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August 19, 2005

BY HAND DELIVERY

Docket Clerk
California Public Utilities Commission
505 Van Ness Ave.
San Francisco, CA 94102

Re: Order Instituting Rulemaking on the Commission's Proposed Policies and Programs
Governing Post-2003 Low-Income Assistance Programs – R. 04-01-006, et al.

Dear Clerk:

Pursuant to Decision 05-04-052, Ordering Paragraph 18, enclosed for filing is the original and five (5) copies of **“JOINT UTILITIES’ FILING OF A LOW INCOME ENERGY EFFICIENCY CONTRACTOR COST TEMPLATE”** in the above-captioned matter. This filing is made by Pacific Gas and Electric Company (PG&E) on behalf of the Joint Utilities, i.e., PG&E, Southern California Edison Company, Southern California Gas Company, and San Diego Gas & Electric Company.

Please file the original document, date-stamp one copy, and return it in the enclosed self-addressed stamped envelope.

Very truly yours,

Margaret deB. Brown

MDB/mbs

Enclosures

cc: All Parties on Official Service List for:
R. 04-01-006; A. 04-06-038; A. 04-07-002; A. 04-07-010; A. 04-07-011; A. 04-07-012;
A. 04-07-013; A. 04-04-014; A. 04-07-015; A. 04-07-027 and A. 04-07-050

Assigned Commissioner Dian Grueneich
ALJ Sarah R. Thomas
ALJ Steven A. Weissman

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

Order Instituting Rulemaking on the Commission's Proposed Policies and Programs Governing post-2003 Low-Income Assistance Programs.	Rulemaking 04-01-006 (Filed January 8, 2004)
In the Matter of the Application of PACIFICORP for Approval of 2005 Low-Income Assistance Program Budgets.	Application 04-06-038 (Filed June 30, 2004)
In the Matter of the Application of Southwest Gas Corporation (U 905 G) for Approval of Program Year 2005 Low-Income Assistance Program Budgets.	Application 04-07-002 (Filed June 30, 2004)
Application of Southern California Gas Company (U 904 G) for Approval of Program Year 2005 Low-Income Assistance Programs and Funding.	Application 04-07-010 (Filed July 1, 2004)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Program Year 2005 Low-Income Assistance Programs and Funding.	Application 04-07-011 (Filed July 1, 2004)
Southern California Edison Company's (U 338-E) Application Regarding Low-Income Assistance Programs for Program Year 2005.	Application 04-07-012 (Filed July 1, 2004)
Application of Pacific Gas and Electric Company (U 39 M) for Approval Of The 2005 California Alternate Rates for Energy and Low Income Energy Efficiency Programs and Budget.	Application 04-07-013 (Filed July 1, 2004)
In the Matter of the Application of SIERRA PACIFIC POWER COMPANY (U 903), for an Order Approving its 2005 California Alternate Rates for Energy (CARE) and Low Income Efficiency (LIEE) Plans and Budgets.	Application 04-07-014 (Filed July 1, 2004)
In the Matter of the Application of Avista Corporation for Approval of Program Year 2005 Low-Income Assistance Program Budgets.	Application 04-07-015 (Filed July 1, 2004)

In the Matter of the Application of the SOUTHERN CALIFORNIA WATER COMPANY (U 133 W) Regarding Low Income Assistance Programs for its Bear Valley Electric Service Customers for Program Year 2005.

Application 04-07-020
(Filed July 8, 2004)

Application of Alpine Natural Gas Operating Company No. 1 LLC in Compliance with Decision 03-12-016 (PY 2004 Low Income Energy Efficiency ("LIEE") and California Alternate Rates For Energy ("CARE") program Plans).

Application 04-07-027
(Filed July 2, 2004)

In the Matter of the Application of West Coast Gas Company (U-910-G) For Approval of Program Year 2005 Low-Income Assistance Program Budgets.

Application 04-07-050
(Filed July 29, 2004)

**JOINT UTILITIES' FILING OF A LOW INCOME ENERGY EFFICIENCY
CONTRACTOR COST TEMPLATE**

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Attorneys for:
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Dated: August 19, 2005

**BEFORE THE PUBLIC UTILITIES COMMISSION OF THE
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JOINT UTILITIES’ FILING OF A LOW INCOME ENERGY EFFICIENCY CONTRACTOR COST TEMPLATE

I. INTRODUCTION

Pacific Gas and Electric Company (PG&E), on behalf of PG&E, Southern California Edison Company (SCE), Southern California Gas Company (SCG), and San Diego Gas & Electric Company (SDG&E) (collectively, the Joint Utilities), hereby submits the attached Low Income Energy Efficiency (LIEE) Contractor Cost Template, Attachment E, in compliance with Decision (D.) 05-04-052, Ordering Paragraph 18, which states:

18. With regard to third party contractor cost data used to support IOUs’ low- income budgets, the IOUs shall meet and confer and develop consistent budget templates for their contractors’ use. The IOUs shall use their best efforts to include affected contractors in this process. To the extent any forms or templates developed in the context of other Commission proceedings – such as our Energy Efficiency proceeding, R.01-08-028 – are useful for this purpose, the IOUs may use them. The IOUs shall file and serve a report on the results of this meet and confer process no later than 120 days after the effective date of this decision. No third party contractor shall receive LIEE or CARE funding without agreeing to break out its costs consistently and in accordance with the templates the IOUs develop. The contractors shall furnish data pursuant to these templates no later than January 31, 2006.

II. CONTRACTOR COST TEMPLATE INITIAL DESIGN

The Joint Utilities met and conferred throughout July and August, 2005, to develop a consistent LIEE Contractor Cost Template. The Joint Utilities reviewed the forms used in the

Energy Efficiency proceeding, R.01-08-028, as well as the contractor cost matrices previously filed for the LIEE program in the Joint Utilities' PY2005 Program Applications that were filed in July 2004. The Joint Utilities then worked together to design a simpler format more applicable to LIEE costs. As discussed below, the Joint Utilities then shared the draft Contractor Cost Template with their contractors and revised it based on their inputs.

In addition to contractor input, the Joint Utilities took into consideration a number of other factors in developing the proposed Contractor Cost Template, including the issue of which LIEE program contractors should be required to fill out a cost matrix. After discussion, the Joint Utilities decided that the Contractor Cost Template should not include contractors that provide various types of support services to the Joint Utilities' LIEE programs, such as printing, brochure artwork and design, and other utility administrative services. Many of the costs incurred by these particular contractors are charged across multiple programs besides the LIEE programs. The Joint Utilities believe that the Commission's intent in Ordering Paragraph 18 (as quoted above) was to include those contractors who implement the LIEE programs, rather than the contractors who provide other types of support services. Therefore, the Joint Utilities designed the Contractor Cost Template to break down costs incurred by the LIEE implementation contractors, including contractors providing weatherization services, education services, and appliance repair and replacement services for the LIEE programs.

The Joint Utilities also excluded California Alternate Rates for Energy (CARE) capitation contractors from the LIEE Contractor Cost Template. Due to differences in program delivery of the LIEE and CARE programs, any contractor cost categories that are applicable to the LIEE contractors would not apply to the CARE contractors. Moreover, CARE capitation costs are already filed in the Joint Utilities' monthly low income program reports to the Commission (Tables 8 and 8A are filed quarterly), so that filing another cost breakdown would

be duplicative for these contractors. Thus, CARE contractors were not included in the Contractor Cost Template.

III. INPUT FROM UTILITY MEETINGS WITH CONTRACTORS

Each of the Joint Utilities held meetings with contractors to solicit their input in the template design. SCE and SCG held a joint meeting with their LIEE contractors, while PG&E and SDG&E held individual meetings. The utilities' contractor workshop notes, which provide a summary of the comments received in workshops, are attached as Attachments A-C.

During the utilities' contractor meetings, many of the contractors noted that the data that they would provide in their measure cost breakdown tables would be based upon estimates, best guesses, and averages. Most contractors in PG&E's service area found the Energy Efficiency format difficult both to understand and to apply to their costs. In contrast, contractors in the Southern California utilities' service areas preferred an Energy Efficiency-derived template because it does not attempt to apportion program costs across measures. All contractors expressed concerns that they would be unable to use any measure-based template because they could not adequately break out their costs on a per-measure basis.

Contractors noted that contractor measure costs vary throughout the year and are dependent on multiple factors, such as the number of homes they are assigned in their contracts and the measure mix to be installed in those homes. At the beginning of a new program year, any assignment of costs by measure would be based on estimates and averages, and these estimates could vary widely from what is actually found in specific homes, or from the averages of the actual work done on all homes during the year. This will be particularly true of per-measure cost breakdowns estimated for new program measures, since neither contractors nor program managers have any history of predicting the extent to which such measures will be installed.

Several contractors also expressed concerns that the Commission or others may seek to set a flat fee across the state without understanding how measure costs differ from contractor to contractor, and area to area. A flat fee across the state would not be appropriate because contractor costs are influenced by competition, the number of units available in a given project area, measure availability and access to distributor networks, delivery systems, overheads, insurance, gas, office rental, local pay rates, and taxes. Many of these factors are closely attuned to local demographics (such as geography, population density, politics, and economics). Contractors working for the Southern California utilities are paid a fixed price per measure for the work they perform within each utility's service territory, and would likely use different factors to allocate the costs among categories, such as labor, materials, and travel.

IV. DEVELOPMENT OF THE JOINT UTILITIES AND ENERGY DIVISION TEMPLATES

Based on the input from the contractor meetings, the Joint Utilities refocused their efforts on the development of an LIEE Contractor Cost Template using the Energy Efficiency (non-LIEE) template as a starting point. Energy Division staff also forwarded a template for the utilities to consider based on the Energy Efficiency template (Attachment D). The utilities met again to discuss Energy Division's template and revised the Energy Division's suggested template to address contractor concerns. The result of this work is the Joint Utilities' Cost Contractor Template (Attachment E). The Joint Utilities also participated in a conference call on August 10 with Energy Division in an effort to reach consensus on the proposed template's final design. (Office of Ratepayer Advocates staff were also invited to join the call, but did not participate).

In finalizing the Joint Utilities' Contractor Cost Template, the Joint Utilities considered, the following factors: (1) contractor comments and concerns indicating that it would not be

useful or accurate to estimate average costs on too detailed a basis; (2) the differences in the delivery of LIEE programs from non-low-income Energy Efficiency programs, as required by Public Utilities Code Section 327, and (3) the Commission's directive to leverage delivery of LIEE program services with other providers of services to low income customers. Based on these considerations, the Joint Utilities streamlined reporting categories on the Contractor Cost Template; for example, the regulatory reporting category was eliminated.

The Joint Utilities then forwarded the two templates to their contractors to get additional feedback. Contractors in all Joint Utility service territories expressed their preference for the Joint Utilities' revised template (Attachment E). Some SCE and SCG contractors also noted that the "Administrative" category should be renamed "Administration / Program Support" to reflect the inclusion within Administration of program-related costs such as vehicles and insurance. One contractor mentioned that vehicle expenses, auto insurance, material storage, building permits, and removal of old refrigerators and air conditioners should be moved to the direct implementation category.

V. SUBMISSION OF TWO TEMPLATES FOR COMMISSION CONSIDERATION

The Joint Utilities hereby submit two templates for consideration by the Commission: the template provided to the Joint Utilities by the Energy Division (Attachment D) and the modified template proposed by the Joint Utilities based on the input received from their contractors (Attachment E). The Joint Utilities believe Energy Division may prefer that its proposed template be adopted by the Commission. However, the template proposed by the Joint Utilities (Attachment E) modifies the Energy Division template in a manner that the Joint Utilities believe reflects the input received from contractors and the service delivery approach for the LIEE program. The Joint Utilities have worked with their contractors to design a cost report template

in compliance with D.05-04-052, and believe that Attachment E provides consistent cost categories broken down at an appropriately detailed level for LIEE contractors. Upon approval of a template by the Commission, the Joint Utilities would expect to file 2006 program budget forecasts for each contractor under seal, using the approved template, by January 31, 2006. The Joint Utilities note that subsequent revisions to funding allocations for each contractor throughout the year may occur in order to match program funds to work flow for each contractor and to ensure that LIEE program funds allocated to 2006 programs are spent in 2006.

VI. CONCLUSION

For the reasons stated above, Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company, and San Diego Gas & Electric Company respectfully request that the proposed LIEE Contractor Cost Template, Attachment E, be approved for use by the LIEE implementation contractors.

Respectfully submitted,

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August 19, 2005

Attorneys for
PACIFIC GAS AND ELECTRIC COMPANY

CERTIFICATE OF SERVICE BY ELECTRONIC OR FIRST CLASS MAIL

I, the undersigned, state that I am a citizen of the United States and am employed in the City and County of San Francisco; that I am over the age of eighteen (18) years and not a party to the within cause; and that my business address is Pacific Gas and Electric Company, Law Department B30A, 77 Beale Street, San Francisco, California 94105. I am readily familiar with the business practice of Pacific Gas and Electric Company for collection and processing of correspondence for mailing with the United States Postal Service. In the ordinary course of business, correspondence is deposited with the United States Postal Service the same day it is submitted for mailing.

On the 19th day of August 2005, I served a true copy of:

**JOINT UTILITIES' FILING OF A LOW INCOME ENERGY EFFICIENCY
CONTRACTOR COST TEMPLATE**

[XX] By U.S. Mail – by placing it for collection and mailing, in the course of ordinary business practice, with other correspondence of Pacific Gas and Electric Company, enclosed in a sealed envelope, with postage fully prepaid, addressed to:

All parties on the official service list for R. 04-01-006; A. 04-06-038; A. 04-07-002; A. 04-07-010; A. 04-07-011; A. 04-07-012; A. 04-07-013; A. 04-07-014; A. 04-07-015; A. 04-07-027 and A. 04-07-050 without an e-mail address

[XX] By Electronic Mail – serving the enclosed via e-mail transmission to each of the parties listed on the official service list for All parties on the official service list for R. 04-01-006; A. 04-06-038; A. 04-07-002; A. 04-07-010; A. 04-07-011; A. 04-07-012; A. 04-07-013; A. 04-07-014; A. 04-07-015; A. 04-07-027 and A. 04-07-050 providing an e-mail address.

I certify and declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed in San Francisco, California on the 19th day of August, 2005.

MARY B. SPEARMAN

ATTACHMENT A

PG&E Contractor Cost Matrix Meetings

D.05-04-052 (O.P.18) mandated the IOUs to meet and confer and develop consistent contractor cost templates. The decision also requested the utilities use their best efforts to include contractor input in the process of developing the contractor cost matrix template. To comply, PG&E held three meetings with its LIEE contractors. These meetings were held on July 19, July 20, and August 1. All participants received a copy of the contractor cost matrix they filled out in 2004 for inclusion in PG&E's PY2005 LIEE Program Application, filed July 1, 2004. They also received a copy of a second draft template revised by the utilities in July 2005 to generate discussion.

Leveraging Partners Conference Call, 7/19/05

PG&E LIEE program managers held a conference call with its Leveraging Partners on July 19. Leveraging Partners are LIHEAP agencies that are not PG&E LIEE implementation contractors. Leveraging Partners have contracts with PG&E to leverage their LIHEAP funds by providing refrigerators to qualifying PG&E customers that they are treating under the LIHEAP program. Four Leveraging Partners participated in the call. Their comments follow.

- The Commission should expect to see different costs for refrigerators in the matrix. There will be a cost spread because there are different refrigerator makes and models.
- Average costs for contractors will differ because charges are dependent on travel, refrigerator size.
- Don't forget to add a category to reflect recycling.
- Don't build the program on an urban matrix.
- Worried about abolishment of minimum funding. This leveraging program allows us to stay alive.
- Costs will be different for different contractors.
- Costs are current for the moment only.
- Just collecting data is one thing, but is this going to be used for something? What is this matrix going to be used for?
- Why does the Commission want this information?
- Rural areas have a whole different set of problems. More costly, can't take a cookie cutter approach.

One contractor that was unable to participate in the conference call forwarded an email regarding the contractor cost matrix:

From: Energy Demonstration Center [mailto:ecenter1@pacbell.net]
Sent: Tuesday, July 19, 2005 11:17 AM
To: Chiu, Laura P
Subject: CPUC Request

Per our conversation of this morning, I am forwarding Redwood Community Action Agency's concerns and comments regarding the disclosure of costs for services rendered.

Redwood has an extensive history of completing fee-for-service work for PG&E and others that has never required the disclosure of RCAA's actual expenses. The very nature of fee-for-service work is the independent provision of service for a fixed fee or specific fee structure, otherwise the vendor becomes an employee. The request for the reporting of actual costs in addition to the invoicing process does not add value to the program but rather is seen as a potential way for the Commission or Master Contractor to ratchet down prices and, by extension, quality.

Redwood opposes the request as see as unnecessary and in conflict with the fee-for-service contracting process.

Val Martinez

LIEE Contractor Meeting, 7/20/05

RHA (PG&E's LIEE program administrator) holds regular monthly meetings with the LIEE implementation contractors in Stockton. Representatives from all of RHA's LIEE contractors attend, along with RHA and PG&E program staff. PG&E program managers solicited input on the contractor cost matrix at the regular contractor meeting on 7/20/05. Comments on the contractor matrix follow.

- Will the CPUC understand differences in different areas?
- What will they use this for?
- How will they use it?
- Would it be better to continue to use the same form we filled out last year? (For PG&E's PY2005 LIEE Program Application, filed July 1, 2004.) Will switching to a different format cause confusion?
- Will we know how many homes are assigned per area when we fill out the form? That will influence our cost estimation. **A:** Yes, that will be part of the bid. PG&E anticipates that this matrix will be submitted by contractors with their bids, if the Decision is timely. PG&E will file the cost matrix forms with the Commission under seal of confidentiality, and will assign number codes to each contractor to report their information individually, as it did last year for the cost matrices filed with our PY2005 applications.
- Will PG&E/RHA use costs in categories other "Total" to evaluate bids? **A:** No.
- If we file more complex comments or issues, will that delay program adoption (and thus PG&E's bid and a January program start?) **A:** Probably, but you should file anyway if you have something you want to say.
 - PG&E explained the public filing and comment process, and how to get on the service list in this proceeding. PG&E will send the Joint Utility filing on this topic to the contractors after it is filed in August, so they can either comment directly or send comments to us if they'd prefer us to include them with our reply comments.
- Can this matrix be filed directly with the Commission, bypassing PG&E/RHA? **A:** That depends on the Commission. You can suggest this in your comments and we can suggest this process in our filing.

LIEE Repair & Replacement Contractor Meeting, 8/1/05

PG&E scheduled a meeting with its Repair and Replacement (R&R) contractors, who perform furnace and water heater R&R for the LIEE program. This meeting was scheduled for August 1 in San Ramon. Their comments follow.

- R&R contract runs June 1- May 31. Will this be an issue for filling out contractor cost matrix in January? Why is it due in January? **A:** Contractors should note that information when they fill it out at the beginning of the year. We think its due in January because that's the beginning of the program year.
- One of the draft versions of the contractor cost matrix doesn't have furnaces on it. **A:** We'll check to be sure all measures area there. Furnaces will be added.
- The draft has no format for the labor contract. We supply current cost breakdowns under our contracts now. **A:** We'll take a copy of the form you use under your contracts to see what we can use in the template. Some of the info may be too specific to Furnace R&R work to be incorporated.
- How can contractors file comments? **A:** One of the PG&E team will send you a copy of the Joint Utility filing when we file it, and we'll tell you how to file comments.
- What is the Commission looking for in this filing? How ill they use the cost info? Are they looking for consistency in the cost across the board? Costs are different in different areas. For example, installing a water heater in Eureka costs differently that installing one in San Jose. Also, each install may have different installation criteria driving up costs, such as whether or not you need to use a crane for a roof mount.
- Admin costs can fluctuate due to some folks being at home for inspections and pulling permits, and others not being there and requiring multiple trips to the home to get the inspections done.
- CIP contract holders have already run database queries on average cost per contractor so far. They will provide this to each contractor, and contractors can use it as a basis. Contractors will need to split their own costs by category.
- Can other contractors see what we provide? **A:** No. P&E will file it under seal of confidentiality. Only CPUC staff will be able to see it.
- Are we going to have flat rates across the state? Is that where the Commission is going? **A:** We don't know.
- We wouldn't want the South simply compared to the North. There are too many demographic differences. Does the Commission understand this?
- Do we have to provide data now? **A:** No, the utilities are working together to design the template now. You won't need to fill it out until January. Also, we'll send you what the Joint Utilities file, and you'll have an opportunity to file your comments on it with the Commission in August or September.

Comments on Templates Emailed to PG&E Contractors, 8/11/05

On August 11, PG&E emailed two templates to its LIEE contractors and leveraging partners: a draft template forwarded by Energy Division, and a second version of the Energy Division draft that was revised by the Joint Utilities based on contractor input from the meetings held by the utilities. (These are Attachments D and E in this filing.) Several contractors sent comments. These follow.

- If one of the two templates is used, the Third Party template [the unrevised Energy Division draft template in Attachment D] is too detailed for my purposes and also doesn't have a clearly defined line item for the cost of the equipment. It seems to cover primarily labor costs. Most of the categories and line items appear to be related more to PG&E reporting than to subcontractors.
- We're okay with it.
- Does travel time, computer time, general paperwork, time at the appliance dealer and such come under a GENERAL category? Also, I'm deeply concerned that those who want to track all of this will understand that the urban and rural areas have some VERY different needs. (I sometimes travel upwards of 50 miles to a job.)
- Looks ok to me. It appears to deal only with the LIEE programs and has nothing to do with LIHEAP/DOEWAP etc. My sticking point was in relation to the issue of cross referencing with the state programs.
- What is the purpose of the budget form? I never require subcontractors to provide a budget for their work. Budgets are required for some state and federally funded projects but never for fee-to-service contracts. The attached form seeks to manage the subcontractors' resources by establishing line item budgets for fee-for-service contracts, which is in direct conflict with the intent of buying "price per unit services" such as replacement refrigerators.

The level of scrutiny contained in the proposed budget is such that the utility companies appear to be attempting to micromanage their subcontractors' activities, staffing, equipment purchases and overhead costs as if they were a government agency. It is our position that the current price per unit is appropriate and that if the utility companies were to adopt a "budget management" system, they could be changing the nature of their relationship with the subcontractors to that of an employer-employee relationship.

We routinely contract with the various state and federal departments which require budgets. However, the proposed budget exceeds the level of budget "reporting" required by these entities. Why are the utility companies requiring such budget minutia?

Proposed Alternative – IF NECESSARY

ADMIN - \$\$

PG&E to list activities (Costs to include items in proposed budget)

OUTREACH - \$\$

PG&E to list activities

EDUCATION - \$\$

PG&E to list activities

ASSESSMENT - \$\$

PG&E to list activities

INSTALLATIONS - \$\$
PG&E to list activities

- We are concerned with the time involved to complete these.
- Either format. Our concern is how these will be used for contractor selection purposes. Since each contractor has vastly different business operating criteria, cost breakdowns will vary widely. Although we don't completely understand the purpose of a P&L type breakdown, we hope the actual per unit cost to Energy Partners is the overall determining factor for selection purposes.

ATTACHMENT B

San Diego Gas & Electric Company

Meetings on Low Income Energy Efficiency (LIEE) Contractor Budget Templates

Decision 05-04-052 directed the utilities to develop a contractor budget template and requested the utilities to use their best efforts to include contractor input in the process of developing the contractor budget template.

On July 20, 2005, SDG&E met with its prime contractor to discuss a statewide template that the utilities drafted for consideration and comment by the contractors. The template reflected that the contractor provide the budgeted dollars by all measures that could be installed at a participants residence.

Questions/Comments from Contractor of LIEE Budget Template (By Measure)

SDG&E received the following questions and comments as quoted from its contractor:

Questions:

What is the purpose of the matrix as it relates to the CPUC's objectives?

- Is it to provide a statewide comparison base and thereby serve as a check point for individual IOU cost effectiveness?
- Is it to assist in cost benefit analysis of measures for future planning?
- Is it to enable analysis of overall DAP service delivery costs and establish uniform pricing?

Comments:

The pricing matrix is not particularly meaningful at the measure detail level for a number of reasons.

1. Unlike construction activity that has a static list of items to install, measures installation in the DAP program must fall within parameters that are dictated by:
 - customer preference
 - customer availability
 - program guidelines
 - climate zone
 - age of existing appliance,
 - Ancillary home repair tied to other measure installation (such as floor or wall repair associated with furnace installation).

2. In spite of pre-assessment activity, installers may deviate from a work order due to physical circumstance unknown to the initial assessor (termite damage, low attic, deteriorated plumbing etc.).
3. Issues such as regional cost of living, travel distance, regional fuel cost variance, travel time unrelated to distance (dense metropolitan areas vs. rural area) dictates individual measure pricing based on locality or region. Some service territories cover wide areas with wide variances.
4. While a, fixed fee per measure, pricing model makes sense from an administrative viewpoint with many thousands of transactions taking place, it is not realistic to establish uniform statewide measure costs because of the items covered in point 3 above.
5. The current contractor pricing model is established by averaging measure frequency over a large historical sample. Contractor margins, labor, material cost variations and other risk factors contained within pricing structures are proprietary data.
6. The current system in place provides adequate checks and balances to help ensure the program is receiving competitive pricing. This goal is achieved by using competitive bids, comparing pricing with other contractors to identify any unusual fluctuations and contract negotiation by experienced program personnel.
7. The cost of the item being installed may be different based on the quantities assigned to each contractor. A small rural region is just as important as the metropolitan area but the available units are significantly less. Therefore, a smaller contractor would have to spread their fixed costs over a smaller base. It would not be cost effective for the metropolitan contractor to complete the rural units. This is another example of how difficult it would be to arrive at a standard measure cost for all contractors.

Comments from Contractor of LIEE Budget Template (Joint Utilities Template)

On August 6, 2005 SDG&E sent its prime contractor the current draft of the Joint Utilities template. SDG&E received the following comments as quoted from its contractor:

The contractors would be in a better position to complete the new budget template format. This data should be readily available as opposed to the very detailed cost by measure approach. Some of our comments relating to attempting to setting statewide standard pricing and other related comments would still apply.

It looks like there are certain G&A cost categories that are missing, such as:

General Liability Insurance
Office Rent
Professional Services (Legal & Accounting, etc)

Taxes & Licenses
Utilities - Electric, Gas, City services

Possibly a General & Admin. other category would be adequate.

The 2006 P&P recommendations for customer eligibility categorizes measures as follows:

HVAC
Electric Equipment Measures
Water Heating Measures
Minor Home Repair

We are not suggesting a more detailed breakdown at this time however, if this detail was available under measures it could make the comparisons more meaningful. Especially when you are looking at different climate zones and rural v. metropolitan locations. However it is doubtful the contractors capture this detail. The most important point is to discuss is that the contractors have developed their accounting systems to meet their business needs. If other data accumulation is required, then contractors should possibly be given enough time to revamp their accounting systems accumulate costs to meet any CPUC requirements.

Joint Utility and Energy Division Templates

On August 16, 2005, SDG&E provided the proposed Joint Utilities template and the Energy Division template to its contractor for further consideration and comment. Both templates were derived from the budget template utilized for the Energy Efficiency proceeding in Rulemaking 01-08-028. As noted in the attached file below, the contractor preferred the Joint Utilities template, however the contractor suggested including additional items under the Overhead category, such as insurance, rent, utilities, taxes and licenses, and professional fees and services. Additionally, the contractor suggested the inclusion of HVAC Measures, Electric Measures, Water Heating Measures, and Minor Home Repairs under the Direct Implementation category.

Comments from Contractor of LIEE Budget Template (Joint Utility and Energy Division template)

SDG&E received the following comments as quoted from its contractor:

I have attached the template that we would prefer with our suggested additions.



Contractor
Recommendation.xls

**EXHIBIT
TO
ATTACHMENT B**

CONTRACTOR BUDGET TEMPLATE

LOW-INCOME ENERGY EFFICIENCY PROGRAM PROGRAM YEAR 2006

BUDGET CATEGORIES	Estimated Budget
Administrative	
Managerial and Clerical Labor Labor - Clerical Labor - Project Management Labor - Staff Management/Supervision	
<i>Subtotal Managerial and Clerical Labor</i>	\$ -
Personnel (Applies to all Labor) Pension/ Employee Benefits/ Payroll taxes Payroll/ Human Resources Staff Development/Training	
<i>Subtotal Personnel</i>	\$ -
Travel Mileage and Parking Meals and Lodging Misc.	
<i>Subtotal Travel</i>	\$ -
Overhead (General and Admin) - Labor and Materials Equipment - General Office Insurance Expense Equipment - Vehicles Facilities/ Rent Expense/ Utilities Taxes & Licenses Office Supplies/Postage Professional Fees & Services Labor - Overhead	
<i>Subtotal Overhead</i>	\$ -
Total Administrative Costs	\$ -
Enrollment	
Labor - Outreach Labor - Income Documentation Labor - Education Labor - Assessment	
Total Outreach	\$ -
Direct Implementation	
HVAC Measures Labor - Installation and Services Hardware and Materials	
Electric Equipment Measures Labor - Installation and Services Hardware and Materials	
Water Heating Measures Labor - Installation and Services Hardware and Materials	
Minor Home Repairs Labor - Installation and Services Hardware and Materials	
Total Direct Implementation	\$ -
Total Budget	\$ -

ATTACHMENT C

**LIEE Contractor Budget Template Meeting
 Joint Presentation by SCE and SCG
 Wednesday, JULY 27, 2005
 Energy Resource Center, Downey**

ATTENDEES	COMPANY
German Garcia	SCE
Virginia Quintero	SCE
William Warren, Jr.	San Bernardino
Edward Ocampo	Maravilla
Toni Carillo	CUI
Ron Garcia	Reliable Energy/Avalon Carver
Elisabeth Adams	ASSERT
Richard Shaw	ASSERT
Arleen Novotney	So Cal Forum
Roberto Del Real	SCE
Dave Olsen	VCCHC
Monte Winegar	Winegard Energy
Kathy Kifaya	CAPOC
Traci Smith	LA Works
Suzie Hernandez-Villanueva	LA Works
Kathy Ford	LA Works
Art Cisneros	VICS
Gregg Lawless	SCG
Jim Lucas	SCG
John Fasana	SCE

POWERPOINT PRESENTATION

Gregg Lawless and Roberto Del Real presented the following:



BudgetTemplate7-27
 -05final.ppt

CONTRACTOR QUESTIONS/COMMENTS ON THE PROPOSED “MEASURE” BUDGET TEMPLATE (NOTE: Based on feedback received by all four utilities from contractors, they are not submitting a “Measure” level budget template, therefore, the comments in this section do not apply to the “Version 3 and 4” templates.)

SCE and SoCalGas received the following questions and comments as quoted from their contractors:

- Many of the costs/overheads listed (examples: mileage, inventory costs) under the “Administration” column should be listed under the “Implementation” column.
- Contractors do not operate on a per measure basis. In order for the template to be standardized and comparable between agencies, each measure needs an arbitrary weight value in order to calculate costs.
- Without including Admin, Outreach and Assessment costs, on a per measures basis, some contractors will not show as being profitable when comparing to installer hourly wages.
- Based on the design of the template, the frequency of the measure being installed dictates the costs associated with that measure.
 - This is going to skew the report so that high-frequency measures have higher associated costs and may not show as a cost effective measure. A standard needs to be set for all administrative type fees so that the reports will be similar in comparison.
 - Something that is needed is a standard “back-end” formula that will put the reports on a standard basis for all contractors.
 - This budget template format creates a big red flag. Those contractors that are installing a lot of evaporative coolers will have large up front costs due to high admin fees while those doing minimal evaporative cooler installs will have a low admin fee. What needs to be looked at is to put the measures on a per unit basis but it may disadvantage those contractors that do not service a lot of homes.
- How will “one time” types of costs be treated? Example is uniforms. Should they be amortized across useful life? How should these costs be applied on a per measure basis?
 - Response – decision is up to the contractor
- Suggestion is to change “Administration” to “Administration and Support”. This way, indirect costs relating to installations (mileage for example) can be considered “Support”.
- Much too difficult to breakdown on a measure basis. For example, Weatherstripping includes screws and screws generally are not tracked on a per measure/home basis.

CONTRACTOR QUESTIONS/COMMENTS REGARDING THE REPORTING REQUIREMENTS

- Does the Commission want to know costs on a measure basis? If so, then these costs will be misleading because upfront costs like Outreach and Assessment assist with the costs of installing measures.
- Will the data being submitted to the Commission be public information?
 - Answer: No, it will be under seal.
- Since the budget report is for 2006, how will the contractors know their budget dollar amounts?
 - Answer: Contracts will be sent to you prior to the budget templates being due on January 31, 2006.

CONTRACTOR QUESTIONS/COMMENTS ON THE ENERGY EFFICIENCY BUDGET TEMPLATE

Gregg and Roberto presented the EE Budget Template to show the contractors the format being used for the non low income energy efficiency programs. Based on the comments below, the utilities agreed to send out a revised version of the EE Template to contractors that disables the links, macros, etc. that complicate the spreadsheet and for general review purposes, are not needed. The utilities asked the contractors to provide comments to SCE and SoCalGas by noon on August 2, 2005.

The following contractor comments were provided:

- One contractor said they prefer the EE Budget Template and would like to get a copy of it.
- The majority of the contractors mentioned they liked it as well and prefer it to the “Measure Budget Template”.
- The contractor that brought up the evaporative cooler example previously likes this version as well since there will not be comparison inconsistencies due to the frequency of the measure being installed.

Comments Received from Contractors Via E-mail Regarding Budget Template

SCE and SoCalGas received the following comments as quoted from their contractors:

- 1) This format (EE Budget Template) will work as agreed upon at our meeting. I personally see 3 major categories. They are Administrative Cost, Program Support or Other Program Cost and Direct Program Cost. As a group we need to decide what will go into each category.
- 2) Three major categories/titles are adequate for reporting purposes with the assumption that they cannot be changed.
- 3) Strongly recommend that service providers be given opportunities to assist SCGC staff to modify line items/language to more accurately reflect cost/expenditures of energy programs.

- 4) Service providers group meetings should be scheduled before any final responses are submitted to CPUC.
- 5) We would prefer to report using the modified budget worksheet (EE version), not the per measure worksheet. It will be easier to gather the information.
- 6) Feedback from my CFO is that the "templates" are an Accountant's dream, the back end tracking of time and tasks can become a "nightmare". I am concerned that we as a non-profit network may not have the technology or the time or manpower to put systems into place to accommodate this very high end budgeting and reporting procedure. Perhaps we can strive to come up with a compromise that will be workable for a majority of the providers at this time and/or can become workable for the rest.
- 7) The EE Budget Template is workable. Some line items and sub-categories would have to be added and some deleted to conform with the weatherization model. (would this include the furnace program?) Again, with some revisions this is a workable template.
- 8) We strongly vote for the EE budget template.

Comments Received from Contractors Pertaining for Budget Template Versions 3 and 4 (Request for comments sent via e-mail on 8/15/05)



Immediate Action
Requested - Contract

SCE and SoCalGas received the following comments as quoted from their contractors:

- 1) The basic template looks ok to me--simple and straightforward; however, I feel that the direct implementation category should be expanded to include vehicle expenses, insurance (at least auto), facility costs i.e. material storage, building permits, removal of old items i.e. refrigerators, air conditioners, etc. These costs are an integral part of providing services to our customers and should not be included in the administrative/overhead category. If they are included in administrative category it would look like close to 50% of the program costs are administrative.
- 2) I did some quick calculations yesterday and found that insurance equals 5% of our costs so far this year (this does include workers compensation), vehicles (repair and gasoline) 3.2%, refrigerator disposal 2.1%, facilities 4.15% etc. You can see if I include these costs into administration it will really change the percentages and the amounts that are being charged to those categories.
- 3) I have noted that **Personnel (Applies to all Direct Labor)** costs are included in administrative. Again, this will create an impression that these programs are more administrative than Direct Implementation. I would suggest moving that category where it logically belongs-- Direct Implementation.

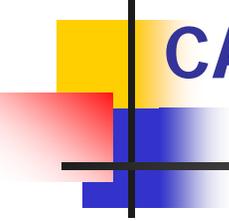
- 4) I like the shorter version with some modifications. We need to have a Program Support section, separate from administration or call it Administration/Program Support.
- 5) The short version, (version 3) is very good and should meet our requirements. My only suggestion is that either a fourth category be added for program support or that the administration category reads administration/program support.
- 6) The budget of an independent contractor is a working tool and solely the contractor's concern. If the contractor provides specified service for a negotiated reimbursement and complies with all reassurances of the agreement, then the budget is a non-factor to a third party. This is not a "grant" where a budget might be an integral part of the negotiation; it is a performance contract. Unless the PUC is mandating that the nature and structure of the agreement document is to be changed in 2006, this is inappropriate. If SoCal is just asking for information as a means to help DAP supply ballpark figures to the PUC to comply with a requirement of their own, that's a different matter. Otherwise, as an independent contractor, I am not comfortable with this precedent.

**EXHIBIT 1
TO
ATTACHMENT C**

LIEE Contractor Budget Template Meeting

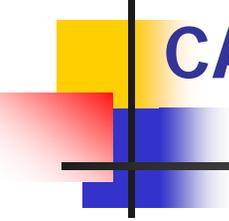
Joint Presentation by SCE and SCG
Energy Resource Center
Wednesday, July 27 2005





Interim Opinion Approving 2005 LIEE and CARE Programs for PG&E, SCE, SCG & SDG&E

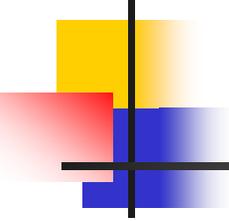
- Decision 05-04-052, Section V - Issues Generic to Utility CARE/LIEE Applications
 - Subpart E - IOU Contractor Costs states:
 - We must have before us all costs an IOU incurs – whether in-house or from an outside contractor – in analyzing the IOU low-income budgets.
 - In the future, as a condition of receiving public goods charge funding, any third party contractor must agree to provide such data so that the IOUs can furnish it to the Commission. The IOUs may furnish the data under seal, but they may not refuse to provide the data at all.



Interim Opinion Approving 2005 LIEE and CARE Programs for PG&E, SCE, SCG & SDG&E

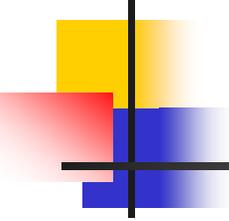
(Continued)

- The IOUs shall meet and confer and develop consistent budget templates for their contractors' use. They shall use their best efforts to include affected contractors in this process.
- The IOUs shall file and serve a report on the results of this meet and confer process no later than 120 days after the effective date of this decision (4/21/05). The contractors shall furnish data pursuant to these templates no later than January 31, 2006.



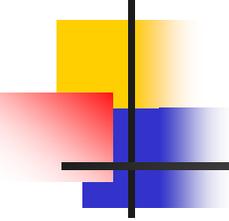
Contractor Budget Template

- PG&E, SCE, SCG and SDG&E have jointly developed a budget template.
- Budget template separates incurred costs in three categories:
 - Outreach/Education/Assessment
 - Administration
 - Implementation



Breakdown of Three Categories

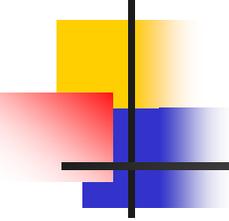
Outreach/Education/Assessment	Administration	Implementation
Outreach	Data Entry	Installation of measures
Direct customer signup activities	Customer Service	Measures - Materials
Assessment	Scheduling	NGAT
Energy Education	Billing/Invoices	Delivery/Removal Appliances
	Data Management (filing, organization, paper flow, etc.)	
	Data Retention (long-term storage)	
	Program management	
	Supervision (field and office)	
	Test Equipment	
	Tools	
	Copy Machines	
	Travel Costs	
	Office Support	
	Office Supplies	



Budget Template Design

Measure	Total Cost	Administrative	Outreach, Education, Assessment	Implementation
Attic Access Install				
Attic Access Weatherstripping				
Refrigerator				
Window Wall AC				
Caulking - Mobile (flat fee)				
Evaporative Cooler				
Caulking - SF <200' (flat fee)				
Ceiling Repair				
CFL's				
Cover Plate Replaced				
CVA				
Door Jambs				
Door Patch/Plate				
Door Replacement				
Door Weatherstripping				

Note: The above table does not show all of the measures included on the template (see handout for all measures)



Open Discussion

- Questions

- Comments

- Concerns

**EXHIBIT 2
TO
ATTACHMENT C**

From: Lucas, Jim
Sent: Monday, August 15, 2005 5:25 PM
To: Arleen Novotney (E-mail); Art Cisneros (E-mail); Dave Olsen (VCCHC) (E-mail); Edward Ocampo (Maravilla) (E-mail); Elisabeth Adams (E-mail); Guadalupe (VICS) 'Rodriguez (E-mail); Kathy Ford (LA WORKS) (E-mail); Kathy Kifaya (CAPOC) (E-mail); Monte Winegar (Winegard) (E-mail); Richard Shaw (E-mail); Ron Garcia (Avalon-Carver) (E-mail); Suzie Hernandez-Villanueva (LA Works) (E-mail); Toni Carrillo (Campesinos Unidos) (E-mail); 'Traci Smith (LA Works)'; William Warren Jr. (San Bernardino) (E-mail)
Cc: Lawless, Gregg; Roberto Del Real (E-mail); John Fasana (SCE) (E-mail); 'Virginia Quintero (SCE)'; German Garcia (SCE) (E-mail)
Subject: Immediate Action Requested - Contractor Budget Template
Importance: High
Follow Up Flag: Follow up
Due By: Wednesday, August 17, 2005 12:00 PM
Flag Status: Flagged

On July 27th SoCalGas and SCE met with you jointly to discuss a Statewide Contractor Budget Template that is being developed by the utilities in response to the CPUC directive in Decision 05-04-052. After that meeting many of you provided us with comments on the two templates available at that point in time. Based on your comments, and those of other program contractors throughout the state, we have two new templates for your consideration. Each version has been derived from the more detailed Energy Efficiency template that we presented. We would appreciate you taking a few minutes to review each of them and provide feedback.

The utilities will be submitting their proposal to the CPUC on August 19, 2005. If you can provide your responses by noon on Wednesday 8/17 it would be appreciated.

Thanks.



LIEEBudgetTemplat
eVer3.xls



LIEEBudgetTemplat
eVer4.xls

Jim Lucas
Energy Programs Manager
Direct Assistance Program - SoCalGas
Office: (213) 244-3276
Cell: (213) 215-1319

ATTACHMENT D

Budget Items (Choose from list)	Budget	Notes		
Administrative				
Managerial and Clerical Labor				
Subcontractor Labor - Clerical	\$ 300,000			
Subcontractor Labor - Project Management	\$ 500,000			
Subcontractor Labor - Staff Management	\$ 25,000			
Subcontractor Labor - Staff Supervision	\$ 10,000			
<i>Subtotal Managerial and Clerical Labor</i>	<i>\$ 835,000</i>			
Human Resource Support and Development				
Subcontractor Benefits - Administrative Labor	\$ 20,000			
Subcontractor Benefits - Direct Implementation Labor				
Subcontractor Benefits - Outreach Labor				
Subcontractor Labor - Human Resources				
Subcontractor Labor - Staff Development and Training	\$ 5,000			
Subcontractor Payroll Tax - Administrative Labor				
Subcontractor Payroll Tax - Direct Implementation Labor				
Subcontractor Payroll Tax - Outreach Labor				
Subcontractor Pension - Administrative Labor				
Subcontractor Pension - Direct Implementation Labor				
Subcontractor Payroll Tax - Outreach Labor				
<i>Subtotal HR Support and Development</i>	<i>\$ 25,000</i>			
Travel and Conference Fees				
Subcontractor - Travel - Lodging				
Subcontractor - Travel - Meals				
Subcontractor - Travel - Mileage				
Subcontractor - Travel - Parking				
<i>Subtotal Travel and Conference Fees</i>	<i>\$ -</i>			

Budget Items (Choose from list)	Budget	Notes		
Overhead (General and Administrative) - Labor and Materials				
Subcontractor - Equipment - Communications				
Subcontractor - Equipment - Computing				
Subcontractor - Equipment - Document Reproduction				
Subcontractor - Equipment - General Office				
Subcontractor - Equipment - Vehicles				
Subcontractor - Facilities - Lease/Rent Payment				
Subcontractor - Office Supplies				
Subcontractor - Postage	\$ 4,000			
Subcontractor Labor - Accounts Payable				
Subcontractor Labor - Accounts Receivable				
Subcontractor Labor - Administrative				
Subcontractor Labor - Automated Systems				
Subcontractor Labor - Communications				
Subcontractor Labor - Contract Reporting				
Subcontractor Labor - Corporate Services				
Subcontractor Labor - Facilities Maintenance				
Subcontractor Labor - Information Technology				
Subcontractor Labor - Materials Management				
Subcontractor Labor - Procurement				
Subcontractor Labor - Regulatory Reporting ?				
Subcontractor Labor - Shop Services				
Subcontractor Labor - Telecommunications				
Subcontractor Labor - Transportation Services				
Food Service				
Subcontractor Labor - Accounting Support				
<i>Subtotal Overhead</i>	\$ 4,000			
Total Administrative Costs	\$ 864,000			
Outreach				
Subcontractor Labor - Customer Outreach	\$ 2,000			
Total Outreach	\$ 2,000			

Budget Items (Choose from list)	Budget	Notes		
Direct Implementation				
Installation and Service - Labor				
Subcontractor Labor - Customer Equipment Repair and Servicing	\$ 5,000			
Subcontractor Labor - Measure Installation				
Subcontractor Labor - Minor Home Repair ?				
Subcontractor Labor - Furnace Repair ?				
Subcontractor Labor - Furnace Replacement ?				
<i>Subtotal Installation</i>	\$ 5,000			
Hardware and Materials - Installation and Other DI Activity				
Subcontractor - Energy Measurement Tools				
Subcontractor - Installation Hardware	\$ 500			
Subcontractor - Audit Applications and Forms				
<i>Subtotal Hardware and Materials</i>	\$ 500			
Total Direct Implementation	\$ 5,500			
Financing Costs ?	\$ 1,000			
Total Budget	\$ 872,500			

ATTACHMENT E

CONTRACTOR BUDGET TEMPLATE

LOW-INCOME ENERGY EFFICIENCY PROGRAM PROGRAM YEAR 2006

BUDGET CATEGORIES	Estimated Budget
Administrative	
Managerial and Clerical Direct Labor	
Clerical	
Project Management	
Staff Management/Supervision	
<i>Subtotal Managerial and Clerical Labor</i>	\$ -
Personnel (Applies to all Direct Labor)	
Pension/Benefits	
Payroll	
Staff Development/Training	
<i>Subtotal Personnel</i>	\$ -
Travel	
Mileage and Parking	
Meals and Lodging	
Misc.	
<i>Subtotal Travel</i>	\$ -
Overhead (General and Admin) - Labor and Materials	
Labor - Indirect	
Equipment - General Office	
Equipment - Vehicles	
Facilities	
Office Supplies/Postage	
<i>Subtotal Overhead</i>	\$ -
Total Administrative Costs	\$ -
Outreach	
Labor - Outreach	
Labor - Education	
Labor - Assessment	
Total Outreach	\$ -
Direct Implementation	
Measures	
Labor - Installation and Services	
Hardware and Materials	
Total Direct Implementation	\$ -
Total Budget	\$ -