

**Statewide Finance Program
Attachment 2**

Table 1: Total Projected Program Budget & Savings by Subprogram

Subprogram	PG&E (\$)	SCE (\$)	SDG&E (\$)	SCG (\$)	Kwh	KW	Therms
OBF				\$1,727,378	0	0	750,001
ARRA-Originated Financing				\$3,200,000	TBD	TBD	TBD
New Financing Offerings				\$10,267,622	TBD	TBD	TBD
Total				\$15,195,000	0	0	750,001

Table 2: Total Projected Program Savings by IOU

Subprogram	PG&E	PG&E	PG&E	SCE	SCE	SDG&E	SDG&E	SDG&E	SCG	Total
	Kwh	KW	Therms	Kwh	KW	Kwh	KW	Therms	Therms	
OBF									750,001	
ARRA-Originated Financing									TBD	
New Financing Offerings									TBD	
Total									750,001	

Table 1. Projected Sub-Program Budget, by Calendar Year

On-Bill Financing	Program Year		
	2013	2014	Total
Admin (\$)	\$26,110.32	\$26,110.32	\$52,220.64
General Overhead (\$)	\$29,223.29	\$29,223.29	\$58,446.58
Loan Funding Implementation(\$)	\$513,109.01	\$513,109.01	\$1,026,218.02
Marketing & Outreach (\$)	\$36,596.38	\$36,596.38	\$73,192.76
Education & Training (\$)	\$8,650.00	\$8,650.00	\$17,300.00
Total Budget (\$)	\$613,689.00	\$613,689.00	\$1,227,378.00

* This table only reflects the non-incentive finance budget; \$500,000 in incentives for 2013-2014 are not shown.

Individual utility specific information to be provided in this table

Table 2. Projected Sub-Program Net Energy and Demand Impacts, by Calendar Year

	Program Years		
	2013	2014	Total
OBF			
GWh	0	0	0
Peak MW	0	0	0
Therms (millions)	0.375	0.375	0.75

Individual utility specific information to be provided in this table

Table 3. Quantitative Program Targets (PPMs)

Target	2013	2014
Number of homes or buildings treated	TBD	TBD
Number of units incented or rebated	TBD	TBD

Table 4 – Work Paper Status

#	Workpaper Number/Measure Name	Approved	Pending Approval	Submitted but Awaiting Review
1				
2				
3				
4				
5				
6				

For ARRA-originated finance programs and New financing Offerings: TBD

Table 5:. On Bill Financing Subprogram Milestones and Timeline (example)

Milestone	Date
Statewide Coordination Meeting	Oct-12
Statewide Vendor Participation Guidelines Completed	Nov-12
Vendor training module completed	Nov-12
Marketing materials completed	Feb-13
SW OBF Finance Manual Draft 1 Completed	13-Feb
Loans funded	2/2013 – 12/2014

Table 6 Geographic Regions

Geographic Region	Statewide Financing - SCG
CEC Climate Zone 1	
CEC Climate Zone 2	
CEC Climate Zone 3	
CEC Climate Zone 4	x
CEC Climate Zone 5	x
CEC Climate Zone 6	x
CEC Climate Zone 7	x
CEC Climate Zone 8	x
CEC Climate Zone 9	x
CEC Climate Zone 10	x
CEC Climate Zone 11	
CEC Climate Zone 12	
CEC Climate Zone 13	x
CEC Climate Zone 14	x
CEC Climate Zone 15	x
CEC Climate Zone 16	x

Table 7: Program Administration of Program Component:

Program Name	Program Component	Implemented by IOU Staff? (X = Yes)	Implemented by contractors to be selected by competitive bid process (if Yes then enter type of contractor/other market actor possibly used)	Implemented by contractors NOT selected by competitive bid process (list prime contractor and sub-contractor names)	Implemented by local government or other entity (X = Yes)
On-Bill Financing	Program Application Process	X			
On-Bill Financing	Inspections	X			
On-Bill Financing	Project Engineering Review	X			
On-Bill Financing	Loan Funding	X			
On-Bill Financing	Loan Repayment Process	X			
On-Bill Financing	Marketing/Outreach	X			X

Table 8: Customer Eligibility Requirements (Joint Utility Table)

For On Bill Financing subprogram:

Customer Eligibility Requirement (list of requirements)	PGE	SCE	SDGE	SCG
Non-residential customers (including institutional customers)	x	x	x	x
Owners of multifamily units who do not reside on the premises	x	x	x	x

The utilities must work together and submit this table jointly in their respective applications

For ARRA-originated finance programs and New financing Offerings: TBD

Table 9: Contractor Eligibility Requirements (Joint Utility Table)

Contractor Eligibility Requirement (list of requirements)	PGE	SCE	SDGE	SCG
TBD				TBD

List any contractor (and/or developer, manufacturer, retailer or other “participant”) eligibility requirements (e.g. specific IOU required trainings; specific contractor accreditations; and/or, specific technician certifications required).

The utilities must work together and submit this table jointly in their respective applications

Table 10: Manufacturer/Retailer/Distributor Partners

Manufacturer/Retailer/Distributor Partner Information	PGE	SCE	SDGE	SCG
	[list kinds of manufacturers]			
Manufacturers enrolled in program				N/A
Manufacturers enrolled in program				N/A
Manufacturers targeted for enrollment in program				N/A
Manufacturers targeted for enrollment in program				N/A
Manufacturers targeted for enrollment in program				N/A
Retailers enrolled in program				N/A
Retailers enrolled in program				N/A
Retailers enrolled in program				N/A
Retailers enrolled in program				N/A
Retailers targeted for enrollment in program				N/A
Retailers targeted for enrollment in program				N/A
Retailers targeted for enrollment in program				N/A
Distributors enrolled in program				N/A
Distributors enrolled in program				N/A
Distributors enrolled in program				N/A
Distributors targeted for enrollment in program				N/A
Distributors targeted for enrollment in program				N/A
Distributors targeted for enrollment in program				N/A

Table 12: Additional Services

Additional Services that On-bill Financing Sub-Program Will Provide	To Which Market Actors	PGE	SCE	SDGE	SCG
		[indicate the level at which the service will be incented or funded]	[indicate the level at which the service will be incented or funded]	[indicate the level at which the service will be incented or funded]	[indicate the level at which the service will be incented or funded]
Energy Audit					0
Energy Savings Assessment					0
Information on Other Utility Programs					0

a. For each service provided, indicate any expected charges to market actors of the services, and/or the level at which any such services will be incented or funded.

Table 14: Quality Assurance Provisions

QA Requirements	QA Sampling Rate (Indicate Pre/Post Sample)	QA Personnel Certification Requirements
QA requirements #1	TBD	TBD
QA requirements #2		
QA requirements #3		
QC requirement #1		
QC requirement #2		
QC requirement #3		

NOTE: Please list quality assurance, quality control, including accreditations/certification or other credentials required.

Table 15: Cross-cutting Sub-program and Non-IOU Partner Coordination

Sub-Program Name		
Other IOU Sub-program Name	Coordination Mechanism	Expected Frequency
TBD	TBD	TBD
Coordination Partners Outside CPUC		
TBD	TBD	TBD

Note: “Mechanisms” refers to communication methods (i.e. quarterly meetings; internal list serves; monthly calls, etc.) and/or any cross-program review methods (i.e., feedback on program plans; sign off on policies, etc). or harmonization techniques (i.e. consistent certification requirements across programs, program participant required cross trainings, etc).

Table 16: Non-EE Sub-Program Information

Sub-Program Name		
Non-EE Sub-Program	Budget	Rationale and General Approach for Integrating Across Resource Types
TBD	TBD	TBD

NOTE: Column C --> Integrated/coordinated Demand Side Management: As applicable, describe how sub-program will promote customer education and sub-program participation across all DSM options. Provide budget information of non-EE sub-programs where applicable. Column D --> Integration across resource types (energy, water, air quality, etc): If sub-program aims to integrate across resources types, please provide rationale and general approach