

Decision 00-07-020 July 6, 2000

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

Application of Southern California Gas Company (904-G) for Authority to Continue Low Income Assistance Programs and Funding Through 2000.

Application 99-07-002  
(Filed July 1, 1999)

Application of San Diego Gas & Electric Company (U 902-E) Authority to continue Low Income Assistance Programs and Funding Through 2000.

Application 99-07-004  
(Filed July 1, 1999)

Southern California Edison Company for Approval of Year 2000 Low Income Energy Efficiency Program Plans.

Application 99-07-011  
(Filed July 1, 1999)

Application of Pacific Gas and Electric Company for Approval of Year 2000 Low Income Programs (U 39M).

Application 99-07-012  
(Filed July 1, 1999)

**FINAL OPINION: PROGRAM YEAR 2000  
LOW-INCOME ASSISTANCE PROGRAMS**

(See Attachment 1 for appearances.)

prices for the measures installed in SDG&E's program (not including minor home repairs) would have yielded total saving per home of 24.2%, or \$440,920. (Contractors' Coalition Reply Brief, Appendix A.)

### **19.2 Bill Savings to Low-Income Customers**

The benefits to low-income customers from energy efficiency programs should be directly measurable in terms of the level of bill savings they realize from having the work done to their homes. This is a function of the number and mix of measures installed in each home, the savings associated with that number and mix of measures, and, for the program as a whole, the number of homes weatherized. The relative cost-efficiency of the programs, which is of particular interest to non-participating ratepayers, should be measurable in terms of the total program (or per home) level of bill savings relative to program expenditures.

Therefore, an important area of discovery in this proceeding should have been the level of bill savings to participating customers, relative to program dollar expenditures, across utility programs. Only Contractors' Coalition attempted to address this issue by examining comparative costs and the ability to treat more homes under competitive bidding.

At the direction of the assigned ALJ, the utilities put together late-filed Exh. 76 attempting to document and compare program expenditures and lifecycle customer bill savings for program years 1997, 1998, and 1999. This document was submitted on December 16, 1999.

The workpapers to Exh. 76 indicate that this analysis is not responsive to the ALJ's direction. The Commission needs information regarding reasonable assumptions for bill savings per home, based on measures actually installed in the homes in each year. (RT at 1162 to 1167.) The numbers produced

for the exhibit, at least in the case of PG&E, base the lifecycle savings on the number and mix of measures installed in homes in 1995.

As a result, the numbers for PG&E show a fixed amount of savings per home, and do not reflect any changes in the mix or number of measures per home from year to year. For the purpose of comparing the impact of competitive bidding on potential bill savings, these figures are essentially useless. Moreover, we are not assured that the figures presented in Exh. 76 are consistent with the assumptions and methodologies approved for measuring program costs and benefits in our Annual Earnings Assessment Proceedings. In fact, we observe that the cost-effectiveness ratios for the southern California utilities, calculated from the bill savings and expenditure levels in Exh. 76, are dramatically higher than the PY2000 cost-effectiveness tests presented in their testimony.<sup>1</sup>

For example, the figures SDG&E presents in Exh. 76 indicate a ratio of 1.03 for life-cycle bill savings relative to total program expenditures under SDG&E's PY1999 LIEE program. However, in calculating its projected PY2000 performance incentives, SDG&E projects the present value of bills avoided at \$2,035,348 relative to \$7,281,545 in measure costs or \$5,015,204 in utility costs, which would indicate a bill savings per total cost ratio in the range of 0.28-0.40. This range is also more in line with the other ratios of cost-effectiveness that SDG&E presents in its testimony, i.e., 0.22 for the utility cost test and 0.21 for the total resource cost test.<sup>2</sup>

SCE's figures in Exh. 76 suggest a bill savings/cost ratio of 1.85, i.e., a highly cost-effective program from the perspective of benefits to low-income

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<sup>1</sup> See Exh. 14, p. 75.

<sup>2</sup> Exh. 40, Attachment D.3.

customers. However, this calculation does not appear to be “in line” with SCE’s calculations of cost-effectiveness in Exh. 8, Table C. In those calculations, the program is not cost-effective from either the utility cost or total resource test of cost-effectiveness, with ratios of 0.66 and 0.657, respectively.

Although SoCal’s LIEE program is far from cost-effective under any calculation presented in the record, the figures in Exh. 76 suggest a bill savings/costs ratio of 0.20 for the LIEE program in 1999, whereas the ratio between the present value of bills avoided and measure costs or utility costs in Exh. 47 (Attachment C, Table 2) yield a lower ratio in the range of 0.12-0.14.

In sum, our inquiry is limited by the lack of consistent data on program bill savings, expenditures and cost-effectiveness calculations, with which to evaluate the relative performance of the utilities’ LIEE programs. Competitive bidding aside, this is fundamental information that should be readily available to program evaluators, program implementors and the general public. In Section 19 we discuss steps to acquire this information in the future.

### **19.3 Installation Quality**

Most of the testimony in this proceeding focused on whether or not competitive bidding would compromise the installation quality and performance of weatherization contractors. We examine the evidence below.

#### **19.3.1 Per-Home Pass Rates**

One measure of performance presented during evidentiary hearings was the per-home inspection pass rates. All of the utilities apparently record this measure, so it was readily available across program years, utilities, and contractors. A per-home pass rate indicates how many homes, out of the total inspected, pass an inspection of all of the measures installed in that home. The exhibits presented in this proceeding show that per-home inspection pass

- (1) submitted a bid (if applicable) to win the initial or current contract with the utility or prime contractor, or
- (2) commenced work under a negotiated contract that was not subject to competitive bidding.

The utility's report should clearly describe what those licensing requirements are and certify that they have been met by including copies of licenses or other documentation. The reports will be due no later than 120 days from the effective date of this decision should be filed at the Commission's Docket Office in R.98-07-037. Copies of the reports should be served on the state service list and appearances in R.98-07-037 (or any successor proceeding) and in this proceeding.

#### **19. Program Evaluation and Monitoring for Future Program Planning Cycles**

It became apparent during the course of this proceeding that this Commission, utility administrators, interested parties and the general public lack critical information, on a consistent basis across utilities, with which to effectively monitor and evaluate the effectiveness of LIEE programs. This issue was not the specific subject of this proceeding, but it will not go unattended.

With regard to cost considerations, we need data on bill savings and expenditures for LIEE programs on an overall program and per unit basis, for each utility. This information needs to be presented on a standardized basis across utilities, consistent with the methodologies used to evaluate energy efficiency costs and savings in our Annual Earnings Assessment Proceeding. We direct the utilities to jointly develop this standardized methodology with input from interested parties and the LIAB. The utilities should coordinate with Energy Division on all aspects of methodology design and implementation.

The joint report should be filed no later than February 1, 2001, so that it can be considered during the PY2002 program planning process. The report

should present the proposed methodology and explain how it is consistent with cost-effectiveness methods and calculations utilized in the AEAP. In this report, the utilities should apply the proposed methodology to calculate bill savings and expenditures for their PY1997, PY1998, and PY1999 LIEE programs, or explain why a study of a particular program year would be duplicative of what has already been done in the AEAP. In that event, the results of the AEAP should be presented. All assumptions and workpapers should be presented. To the extent that data has been compiled for PY2000 programs, the report should provide bill savings and expenditure calculations for that program year (or portion thereof) as well.

The joint report should be filed and served on appearances and the state service list in this proceeding and in R.98-07-037, or any successor proceeding. Comments on the report are due 30 days thereafter. Responses to the comments will be due within 15 days.

We also require additional information in order to determine the extent to which competitive bidding offers overall cost savings to nonparticipating customers. First, we need estimates of the one-time administrative costs associated with the bidding process. PG&E should prepare this information, based on its experience with competitive bidding, for evaluation during the PY2002 program planning cycle. Other utilities may present information on this issue as well. We continue to need this type of comparison cost information presented in Exh. 66, for all utilities. PG&E, SDG&E, SoCal, and SCE should provide the information prepared by SDG&E and PG&E in Exhs. 35 and 36, which was used to compile comparison Exh. 66, so that we can duplicate this comparison across utilities for their PY1998, PY1999, and PY2000 program results. This information should be provided by the utilities in their PY2002 LIEE program applications, together with all relevant workpapers.

In addition, we need better information on the current costs of training LIEE contractors, in order to evaluate the relative cost-efficiency of keeping this function in-house, versus outsourcing. After receiving public input and standardizing the methodology and reporting of training costs, the utilities should submit these costs as part of their applications for approval of PY2002 program plans. In addition, as discussed in Section 9, PG&E and SoCal should include information that would allow us to compare their in-house costs of training with outsourcing that function.

We also need to move forward with standardizing utility administrative costs and reporting requirements, since the manner in which these costs are compiled and reported may have an impact on comparative cost evaluations for LIEE programs. These issues are being addressed in R.98-07-037, and we will closely monitor progress in that proceeding.

As discussed in this decision, we will revisit the role of the utilities in LIEE program implementation, as well as competitive bidding as an outsourcing approach, during the PY2002 program planning process. Between now and then, we expect the utilities that do outsource via competitive bidding to solicit additional public input and coordinate with each other, with the objective of developing more consistency in their competitive bid practices for PY2002.

With regard to non-cost considerations, we discuss in this decision the need to improve approaches for measuring the performance of installation contractors. First, there is clearly room for improvement in consistency across utilities in terms of inspection procedures, as evidenced by the information presented in Exh. 73. The utilities have been directed by the Assigned Commissioner to undertake such standardization efforts as part of the ongoing standardization project in R.98-07-037. Energy Division will coordinate this effort, in consultation with the Assigned Commissioner's Office, so that

recommendations on inspection procedures will be available for the PY2002 planning cycle, if not sooner.

As we discuss in Section 10, the most glaring shortcoming with using a per-home pass rate as an indicator of relative performance quality, is that it does not indicate the level of savings per home that is being achieved by the contractor, or compare that achievement on a consistent basis across contractors. In their PY2002 applications, the utilities should address this shortcoming, and propose alternatives that will improve the tracking and reporting of the performance their contractors.

To this end, we also initiate pay-for-measured savings pilots in each utility's service territory. As discussed in Section 15, the utilities should file applications describing their proposed pilots no later than February 1, 2001. Between now and then, the utilities should hold public workshops to discuss pilot design. The utility applications should include a schedule for pilot program evaluation and the evaluation criteria to be used. We expect the utilities to coordinate closely with each other and the Energy Division in developing the pilots so that the pilot designs and evaluation approaches are standardized. At their option, the utilities may file a joint application rather than separate applications in submitting their proposals.

In addition, we direct the utilities to report on the access of low-income customers to programs provided by community service providers, consistent with the intent of the Legislature. (Pub. Util. Code § 385.1(a).) The report should indicate the number of CBOs (and percentage of units treated by CBOs) participating in the program as contractors or subcontractors, relative to the number of non-WMDVBE and WMDVBE private contractors. The report should describe the utility's referral system between the CARE and LIHEAP program, and whether or not that utility has met the requirements to qualify for financial

leveraging of federal funds. In addition, the report should describe the systems in place to identify the needs of participants in low-income energy efficiency programs and direct them over to the CBOs and other low-income community agencies. An initial report should be filed no later than October 1, 2000, with an update report by April 2001 in R.98-07-037 or any successor proceeding. These reports should be filed on the appearances and state service list in this proceeding and in R.98-07-037. Comments on the report are due 30 days thereafter, and replies are due within 15 days.

In addition, pursuant to AB 1393, competitive bid criteria should recognize “the bidder’s general contractor’s license and evidence of good standing with the Contractors’ State License Board.” (Pub. Util. Code § 327(b)(5).) All LIEE contractors and subcontractors, whether or not their contracts resulted from a competitive bid, should be in good standing with the CSLB. In Section 18, we direct the utilities to report information regarding the licensing status of their current contractors and subcontractors, so that we may monitor this non-cost consideration.

Specifically, we direct the utilities to submit reports that demonstrate the good standing of all of their current LIEE contractors and subcontractors with CSLB licensing requirements at the time the contractor or subcontractor:

- (1) submitted a bid (if applicable) to win the initial or current contract with the utility or prime contractor, or
- (2) commenced work under a negotiated contract that was not subject to competitive bidding.

The utility’s report should clearly describe what those licensing requirements are and certify that they have been met by including copies of licenses or other documentation. The reports will be due no later than 120 days from the effective date of this decision should be filed at the Commission’s

Docket Office in R. 98-07-037. Copies of the reports should be served on the state service list and appearances in R.98-07-037 (or any successor proceeding) and in this proceeding.

Within 60 days of the effective date of this order, the utilities should file advice letters requesting a budget augmentation sufficient to cover the cost of the new studies and reports specified in this decision. The budget augmentation request should include a breakout of the cost of each study or report.

We intend to use the cost and non-cost information described above to improve our oversight and evaluation of utility LIEE programs in the future. Further direction on the scope and schedule for future LIEE program evaluations will be directed by the Assigned Commissioner in R.98-07-037 or any successor proceeding.

## **20. Adopted PY2000 CARE and LIEE Budgets**

Attachment 4 presents the utilities' PY2000 budget proposals, which are unopposed. These budgets are consistent with current authorized amounts, per the Assigned Commissioner's scoping memo. However, they also include LIAB's proposed PY2000 budget levels for LIAB activities, which are currently being considered by the Commission in R.98-07-037. In the meantime, LIAB has been authorized to expend funds at a monthly prorated amount of the levels authorized for 1999. (See Assigned Commissioner's ruling in R.98-07-037, dated December 13, 1999.) Therefore, in adopting the utility's proposed PY2000 budgets today, we leave the amounts contained in those budgets for LIAB activities as placeholders, subject to the outcome of our determinations in R.98-07-037.

(2) commenced work under a negotiated contract that was not subject to competitive bidding.

The utility's report shall clearly describe what those licensing requirements are and certify that they have been met by including copies of licenses or other documentation. The reports are due no later than 120 days from the effective date of this decision, and shall be filed at the Commission's Docket Office in R.98-07-037. Copies of the reports shall be served on the state service list and appearances in R.98-07-037 (or any successor proceeding) and in this proceeding.

7. With input from interested parties and the LIAB, the utilities shall jointly develop standardized methods for producing data on bill savings and expenditures for LIEE programs on an overall program and per unit basis, by utility. The methods used to produce this information shall be consistent with the methodologies used to evaluate energy efficiency costs and savings in the AEAP. The utilities shall coordinate with Energy Division on all aspects of methodology design and implementation.

The utilities shall file a joint report no later than February 1, 2001, presenting the proposed standardized methods and explain how the methods are consistent with cost-effectiveness methods and calculations utilized in the AEAP. In this report, the utilities shall apply the proposed methods to calculate bill savings and expenditures for their PY1997, PY1998, and PY1999 LIEE programs, or explain why a study of a particular program year would be duplicative of what has already been done in the AEAP. In that event, the results of the AEAP study shall be presented. All assumptions and workpapers shall be presented. To the extent that data has been compiled for PY2000 programs, the report shall provide bill savings and expenditure calculations for that PY (or portion thereof) as well.

The joint report shall be filed and served on appearances and the state service list in this proceeding and in R.98-07-037, or any successor proceeding. Comments on the report are due 30 days thereafter. Responses to the comments will be due within 15 days.

8. As part of the PY2002 program planning process, PG&E shall prepare estimates of the one-time administrative costs associated with the competitive bidding process, based on its experience. Other utilities may present information on this issue as well in their PY2002 LIEE program applications. In addition, PG&E, SDG&E, SoCal, and SCE shall provide the information prepared by SDG&E and PG&E in Exhibits (Exhs.) 35 and 36, which was used to compile comparison Exh. 66 in this proceeding, so that this comparison can be duplicated across utilities for their PY1998--PY2001 annual program results. This information shall be provided by the utilities in their PY2002 LIEE program applications, together with all relevant workpapers.

9. In their PY2002 applications, the utilities shall propose alternatives to the per-home pass rate as an indicator of relative performance quality, as discussed in this decision.

10. As discussed in this decision, the utilities shall report on the access of their low-income program participants to programs provided by community service providers, consistent with the intent of the Legislature. (Pub. Util. Code § 385.1(a).) The report shall indicate the number of CBOs participating in the program as contractors or subcontractors, as well as the percentage of units treated by CBOs. Comparable information on non-CBO participants shall be presented as well. The report shall describe the utility's referral system between the CARE and Low-Income Home Energy Assistance Program, and whether or not that utility has met the requirements for the state to qualify for financial leveraging of federal funds. In addition, the report shall describe the systems in

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

Order Instituting Rulemaking on the Commission's Proposed  
Policies and Programs Governing Energy Efficiency, Low-Income  
Assistance, Renewable Energy and Research, Development and  
Demonstration. )  
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Rulemaking 98-07-037  
  
(Filed July 23, 1998)

**REPORTING REQUIREMENTS MANUAL (RRM) WORKING GROUP REPORT FOR  
LOW INCOME ASSISTANCE PROGRAMS**

In accordance with the Commission's directives in the Assigned Commissioner's Ruling dated April 28, 2000 in Rulemaking 98-07-037, the Southern California Edison hereby respectfully submits on behalf of the Working Group the Reporting Requirements Manual Working Group Report for Low Income Assistance Programs.

Respectfully submitted,

MEGAN SCOTT-KAKURES  
LAURA A. LARKS  
JENNIFER R. HASBROUCK

By: \_\_\_\_\_  
Jennifer R. Hasbrouck

Attorneys for  
SOUTHERN CALIFORNIA EDISON COMPANY

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Dated: October 2, 2000

## ***LIEE Reporting***

### **Annual**

The Working Group proposes the following revised Section 7 of the RRM. Section 7 consists of a narrative discussing LIEE reporting requirements and associated tables for the Energy Efficiency Programs Annual Report. The tables have been revised to provide additional functional detail as requested by LIAB. Section 7 also addresses modifications proposed for the cost effectiveness tests and reporting of energy-related hardship. The lifecycle savings information that was formerly provided in Table TA 7.3 has been deleted as members of the Working Group did not believe any parties found the information to be useful, nor was the information input directly into the cost effectiveness analyses. The revised Table TA 7.3 and newly created Table TA 7.4 provide information on dwelling types served and installed measures.

Of greatest significance, the Working Group recommends that the old practice of reporting on mandatory versus non-mandatory measures be eliminated to reflect recent policy enacted by AB 1393 that all feasible measures be installed. This change in reporting is compatible with the recently adopted approach to measure selection within the Phase I Standardization Report.

The Working Group proposes that energy-related hardship be addressed on an interim basis in the narrative supporting the low income section of the energy efficiency annual report. As quantitative indicators of energy-related hardship are developed, it may be appropriate at a later date to issue subsequent recommendations for reporting hardship.

### Consensus

PG&E, SoCalGas, SDG&E, SCE, Energy Division, ORA, and ICA concur with the annual LIEE reporting requirements as presented in this report.

### Dissent

No dissents were received regarding the annual LIEE reporting requirements as presented in this report.

### **Section 7: Low Income**

The primary purpose and contents of the Low Income section is to highlight the status of energy efficiency program activities in terms of results from the previous year and plans for the current year in low income customer segments.

The Low Income section should contain subsections:

- Summary
- Low Income Energy Efficiency (LIEE) Program
- Measurement and Evaluation (M&E) and Regulatory Oversight for Low Income activities
- Shareholder Performance Incentives for Low Income activities

The Summary subsection should contain, and use as a primary reference for the summary narrative, a set of standard tables: Table 7.1 (costs); Table 7.2 (effects, expressed as first-year annualized energy reductions), and Tables 7.3 and 7.4 (cost-effectiveness). The narrative should briefly address the methods used by the utility to market and promote the LIEE program. The primary focus of the narrative for the summary section should be on the ways and means by which the utility believes its accomplishments and plans:

- Support and are consistent with Commission-adopted policy objectives as they apply to this program area market;
- Address energy-related hardship; and,
- Conform with Commission-adopted policy rules applicable to this program area.

The subsequent subsections should contain narrative and supplemental tables that sufficiently describe costs and the effects in a manner that retains consistency between the standard program categories, programs, and program elements in Appendix B. Each subsection should also clearly identify the utility program marketing name used by the utility to promote participation (i.e., the products and/or services provided by or through the low income energy efficiency funds).

The values reported in the standard summary tables and, if used, supplemental tables, should be consistent with, and supported by the standard tables in the Technical Appendix for this program area.

**TABLE 7.1**  
**SUMMARY OF COSTS: LOW INCOME - (UTILITY NAME)**  
**(Electric and Gas Combined)\***

LIEE Programs	Last Year		Current Year
	Budgeted	Recorded	Budgeted
Energy Efficiency			
- Furnaces – Gas			
- Other Measures			
- Outreach & Assessment			
- In Home Energy Education			
- Education Workshops			
Energy Efficiency TOTAL			
Pilots			
- Pilot (A)			
- Pilot (B)			
Total Pilots			
Training Center			
Inspections			
Advertising			
M&E Studies			
Regulatory Compliance			
Other Administration			
Indirect Costs**			
Oversight Costs			
- LIAB Start-up			
- LIAB PY Past Year***			
- LIAB PY Present Year***			
- CPUC Energy Division			
Total Oversight Costs			
Shareholder Incentives****			
TOTAL COSTS			

\* This table actually has three sections. Although only the “electric and gas combined” section of Table 7.1 is depicted here, electric and gas also should be broken out separately and shown as separate sections of this table. The rows will be the same for all three sections. Single-fuel utilities should only prepare the electric or gas sections of this table as appropriate.

\*\* All program costs should be shown whether budgeted to the program or not. Footnote the amount of costs that are not part of the LIEE budget.

\*\*\* Enter actual year in tables.

\*\*\*\* Shareholder incentives are determined in the subsequent year’s AEAP. The amounts presented are estimates only and are not part of the program budgets.

**TABLE 7.2**  
**SUMMARY OF LIEE PROGRAM EFFECTS – (UTILITY NAME)**  
**(Annual Energy Reductions)**

	Last Year (recorded)	Current Year (planned)
mWh		
mTherm		

**TABLE 7.3**  
**SUMMARY OF LIEE COST-EFFECTIVENESS – (UTILITY NAME)**  
**(RATIO OF BENEFITS OVER COSTS)**

	Last Year (recorded)			Current Year (Planned)		
	Utility Cost Test	Total Resource Cost Test	Participant Test	Utility Cost Test	Total Resource Cost Test	Participant Test
Energy Efficiency						

**TABLE 7.4**  
**SUMMARY OF LIEE COST-EFFECTIVENESS: – (UTILITY NAME)**  
**(NET BENEFITS; \$MIL)**

	Last Year (recorded)		Current Year (Planned)	
	TRC	Participant	TRC	Participant
Energy Efficiency				

**Annual Energy Efficiency Report Structure: Technical Appendix**

The purpose of the Technical Appendix (TA) is to provide additional information (narrative and tabular data) to document the narrative and tabular data (standard tables or otherwise) reported in the main report. Consistency between the more detailed tabular data provided in the TA and the summary tabular data in the main report should be established by way of footnotes to columns or rows of the TA tables and/or the narrative that accompanies the TA tables.

Unless stated otherwise, the information provided in the TA applies to costs, effects, and cost-effectiveness, of programs reported in the Energy Efficiency Programs Annual Report as Last Year's programs.

**TA Section 7: Low Income Energy Efficiency**

Technical Appendix Section 7 should include supporting documentation for Section 7 of the Energy Efficiency Programs Annual Report.

**TABLE TA 7.1  
LIEE PROGRAM COST ESTIMATES USED FOR COST-EFFECTIVENESS  
(UTILITY NAME)  
Electric and gas combined**

	UTILITY COSTS						IMC*
LIEE	PROGRAM INCENTIVES (RECORDED)		Admin	Shareholder Incentives	Other	Total	
	Actual	Committed					
Energy Efficiency							

**Electric**

	UTILITY COSTS						IMC*
LIEE	PROGRAM INCENTIVES (RECORDED)		Admin	Shareholder Incentives	Other	Total	
	Actual	Committed					
Energy Efficiency							

**Natural Gas**

	UTILITY COSTS						IMC*
LIEE	PROGRAM INCENTIVES (RECORDED)		Admin	Shareholder Incentives	Other	Total	
	Actual	Committed					
Energy Efficiency							

\* Incremental Measure Cost

**TABLE TA 7.2  
LIEE COST ELEMENTS – (UTILITY NAME)  
(ELECTRIC AND GAS COMBINED)\***

LIEE Program	Expenditures Recorded by Cost Element – Last Year			
	Labor	Non-Labor	Contract	TOTAL
Energy Efficiency				
- Furnaces – Gas				
- Other Measures				
- Outreach & Assessment				
- In Home Energy Education				
- Education Workshops				
Energy Efficiency TOTAL				
Pilots				
- Pilot (A)				
- Pilot (B)				
Total Pilots				
Training Center				
Inspections				
Advertising				
M&E Studies				
Regulatory Compliance				
Other Administration				
Indirect Costs**				
Oversight Costs				
- LIAB Start-up				
- LIAB PY Past Year***				
- LIAB PY Present Year***				
- CPUC Energy Division				
Total Oversight Costs				
<b>TOTAL COSTS</b>				

\* This table actually has three sections. Although only the “electric and gas combined” section of Table 7.1 is depicted here, electric and gas also should be broken out separately and shown as separate sections of this table. The rows will be the same for all three sections. Single-fuel utilities should only prepare the electric or gas sections of this table as appropriate.

\*\* All program costs should be shown whether budgeted to the program or not. Footnote the amount of costs that are not part of the LIEE budget.

\*\*\* Enter actual year in tables.

**TABLE TA 7.3  
PROGRAM DETAIL BY HOUSING TYPE AND HEATING SOURCE  
(UTILITY NAME)**

	Energy Saved and Program Costs			Number of Dwellings		
	Last Year (mWh)	Last Year (mTherm)	Last Year Expenses	Last Year (Planned)	Last Year (Actual)	This Year (Planned)
Gas Heat – Own						
- Single Family						
- Multi Family						
- Mobile Home						
Sub Total Dwellings Served						
Gas Heat – Rent						
- Single Family						
- Multi Family						
- Mobile Home						
Sub Total Dwellings Served						
Electric Heat – Own						
- Single Family						
- Multi Family						
- Mobile Home						
Sub Total Dwellings Served						
Electric Heat – Rent						
- Single Family						
- Multi Family						
- Mobile Home						
Sub Total Dwellings Served						
<b>TOTAL DWELLINGS SERVED</b>						

**TABLE TA 7.4  
PROGRAM DETAIL BY MEASURE – (UTILITY NAME)**

	Energy Saved and Program Costs			Number of Dwellings Served
	Last Year (mWh)	Last Year (mTherm)	Last Year Expenses	Last Year (Actual)
Energy Education				
- Outreach & Assessment				
- In-Home Education				
- Education Workshops				
Total Energy Education				
Furnaces Gas				
- Repair				
- Replacement				
Total Furnaces Gas				
Infiltration & Space Conditioning.				
- Caulking				
- Door Weatherstripping				
- Duct Repair				
- Cover Plate Gaskets				
- Evaporative Cooler Covers				
- Window Replacements				
- Glass Replacements				
- Wall Repair (exterior)				
- Attic Ventilation				
- Attic Insulation				
- HVAC Air Filter Replacement				
Total Infiltration & Space Conditioning				
Water Heating Savings				
- Water Heater Blanket				
- Low Flow Showerhead				
- Water Heater Pipe Wrap				
- Faucet Aerators				
Total Water Heating Savings				
Miscellaneous Measures				
Evaporative Coolers				
Refrigerators				
Compact Fluorescents (inc. porchlights)				

## **Monthly**

The April 28, 2000 ACR discusses the need by LIAB to receive information on a timely basis, rather than in an annual report. For LIEE programs, the Working Group recommends that utilities report monthly expenditure information that can be used to compare program expenditures with annual budgets on a monthly basis. This information will be highly variable on a month-to-month basis, but over time will be useful as an indicator of program activity. Footnotes are to be used as appropriate to highlight information that may be specific to individual utilities or to clarify information in the table.

The Working Group recommends that the proposed table replace the current reports that are provided monthly to the Energy Division in response to a data request that originally was issued in the 4<sup>th</sup> quarter of 1999. The following report provides more information by functional classification that is consistent with the information that will be filed annually in the Energy Efficiency Programs Annual Report.

The report also deletes the requirement to present monthly budget information. The Working Group determined there significant effort would be required and little value received in allocating the annual budget into each month. This practice would require consistency on whether to re-spread the allocation each month to account for variances in the prior month.

### Consensus

PG&E, SoCalGas, SDG&E, SCE, Energy Division, ORA, and ICA concur with the monthly LIEE reporting requirements as presented in this report.

### Dissent

No dissents were received regarding the monthly LIEE reporting requirements as presented in this report.

### LIEE Monthly Expenses – (Utility name)

LIEE Program:	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	Annual Budget	YTD/ Budget (%)
Energy Efficiency															
- Furnaces – Gas															
- Other Measures															
- Outreach & Assessment															
- In Home Energy Education															
- Education Workshops															
Energy Efficiency TOTAL															
Pilots															
- Pilot (A)															
- Pilot (B)															
Total Pilots															
Training Center															
Inspections															
Advertising															
M&E Studies															
Regulatory Compliance															
Other Administration															
Indirect Costs*															
Oversight Costs															
- LIAB Start-up															
- LIAB PY Past Year**															
- LIAB PY Present Year**															
- CPUC Energy Division															
Total Oversight Costs															
TOTAL COSTS															

\* All program costs should be shown whether budgeted to the program or not. Footnote the amount of costs that are not part of the LIEE budget.

\*\* Enter actual year in tables.

## **Reporting Category Definitions**

The Working Group recommends that the Reporting Category Definitions for Low Income Programs in Appendix B of the RRM2 be revised as follows. The revisions reflect current Commission policy and are minor in nature.

Low Income Energy Efficiency (LIEE): Programs which are intended to provide assistance to low income customer groups. Assistance consists primarily of full subsidies of the energy efficiency measures. The primary purpose of the program is to serve an equity objective in assisting customers who are highly unlikely or unable to participate in other residential programs.

Shareholder Performance Incentives: The amount collected from ratepayers and paid to utility shareholders for the administration of LIEE programs.

M&E: The amount of the Low Income Public Goods Charge and the amounts collected from gas ratepayers used to measure and evaluate LIEE programs, the low income customer market, or LIEE service providers.

Low Income Advisory Board: The amount of the Low Income Public Goods Charge and the amounts collected from gas ratepayers used to pay for the operating costs of the LIAB, including the costs of compensation of LIAB board members, the costs of LIAB meetings, costs of administrative support services, and the costs of technical support services.

### Consensus

PG&E, SoCalGas, SDG&E, SCE, Energy Division, ORA, and ICA concur with the LIEE Appendix B definitions as presented in this report.

### Dissent

No dissents were received regarding the LIEE Appendix B definitions as presented in this report.