities (Southern California Edison and SoCalGas), the Portfolio has realized geometric improvement and delivery.

Based on positive outcomes from its 2017 pivot to a performance-based Portfolio, the SoCalREN has developed a number of additional (but not exclusive or exhaustive) strategies to further establish it as a reliable, inventive, generative *and* cost-effective Program Administrator. The SoCalREN is determined to meet the rigor and maturity necessary to attain permanent Program Administrator status. To this end, the SoCalREN has mapped a number of 2018 Objectives and Strategies:



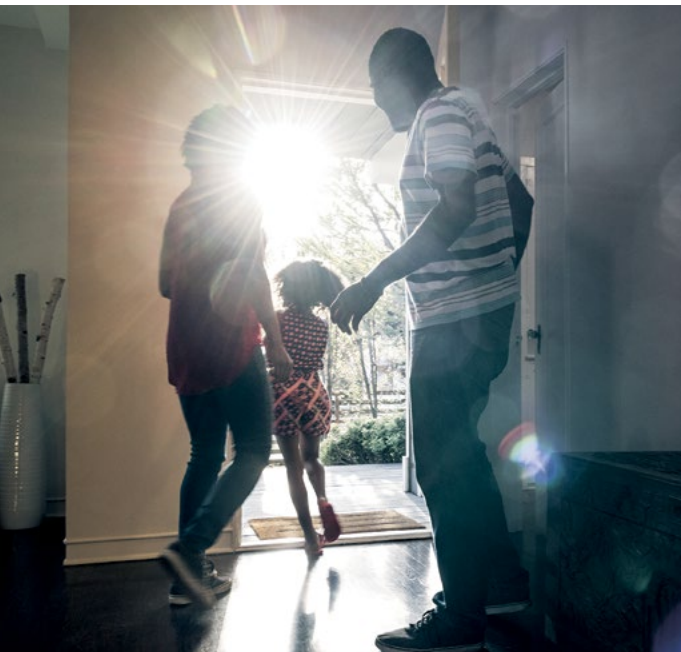
Objectives

Subject to final CPUC approval of its Business Plan and implementation proposals, in 2018 the SoCalREN will:

- Execute additional improvements to the Multifamily Program, to induce even greater productivity and return in energy savings
- Pilot model(s) that address market barriers in the Single-Family sector, including funding mechanisms
- Engage strategies (e.g., funding mechanisms, outreach, resource development) to expand whole-building retrofits among government agency facilities and sites
- Expand training and education—especially within underserved communities—to better reflect the integrated grid now under proceeding at the CPUC, i.e., integrating energy efficiency, renewables, storage, electrification, building analytics, and assessments
- Reshape and rework conventional approaches to Marketing, Education, and Outreach from awareness-building programs to market identification, market indicators, and calls-to-action
- Continue and expand leveraged funds and efforts, with a focus on Disadvantaged Communities and healthy housing
- Coordinate with other Energy-Sector Administrators, such as Los Angeles Department of Water and Power (LADWP), and regional Community Choice Energy (CCE) Authorities
- Continue active representation in regulatory and legislative proceedings

Programmatic and Operational Strategies

- Alternative scenario-building with the CPUC
- Longer-term contracts and resolution of gaps in contracting
- Greater emphasis on three-dimensional integration
 - Cross-cutting within the Portfolio
 - Cross-leveraging with other partners (CCE, LADWP, incumbent utilities)
 - Increased funding leverage (e.g., other State and national agencies)
- Continued process toward streamlined programs
- Shift to third-party program innovative solicitations (such as Requests for Abstracts)
- Increased emphasis on pay-for-performance programs
- Expanded relationships with relevant technical and professional associations
- Emphasis on strong new brand
 - Cohesive website for SoCalREN in 2018—all programs in one place for improved customer experience
 - Streamlined brand applied to all programs
 - Improved social media presence in 2018—all programs, not just residential
 - Restructure marketing plans to define indicators, identify target customers, and align incentives with end-user priorities





APPENDICES

EFFICIENCY

BENCHMARKING

REDUCE



SUSTAINABILITY

UPGRADES

SOLUTIONS

BENEFITS

IMPROVEMENTS



APPENDICES: 2016 ANNUAL REPORT

Table 1. Electricity and Natural Gas Savings and Demand Reduction (Gross)

Annual Results	2016 Installed Savings ^[1]	CPUC 2016 Adopted Goals (D.15-10-028)	% of Goals (2016)
2016 Energy Savings (GWh) – Annual			
PG&E			
SCE			
SDG&E			
SCG			
MCE			
BayREN			
SoCalREN	0.867	4.622	19%
TOTAL Energy Savings (GWh) - Annual	0.867	4.622	19%
2016 Energy Savings (GWh) – Lifecycle^[2]			
PG&E			
SCE			
SDG&E			
SCG			
MCE			
BayREN			
SoCalREN	n/a	n/a	n/a
TOTAL Energy Savings (GWh) – Lifecycle	n/a	n/a	n/a
2016 Natural Gas Savings (MMth) – Annual			
PG&E			
SCE			
SDG&E			
SCG			
MCE			
BayREN			
SoCalREN	0.059	0.230	26%
TOTAL Natural Gas Savings (MMth) – Annual	0.059	0.230	26%

Annual Results	2016 Installed Savings ^[1]	CPUC 2016 Adopted Goals (D.15-10-028)	% of Goals (2016)
<i>2016 Natural Gas Savings (MMth) – Lifecycle</i>			
PG&E			
SCE			
SDG&E			
SCG			
MCE			
BayREN			
SoCalREN	n/a	n/a	n/a
TOTAL Natural Gas Savings (MMth) – Lifecycle	n/a	n/a	n/a
<i>2016 Peak Demand savings (MW)</i>			
PG&E			
SCE			
SDG&E			
SCG			
MCE			
BayREN			
SoCalREN	0.921	3.536	26%
TOTAL Peak Demand savings (MW)	0.921	3.536	26%

[1] Installed savings are from two resource programs: Multi-Family and Single-Family.

[2] Lifecycle goals not given in D. 15-10-028

**Table 3. 2016 Expenditures
(including expenditures on past cycle commitments paid in 2016)**

2016 Expenditures[1]	Administrative Cost		
	Non-IOU Implementer		
	10-12 Committed Funds Expenditures	13-15 Committed Funds Expenditures	2016 Expenditures from 2016 Budget
IOU Programs			
Local Government Programs (Partnership Programs)			
Third Party Programs (Competitive Bid Program)			
RENs & CCA (Non-IOU Programs)	\$ -	\$ -	\$ 3,484,117.43
Subtotal			
EM&V - IOU			
EM&V - Joint Staff			
Total Portfolio			
SW ME&O*			
OBF/Revolving Loan Pool*			
Energy Savings Assistance Program (ESA)*			
Total Expenditures			

*Budget dollars outside Portfolio Total

[1] Not final 2016 expenditures. Los Angeles County and its PUC appointed fiscal administrator will settle final 2016 expenditures after the Annual Report's due date.

2016 Expenditures[1]	Administrative Cost			Direct Implementation Non-Incentive		
	IOU Support					
	10-12 Committed Funds Expenditures	13-15 Committed Funds Expenditures	2016 Expenditures from 2016 Budget	10-12 Committed Funds Expenditures	13-15 Committed Funds Expenditures	2016 Expenditures from 2016 Budget
IOU Programs						
Local Government Programs (Partnership Programs)						
Third Party Programs (Competitive Bid Program)						
RENs & CCA (Non-IOU Programs)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,018,897.02
Subtotal						
EM&V - IOU						
EM&V - Joint Staff						
Total Portfolio						
SW ME&O*						
OBF/Revolving Loan Pool*						
Energy Savings Assistance Program (ESA)*						
Total Expenditures						

*Budget dollars outside Portfolio Total

[1] Not final 2016 expenditures. Los Angeles County and its PUC appointed fiscal administrator will settle final 2016 expenditures after the Annual Report's due date.

2016 Expenditures[1]

	Direct Implementation Incentives & Rebates			PA Administered ME&O (outside the SW ME&O activities)		
	10-12 Committed Funds Expenditures	13-15 Committed Funds Expenditures	2016 Expenditures from 2016 Budget	10-12 Committed Funds Expenditures	13-15 Committed Funds Expenditures	2016 Expenditures from 2016 Budget
IOU Programs						
Local Government Programs (Partnership Programs)						
Third Party Programs (Competitive Bid Program)						
RENs & CCA (Non-IOU Programs)	\$ -	\$ -	\$ 2,025,350.00	\$ -	\$ -	\$ 2,469,770.72
Subtotal						
EM&V - IOU						
EM&V - Joint Staff						
Total Portfolio						
SW ME&O*						
OBF/Revolving Loan Pool*						
Energy Savings Assistance Program (ESA)*						
Total Expenditures						

*Budget dollars outside Portfolio Total

[1] Not final 2016 expenditures. Los Angeles County and its PUC appointed fiscal administrator will settle final 2016 expenditures after the Annual Report's due date.

2016 Expenditures[1]

Adopted 2016
Budget
(Decision 14-10-046)

IOU Programs	
Local Government Programs (Partnership Programs)	
Third Party Programs (Competitive Bid Program)	
RENs & CCA (Non-IOU Programs)	21,651,000.00
Subtotal	
EM&V - IOU	
EM&V - Joint Staff	
Total Portfolio	
SW ME&O*	
OBF/Revolving Loan Pool*	
Energy Savings Assistance Program (ESA)*	
Total Expenditures	

*Budget dollars outside Portfolio Total

[1] Not final 2016 expenditures. Los Angeles County and its PUC appointed fiscal administrator will settle final 2016 expenditures after the Annual Report's due date.

APPENDICES: 2017 Q1 REPORT

2016 IOU Energy Efficiency Cap and Target Expenditure Performance^{1,2}

Budget Category	Expenditures			IOU Budget ³
	IOU	Third Party + Partnerships	Total Portfolio	
Administrative Costs				\$ 2,229,863
IOU	\$ 492,928		\$ 492,928	
Non-IOU ⁴		\$ 14,319	\$ 14,319	
IOU Administrative Cap Exempt Programs ⁵		\$ 137,099	\$ 137,099	
Marketing and Outreach Costs				\$ 3,199,169
Marketing & Outreach ⁶	\$ -	\$ 304,124	\$ 304,124	
Statewide Marketing & Outreach ⁹				
Direct Implementation Costs				\$ 16,221,968
Direct Implementation (Incentives and Rebates) ⁷		\$ 731,850	\$ 731,850	
Direct Implementation (Non Incentives)	\$ -	\$ 491,745	\$ 491,745	
Direct Implementation Target Exempt Programs ⁸	\$ -	\$ 2,383,686	\$ 2,383,686	
EM&V Costs (Investor Owned Utilities & Energy Division)	\$ -	\$ -	\$ -	
OBF Loan Pool				
Total	\$ 492,928	\$ 4,062,823	\$ 4,555,751	\$ 21,651,000

Notes

- Includes energy efficiency costs authorized in D.12-11-015; does not include costs recovered in IOU General Rate Cases.
- Does not include costs incurred by RENs or CCAs
- The 2013-2014 EE budget was authorized in D.12-11-015; the Statewide Marketing & Outreach budget was authorized in D.13-12-038.
- The Third-Party and Partnership administrative cost target is calculated as a percentage of total Third Party and Partnership expenditures (excluding IOU support).
- Administrative Cap Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Statewide Marketing & Outreach expenditures are excluded from the Marketing and Outreach Cost target calculation.
- Direct Implementation (Incentives and Rebates) include: End User Rebates, Direct Install labor activity, Direct Install Materials & Services, and Upstream/Midstream rebates.
- Direct Implementation Target Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Per PUC does not apply to SoCalREN.
- Per D.12-11-015 (p. 15) PUC "will not apply hard caps on these expenditures [Administrative and Marketing and Outreach] at this time".

Budget Category	Cap & Target Performance ¹⁰			Cap/Target % of Spend (FYI Only)
	Actual %	Cap %	Target %	
Administrative Costs				
IOU	10.8%		10.0%	
Non-IOU ⁴	0.3%			
IOU Administrative Cap Exempt Programs ⁵	3.0%			
Marketing and Outreach Costs				
Marketing & Outreach ⁶	6.7%		6.0%	
Statewide Marketing & Outreach ⁹				
Direct Implementation Costs				
Direct Implementation (Incentives and Rebates) ⁷	16.1%			
Direct Implementation (Non Incentives)	10.8%		20.0%	
Direct Implementation Target Exempt Programs ⁸	52.3%		20.0%	
EM&V Costs (Investor Owned Utilities & Energy Division)				
OBF Loan Pool				
Total				

Notes

- Includes energy efficiency costs authorized in D.12-11-015; does not include costs recovered in IOU General Rate Cases.
- Does not include costs incurred by RENs or CCAs
- The 2013-2014 EE budget was authorized in D.12-11-015; the Statewide Marketing & Outreach budget was authorized in D.13-12-038.
- The Third-Party and Partnership administrative cost target is calculated as a percentage of total Third Party and Partnership expenditures (excluding IOU support).
- Administrative Cap Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Statewide Marketing & Outreach expenditures are excluded from the Marketing and Outreach Cost target calculation.
- Direct Implementation (Incentives and Rebates) include: End User Rebates, Direct Install labor activity, Direct Install Materials & Services, and Upstream/Midstream rebates.
- Direct Implementation Target Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Per PUC does not apply to SoCalREN.
- Per D.12-11-015 (p. 15) PUC "will not apply hard caps on these expenditures [Administrative and Marketing and Outreach] at this time".

2017 Energy Efficiency Fund Shift Report – First Quarter

Category	Program ID	Program / Sub Program	Program Budgets & Fundshifting				
			2016 Operating Budget	2017 Authorized Budget	2016 Authorized Encumbered / Committed Funds	2017 Funds Transferred In (Cumulative for Year)	2017 Funds Transferred Out (Cumulative for Year)
	1	SoCalREN PROGRAMS	\$ 24,173,425	\$ 21,651,000	\$ 3,453,475	\$ -	\$ -
		SCR-EUC - Energy Upgrade California					
	SCR-EUC-A1	Local Marketing and Outreach	\$ 1,636,372.00	\$ 1,636,372.00	\$ -	\$ -	\$ -
	SCR-EUC-A2	Green Building Labeling	\$ 1,005,000.00	\$ 1,005,000.00	\$ -	\$ -	\$ -
	SCR-EUC-A3	Flex Path Incentives	\$ 2,660,504.00	\$ 2,307,155.00	\$ 130,100	\$ -	\$ -
	SCR-EUC-A4	Contractor Outreach and Training	\$ 507,125.00	\$ 507,125.00	\$ -	\$ -	\$ -
	SCR-EUC-A5	Multifamily Incentives	\$ 6,940,976.00	\$ 4,771,900.00	\$ 3,323,375	\$ -	\$ -
	SCR-EUC-A6	Low-Income Single Family Residential	\$ 350,000.00	\$ 350,000.00	\$ -	\$ -	\$ -
		SCR-FIN - Financing					
	SCR-FIN-B1	Public Building Loan Loss Reserve	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -	\$ -
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	\$ 1,737,500.00	\$ 1,737,500.00	\$ -	\$ -	\$ -
	SCR-FIN-B4	Non-Residential PACE	\$ 705,750.00	\$ 705,750.00	\$ -	\$ -	\$ -
	SCR-FIN-B5	Public Agency Revolving Loan Fund	\$ 236,000.00	\$ 236,000.00	\$ -	\$ -	\$ -
		SCR-REC - REC					
	SCR-REC-C1	Aggregated Regional Procurement	\$ 3,355,771.00	\$ 3,355,771.00	\$ -	\$ -	\$ -
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601.00	\$ 3,328,601.00	\$ -	\$ -	\$ -
	SCR-REC-C3	Regional Climate Action and Energy Plan	\$ 395,120.00	\$ 395,120.00	\$ -	\$ -	\$ -
	SCR-REC-C4	Water-Energy Nexus	\$ 253,893.00	\$ 253,893.00	\$ -	\$ -	\$ -
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735.00	\$ 138,735.00	\$ -	\$ -	\$ -
	SCR-REC-C6	Marketing, Outreach, Education, and Training	\$ 672,078.00	\$ 672,078.00	\$ -	\$ -	\$ -
	SCR-REC-C7	Workforce Development	\$ 150,000.00	\$ 150,000.00	\$ -	\$ -	\$ -
	EM&V	2 EM&V⁶		\$ -	\$ -	\$ -	\$ -
	GRAND TOTAL			\$ 21,651,000	\$ 3,453,475	\$ -	\$ -

Category	Program ID	Program / Sub Program	Program Budgets & Fundshifting		
			Revised 2017 Operating Budget ¹	2017 Annual Fund Shift Threshold - Not Applicable	Advice Letter Submitted & Approved ³
	1	SoCalREN PROGRAMS	\$ 25,104,475	\$ 3,247,650	
		SCR-EUC - Energy Upgrade California			
	SCR-EUC-A1	Local Marketing and Outreach	\$ 1,636,372	\$ 245,456	
	SCR-EUC-A2	Green Building Labeling	\$ 1,005,000	\$ 150,750	
	SCR-EUC-A3	Flex Path Incentives	\$ 2,437,255	\$ 346,073	
	SCR-EUC-A4	Contractor Outreach and Training	\$ 507,125	\$ 76,069	
	SCR-EUC-A5	Multifamily Incentives	\$ 8,095,275	\$ 715,785	
	SCR-EUC-A6	Low-Income Single Family Residential	\$ 350,000	\$ 52,500	
		SCR-FIN - Financing			
	SCR-FIN-B1	Public Building Loan Loss Reserve	\$ 100,000	\$ 15,000	
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	\$ 1,737,500	\$ 260,625	
	SCR-FIN-B4	Non-Residential PACE	\$ 705,750	\$ 105,863	
	SCR-FIN-B5	Public Agency Revolving Loan Fund	\$ 236,000	\$ 35,400	
		SCR-REC - REC			
	SCR-REC-C1	Aggregated Regional Procurement	\$ 3,355,771	\$ 503,366	
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601	\$ 499,290	
	SCR-REC-C3	Regional Climate Action and Energy Plan	\$ 395,120	\$ 59,268	
	SCR-REC-C4	Water-Energy Nexus	\$ 253,893	\$ 38,084	
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 20,810	
	SCR-REC-C6	Marketing, Outreach, Education, and Training	\$ 672,078	\$ 100,812	
	SCR-REC-C7	Workforce Development	\$ 150,000	\$ 22,500	
	EM&V	2 EM&V⁶	\$ -		
	GRAND TOTAL		\$ 25,104,475	\$ 3,247,650	

Notes:

- [1] Revised Operating Budget, Column M = J+K+L
- [2] IOU Fund Shift Threshold set at 15% x H (2012 Authorized Budget). For C&S, ET and ME&O see footnote 5.
- [3] An Advice Letter is required for fund shifts greater than 15%.
- [4] Funds cannot be shifted into the program; however, funds can be shifted out of the program.
- [5] An Advice Letter is required for shifts that would reduce any of these programs by more than 1% of budgeted levels.
- [6] Funds cannot be shifted out of EM&V by any amount without assigned ALJ or Commissioner ruling.

Category	Program ID	Program / Sub Program	Program Expenditures Exclusive of Carryover Spending (Inception-To-Date, 3 Months Through March 31, 2017)				
			Administrative	Marketing	Direct Implementation	EM&V	Total
	1	SoCalREN PROGRAMS	\$ 644,346	\$ 304,124	\$ 3,607,281	\$ -	\$ 4,555,751
		SCR-EUC - Energy Upgrade California					
	SCR-EUC-A1	Local Marketing and Outreach	\$ 33,132.37	\$ 31,394.34	\$ 258,131.25	\$ -	\$ 322,658
	SCR-EUC-A2	Green Building Labeling	\$ 34,530.82	\$ -	\$ 197,516.30	\$ -	\$ 232,047
	SCR-EUC-A3	Flex Path Incentives	\$ 70,004.36	\$ -	\$ 299,476.44	\$ -	\$ 369,481
	SCR-EUC-A4	Contractor Outreach and Training	\$ 28,874.62	\$ 116,599.96	\$ 158,061.83	\$ -	\$ 303,536
	SCR-EUC-A5	Multifamily Incentives	\$ 102,046.14	\$ 10,000.00	\$ 924,118.81	\$ -	\$ 1,036,165
	SCR-EUC-A6	Low-Income Single Family Residential	\$ 9,274.84	\$ -	\$ 7,282.00	\$ -	\$ 16,557
		SCR-FIN - Financing					
	SCR-FIN-B1	Public Building Loan Loss Reserve	\$ 3,136.57	\$ -	\$ 1,550.00	\$ -	\$ 4,687
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	\$ 8,256.67	\$ -	\$ 54,422.75	\$ -	\$ 62,679
	SCR-FIN-B4	Non-Residential PACE	\$ 30,621.65	\$ 61,347.25	\$ -	\$ -	\$ 91,969
	SCR-FIN-B5	Public Agency Revolving Loan Fund	\$ 6,986.00	\$ -	\$ -	\$ -	\$ 6,986
		SCR-REC - REC					
	SCR-REC-C1	Aggregated Regional Procurement	\$ 1,863.27	\$ -	\$ -	\$ -	\$ 1,863
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	\$ 264,514.66	\$ -	\$ 1,538,559.96	\$ -	\$ 1,803,075
	SCR-REC-C3	Regional Climate Action and Energy Plan	\$ 10,631.59	\$ -	\$ -	\$ -	\$ 10,632
	SCR-REC-C4	Water-Energy Nexus	\$ 8,768.32	\$ -	\$ -	\$ -	\$ 8,768
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 13,943.91	\$ -	\$ 84,320.35	\$ -	\$ 98,264
	SCR-REC-C6	Marketing, Outreach, Education, and Training	\$ 8,005.78	\$ 84,782.47	\$ 38,841.07	\$ -	\$ 131,629
	SCR-REC-C7	Workforce Development	\$ 9,754.75	\$ -	\$ 45,000.00	\$ -	\$ 54,755
	EM&V	2 EM&V⁶	\$ -	\$ -	\$ -	\$ -	\$ -
	GRAND TOTAL		\$ 644,346	\$ 304,124	\$ 3,607,281	\$ -	\$ 4,555,751

Category	Program ID	Program / Sub Program	Program Activity (Inception-To-Date, 3 Months Through March 31, 2017)		
			Energy Savings (Gross Annual kWh)	Demand Reduction (Gross Peak kW)	Gas Savings (Gross Annual Therms)
	1	SoCalREN PROGRAMS	2,015,251	426	36,906
		SCR-EUC - Energy Upgrade California			
	SCR-EUC-A1	Local Marketing and Outreach	0.00	0.00	0.00
	SCR-EUC-A2	Green Building Labeling	0.00	0.00	0.00
	SCR-EUC-A3	Flex Path Incentives	99,968.90	175.19	10,534.70
	SCR-EUC-A4	Contractor Outreach and Training	0.00	0.00	0.00
	SCR-EUC-A5	Multifamily Incentives	1,915,282.00	251.15	26,371.00
	SCR-EUC-A6	Low-Income Single Family Residential	0.00	0.00	0.00
		SCR-FIN - Financing			
	SCR-FIN-B1	Public Building Loan Loss Reserve	0.00	0.00	0.00
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	0.00	0.00	0.00
	SCR-FIN-B4	Non-Residential PACE	0.00	0.00	0.00
	SCR-FIN-B5	Public Agency Revolving Loan Fund	0.00	0.00	0.00
		SCR-REC - REC			
	SCR-REC-C1	Aggregated Regional Procurement	0.00	0.00	0.00
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	0.00	0.00	0.00
	SCR-REC-C3	Regional Climate Action and Energy Plan	0.00	0.00	0.00
	SCR-REC-C4	Water-Energy Nexus	0.00	0.00	0.00
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	0.00	0.00	0.00
	SCR-REC-C6	Marketing, Outreach, Education, and Training	0.00	0.00	0.00
	SCR-REC-C7	Workforce Development	0.00	0.00	0.00
	EM&V	2 EM&V⁶			
	GRAND TOTAL		2,015,251	426	36,906

Notes:

- [1] Revised Operating Budget, Column M = J+K+L
- [2] IOU Fund Shift Threshold set at 15% x H (2012 Authorized Budget). For C&S, ET and ME&O see footnote 5.
- [3] An Advice Letter is required for fund shifts greater than 15%.
- [4] Funds cannot be shifted into the program; however, funds can be shifted out of the program.
- [5] An Advice Letter is required for shifts that would reduce any of these programs by more than 1% of budgeted levels.
- [6] Funds cannot be shifted out of EM&V by any amount without assigned ALJ or Commissioner ruling.

APPENDICES: 2017 Q2 REPORT

2017 IOU Energy Efficiency Cap and Target Expenditure Performance^{1,2}

Budget Category	Expenditures			IOU Budget ³
	IOU	Third Party + Partnerships	Total Portfolio	
Administrative Costs				\$ 2,229,863
IOU	\$ 989,632	\$ -	\$ 989,632	
Non-IOU ⁴	\$ -	\$ 55,710	\$ 55,710	
IOU Administrative Cap Exempt Programs ⁵	\$ -	\$ 289,368	\$ 289,368	
Marketing and Outreach Costs				\$ 3,199,169
Marketing & Outreach ⁶	\$ -	\$ 527,526	\$ 527,526	
Statewide Marketing & Outreach ⁹	\$ -	\$ -	\$ -	
Direct Implementation Costs				\$ 16,221,968
Direct Implementation (Incentives and Rebates) ⁷	\$ -	\$ 3,303,430	\$ 3,303,430	
Direct Implementation (Non Incentives)	\$ 133,349	\$ 1,038,827	\$ 1,172,176	
Direct Implementation Target Exempt Programs ⁸	\$ -	\$ 4,303,830	\$ 4,303,830	
EM&V Costs (Investor Owned Utilities & Energy Division)	\$ -	\$ -	\$ -	
OBF Loan Pool				
Total	\$ 1,122,981	\$ 9,518,692	\$ 10,641,672	\$ 21,651,000

Notes

- Includes energy efficiency costs authorized in D.12-11-015; does not include costs recovered in IOU General Rate Cases.
- Does not include costs incurred by RENs or CCAs
- The 2013-2014 EE budget was authorized in D.12-11-015; the Statewide Marketing & Outreach budget was authorized in D.13-12-038.
- The Third-Party and Partnership administrative cost target is calculated as a percentage of total Third Party and Partnership expenditures (excluding IOU support).
- Administrative Cap Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Statewide Marketing & Outreach expenditures are excluded from the Marketing and Outreach Cost target calculation.
- Direct Implementation (Incentives and Rebates) include: End User Rebates, Direct Install labor activity, Direct Install Materials & Services, and Upstream/Midstream rebates.
- Direct Implementation Target Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Per PUC does not apply to SoCalREN.
- Per D.12-11-015 (p. 15) PUC "will not apply hard caps on these expenditures [Administrative and Marketing and Outreach] at this time".

Budget Category	Cap & Target Performance ¹⁰			Cap/Target % of Spend (FYI Only)
	Actual %	Cap %	Target %	
Administrative Costs				
IOU	9.3%		10.0%	
Non-IOU ⁴	0.5%			
IOU Administrative Cap Exempt Programs ⁵	2.7%			
Marketing and Outreach Costs				
Marketing & Outreach ⁶	5.0%		6.0%	
Statewide Marketing & Outreach ⁹				
Direct Implementation Costs				
Direct Implementation (Incentives and Rebates) ⁷	31.0%			
Direct Implementation (Non Incentives)	11.0%		20.0%	
Direct Implementation Target Exempt Programs ⁸	40.4%		20.0%	
EM&V Costs (Investor Owned Utilities & Energy Division)				
OBF Loan Pool				
Total				

Notes

1. Includes energy efficiency costs authorized in D.12-11-015; does not include costs recovered in IOU General Rate Cases.
2. Does not include costs incurred by RENs or CCAs
3. The 2013-2014 EE budget was authorized in D.12-11-015; the Statewide Marketing & Outreach budget was authorized in D.13-12-038.
4. The Third-Party and Partnership administrative cost target is calculated as a percentage of total Third Party and Partnership expenditures (excluding IOU support).
5. Administrative Cap Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
6. Statewide Marketing & Outreach expenditures are excluded from the Marketing and Outreach Cost target calculation.
7. Direct Implementation (Incentives and Rebates) include: End User Rebates, Direct Install labor activity, Direct Install Materials & Services, and Upstream/Midstream rebates.
8. Direct Implementation Target Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
9. Per PUC does not apply to SoCalREN.
10. Per D.12-11-015 (p. 15) PUC "will not apply hard caps on these expenditures [Administrative and Marketing and Outreach] at this time".

2017 Energy Efficiency Fund Shift Report – Second Quarter

Category	Program ID	Program / Sub Program	Program Budgets & Fundshifting				
			2016 Operating Budget	2017 Authorized Budget	2016 Authorized Encumbered / Committed Funds	2017 Funds Transferred In (Cumulative for Year)	2017 Funds Transferred Out (Cumulative for Year)
	1	SoCalREN PROGRAMS	\$ 24,173,425	\$ 21,651,000	\$ 3,453,475	\$ -	\$ -
		SCR-EUC - Energy Upgrade California					
	SCR-EUC-A1	Local Marketing and Outreach	\$ 1,636,372.00	\$ 1,636,372.00	\$ -	\$ -	\$ -
	SCR-EUC-A2	Green Building Labeling	\$ 1,005,000.00	\$ 1,005,000.00	\$ -	\$ -	\$ -
	SCR-EUC-A3	Flex Path Incentives	\$ 2,660,504.00	\$ 2,307,155.00	\$ 130,100	\$ -	\$ -
	SCR-EUC-A4	Contractor Outreach and Training	\$ 507,125.00	\$ 507,125.00	\$ -	\$ -	\$ -
	SCR-EUC-A5	Multifamily Incentives	\$ 6,940,976.00	\$ 4,771,900.00	\$ 3,323,375	\$ -	\$ -
	SCR-EUC-A6	Low-Income Single Family Residential	\$ 350,000.00	\$ 350,000.00	\$ -	\$ -	\$ -
		SCR-FIN - Financing					
	SCR-FIN-B1	Public Building Loan Loss Reserve	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -	\$ -
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	\$ 1,737,500.00	\$ 1,737,500.00	\$ -	\$ -	\$ -
	SCR-FIN-B4	Non-Residential PACE	\$ 705,750.00	\$ 705,750.00	\$ -	\$ -	\$ -
	SCR-FIN-B5	Public Agency Revolving Loan Fund	\$ 236,000.00	\$ 236,000.00	\$ -	\$ -	\$ -
		SCR-REC - REC					
	SCR-REC-C1	Aggregated Regional Procurement	\$ 3,355,771.00	\$ 3,355,771.00	\$ -	\$ -	\$ -
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601.00	\$ 3,328,601.00	\$ -	\$ -	\$ -
	SCR-REC-C3	Regional Climate Action and Energy Plan	\$ 395,120.00	\$ 395,120.00	\$ -	\$ -	\$ -
	SCR-REC-C4	Water-Energy Nexus	\$ 253,893.00	\$ 253,893.00	\$ -	\$ -	\$ -
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735.00	\$ 138,735.00	\$ -	\$ -	\$ -
	SCR-REC-C6	Marketing, Outreach, Education, and Training	\$ 672,078.00	\$ 672,078.00	\$ -	\$ -	\$ -
	SCR-REC-C7	Workforce Development	\$ 150,000.00	\$ 150,000.00	\$ -	\$ -	\$ -
	EM&V	2 EM&V⁶		\$ -	\$ -	\$ -	\$ -
	GRAND TOTAL			\$ 21,651,000	\$ 3,453,475	\$ -	\$ -

Category	Program ID	Program / Sub Program	Program Budgets & Fundshifting		
			Revised 2017 Operating Budget ¹	2017 Annual Fund Shift Threshold - Not Applicable	Advice Letter Submitted & Approved ³
	1	SoCalREN PROGRAMS	\$ 25,104,475	\$ 3,247,650	
		SCR-EUC - Energy Upgrade California			
	SCR-EUC-A1	Local Marketing and Outreach	\$ 1,636,372	\$ 245,456	
	SCR-EUC-A2	Green Building Labeling	\$ 1,005,000	\$ 150,750	
	SCR-EUC-A3	Flex Path Incentives	\$ 2,437,255	\$ 346,073	
	SCR-EUC-A4	Contractor Outreach and Training	\$ 507,125	\$ 76,069	
	SCR-EUC-A5	Multifamily Incentives	\$ 8,095,275	\$ 715,785	
	SCR-EUC-A6	Low-Income Single Family Residential	\$ 350,000	\$ 52,500	
		SCR-FIN - Financing			
	SCR-FIN-B1	Public Building Loan Loss Reserve	\$ 100,000	\$ 15,000	
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	\$ 1,737,500	\$ 260,625	
	SCR-FIN-B4	Non-Residential PACE	\$ 705,750	\$ 105,863	
	SCR-FIN-B5	Public Agency Revolving Loan Fund	\$ 236,000	\$ 35,400	
		SCR-REC - REC			
	SCR-REC-C1	Aggregated Regional Procurement	\$ 3,355,771	\$ 503,366	
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601	\$ 499,290	
	SCR-REC-C3	Regional Climate Action and Energy Plan	\$ 395,120	\$ 59,268	
	SCR-REC-C4	Water-Energy Nexus	\$ 253,893	\$ 38,084	
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 20,810	
	SCR-REC-C6	Marketing, Outreach, Education, and Training	\$ 672,078	\$ 100,812	
	SCR-REC-C7	Workforce Development	\$ 150,000	\$ 22,500	
	EM&V	2 EM&V⁶	\$ -		
	GRAND TOTAL		\$ 25,104,475	\$ 3,247,650	

Notes:

- [1] Revised Operating Budget, Column M = J+K+L
- [2] IOU Fund Shift Threshold set at 15% x H (2012 Authorized Budget). For C&S, ET and ME&O see footnote 5.
- [3] An Advice Letter is required for fund shifts greater than 15%.
- [4] Funds cannot be shifted into the program; however, funds can be shifted out of the program.
- [5] An Advice Letter is required for shifts that would reduce any of these programs by more than 1% of budgeted levels.
- [6] Funds cannot be shifted out of EM&V by any amount without assigned ALJ or Commissioner ruling.

Category	Program ID	Program / Sub Program	Program Expenditures Exclusive of Carryover Spending (Inception-To-Date, 6 Months Through June 30, 2017)							
			Administrative	Marketing	Direct Implementation	EM&V	Total			
	1	SoCalREN PROGRAMS	\$	1,334,710	\$	527,526	\$	8,779,436	\$	10,641,672
		SCR-EUC - Energy Upgrade California								
	SCR-EUC-A1	Local Marketing and Outreach	\$	92,536.59	\$	43,216.11	\$	376,128.60	\$	511,881
	SCR-EUC-A2	Green Building Labeling	\$	62,843.41	\$	1,304.69	\$	230,928.96	\$	295,077
	SCR-EUC-A3	Flex Path Incentives	\$	123,269.60	\$	10,437.50	\$	776,202.94	\$	909,910
	SCR-EUC-A4	Contractor Outreach and Training	\$	31,787.35	\$	195,993.04	\$	227,792.23	\$	455,573
	SCR-EUC-A5	Multifamily Incentives	\$	253,519.33	\$	7,828.13	\$	3,566,276.19	\$	3,827,624
	SCR-EUC-A6	Low-Income Single Family Residential	\$	16,436.91	\$	4,680.69	\$	146,911.35	\$	168,029
		SCR-FIN - Financing								
	SCR-FIN-B1	Public Building Loan Loss Reserve	\$	3,414.18	\$	-	\$	14,632.50	\$	18,047
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	\$	54,595.87	\$	210.35	\$	56,001.75	\$	110,808
	SCR-FIN-B4	Non-Residential PACE	\$	35,142.89	\$	77,930.50	\$	473.75	\$	113,547
	SCR-FIN-B5	Public Agency Revolving Loan Fund	\$	6,828.37	\$	-	\$	335.00	\$	7,163
		SCR-REC - REC								
	SCR-REC-C1	Aggregated Regional Procurement	\$	84,332.93	\$	-	\$	5,634.55	\$	89,967
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	\$	267,518.88	\$	-	\$	3,145,109.42	\$	3,412,628
	SCR-REC-C3	Regional Climate Action and Energy Plan	\$	90,939.22	\$	-	\$	155,263.01	\$	246,202
	SCR-REC-C4	Water-Energy Nexus	\$	42,166.47	\$	-	\$	-	\$	42,166
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	\$	84,294.93	\$	-	\$	2,496.00	\$	86,791
	SCR-REC-C6	Marketing, Outreach, Education, and Training	\$	42,916.47	\$	185,925.31	\$	-	\$	228,842
	SCR-REC-C7	Workforce Development	\$	42,166.47	\$	-	\$	75,250.00	\$	117,416
	EM&V	2 EM&V⁶	\$	-	\$	-	\$	-	\$	-
	GRAND TOTAL		\$	1,334,710	\$	527,526	\$	8,779,436	\$	10,641,672

Category	Program ID	Program / Sub Program	Program Activity (Inception-To-Date, 6 Months Through June 30, 2017)		
			Energy Savings (Gross Annual kWh)	Demand Reduction (Gross Peak kW)	Gas Savings (Gross Annual Therms)
	1	SoCalREN PROGRAMS	5,026,480	1,183	128,809
		SCR-EUC - Energy Upgrade California			
	SCR-EUC-A1	Local Marketing and Outreach	0.00	0.00	0.00
	SCR-EUC-A2	Green Building Labeling	0.00	0.00	0.00
	SCR-EUC-A3	Flex Path Incentives	139,752.10	244.04	15,838.70
	SCR-EUC-A4	Contractor Outreach and Training	0.00	0.00	0.00
	SCR-EUC-A5	Multifamily Incentives	4,886,728.00	939.29	112,970.00
	SCR-EUC-A6	Low-Income Single Family Residential	0.00	0.00	0.00
		SCR-FIN - Financing			
	SCR-FIN-B1	Public Building Loan Loss Reserve	0.00	0.00	0.00
	SCR-FIN-B2	EUC Residential Loan Loss Reserve	0.00	0.00	0.00
	SCR-FIN-B4	Non-Residential PACE	0.00	0.00	0.00
	SCR-FIN-B5	Public Agency Revolving Loan Fund	0.00	0.00	0.00
		SCR-REC - REC			
	SCR-REC-C1	Aggregated Regional Procurement	0.00	0.00	0.00
	SCR-REC-C2	Integrated Comprehensive Whole Building Retrofits	0.00	0.00	0.00
	SCR-REC-C3	Regional Climate Action and Energy Plan	0.00	0.00	0.00
	SCR-REC-C4	Water-Energy Nexus	0.00	0.00	0.00
	SCR-REC-C5	Regional Energy Project Tracking and Permitting (CEEPMS)	0.00	0.00	0.00
	SCR-REC-C6	Marketing, Outreach, Education, and Training	0.00	0.00	0.00
	SCR-REC-C7	Workforce Development	0.00	0.00	0.00
	EM&V	2 EM&V⁶			
	GRAND TOTAL		5,026,480	1,183	128,809

Notes:

- [1] Revised Operating Budget, Column M = J+K+L
- [2] IOU Fund Shift Threshold set at 15% x H (2012 Authorized Budget). For C&S, ET and ME&O see footnote 5.
- [3] An Advice Letter is required for fund shifts greater than 15%.
- [4] Funds cannot be shifted into the program; however, funds can be shifted out of the program.
- [5] An Advice Letter is required for shifts that would reduce any of these programs by more than 1% of budgeted levels.
- [6] Funds cannot be shifted out of EM&V by any amount without assigned ALJ or Commissioner ruling.

APPENDICES: 2017 Q3 REPORT

2017 IOU Energy Efficiency Cap and Target Expenditure Projections

Line	Budget Category	Expenditures		
		PA	Third Party + Partnership	Total Portfolio
1	Administrative Costs	\$ 1,562,378	\$ 486,163	\$ 2,048,541
2	PA	\$ 1,562,378	\$ -	\$ 1,562,378
3	Third Party & Partnership	\$ -	\$ 59,811	\$ 59,811
4	Target Exempt IOU Programs	\$ -	\$ 426,352	\$ 426,352
5	Marketing and Outreach Costs	\$ -	\$ 708,398	\$ 708,398
6	Marketing & Outreach	\$ -	\$ 708,398	\$ 708,398
7	Statewide Marketing & Outreach	\$ -	\$ -	\$ -
8	Direct Implementation Costs	\$ 262,915	\$ 11,342,455	\$ 11,605,370
9	Direct Implementation (Incentives and Rebates)	\$ -	\$ 3,581,830	\$ 3,581,830
10	Direct Implementation (Non Incentives and Non Rebates)	\$ 262,915	\$ 1,456,179	\$ 1,719,094
11	Direct Implementation Target Exempt Programs	\$ -	\$ 6,304,446	\$ 6,304,446
12	EM&V Costs (Investor Owned Utilities & Energy Division)	\$ -	\$ -	\$ -
13	Total	\$ 1,825,293	\$ 12,537,016	\$ 14,362,309
14	2017 Approved Budget	\$ -	\$ -	\$ 21,651,000
15	Third Party Program (3P) and Statewide Competitively Solicited Programs	\$ -	\$ -	\$ -

Line	Budget Category	Cap & Target Performance		
		Percent of Budget	Cap %	Target %
1	Administrative Costs			
2	PA	7.2%	10.0%	
3	Third Party & Partnership	0.0%		10.0%
4	Target Exempt IOU Programs			
5	Marketing and Outreach Costs			
6	Marketing & Outreach	3.3%		6.0%
7	Statewide Marketing & Outreach			
8	Direct Implementation Costs			
9	Direct Implementation (Incentives and Rebates)			
10	Direct Implementation (Non Incentives and Non Rebates)	7.9%		20.0%
11	Direct Implementation Target Exempt Programs			
12	EM&V Costs (Investor Owned Utilities & Energy Division)	0.0%	4.0%	
13	Total			
14	2017 Approved Budget			
15	Third Party Program (3P) and Statewide Competitively Solicited Programs			

APPENDICES:

9/1 BUDGET FILING 2016

Appendix B.1 – Budget by Budget Category

New/Existing Program #	Main Program Name / Sub-Program Name	Total Administrative Cost			
		2015 Authorized Budget	2015 Budget Spent	2016 Authorized Budget	2017 Proposed Budget
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 1,149,139	\$ 1,706,548	\$ 1,149,139	\$ 1,149,139
	Local Marketing and Outreach	\$ 163,608	\$ 361,748	\$ 163,608	\$ 163,608
	Green Building Labeling	\$ 159,548	\$ 279,787	\$ 159,548	\$ 159,548
	Flex Path (EUC)	\$ 239,723	\$ 514,940	\$ 239,723	\$ 239,723
	Contractor Outreach and Training	\$ 76,337	\$ 77,481	\$ 76,337	\$ 76,337
	Multifamily	\$ 497,172	\$ 471,952	\$ 497,172	\$ 497,172
	Low-Income Single Family Residential	\$ 12,751	\$ 640	\$ 12,751	\$ 12,751
SCR-FIN	Financial Programs Total	\$ 477,991	\$ 206,378	\$ 477,991	\$ 477,991
	Public Building Loan Loss Reserve	\$ 17,518	\$ 8,318	\$ 17,518	\$ 17,518
	EUC Residential Loan Loss Reserve	\$ 95,101	\$ 55,119	\$ 95,101	\$ 95,101
	Non-Residential PACE	\$ 278,543	\$ 124,388	\$ 278,543	\$ 278,543
	Public Agency Revolving Loan Fund	\$ 86,829	\$ 18,554	\$ 86,829	\$ 86,829
SCR-REC	REC Programs Total	\$ 602,733	\$ 1,719,349	\$ 602,733	\$ 602,733
	Aggregated Regional Procurement	\$ 204,654	\$ 747,780	\$ 204,654	\$ 204,654
	Integrated Comprehensive Whole Building Retrofit	\$ 206,146	\$ 572,644	\$ 206,146	\$ 206,146
	Regional Climate Action and Energy Plan	\$ 9,339	\$ 47,332	\$ 9,339	\$ 9,339
	Water-Energy Nexus	\$ 15,233	\$ 10,284	\$ 15,233	\$ 15,233
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 8,324	\$ 42,369	\$ 8,324	\$ 8,324
	Marketing, Outreach, Education, and Training	\$ 9,037	\$ 292,941	\$ 9,037	\$ 9,037
	Workforce Development	\$ 150,000	\$ 6,000	\$ 150,000	\$ 150,000
	PA PROGRAM TOTAL	\$ 2,229,863	\$ 3,632,275	\$ 2,229,863	\$ 2,229,863
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 2,229,863	\$ 3,632,275	\$ 2,229,863	\$ 2,229,863

New/Existing Program #	Main Program Name / Sub-Program Name	Total Marketing & Outreach			
		2015 Budget	2015 Budget Spent	2016 Authorized Budget	2017 Proposed Budget
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 1,967,668	\$ 1,543,740	\$ 1,967,668	\$ 1,967,668
	Local Marketing and Outreach	\$ 693,707	\$ 551,737	\$ 693,707	\$ 693,707
	Green Building Labeling	\$ 345,214	\$ 431,941	\$ 345,214	\$ 345,214
	Flex Path (EUC)	\$ 67,686	\$ 36,274	\$ 67,686	\$ 67,686
	Contractor Outreach and Training	\$ 131,500	\$ 295,912	\$ 131,500	\$ 131,500
	Multifamily	\$ 729,561	\$ 163,479	\$ 729,561	\$ 729,561
	Low-Income Single Family Residential	\$ -	\$ 64,398	\$ -	\$ -
SCR-FIN	Financial Programs Total	\$ 698,688	\$ 873,251	\$ 698,688	\$ 698,688
	Public Building Loan Loss Reserve	\$ 82,482	\$ 19,927	\$ 82,482	\$ 82,482
	EUC Residential Loan Loss Reserve	\$ 39,828	\$ 14,464	\$ 39,828	\$ 39,828
	Non-Residential PACE	\$ 427,207	\$ 656,298	\$ 427,207	\$ 427,207
	Public Agency Revolving Loan Fund	\$ 149,171	\$ 182,563	\$ 149,171	\$ 149,171
SCR-REC	REC Programs Total	\$ 532,813	\$ 313,386	\$ 532,813	\$ 532,813
	Aggregated Regional Procurement	\$ 49,765	\$ -	\$ 49,765	\$ 49,765
	Integrated Comprehensive Whole Building Retrofit	\$ 41,872	\$ -	\$ 41,872	\$ 41,872
	Regional Climate Action and Energy Plan	\$ 750	\$ -	\$ 750	\$ 750
	Water-Energy Nexus	\$ 2,711	\$ -	\$ 2,711	\$ 2,711
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 3,873	\$ -	\$ 3,873	\$ 3,873
	Marketing, Outreach, Education, and Training	\$ 433,842	\$ 297,168	\$ 433,842	\$ 433,842
	Workforce Development	\$ -	\$ 16,218	\$ -	\$ -
	PA PROGRAM TOTAL	\$ 3,199,169	\$ 2,730,377	\$ 3,199,169	\$ 3,199,169
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 3,199,169	\$ 2,730,377	\$ 3,199,169	\$ 3,199,169

New/Existing Program #	Main Program Name / Sub-Program Name	Total Direct Implementation (NonIncentives or Rebates)			
		2015 Budget	2015 Budget Spent	2016 Authorized Budget	2017 Proposed Budget
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 3,342,706	\$ 3,763,321	\$ 3,342,706	\$ 3,342,706
	Local Marketing and Outreach	\$ 779,057	\$ 897,305	\$ 779,057	\$ 779,057
	Green Building Labeling	\$ 500,238	\$ 499,119	\$ 500,238	\$ 500,238
	Flex Path (EUC)	\$ 464,916	\$ 552,001	\$ 464,916	\$ 464,916
	Contractor Outreach and Training	\$ 299,288	\$ 402,695	\$ 299,288	\$ 299,288
	Multifamily	\$ 961,958	\$ 1,201,418	\$ 961,958	\$ 961,958
	Low-Income Single Family Residential	\$ 337,249	\$ 210,782	\$ 337,249	\$ 337,249
SCR-FIN	Financial Programs Total	\$ 325,595	\$ 240,462	\$ 325,595	\$ 325,595
	Public Building Loan Loss Reserve	\$ -	\$ -	\$ -	\$ -
	EUC Residential Loan Loss Reserve	\$ 325,595	\$ 146,511	\$ 325,595	\$ 325,595
	Non-Residential PACE	\$ -	\$ 16,847	\$ -	\$ -
	Public Agency Revolving Loan Fund	\$ -	\$ 77,104	\$ -	\$ -
SCR-REC	REC Programs Total	\$ 7,158,652	\$ 8,441,864	\$ 7,158,652	\$ 7,158,652
	Aggregated Regional Procurement	\$ 3,101,352	\$ 387,648	\$ 3,101,352	\$ 3,101,352
	Integrated Comprehensive Whole Building Retrofit	\$ 3,080,583	\$ 6,994,543	\$ 3,080,583	\$ 3,080,583
	Regional Climate Action and Energy Plan	\$ 385,031	\$ 537,945	\$ 385,031	\$ 385,031
	Water-Energy Nexus	\$ 235,949	\$ 252,769	\$ 235,949	\$ 235,949
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 126,538	\$ 218,776	\$ 126,538	\$ 126,538
	Marketing, Outreach, Education, and Training	\$ 229,199	\$ (214,219)	\$ 229,199	\$ 229,199
	Workforce Development	\$ -	\$ 264,402	\$ -	\$ -
	PA PROGRAM TOTAL	\$ 10,826,953	\$ 12,445,647	\$ 10,826,953	\$ 10,826,953
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 10,826,953	\$ 12,445,647	\$ 10,826,953	\$ 10,826,953

New/Existing Program #	Main Program Name / Sub-Program Name	Direct Implementation (Incentives & Rebates)			
		2015 Budget	2015 Budget Spent	2016 Authorized Budget	2017 Proposed Budget
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 4,118,039	\$ 2,294,315	\$ 4,118,039	\$ 4,118,039
	Local Marketing and Outreach	\$ -	\$ -	\$ -	\$ -
	Green Building Labeling	\$ -	\$ -	\$ -	\$ -
	Flex Path (EUC)	\$ 1,534,829	\$ 993,500	\$ 1,534,829	\$ 1,534,829
	Contractor Outreach and Training	\$ -	\$ -	\$ -	\$ -
	Multifamily	\$ 2,583,210	\$ 1,300,815	\$ 2,583,210	\$ 2,583,210
	Low-Income Single Family Residential	\$ -	\$ -	\$ -	\$ -
SCR-FIN	Financial Programs Total	\$ 1,276,976	\$ -	\$ 1,276,976	\$ 1,276,976
	Public Building Loan Loss Reserve	\$ -	\$ -	\$ -	\$ -
	EUC Residential Loan Loss Reserve	\$ 1,276,976	\$ -	\$ 1,276,976	\$ 1,276,976
	Non-Residential PACE	\$ -	\$ -	\$ -	\$ -
	Public Agency Revolving Loan Fund	\$ -	\$ -	\$ -	\$ -
SCR-REC	REC Programs Total	\$ -	\$ -	\$ -	\$ -
	Aggregated Regional Procurement	\$ -	\$ -	\$ -	\$ -
	Integrated Comprehensive Whole Building Retrofit	\$ -	\$ -	\$ -	\$ -
	Regional Climate Action and Energy Plan	\$ -	\$ -	\$ -	\$ -
	Water-Energy Nexus	\$ -	\$ -	\$ -	\$ -
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ -	\$ -	\$ -	\$ -
	Marketing, Outreach, Education, and Training	\$ -	\$ -	\$ -	\$ -
	Workforce Development	\$ -	\$ -	\$ -	\$ -
	PA PROGRAM TOTAL	\$ 5,395,015	\$ 2,294,315	\$ 5,395,015	\$ 5,395,015
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 5,395,015	\$ 2,294,315	\$ 5,395,015	\$ 5,395,015

New/Existing Program #	Main Program Name / Sub-Program Name	Total Direct Implementation			
		2015 Budget	2015 Budget Spent	2016 Authorized Budget	2017 Proposed Budget
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 7,460,745	\$ 6,057,636	\$ 7,460,745	\$ 7,460,745
	Local Marketing and Outreach	\$ 779,057	\$ 897,305	\$ 779,057	\$ 779,057
	Green Building Labeling	\$ 500,238	\$ 499,119	\$ 500,238	\$ 500,238
	Flex Path (EUC)	\$ 1,999,745	\$ 1,545,501	\$ 1,999,745	\$ 1,999,745
	Contractor Outreach and Training	\$ 299,288	\$ 402,695	\$ 299,288	\$ 299,288
	Multifamily	\$ 3,545,168	\$ 2,502,233	\$ 3,545,168	\$ 3,545,168
	Low-Income Single Family Residential	\$ 337,249	\$ 210,782	\$ 337,249	\$ 337,249
SCR-FIN	Financial Programs Total	\$ 1,602,571	\$ 240,462	\$ 1,602,571	\$ 1,602,571
	Public Building Loan Loss Reserve	\$ -	\$ -	\$ -	\$ -
	EUC Residential Loan Loss Reserve	\$ 1,602,571	\$ 146,511	\$ 1,602,571	\$ 1,602,571
	Non-Residential PACE	\$ -	\$ 16,847	\$ -	\$ -
	Public Agency Revolving Loan Fund	\$ -	\$ 77,104	\$ -	\$ -
SCR-REC	REC Programs Total	\$ 7,158,652	\$ 8,441,864	\$ 6,181,935	\$ 7,158,652
	Aggregated Regional Procurement	\$ 3,101,352	\$ 387,648	\$ 3,101,352	\$ 3,101,352
	Integrated Comprehensive Whole Building Retrofit	\$ 3,080,583	\$ 6,994,543	\$ 3,080,583	\$ 3,080,583
	Regional Climate Action and Energy Plan	\$ 385,031	\$ 537,945	\$ 385,031	\$ 385,031
	Water-Energy Nexus	\$ 235,949	\$ 252,769	\$ 235,949	\$ 235,949
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 126,538	\$ 218,776	\$ 126,538	\$ 126,538
	Marketing, Outreach, Education, and Training	\$ 229,199	\$ (214,219)	\$ 229,199	\$ 229,199
	Workforce Development	\$ -	\$ 264,402	\$ -	\$ -
	PA PROGRAM TOTAL	\$ 16,221,968	\$ 14,739,962	\$ 15,245,251	\$ 16,221,968
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 16,221,968	\$ 14,739,962	\$ 15,245,251	\$ 16,221,968

New/Existing Program #	Main Program Name / Sub-Program Name	Total				
		2015 Authorized Budget	2015 Budget (after program fundshifting)	2015 Budget Spent	2016 Authorized Budget	2017 Proposed Budget
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 10,577,552	\$ 10,577,552	\$ 9,307,924	\$ 10,577,552	\$ 10,577,552.00
	Local Marketing and Outreach	\$ 1,636,372	\$ 1,636,372	\$ 1,810,790	\$ 1,636,372	\$ 1,636,372
	Green Building Labeling	\$ 1,005,000	\$ 1,005,000	\$ 1,210,847	\$ 1,005,000	\$ 1,005,000
	Flex Path (EUC)	\$ 2,307,154	\$ 2,307,154	\$ 2,096,715	\$ 2,307,154	\$ 2,307,154
	Contractor Outreach and Training	\$ 507,125	\$ 507,125	\$ 776,088	\$ 507,125	\$ 507,125
	Multifamily	\$ 4,771,901	\$ 4,771,901	\$ 3,137,664	\$ 4,771,901	\$ 4,771,901
	Low-Income Single Family Residential	\$ 350,000	\$ 350,000	\$ 275,821	\$ 350,000	\$ 350,000
SCR-FIN	Financial Programs Total	\$ 2,779,250	\$ 2,779,250	\$ 1,320,091	\$ 2,779,250	\$ 2,779,250
	Public Building Loan Loss Reserve	\$ 100,000	\$ 100,000	\$ 28,245	\$ 100,000	\$ 100,000
	EUC Residential Loan Loss Reserve	\$ 1,737,500	\$ 1,737,500	\$ 216,093	\$ 1,737,500	\$ 1,737,500
	Non-Residential PACE	\$ 705,750	\$ 705,750	\$ 797,532	\$ 705,750	\$ 705,750
	Public Agency Revolving Loan Fund	\$ 236,000	\$ 236,000	\$ 278,220	\$ 236,000	\$ 236,000
SCR-REC	REC Programs Total	\$ 8,294,198	\$ 8,294,198	\$ 10,474,600	\$ 8,294,198	\$ 8,294,198.00
	Aggregated Regional Procurement	\$ 3,355,771	\$ 3,355,771	\$ 1,135,428	\$ 3,355,771	\$ 3,355,771
	Integrated Comprehensive Whole Building Retrofit	\$ 3,328,601	\$ 3,328,601	\$ 7,567,187	\$ 3,328,601	\$ 3,328,601
	Regional Climate Action and Energy Plan	\$ 395,120	\$ 395,120	\$ 585,276	\$ 395,120	\$ 395,120
	Water-Energy Nexus	\$ 253,893	\$ 253,893	\$ 263,053	\$ 253,893	\$ 253,893
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 138,735	\$ 261,146	\$ 138,735	\$ 138,735
	Marketing, Outreach, Education, and Training	\$ 672,078	\$ 672,078	\$ 375,891	\$ 672,078	\$ 672,078
	Workforce Development	\$ 150,000	\$ 150,000	\$ 286,620	\$ 150,000	\$ 150,000
	PA PROGRAM TOTAL	\$ 21,651,000	\$ 21,651,000	\$ 21,102,615	\$ 21,651,000	\$ 21,651,000.00
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 21,651,000	\$ 21,651,000	\$ 21,102,615	\$ 21,651,000	\$ 21,651,000

Appendix B.3 – Budget, Spent, Unspent, Carryover Details

		2013-2015 Budget, Spent, Unspent and Carryover			
New/Existing Program #	Main Program Name / Sub-Program Name	2015 Authorized Budget	2015 Total Budget with Commitments & Fundshifts	2015 Total Budget with Commitments, Fundshifts, Unspent 13-14	2015 Total Budget Spent
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 10,577,552	\$ 10,577,552	\$ 22,516,437	\$ 9,307,924
	Local Marketing and Outreach	\$ 1,636,372	\$ 1,636,372	\$ 1,957,727	\$ 1,810,790
	Green Building Labeling	\$ 1,005,000	\$ 1,005,000	\$ 1,302,542	\$ 1,210,847
	Flex Path (EUC)	\$ 2,307,154	\$ 2,307,154	\$ 5,451,339	\$ 2,096,715
	Contractor Outreach and Training	\$ 507,125	\$ 507,125	\$ 878,114	\$ 776,088
	Multifamily	\$ 4,771,901	\$ 4,771,901	\$ 12,178,519	\$ 3,137,664
	Low-Income Single Family Residential	\$ 350,000	\$ 350,000	\$ 748,196	\$ 275,821
SCR-FIN	Financial Programs Total	\$ 2,779,250	\$ 2,779,250	\$ 5,330,657	\$ 1,320,091
	Public Building Loan Loss Reserve	\$ 100,000	\$ 100,000	\$ 118,815	\$ 28,245
	EUC Residential Loan Loss Reserve	\$ 1,737,500	\$ 1,737,500	\$ 4,239,240	\$ 216,093
	Non-Residential PACE	\$ 705,750	\$ 705,750	\$ 516,246	\$ 797,532
	Public Agency Revolving Loan Fund	\$ 236,000	\$ 236,000	\$ 456,356	\$ 278,220
SCR-REC	REC Programs Total	\$ 8,294,198	\$ 8,294,198	\$ 11,560,956	\$ 10,474,600
	Aggregated Regional Procurement	\$ 3,355,771	\$ 3,355,771	\$ 1,155,000	\$ 1,135,428
	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601	\$ 3,328,601	\$ 8,591,456	\$ 7,567,187
	Regional Climate Action and Energy Plan	\$ 395,120	\$ 395,120	\$ 597,000	\$ 585,276
	Water-Energy Nexus	\$ 253,893	\$ 253,893	\$ 269,100	\$ 263,053
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 138,735	\$ 265,500	\$ 261,146
	Marketing, Outreach, Education, and Training	\$ 672,078	\$ 672,078	\$ 390,300	\$ 375,891
	Workforce Development	\$ 150,000	\$ 150,000	\$ 292,600	\$ 286,620
	PA PROGRAM TOTAL	\$ 21,651,000	\$ 21,651,000	\$ 39,408,050	\$ 21,102,615
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 21,651,000	\$ 21,651,000	\$ 39,408,050	\$ 21,102,615

		2013-2015 Budget, Spent, Unspent and Carryover			
New/Existing Program #	Main Program Name / Sub-Program Name	Pre-2013 Commitments Remaining as of 12/31/15	2013-2015 Unspent/Uncommitted Funds Returned to Ratepayers	2013-2015 Commitments as of 12/31/15	Pre-2016 Unspent/Uncommitted Funds Available for 2017 offset
SCR-EUC	EUC Energy Efficiency Programs Total			\$ 2,522,425	\$ 10,686,088
	Local Marketing and Outreach				\$ 146,937
	Green Building Labeling				\$ 91,695
	Flex Path (EUC)			\$ 353,350	\$ 3,001,274
	Contractor Outreach and Training				\$ 102,026
	Multifamily			\$ 2,169,075	\$ 6,871,780
	Low-Income Single Family Residential				\$ 472,375
SCR-FIN	Financial Programs Total			\$ -	\$ 4,010,567
	Public Building Loan Loss Reserve				\$ 90,570
	EUC Residential Loan Loss Reserve				\$ 4,023,147
	Non-Residential PACE				\$ (281,287)
	Public Agency Revolving Loan Fund				\$ 178,136
SCR-REC	REC Programs Total			\$ -	\$ 1,086,356
	Aggregated Regional Procurement				\$ 19,572
	Integrated Comprehensive Whole Building Retrofits				\$ 1,024,269
	Regional Climate Action and Energy Plan				\$ 11,724
	Water-Energy Nexus				\$ 6,047
	Regional Energy Project Tracking and Permitting (CEEPMS)				\$ 4,354
	Marketing, Outreach, Education, and Training				\$ 14,409
	Workforce Development				\$ 5,980
	PA PROGRAM TOTAL	\$ -	\$ -	\$ 2,522,425	\$ 15,783,010
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ -	\$ -	\$ 2,522,425	\$ 15,783,010

		2016 Budget, Fundshifts and Spending to Date			
New/Existing Program #	Main Program Name / Sub-Program Name	2016 Authorized Budget	2016 Fundshifts	2016 Total Budget (includes prior 2016 commitments)	2016 Budget Spent as of 06/30/2016
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 10,577,552	\$ -	\$ 13,099,977	\$ 4,249,726
	Local Marketing and Outreach	\$ 1,636,372		\$ 1,636,372	\$ 600,266
	Green Building Labeling	\$ 1,005,000		\$ 1,005,000	\$ 612,433
	Flex Path (EUC)	\$ 2,307,154		\$ 2,660,504	\$ 1,400,405
	Contractor Outreach and Training	\$ 507,125		\$ 507,125	\$ 362,210
	Multifamily	\$ 4,771,901		\$ 6,940,976	\$ 1,127,144
	Low-Income Single Family Residential	\$ 350,000		\$ 350,000	\$ 147,267
SCR-FIN	Financial Programs Total	\$ 2,779,250	\$ -	\$ 2,779,250	\$ 299,492
	Public Building Loan Loss Reserve	\$ 100,000		\$ 100,000	\$ 24,749
	EUC Residential Loan Loss Reserve	\$ 1,737,500		\$ 1,737,500	\$ 108,980
	Non-Residential PACE	\$ 705,750		\$ 705,750	\$ 165,369
	Public Agency Revolving Loan Fund	\$ 236,000		\$ 236,000	\$ 394
SCR-REC	REC Programs Total	\$ 8,294,198	\$ -	\$ 8,294,198	\$ 4,207,676
	Aggregated Regional Procurement	\$ 3,355,771		\$ 3,355,771	\$ 54,298
	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601		\$ 3,328,601	\$ 3,804,029
	Regional Climate Action and Energy Plan	\$ 395,120		\$ 395,120	\$ 18,958
	Water-Energy Nexus	\$ 253,893		\$ 253,893	\$ 3,514
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735		\$ 138,735	\$ 5,391
	Marketing, Outreach, Education, and Training	\$ 672,078		\$ 672,078	\$ 151,400
	Workforce Development	\$ 150,000		\$ 150,000	\$ 170,086
	PA PROGRAM TOTAL	\$ 21,651,000	\$ -	\$ 24,173,425	\$ 8,756,894
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 21,651,000	\$ -	\$ 24,173,425	\$ 8,756,894

		2017 Proposed Budget		
New/Existing Program #	Main Program Name / Sub-Program Name	2017 Proposed Budget	2017 Budget Offset from Pre-2016 Carryover (Col K)	2017 Funds Requested
SCR-EUC	EUC Energy Efficiency Programs Total	\$ 10,577,552	\$ 10,686,088	\$ (108,536)
	Local Marketing and Outreach	\$ 1,636,372	\$ 146,937	\$ 1,489,435
	Green Building Labeling	\$ 1,005,000	\$ 91,695	\$ 913,305
	Flex Path (EUC)	\$ 2,307,154	\$ 3,001,274	\$ (694,120)
	Contractor Outreach and Training	\$ 507,125	\$ 102,026	\$ 405,099
	Multifamily	\$ 4,771,901	\$ 6,871,780	\$ (2,099,879)
	Low-Income Single Family Residential	\$ 350,000	\$ 472,375	\$ (122,375)
SCR-FIN	Financial Programs Total	\$ 2,779,250	\$ 4,010,567	\$ (1,231,317)
	Public Building Loan Loss Reserve	\$ 100,000	\$ 90,570	\$ 9,430
	EUC Residential Loan Loss Reserve	\$ 1,737,500	\$ 4,023,147	\$ (2,285,647)
	Non-Residential PACE	\$ 705,750	\$ (281,287)	\$ 987,037
	Public Agency Revolving Loan Fund	\$ 236,000	\$ 178,136	\$ 57,864
SCR-REC	REC Programs Total	\$ 8,294,198	\$ 1,086,356	\$ 7,207,842
	Aggregated Regional Procurement	\$ 3,355,771	\$ 19,572	\$ 3,336,199
	Integrated Comprehensive Whole Building Retrofits	\$ 3,328,601	\$ 1,024,269	\$ 2,304,332
	Regional Climate Action and Energy Plan	\$ 395,120	\$ 11,724	\$ 383,396
	Water-Energy Nexus	\$ 253,893	\$ 6,047	\$ 247,846
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 4,354	\$ 134,381
	Marketing, Outreach, Education, and Training	\$ 672,078	\$ 14,409	\$ 657,669
	Workforce Development	\$ 150,000	\$ 5,980	\$ 144,020
			\$ -	\$ -
	PA PROGRAM TOTAL	\$ 21,651,000	\$ 15,783,010	\$ 5,867,990
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 21,651,000	\$ 15,783,010	\$ 5,867,990

APPENDICES: 9/1 BUDGET FILING 2017

Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Main Program Name / Sub-Program Name	2013-2015 Budget, Spent, Unspent and Carryover				
		2015 Authorized Budget	2015 Total Budget with Commitments & Fundshifts	2015 Total Budget Spent	Pre-2013 Commitments Remaining as of 12/31/15	2013-2015 Unspent/Uncommitted Funds Returned to Ratepayers
SCR-EUC	Residential and Business Programs	\$ 10,577,552	\$ 10,577,552	\$ 9,307,924	\$ -	\$ -
	Local Marketing and Outreach	\$ 1,636,372	\$ 1,636,372	\$ 1,810,790	\$ -	\$ -
	Green Building Labeling	\$ 1,005,000	\$ 1,005,000	\$ 1,210,847	\$ -	\$ -
	Flex Path Incentives	\$ 2,307,154	\$ 2,307,154	\$ 2,096,715	\$ -	\$ -
	Contractor Outreach and Training	\$ 507,125	\$ 507,125	\$ 776,088	\$ -	\$ -
	Multifamily Incentives	\$ 4,771,901	\$ 4,771,901	\$ 3,137,664	\$ -	\$ -
	Low-Income Single Family Residents	\$ 350,000	\$ 350,000	\$ 275,821	\$ -	\$ -
SCR-FIN	Financial Programs Total	\$ 2,779,250	\$ 2,779,250	\$ 1,320,091	\$ -	\$ -
	Public Building Loan Loss Reserv	\$ 100,000	\$ 100,000	\$ 28,245	\$ -	\$ -
	EUC Residential Loan Loss Reserv	\$ 1,737,500	\$ 1,737,500	\$ 216,093	\$ -	\$ -
	Non-Residential PACE	\$ 705,750	\$ 705,750	\$ 797,532	\$ -	\$ -
	Public Agency Revolving Loan Fun	\$ 236,000	\$ 236,000	\$ 278,220	\$ -	\$ -
SCR-REC	REC Programs Total	\$ 8,294,198	\$ 8,294,198	\$ 10,474,600	\$ -	\$ -
	Aggregated Regional Procurement	\$ 3,355,771	\$ 3,355,771	\$ 1,135,428	\$ -	\$ -
	Integrated Comprehensive Whole Building Retrofit	\$ 3,328,601	\$ 3,328,601	\$ 7,567,187	\$ -	\$ -
	Regional Climate Action and Energy Pla	\$ 395,120	\$ 395,120	\$ 585,276	\$ -	\$ -
	Water-Energy Nexus	\$ 253,893	\$ 253,893	\$ 263,053	\$ -	\$ -
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 138,735	\$ 261,146	\$ -	\$ -
	Marketing, Outreach, Education, and Trainin	\$ 672,078	\$ 672,078	\$ 375,891	\$ -	\$ -
	Workforce Developmen	\$ 150,000	\$ 150,000	\$ 286,620	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -	\$ -
	PA PROGRAM TOTAL	\$ 21,651,000	\$ 21,651,000	\$ 21,102,615	\$ -	\$ -
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 21,651,000	\$ 21,651,000	\$ 21,102,615	\$ -	\$ -

2013-2015 Budget, Spent, Unspent and Carryover				2016 Budget, Spent, Unspent and Carryover		
New/Existing Program #	Main Program Name / Sub-Program Name	2013-2015 Commitments as of 12/31/15	Pre-2016 Unspent/Uncommitted Funds Available for 2016 offset	2016 Authorized Budget	2016 Total Budget with Commitments & Fundshifts	2016 Total Budget Spent
SCR-EUC	Residential and Business Programs	\$ 2,522,425	\$ 1,500,375	\$ 10,577,552	\$ 13,099,977	\$ 9,466,024
	Local Marketing and Outreach	\$ -	\$ -	\$ 1,636,372	\$ 1,636,372	\$ 1,224,238
	Green Building Labeling	\$ -	\$ -	\$ 1,005,000	\$ 1,005,000	\$ 1,060,504
	Flex Path Incentives	\$ 353,350	\$ 0	\$ 2,307,154	\$ 2,660,504	\$ 2,672,156
	Contractor Outreach and Training	\$ -	\$ -	\$ 507,125	\$ 507,125	\$ 1,020,062
	Multifamily Incentives	\$ 2,169,075	\$ 1,500,375	\$ 4,771,901	\$ 6,940,976	\$ 3,209,386
	Low-Income Single Family Residentia	\$ -	\$ -	\$ 350,000	\$ 350,000	\$ 279,678
SCR-FIN	Financial Programs Total	\$ -	\$ -	\$ 2,779,250	\$ 2,779,250	\$ 670,655
	Public Building Loan Loss Reservi	\$ -	\$ -	\$ 100,000	\$ 100,000	\$ 80,512
	EUC Residential Loan Loss Reservi	\$ -	\$ -	\$ 1,737,500	\$ 1,737,500	\$ 246,945
	Non-Residential PACE	\$ -	\$ -	\$ 705,750	\$ 705,750	\$ 341,646
	Public Agency Revolving Loan Fun	\$ -	\$ -	\$ 236,000	\$ 236,000	\$ 1,552
SCR-REC	REC Programs Total	\$ -	\$ -	\$ 8,294,198	\$ 8,294,198	\$ 8,858,562
	Aggregated Regional Procurement	\$ -	\$ -	\$ 3,355,771	\$ 3,355,771	\$ 66,944
	Integrated Comprehensive Whole Building Retrofit	\$ -	\$ -	\$ 3,328,601	\$ 3,328,601	\$ 7,787,079
	Regional Climate Action and Energy Pla	\$ -	\$ -	\$ 395,120	\$ 395,120	\$ 66,271
	Water-Energy Nexus	\$ -	\$ -	\$ 253,893	\$ 253,893	\$ 7,713
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ -	\$ -	\$ 138,735	\$ 138,735	\$ 344,831
	Marketing, Outreach, Education, and Trainin	\$ -	\$ -	\$ 672,078	\$ 672,078	\$ 367,249
	Workforce Developmen	\$ -	\$ -	\$ 150,000	\$ 150,000	\$ 218,475
	PA PROGRAM TOTAL	\$ 2,522,425	\$ 1,500,375	\$ 21,651,000	\$ 24,173,425	\$ 18,995,241
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 2,522,425	\$ 1,500,375	\$ 21,651,000	\$ 24,173,425	\$ 18,995,241

New/Existing Program #	Main Program Name / Sub-Program Name	2016 Budget, Spent, Unspent and Carryover			2017 Budget, Fundshifts and Spending to Date	
		2016 Unspent/Uncommitted Funds Returned to Ratepayers	2016 Commitments as of 12/31/16	Pre-2017 Unspent/Uncommitted Funds Available for 2018 offset	2017 Authorized Budget	2017 Fundshifts
SCR-EUC	Residential and Business Programs	\$ -	\$ 3,677,809	\$ (43,856)	\$ 10,577,552	\$ -
	Local Marketing and Outreach	\$ -	\$ -	\$ 412,134	\$ 1,636,372	\$ (750,000)
	Green Building Labeling	\$ -	\$ -	\$ (55,504)	\$ 1,005,000	\$ (750,000)
	Flex Path Incentives	\$ -	\$ 294,950	\$ (306,602)	\$ 2,307,154	\$ -
	Contractor Outreach and Training	\$ -	\$ -	\$ (512,937)	\$ 507,125	\$ -
	Multifamily Incentives	\$ -	\$ 3,382,859	\$ 348,731	\$ 4,771,901	\$ 1,500,000
	Low-Income Single Family Residentie	\$ -	\$ -	\$ 70,322	\$ 350,000	\$ -
SCR-FIN	Financial Programs Total	\$ -	\$ -	\$ 2,108,595	\$ 2,779,250	\$ -
	Public Building Loan Loss Reserv	\$ -	\$ -	\$ 19,488	\$ 100,000	\$ -
	EUC Residential Loan Loss Reserv	\$ -	\$ -	\$ 1,490,555	\$ 1,737,500	\$ -
	Non-Residential PACE	\$ -	\$ -	\$ 364,104	\$ 705,750	\$ -
	Public Agency Revolving Loan Fun	\$ -	\$ -	\$ 234,448	\$ 236,000	\$ -
SCR-REC	REC Programs Total	\$ -	\$ -	\$ (564,364)	\$ 8,294,198	\$ -
	Aggregated Regional Procurement	\$ -	\$ -	\$ 3,288,827	\$ 3,355,771	\$ (3,325,000)
	Integrated Comprehensive Whole Building Retrofit	\$ -	\$ -	\$ (4,458,478)	\$ 3,328,601	\$ 3,325,000
	Regional Climate Action and Energy Pla	\$ -	\$ -	\$ 328,849	\$ 395,120	\$ -
	Water-Energy Nexus	\$ -	\$ -	\$ 246,180	\$ 253,893	\$ -
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ -	\$ -	\$ (206,096)	\$ 138,735	\$ -
	Marketing, Outreach, Education, and Trainin	\$ -	\$ -	\$ 304,829	\$ 672,078	\$ -
	Workforce Developmen	\$ -	\$ -	\$ (68,475)	\$ 150,000	\$ -
		\$ -	\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -	\$ -
	PA PROGRAM TOTAL	\$ -	\$ 3,677,809	\$ 1,500,375	\$ 21,651,000	\$ -
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ -	\$ 3,677,809	\$ 1,500,375	\$ 21,651,000	\$ -

New/Existing Program #	Main Program Name / Sub-Program Name	2017 Budget, Fundshifts and Spending to Date		2018 Proposed Budget		
		2017 Total Budget	2017 Budget Spent as of 06/30/2017	2018 Proposed Budget	2018 Budget Offset from Pre-2017 Carryover (Col J + Col P)	2018 Funds Requested
SCR-EUC	Residential and Business Programs	\$ 10,577,552	\$ 6,167,943	\$ 10,553,000	\$ (43,856)	\$ 10,596,856
	Local Marketing and Outreach	\$ 886,372	\$ 477,981	\$ 500,000	\$ 412,134	\$ 87,866
	Green Building Labeling	\$ 255,000	\$ 272,477	\$ 28,000	\$ (55,504)	\$ 83,504
	Flex Path Incentives	\$ 2,307,154	\$ 956,897	\$ -	\$ (306,602)	\$ 306,602
	Contractor Outreach and Training	\$ 507,125	\$ 467,063	\$ 250,000	\$ (512,937)	\$ 762,937
	Multifamily Incentives	\$ 6,271,901	\$ 3,814,551	\$ 9,400,000	\$ 348,731	\$ 9,051,269
	Low-Income Single Family Residentie	\$ 350,000	\$ 178,974	\$ 375,000	\$ 70,322	\$ 304,678
SCR-FIN	Financial Programs Total	\$ 2,779,250	\$ 249,565	\$ 2,347,000	\$ 2,108,595	\$ 238,405
	Public Building Loan Loss Reserv	\$ 100,000	\$ 8,102	\$ 100,000	\$ 19,488	\$ 80,512
	EUC Residential Loan Loss Reserv	\$ 1,737,500	\$ 90,375	\$ 1,497,000	\$ 1,490,555	\$ 6,445
	Non-Residential PACE	\$ 705,750	\$ 136,082	\$ 675,000	\$ 364,104	\$ 310,896
	Public Agency Revolving Loan Fun	\$ 236,000	\$ 15,006	\$ 75,000	\$ 234,448	\$ (159,448)
SCR-REC	REC Programs Total	\$ 8,294,198	\$ 4,222,481	\$ 8,751,000	\$ (564,364)	\$ 9,315,364
	Aggregated Regional Procurement	\$ 30,771	\$ 10,194	\$ 150,000	\$ 3,288,827	\$ (3,138,827)
	Integrated Comprehensive Whole Building Retrofit	\$ 6,653,601	\$ 3,702,062	\$ 7,193,000	\$ (4,458,478)	\$ 11,651,478
	Regional Climate Action and Energy Pla	\$ 395,120	\$ 201,808	\$ 395,000	\$ 328,849	\$ 66,151
	Water-Energy Nexus	\$ 253,893	\$ 1,073	\$ 25,000	\$ 246,180	\$ (221,180)
	Regional Energy Project Tracking and Permitting (CEEPMS)	\$ 138,735	\$ 4,604	\$ 138,000	\$ (206,096)	\$ 344,096
	Marketing, Outreach, Education, and Trainin	\$ 672,078	\$ 204,430	\$ 650,000	\$ 304,829	\$ 345,171
	Workforce Developmen	\$ 150,000	\$ 98,310	\$ 200,000	\$ (68,475)	\$ 268,475
		\$ -	\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -	\$ -
	PA PROGRAM TOTAL	\$ 21,651,000	\$ 10,639,989	\$ 21,651,000	\$ 1,500,375	\$ 20,150,625
EM&V	EM&V (PA & CPUC Portions) Total	\$ -	\$ -	\$ -	\$ -	\$ -
72.5%	EM&V - CPUC	\$ -	\$ -	\$ -	\$ -	\$ -
27.5%	EM&V - PA	\$ -	\$ -	\$ -	\$ -	\$ -
	PA TOTAL with EM&V	\$ 21,651,000	\$ 10,639,989	\$ 21,651,000	\$ 1,500,375	\$ 20,150,625

New/Existing Program #	Main Program Name / Sub-Program Name	Program Type	Market Sector	Resource or Non-resource	Program Status	Utility Grouping
SCR-EUC	Residential and Business Programs	REN	Residential	Resource	Existing	Residential Programs
	Local Marketing and Outreach	REN	Residential	Non-resource	Existing	Marketing Education and Outreach
	Green Building Labeling	REN	Residential	Non-resource	Existing	Marketing Education and Outreach
	Flex Path Incentives	REN	Residential	Resource	Existing	Calculated Incentives
	Contractor Outreach and Training	REN	Residential	Non-resource	Existing	Marketing Education and Outreach
	Multifamily Incentives	REN	Residential	Resource	Existing	Calculated Incentives
	Low-Income Single Family Residential	REN	Residential	Non-resource	Existing	Calculated Incentives
SCR-FIN	Financial Programs Total	REN	Cross Cutting	Non-resource	Existing	Financing Programs
	Public Building Loan Loss Reserve	REN	Commercial	Non-resource	Existing	Financing Programs
	EUC Residential Loan Loss Reserve	REN	Residential	Non-resource	Existing	Financing Programs
	Non-Residential PACE	REN	Commercial	Non-resource	Existing	Financing Programs
	Public Agency Revolving Loan Fund	REN	Commercial	Non-resource	Existing	Financing Programs
SCR-REC	REC Programs Total	REN	Commercial	Non-resource	Existing	Public Agency
	Aggregated Regional Procurement	REN	Commercial	Non-resource	Existing	Public Agency
	Integrated Comprehensive Whole Building Retrofit	REN	Commercial	Non-resource	Existing	Public Agency
	Regional Climate Action and Energy Plan	REN	Commercial	Non-resource	Existing	Public Agency
	Water-Energy Nexus	REN	Commercial	Non-resource	Existing	Public Agency
	Regional Energy Project Tracking and Permitting (CEEPMS)	REN	Commercial	Non-resource	Existing	Public Agency
	Marketing, Outreach, Education, and Training	REN	Commercial	Non-resource	Existing	Public Agency
	Workforce Development	REN	Commercial	Non-resource	Existing	Public Agency
	PA PROGRAM TOTAL					
EM&V	EM&V (PA & CPUC Portions) Total					
72.5%	EM&V - CPUC					
27.5%	EM&V - PA					
	PA TOTAL with EM&V					

CREDITS

The Southern California Regional Energy Network (SoCalREN) is administered by the County of Los Angeles and funded by California utility ratepayers under the auspices of the California Public Utilities Commission.

This Annual Report was developed in 2017 within budget guidelines by:

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Community Development Commission of the County of Los Angeles

City of Culver City

Conejo Valley Unified School District

City of Palmdale

Cucamonga Valley Water District

City of Santa Barbara

Emerald Cities Collaborative

City of Santa Monica

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To Enrich Lives through Effective and Caring Service.



The color palette used in the SoCalREN logo and this document was inspired by the natural beauty of Southern California, specifically the succulent varietal pictured above. Succulents are water-preserving plants found throughout the region. They present a perfect example of sustainability and making efficient use of resources.



**Amendment Six
to the
2013-2014 Energy Efficiency
Programs and Budgets Agreement**

This *Amendment Six* to the *2013-2014 Energy Efficiency Programs and Budgets Agreement* is made and entered into as of December 31, 2017, by and among

The County of Los Angeles (the "County"), a political subdivision of the State of California, individually and on behalf of the Southern California Regional Energy Network (the "SoCalREN") as its fiscal agent; and

Southern California Gas Company ("SoCalGas"), a California investor-owned utility and a California corporation, with its principal place of business in Los Angeles, California, and a wholly owned subsidiary of Semptra Energy, a California Corporation; and

Southern California Edison Company ("Edison"), a California investor-owned utility and a California corporation, with its principal place of business in Rosemead, California, a wholly owned subsidiary of Edison International, a California corporation;

RECITALS

R1. Effective as of January 15, 2013, the County, SoCalGas, and Edison entered into the *2013-2014 Energy Efficiency Programs and Budgets Agreement* (as amended by Amendment One, Amendment Two, Amendment Three, Amendment Four, and Amendment Five, the "2013-2014 Programs Agreement"). When doing so, the County's Board of Supervisors delegated authority to the Director of the County's Internal Services Department to approve and execute any amendments to the 2013-2014 Programs Agreement.

R2. Effective as of February 1, 2013, the parties entered into Amendment One to the 2013-2014 Programs Agreement ("Amendment One").

R3. Effective as of July 14, 2013, the parties entered into Amendment Two to the 2013-2014 Programs Agreement ("Amendment Two").

R4. On October 24, 2014, the California Public Utilities Commission (the "Commission"), issued its *Decision Establishing Energy Efficiency Savings Goals and Approving 2015 Energy Efficiency Programs and Budgets*, D. 14-10-046 (the "2015 Decision").

R5. In the 2015 Decision, the Commission approved a portfolio of energy efficiency programs and budgets, including those of the County, SoCalGas, and Edison, that are "largely a carry-forward of prior portfolios" under the 2013-2014 Programs Agreement with the intent that 2015 would be "year three" of a 2013-2015 portfolio."

R6. On December 12, 2014, the parties entered into Amendment Three to the 2013-14 Programs Agreement ("Amendment Three") to continue the 2015 Programs of the County.

R7. On October 28, 2015, the Commission issued its Decision for Energy Efficiency Goals for 2016 and Beyond and Energy Efficiency Rolling Portfolio Mechanics (the "D.15-10-028") which authorizes the EE rolling portfolio mechanics for 2016 and beyond, continuation of energy efficiency programs including the 2016 Programs of the County, SoCalGas and Edison, and explains that annual Advice Letter filings will propose detailed budgets for cost recovery, transfer and contracting purposes.

R8. On December 14, 2015, the parties entered into Amendment Four to the 2013-14 Programs Agreement (“Amendment Four”) to continue the 2016 Programs of the County.

R9. On November 28, 2016, the parties entered into Amendment Five to the 2013-14 Programs Agreement (“Amendment Five”) to continue the 2017 Programs of the County;

R10. As required in D.14-10-046 and D.15-10-028, on September 1, 2017, the County submitted an Advice Letter #6-E-G-A and subsequently cost effectiveness calculation on November 21, 2017 for approval by the Commission for 2018 SoCalREN budget.

R11. In accordance with Section 3.5 of the 2013-2014 Programs Agreement, the Parties now desire to amend the 2013-2014 Programs Agreement to comply with the funding and extension as set forth in the 2015 Decision and the D.15-10-028.

NOW, THEREFORE, the County, SoCalGas, and Edison further agree as follows:

1.0 DOCUMENTS

1.1 This amendment, along with the Exhibit H listed in Section 1.2 below, collectively form and are referred to throughout and hereinafter as the “Amendment Six.”

1.2 The following Exhibits supersede and replace those with corresponding names and letters from the 2013-2014 Programs Agreement:

Exhibit H	County and Sub-Contractors Time & Material Fully Burdened Hourly Rate Schedule 2018
-----------	---

1.3 This Amendment Six is incorporated into and made a part of the 2013-2014 Programs Agreement, as previously amended, supersedes any previous agreements, written or oral, and all communications among the Parties relating to the subject matter contained within Amendment Six.

1.4 The 2013-2014 Programs Agreement, as amended, and this Amendment Six are collectively referred to as the “Programs Agreement.”

1.4 Unless otherwise specifically defined in this Amendment Six, terms with the initial letter capitalized shall have the specific meaning as defined in the Programs Agreement.

2.0 AMENDMENT TO THE MAXIMUM CONTRACT SUM

2.1 Section 4.1 and 4.2 of the 2013-2014 Programs Agreement, as subsequently amended, are hereby replaced in their entirety as follows:

4.1 The Maximum Contract Sum from 2013 through 2018 committed to this Programs Agreement from the Utilities to the County is up to one hundred twenty-nine million, nine-hundred three thousand, three hundred twenty-eight dollars (\$129,904,328). Edison hereby commits up to one hundred three million, seven hundred twenty-nine thousand, one hundred sixty-seven dollars (\$103,729,167), and SoCalGas hereby commits up to twenty-six million, one hundred seventy-five thousand, one hundred sixty-one dollars (\$26,175,161).

2.2 Section 4.4 of the 2013-2014 Programs Agreement, which was added in Amendment Five, is hereby deleted and replaced with the following:

4.4 Notwithstanding the foregoing, the Parties acknowledge that the Commission in the 2015 Decision authorized the use of a “Maximum Contract Amount” for each year after 2015 at the 2015 annual funding levels reflected in Section 4.1 through 2025 unless and until the Commission orders otherwise. In addition, on January 23, 2017, SoCalREN filed an application for approval of SoCalREN Energy Efficiency Rolling Portfolio Business Plan for 2018 -20125 (“SoCalREN Business Plan”). Upon Commission approval of the SoCalREN Business Plan, the Parties agree to execute a new programs agreement to implement the approved SoCalREN Business Plan and comply with all relevant Commission directives for the rolling cycle.

3. AMENDMENT TO THE TERM AND TERMINATION

Section 17.1 and 17.2 of the 2013-2014 Programs Agreement are hereby amended as follows:

17.1 Term. The term of this Programs Agreement shall be from the Effective Date until March 31, 2019, unless terminated earlier as provided in this Section, provided however that all Work and services shall be completed by the dates specified in the Statement of Work or December 31, 2018, whichever is earlier. The 90-day period following December 31, 2018 shall be for administrative purposes only.

17.2 If the County possesses unspent funding authorized by the Commission after July 1, 2019, including moneys repaid pursuant to financing terms, such funds shall be returned to ratepayers unless otherwise directed by the Commission.

4. OTHER PROVISIONS

Except as set forth in this Amendment Six, all other terms and conditions of the 2013-2015 Programs Agreement remain unchanged and in full force and effect.

5. AUTHORIZATION WARRANTIES

- a. The County represents and warrants that the person executing this Amendment Six for the County is an authorized agent who has actual authority to bind the County to each and every term, condition, and obligation of this Amendment Six, and that all requirements of the County have been fulfilled to provide such actual authority.
- b. SoCalGas represents and warrants that the person executing this Amendment Six for SoCalGas is an authorized agent who has actual authority to bind the SoCalGas to each and every term, condition, and obligation of this Amendment Six and that all requirements of the SoCalGas have been fulfilled to provide such actual authority.
- c. Edison represents and warrants that the person executing this Amendment Six is an authorized agent for Edison, and has the actual authority to bind the Edison to each and every term, condition, and obligation of this Amendment Six, and that all requirements of Edison have been fulfilled to provide such actual authority.

IN WITNESS WHEREOF, SoCalGas and Edison hereby each execute this Programs Agreement, and the County of Los Angeles, by order of its Board of Supervisors has caused this Programs Agreement to be executed on its behalf by the Director of the Internal Services Department.

EDISON:

SOCALGAS:

By _____
Marc Ulrich, Ph.D.
VP, Customer Programs & Services

By _____
J. Bret Lane
Chief Operation Officer

COUNTY:

By _____
Scott Minnix, Director
Internal Services Department

APPROVED AS TO FORM:
Mary C. Wickham
County Counsel

By _____
Patrice Salseda
Senior Deputy County Counsel

COUNTY OF LOS ANGELES

REQUEST FOR APPROPRIATION ADJUSTMENT

DEPARTMENT OF INTERNAL SERVICES

AUDITOR-CONTROLLER:

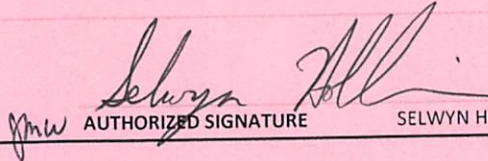
THE FOLLOWING APPROPRIATION ADJUSTMENT IS DEEMED NECESSARY BY THIS DEPARTMENT. PLEASE CONFIRM THE ACCOUNTING ENTRIES AND AVAILABLE BALANCES AND FORWARD TO THE CHIEF EXECUTIVE OFFICER FOR HIS RECOMMENDATION OR ACTION.

ADJUSTMENT REQUESTED AND REASONS THEREFOR
FY 2017-18
4 - VOTES

SOURCES		USES	
UTILITIES A01-IS-88-8737-12460 STATE ENERGY GRANTS INCREASE REVENUE	10,826,000	UTILITIES A01-IS-2000-12460 SERVICES & SUPPLIES INCREASE APPROPRIATION	5,200,000
		UTILITIES A01-IS-5500-12460 OTHER CHARGES INCREASE APPROPRIATION	5,626,000
SOURCES TOTAL	\$ 10,826,000	USES TOTAL	\$ 10,826,000

JUSTIFICATION

Reflects an increase in appropriation to continue California Public Utilities Commission (CPUC) programs, which will be fully reimbursed by the CPUC resulting in no impact on net County cost.


 AUTHORIZED SIGNATURE SELWYN HOLLINS, ADMIN DEPUTY, ISD

BOARD OF SUPERVISOR'S APPROVAL (AS REQUESTED/REVISED)

REFERRED TO THE CHIEF EXECUTIVE OFFICER FOR---

- ACTION
 RECOMMENDATION

- APPROVED AS REQUESTED
 APPROVED AS REVISED

AUDITOR-CONTROLLER

BY Lanfear
DATE Jan. 22, 2018

CHIEF EXECUTIVE OFFICER

BY Cheryl-an
DATE Jan 23, 2018

B.A. NO. 094

SoCalREN Portfolio Matrix

2017 Total Expenditures as of December 31, 2017

Main Program Name/ Sub-Program Name	Implementer	Current Program Status	2017 All Budget (no Incentives)	2017 All Incentives	2017 Total Expenditures* (includes incentives)	2017 Fundshift Out	2017 Fundshift In	Revised 2017 Budget (no Incentives)	2017 Revised Incentives
Residential and Business Programs									
Local Marketing and Outreach	BKI till 4/28 -- now ICF	Scope Reduced	\$ 6,449,392		\$ 11,370,306	\$ 750,000		\$ 4,949,392	
Green Building Labeling	BKI till 4/28 -- now ICF	Paused	\$ 1,636,372		\$ 631,430	\$ 750,000		\$ 886,372	
Flex Path (HU)	BKI till 4/28 -- now ICF	Continuing	\$ 1,005,000		\$ 364,468	\$ 750,000		\$ 255,000	
Contractor Outreach and Training	BKI till 4/28 -- now ICF	Scope Reduced	\$ 762,204	\$ 1,544,950	\$ 2,279,518			\$ 762,204	\$ 1,544,950
Multifamily	BKI till 4/28 -- now ICF	Managing Pipeline	\$ 507,125		\$ 603,400			\$ 507,125	
Low-Income Single Family Residential	BKI till 4/28 -- now ICF	Continuing	\$ 2,188,691	\$ 2,583,210	\$ 7,150,725		\$ 1,500,000	\$ 2,188,691	\$ 4,083,210
	CDC	Continuing	\$ 350,000		\$ 340,765			\$ 350,000	
Financial Programs Total			\$ 2,779,250		\$ 398,648			\$ 2,779,250	
Public Building Loan Loss Reserve	TEC	Continuing	\$ 100,000		\$ 24,822			\$ 100,000	
EUC Residential Loan Loss Reserve	BKI till 4/28 -- now ICF	Paused	\$ 1,737,500		\$ 175,786			\$ 1,737,500	
Non-Residential PACE	BKI till 4/28 -- now ICF	Continuing	\$ 705,750		\$ 182,625			\$ 705,750	
Public Agency Revolving Loan Fund	TEC	Paused	\$ 236,000		\$ 15,415			\$ 236,000	
REC Programs Total			\$ 8,294,198		\$ 8,860,705			\$ 8,294,198	
Aggregated Regional Procurement	TEC	Scope Reduced	\$ 3,355,771		\$ 202,160	\$ 3,325,000		\$ 30,771	
Integrated Comprehensive Whole Building Retrofits	TEC	Continuing	\$ 3,328,601		\$ 7,196,112		\$ 3,325,000	\$ 6,653,601	
Regional Climate Action and Energy Plan	UCLA	Continuing	\$ 395,120		\$ 488,108			\$ 395,120	
Water-Energy Nexus	TEC	Paused	\$ 253,893		\$ 92,033			\$ 253,893	
Regional Energy Project Tracking and Permitting (CEPPMS)	LAC	Continuing	\$ 138,735		\$ 190,095			\$ 138,735	
Marketing, Outreach, Education, and Training	CSE	Continuing	\$ 672,078		\$ 454,139			\$ 672,078	
Workforce Development	Emerald Cities	Continuing	\$ 150,000		\$ 238,058			\$ 150,000	
TOTAL			\$ 17,522,840	\$ 4,128,160	\$ 20,629,660	\$ 4,825,000	\$ 4,825,000	\$ 16,022,840	\$ 5,628,160
			Total All	\$ 21,651,000				Total All	\$ 21,651,000

*2017 Total Expenditures = actuals and invoiced, including paid, reviewed and in process invoices, from January to November, plus December forecasted invoices as implementers will be submitting their invoices in January 2018.

SoCalREN Portfolio Matrix

2018 Forecast and Proposed Budget**

Main Program Name/ Sub-Program Name	Implementer	Current Program Status	2018 AL Proposed Budget (no incentives)	2018 AL Proposed Incentives	2018 Total Expenditures (includes incentives)	2018 Fundshift Out	2018 Fundshift In	Revised 2018 Budget (no Incentives)	2018 Revised Incentives
Residential and Business Programs									
Local Marketing and Outreach	ICF fill RFP	Continuing	\$ 2,903,000	\$ -	\$ -				
Green Building Labeling	ICF fill RFP	Discontinued	\$ 500,000	\$ -	\$ -				
Flex Path (HU)	ICF fill RFP	Discontinued	\$ 28,000	\$ -	\$ -				
Contractor Outreach and Training	ICF fill RFP	Scope Reduced	\$ -	\$ -	\$ -				
Multifamily	ICF fill RFP	Continuing	\$ 250,000	\$ -	\$ -				
Low-Income Single Family Residential	ICF fill RFP	Continuing	\$ 1,750,000	\$ 7,650,000	\$ -				
	CDC	Continuing	\$ 375,000	\$ -	\$ -				
Financial Programs Total			\$ 2,347,000	\$ -	\$ -				
Public Building Loan Loss Reserve	TEC	Scope Reduced	\$ 100,000	\$ -	\$ -				
EUC Residential Loan Loss Reserve	ICF	Continuing	\$ 1,497,000	\$ -	\$ -				
Non-Residential PACE	ICF	Continuing	\$ 675,000	\$ -	\$ -				
Public Agency Revolving Loan Fund	TEC	Scope Reduced	\$ 75,000	\$ -	\$ -				
REC Programs Total			\$ 8,751,000	\$ -	\$ -				
Aggregated Regional Procurement	TEC	Continuing	\$ 150,000	\$ -	\$ -				
Integrated Comprehensive Whole Building Retrofits	TEC	Continuing	\$ 7,193,000	\$ -	\$ -				
Regional Climate Action and Energy Plan	UCLA	Continuing	\$ 395,000	\$ -	\$ -				
Water-Energy Nexus	TEC	Discontinued	\$ 25,000	\$ -	\$ -				
Regional Energy Project Tracking and Permitting (CEEPMS)	LAC	Continuing	\$ 138,000	\$ -	\$ -				
Marketing, Outreach, Education, and Training	CSE	Continuing	\$ 650,000	\$ -	\$ -				
Workforce Development	Emerald Cities	Continuing	\$ 200,000	\$ -	\$ -				
TOTAL			\$ 14,001,000	\$ 7,650,000	\$ -	\$ -	\$ -	\$ -	\$ -
			Total All \$	21,651,000				Total All \$	-

*2018 Budget reflect the proposed budget filed with CPUC in SoCalREN's Annual Budget Advice Letter Filing #6-E-G-A; this advice letter is currently under review and expected to be approved in Q1 2018.