



SCG - SMB
Behavioral Program
Implementation Plan

January 31, 2023

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Program Budget and Savings Information

1. Program and/or Sub-Program Name

Performance-Based Next Gen HERs for SMB Customers

2. Sub-Program ID number

SCG3882

3. Sub-Program Budget Table

Program Budget by Cost Category

	PY1	PY2	PY3	Total	% of Total Budget
Administration	\$100,000	\$0	\$0	\$100,000	6%
Marketing	\$0	\$0	\$0	\$0	0%
Direct Implementation - Non-Incentive	Up to NTE \$524,041	\$524,042	\$524,042	\$1,572,122	94%
Total Budget	Up to NTE \$624,041	\$524,042	\$524,042	Up to NTE \$1,672,125	100%

4. Sub-program Net Impacts Table

The Performance-Based Next Gen BERs for All will initially be available to the following treatment customers.

Wave	Treatment Customers (November 2023, estimated)
Wave 1	18,000
Total	18,000

Program Goals

First Year Annualized Deliverable	PY1	PY2	PY3	Total
Gross Therm Savings	350,000	437,100	356,704	1,143,804
Net Therm Savings	350,000	437,100	356,704	1,143,804
Projected Total System Benefit	\$969,250	\$1,280,920	\$1,106,421	\$3,114,967

Program TRC	1.93	2.44	2.11	2.17
Program PAC	1.93	2.44	2.11	2.17
Assumed Program Launch Date	October - November 2023			

5. Sub-Program Cost-Effectiveness (TRC)

2.17

6. Sub-Program Cost-Effectiveness (PAC)

2.17

7. Type of Sub-Program Implementer (Core, Third Party, or Partnership)

Third-Party

8. Market Sector

Small, Medium Business

9. Sub-program Type (Non-resource, Resource Acquisition, Market Transformation)

Resource Program

10. Intervention Strategies & Market Channels (Upstream, Downstream, Midstream, Direct Install, Non-Resource, Finance, etc)

Downstream, Non-Incentive

11. Timeline

Three program years, from November 2023 through October 2027

Program Implementation Plan Narrative

1. Program Description

SCG is running a behavioral energy efficiency program, which offers behavior intervention strategies to commercial participants to achieve short-term energy and budget savings that can persist and produce long-term behavior change and energy savings. This is achieved by fostering participant engagement, ensuring participant satisfaction, and providing energy education and upgrades through regular and participant-specific touchpoints in the form of digital Business Energy Reports (BERs) and a web-based education portal through the lazy-login feature.

Behavioral programs are required to employ comparative energy usage and disclosure, ex-post measurement, and experimental design. In the commercial sector, randomly selected customers receive their usage feedback via paper and email reports leveraging their usage data. This program includes the use of normative or comparative information, personalized communication about the customers' energy usage, and any other demographic factors.

Program rationale & objectives

Bigdely's program is fully aligned with California's and SoCalGas' focus on expanding cost-effective behavioral program offerings, including for commercial customers. Behavioral energy efficiency is a well-established pillar of energy efficiency potential and results in California. In fact, in light of HER programs' consistent results in recent years, the CPUC has suspended the requirement for ex-post evaluations of HER programs for three years (Decision 19-08-034). Bigdely's program also supports CPUC policy, as noted in Decision 10-04-027, by "educating consumers about their own energy use, and encouraging them to explore options for managing their energy use and saving money." Bigdely's SMB behavioral program provides consumer education in the form of personalized insights about energy use, intuitive usage charts, and more. Our program also provides customers with options for managing their energy use in the form of personalized no- and low-cost ways to save energy recommended SoCalGas energy efficiency programs, and potential products and services that could reduce energy use. Further, Bigdely's program is fully compliant with relevant legislation:

SB 1414: Among other provisions, SB 1414 limits the application of certain existing energy efficiency rebates and incentive provisions to customer or contractor recipients. SB 1414 is not directly applicable to Bigdely's program, as the program does not involve rebates or incentives;

SB 350: Among other provisions, SB 350 requires that California achieve a cumulative doubling of statewide energy efficiency savings in electricity and natural gas end uses of retail customers by January 1, 2030 and that utilities establish targets consistent with this goal. Bigdely's program is aligned with SB 350, as the program directly addresses energy efficiency savings in natural gas end uses, generating measurable savings in service of this goal;

AB 802: Among other provisions, AB 802 authorizes utilities to provide incentives, rebates, technical assistance, and support to their customers to increase the energy efficiency of existing buildings, and to count the energy savings achieved through these programs toward overall energy efficiency goals.

Bigdely's program is aligned with AB 802, as the program provides support to customers, in the form of energy insights and personalized tips, to increase the energy efficiency of existing buildings. Further, the savings measured and verified through RCT methodology will be counted toward overall energy efficiency goals;

AB 758: AB 758 pertains to the ability of utilities to provide energy efficiency financing options to their customers for a comprehensive energy savings program. AB 758 is not directly applicable to Bigdely's program, as the program does not involve energy efficiency financing. However, within the personalized tips that customers receive in Bigdely's program, our solution can incorporate energy efficiency financing offers from SoCalGas and approved third parties;

AB 793: Among other provisions, AB 793 requires utilities to educate residential customers and small and medium business customers about incentives for energy management technology. Bigdely's program is aligned with AB 793, as the program provides information about relevant incentives within communications to customers.

Proposed Commercial Behavior Intervention Strategies	Rationale Behind the Proposed Commercial Intervention Strategies and How it can help Motivate Commercial Customers to Save Energy	Success Metrics Associated with the Proposed Commercial Intervention Strategies (other than aggregate therm savings)
Social norms: similar business comparison based on usage pattern clustering	Bigdely's advanced analytical models identify and group segments of customers based on usage patterns (businesses with 9-to-5 activity vs. business with night-time activity), thus building comparative groups that become much more relevant to customers than when simply based on account characteristics.	Customer satisfaction metrics
Gamification: Ownership	An additional element of personalization and ownership in Bigdely's solutions is the ability to set a personal budget, which bestows a sense of personal accountability on the customer.	Web engagement trends (dependent on the availability of the Bigdely web portal for treated customers)
Gamification: Meaning	Bigdely's Energy Insights that accompany personalized recommendations (behavioral tips, utility programs, and products/services) make it clear why the particular recommendation is presented.	Web engagement trends (dependent on the availability of the Bigdely web portal for treated customers)

Program Goals

The program will market the Performance-Based Next Gen BERs for All to approximately 18,000 customers (Customer Segments served in this portion of the behavioral program). The contractor will coordinate with SCG to promote other Energy Efficiency Programs (Company or Third Parties under

Contract with Company), where applicable. Upon program launch, the Contractor may refer and/or forward customer inquiries about services provided by other programs to SCG.

SCG will provide a downstream program that selects eligible customers and assigns them to a treatment group to receive BERs at regular intervals to encourage energy- and money-saving behavioral changes or to act as a control group for the study. The program's treatment group will receive a series of BERs as well as access to a web portal where they can learn about additional savings potential.

Customers will be enrolled in the program in compliance with the measurement and verification (M&V) plan filed with the California Public Utilities Commission (CPUC). The program will monitor participant eligibility on an ongoing basis, removing participants who no longer wish to participate or otherwise become ineligible to participate.

The SCG Behavioral Program goals are to:

- Establish a cost-effective commercial behavioral program to educate participants on their energy consumption behavior and motivate them to save energy and money over the short- and long-term
- Validate participant savings using Randomized Control Trial (RCT) to measure savings
- 350,000 Therm Savings commitment in Program Year 1
- 437,100 Therm Savings commitment in Program Year 2
- 356,704 Therm Savings commitment in Program Year 3

2. Program Delivery and Customer Service

The contractor will perform the following activities on behalf of the Program:

Communication Channels	Description/Cadence/Frequency
Paper BER	2 paper reports per year which include: <ul style="list-style-type: none"> ● Self-comparison over time ● Peer/ normative comparison ● Dynamic personalized recommendations to save ● Historical usage ● SCG program callout
Digital BER	Up to 13 emails per year <ul style="list-style-type: none"> ● (12) A Monthly Usage Summary email, which includes a Peer Comparison feature ● (1) optional* Seasonal email per peak season: <p>*Contractor and Company will configure seasonal email along with monthly summary but will only send to users as needed based on program performance. Seasonal emails sent will be agreed upon by both parties.</p>
Web portal	An SCG-branded, mobile-responsive web portal, which is readily accessible following program launch, that contains a broad set of features to serve customer needs: <ul style="list-style-type: none"> ● Business Profile Survey ● Preferences Page

Emails are sent by Contractor utilizing an SCG approved domain via a 3rd party email service, SparkPost. The email list is provided by SCG and maintained by their Customer Service Representatives or the users directly. Contractor does not conduct email validation or make any changes unless requested by SCG.

The following table details each component of the information being included in the BER and associated benefits.

Program Components and Benefits

Component	Description	Benefits
Similar Business Comparison	Performed at a whole-business level for similar business	Drive energy savings through social benchmarking
Appliance Itemization	Energy Bill Itemization for customers.	Customers can see where their energy dollars go

<p>Personalized Recommendations</p>	<p>Highly personalized recommendations engine driven by energy itemization, business profile, ease of use, savings impact, season, type, and ownership of the business.</p>	<p>Drive energy savings by empowering customers with a curated set of actionable recommendations with the highest savings impact; Drive interest and adoption of targeted offers</p>
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The SCG Behavioral Program is designed to drive energy awareness and consumption reduction through a behavioral program design. Program objectives will be achieved by providing digital business energy reports that address barriers to action for commercial customers through modeling energy use at the business level and providing reports that call out end uses, costs, and personalized recommendations for improvements. Hard-To-Reach customers and Disadvantaged Communities are included in the treatment waves listed above but are not subject to a specific intervention.

In addition to delivery methods designed specifically to address participants’ needs through a cost-effective and personalized approach, SCG will provide customer service. SCG provides customer support for the behavior program through the SCG Energy Information Center (EIC). The Customer Service Representatives (CSR) on that team are trained on the behavior reports that are deployed. On all reports the EIC phone number is provided along with the EIC email for customer inquiries. CSRs answer questions regarding the reports, where the information comes from, the purpose of the reports, etc. In addition CSRs can update customer information shown on the reports, as well as opt customers out of the program if that is the customer’s desire.

Customer satisfaction through interactions that are timely and that provide meaningful information with actionable recommendations is the cornerstone of the Behavioral Program. Participants will have access to modernized digital programs like the web portal and digital BER that have benefits beyond measurable behavioral energy efficiency (EE); they can also contribute to an increase in customer satisfaction and an improved customer experience.

3. Program Design and Best Practices

Program Specifications

Area	Scope
<p>No. of Participants</p>	<p>The implementer will generate digital BERs for approximately 18,000 treatment group participants. M&V evaluator will determine the list of users in treatment and control, each group having 18,000 at the start of the program. Control group participants are representative when randomly selected within the same zip codes as treatment participants at a proportional distribution. E&V evaluator will determine savings of the treatment group by comparison with the control.</p>

Report Frequency (digital)	1-2 emails per billing cycle, for assigned commercial Behavioral treatment waves <ul style="list-style-type: none"> • A monthly summary with an itemized energy bill and similar business comparison • An optional seasonal energy usage alert for the last season and then provides them energy saving tips for the upcoming season
Customer Selection	SCG’s program-eligible participants will be used to build a treatment group; M&V evaluator will select customers for treatment and control groups in compliance with the M&V Plan, Bidgely’s customer filters, and approved CPUC requirements
Report content	BERs can include the following content: <ul style="list-style-type: none"> • Appliance cost itemization • Education and outreach about complementary programs • Similar business energy consumption comparison • Personalized energy- and cost-saving recommendations
Channel and Delivery	Reports will be emailed to program participants using the email address registered with SCG; The digital report will carry the SCG logo for identification and brand recognition of the program and agency providing the program. Emails are sent by the contractor utilizing their domain via a 3rd party email service, SparkPost. The email list is provided by SCG and maintained by their Customer Service Representatives or the users directly. The contractor does not conduct email validation or make any changes unless requested by SCG.
Channel and Delivery (additional resources for digital option)	Reports including consumption summary element are sent early (e.g., Day 6) in a billing cycle, summarizing what happened in the previous billing cycle, including bill amounts, itemization, and recommendations at whole premise and appliance category level
Unsubscribing	Program participants will be able to unsubscribe from receiving BERs through the program’s website and by contacting SCG’s contact center; SCG will provide support directly to participants and will unsubscribe participants using the web portal or support ticket

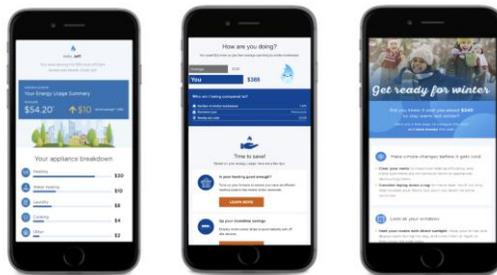
Digital BER

Customers identified for this program have an email address on file with SCG and are enrolled in the digital BER program option. If an email to a customer “bounces”, Bidgely will not remove that customer from the treatment group given there are numerous potential reasons for an email to “bounce,” and Bidgely does not want to unnecessarily remove customers from the treatment group.

Participants will receive alerts and notifications that are timed to users’ billing cycles. These digital touchpoints will be optimized for relevancy and timing to best suit the participant by providing a clear next best action for the participant, increasing the likelihood of the participant adopting the energy-saving tip or signing up for a promoted program. This facilitates a more interactive and engaging relationship with the participant, leading to higher satisfaction and program participation.

The following table describes the types of alerts and notifications customers will receive under the digital BER program option.

Alert Type	Description
Monthly Summary with Similar Business Comparison	Sent early (e.g., day 6) in a billing cycle, summarizing usage from the previous cycle, including an itemization of spending and relevant saving recommendations, as well as comparison of energy usage to peers powered by SCGJ-provided NAICs codes or Bidgely data sets
Seasonal Email	Scheduled summer and winter seasonal alerts notifying the user of their previous season's HVAC cost, and tips to save for the upcoming season



Monthly Summary +
Similar Business Comparison

Seasonal Email Alert

Web Portal

Behavioral Program participants will also have access to a suite of online solutions through a digital platform, which will provide a business profile survey for customers and a preferences page.

The survey includes questions pre-configured that enable refinement of the personalization customers see, and allows the utility to gather key customer data unique to its service territory. This data includes:

- **Business profile data** not already acquired through utility and 3rd-party data sets such as the age of premise, type of permise, levels of insulation, etc.;
- **Occupancy profile data** such as number of occupants and whether they rent or own.

The preferences page of the portal gives customers full control of the notifications they receive, the channel of the notifications, and the specific contact information at which they receive communications.

Market Barriers and Solutions

The Behavioral Program focuses on data analysis to itemize energy bills and generate recommendations that target behavioral change and motivate participants to save energy. The primary market barrier for the commercial customer sector is a lack of information or awareness about end use and how their behavior impacts their energy usage. Proactive delivery of this information to participants via BERs is intended to address this gap while testing various methods of education delivery and serve as a cost-effective way to achieve savings. This and other barriers addressed by the Behavioral Program are listed below.

Barrier	Solution
Difficulty providing personalized end-use data and recommendations	Regular digital reports that include energy consumption and saving potential
Lack of understanding of comparative performance over time	HER compares participant's consumption to similar premise

SCG will also use a state-of-the-art energy consumption analysis tool to provide participant education to make energy-saving changes in their businesses. By using only meter-based energy consumption data (no in-premise devices or any additional hardware) the Behavioral Program software will detect the presence and estimate the energy usage of several different appliances relevant to small and medium businesses. The adoption of this tool can not only increase energy savings but can also drive targeted demand response programs and achieve more efficient grid optimization. It enables the personalized experience that consumers have come to expect.

There are many established data points and reports in the industry that document the efficacy of behavioral programs. Links to three industry reports are included for reference.

1. *Behavior Change Programs: Status and Impact*, Reuven Sussman and Maxine Chikumbo; October 2016 <https://aceee.org/sites/default/files/publications/researchreports/b1601.pdf>
2. *Overview of commercial Energy Feedback and Behavior-based Energy Efficiency*, Prepared by E3 for the Customer Information and Behavior Working Group of the State and Local Energy Efficiency Action Network; February 2011 https://www4.eere.energy.gov/seeaction/system/files/documents/participantinformation_behavioral_status_summary.pdf
3. *Implementing EPA's Clean Power Plan: A Menu of Options*, Chapter 13. Pursue Behavioral Efficiency Programs http://www.4cleanair.org/sites/default/files/Documents/Chapter_13.pdf

4. Innovation

This program brings a diverse range of solution design innovations to SoCalGas' commercial Behavioral Program:

- Personalization: The implementer's platform identifies the energy insights and recommended actions (determined by a customer's usage) for customers at a given point in time.

5. Metrics: Provide metrics that will be used to track program progress.

Commented [1]: Issue: the template says "for program design and implemented by third parties, include the required performance metric for innovation"
Recommendation: add a metric for innovation

In general, the KPI ratings will be based on a 0 – 4 scale:

- 0 – Unsatisfactory
- 1 – Below expectations
- 2 – Meeting Expectations
- 3 – Exceeding Expectations
- 4 – Greatly exceeding expectation

Table –Key Performance Indicators

%	KPI	SoCalGas Metric	Description	Scoring	Continuous Monitoring Mechanisms
70%	Performance: Goal Accomplishment (net therm savings)	S1: Energy Savings	Percentage of net monthly energy savings achieved vs forecasted	0: < or equal to 70% 1: >70 – 90% 2: >90 – 110% 3: >110 – 130% 4: >130%	Monthly Reports
10%	Performance: Digital BERs Open Rate	N/A	Percentage of customers that open digital BERs.	0: < or equal to 30% 1: >30 - 35% 2: >35 - 40% 3: >40 - 50% 4: >50%	Monthly Reports
10%	Service Delivery: Digital BERs	N/A	Percentage of emails that receive "Like Votes" vs "Dislike Votes"	0: < or equal to 50% 1: >50 - 60% 2: >60 - 70% 3: >70 - 80% 4: >80%	Monthly Reports
10%	Service Delivery: Opt-Out Rate	N/A	Percentage of treatment customers who opt not to receive digital BERs	0: >20% 1: 15% - 20% 2: 10% - 15% 3: 5% - 10% 4: <5%	Monthly Reports

Supporting Documents (attach in PDF format)

Commented [2]: Issue: missing sections from the template.
 Recommendation: Please include the missing sections 6, 7, 8, 9, 10 and 11 from the template and state why there is no information provided.

1. Program Manuals and Program Rules

The Behavioral Program does not have a manual because it does not require eligibility to participate or to claim savings. See Program design excerpts.

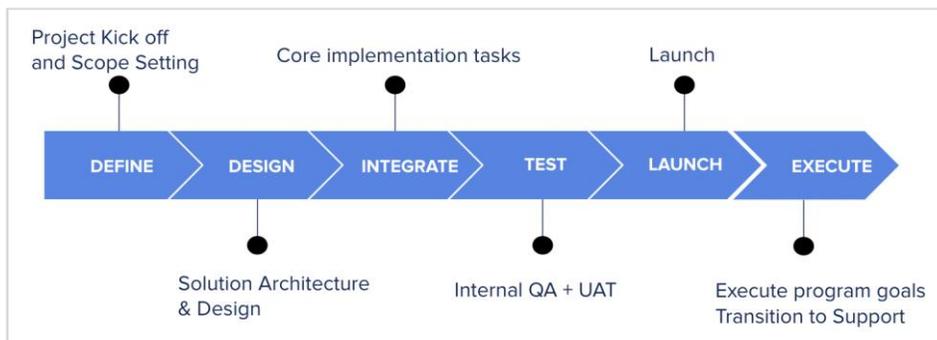
2. Program Logic Model

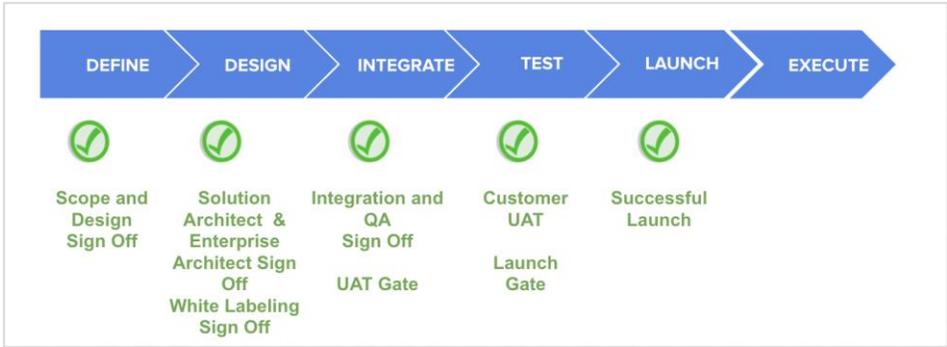
Activity	Description	Output
Program Design		
Customer Selection	Select a potential list of target customers based on pre-defined criteria that will meet or exceed savings goals	Eligible customer accounts
Setup Treatment and Control	Randomized assignment to treatment and control	The final list of treatment and control customers
Program Pre Launch		
Product Configuration	Configuration of the different components of the solution	Final product configurations
Quality Assurance (QA) of Solution	Test functionality of the product to ensure it behaves as expected	Solution ready for launch
Launch readiness	Setup solution in production; ensure the readiness of both implementer and SCG stakeholders to support the solution after go-live	Solution ready to be launched to SCG's customers

Program Performance Assessment		
Go Live	Launch program	Customers start receiving email alerts every month
Savings Measurement	Calculate the EE savings every month post-launch using a post-program regression model.	EE Savings (per household and aggregated) are available
Review Savings	Review savings numbers and compare them with forecasts. If required, take remediation actions to mitigate savings gaps	Enhanced treatment groups / revised forecasts
P4P	Pay the implementer for the recognized EE savings	Payment received

3. Process Flow Chart

The diagram outlines the process flow for the program launch. Participants have already been selected and will be treated with business energy reports from the contractor. Savings will be measured every month.





4. Workpapers, Software Tools

The following table outlines the software components used for this program.

#	Component	Description
1	Data Analytics Platform	The data analytics platform leverages the consumption and billing metadata to develop key data elements such as appliance itemization, similar business comparison, and personalized recommendations used for the reports
2	Email Alerts Engine	This module is responsible for delivering the email alerts
3	Web Engine	This module is responsible for hosting all the web pages relevant to the program including the participant facing portal, the preferences portal as well as the utility console

5. Quantitative Program Targets

The table below provides the number of participants to whom business energy reports will be delivered as well as the targeted gas savings for the group.

The Performance-Based Next Gen BERs for All will initially be available to the following treatment customers.

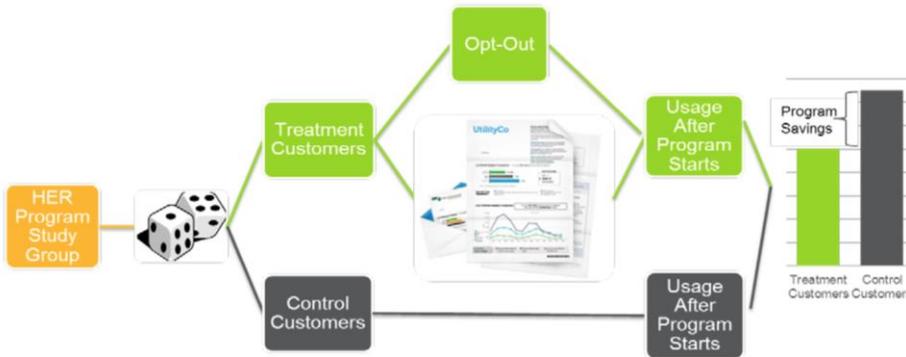
Wave	Treatment Customers (November 2023, estimated)
Wave 1	18,000

Program Goals

First Year Annualized Deliverable	PY1	PY2	PY3	Total
Gross Therm Savings	350,000	437,100	356,704	1,143,804
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Projected Total System Benefit	\$969,250	\$1,280,920	\$1,106,421	\$3,114,967
Program TRC	1.93	2.44	2.11	2.17
Program PAC	1.93	2.44	2.11	2.17
Assumed Program Launch Date	October - November 2023			

6. Diagram of Program

There is no sub-program associated with the Behavioral Program.



Source: Navigant

7. Evaluation, Measurement, and Verification (EM&V)

SCG’s Program will use an RCT methodology to compare participants in the program to a control group’s consumption and savings over time. The RCT approach complies with behavioral program evaluation best practices and CPUC requirements.

This method is used in conjunction by first selecting non-participants randomly from within the intended treatment population, using stratification to ensure equivalency between the two groups, and then by calculating consumption for both participants and non-participants. Then, the difference of differences will be calculated between the two groups to arrive at adjusted gross savings.

Using an RCT design will allow for two things: prevent capturing and paying for naturally occurring efficiency by comparing the treatment and control groups, and prevent selection bias in participant enrollment toward participants who have the highest propensity to save energy even without a behavioral intervention. Moreover, this approach allows specific participant tracking across different programs to avoid double counting of savings.

Program impacts on natural gas consumption are estimated using a lagged dependent variable model in which annual or seasonal energy consumption for treatment and control group customers is estimated using consumption data from the pre-treatment period and post-treatment period. The analysis database includes individual monthly therms consumption data for each customer in the control and treatment group. The regression specification is below, followed by definitions for each term in the table below.

Equation: Lagged Dependent Variable Model Specification

$$therms_{it} = a + b_t + c_t \cdot treatment_i + d \cdot pretreatment_therms_{it} + e_t \cdot pretreatment_therms_{it} + \epsilon_{it}$$

Table: Lagged Dependent Variable Model Definitions

Variable	Definition
<i>therms_{it}</i>	Customer <i>i</i> 's usage in month <i>t</i> .
<i>a</i>	The estimated constant for energy consumption (average for all customers in all periods).
<i>b_t</i>	The estimated coefficient for the month and year indicator variable.
<i>c_t</i>	The estimated coefficient for the month and a year indicator variable for treatment customers. This is the treatment effect for the particular month <i>t</i> .
<i>treatment_i</i>	The treatment indicator variable for customers <i>i</i> . Equal to 1 for treatment customers and 0 otherwise.
<i>d</i>	The estimated coefficient for pretreatment consumption.

<i>pretreatment_therms_{it}</i>	Pretreatment usage for customer <i>i</i> for month <i>t</i>. Pretreatment consumption for a particular month in the post-treatment period refers to the same calendar month in the pretreatment period.
<i>et</i>	The estimated coefficient on pretreatment consumption for a particular month <i>t</i>.
ϵ_{it}	The error term.

This specification applies to all waves, with some indicator variables set to zero for some waves. In other words, the particular months included in the model vary by wave. In each case, the estimation includes one year of pre-treatment and one year of post-treatment natural gas consumption data for each customer. Standard errors are estimated allowing for arbitrary correlation among errors within each customer’s data.

The impacts for the Behavioral Outreach Program are estimated separately for each wave (i.e., a unique regression equation is used for each wave). Season-specific savings are also estimated. To maintain comparability between treatment and control groups, opt-outs (that is, customers assigned to treatment groups that request to be removed from receiving the reports) are retained in the treatment groups throughout the entire year. Two reasons underlie this decision. First, because the experiment uses an opt-out delivery design (in which households in the treatment receive the reports without requesting them), households that subsequently opt-out of receiving the reports receive at least one report before they drop out. So, strictly speaking, they are treated. Second, it is impossible to remove parties in the control group who would have opted out, because their identity is unknown. Removing opt-outs only from the treatment group without doing so for the control group would compromise the internal validity of the savings estimates. BERs are assumed not to affect the rate at which customers close their accounts due to moving or other reasons; this appears to be true since the attrition rate between treatment and control groups are virtually identical. Treatment and control customers who move out during the year are retained in each sample until their accounts are closed. This means that the population of interest grows smaller for both the control and treatment groups as time progresses.

Participant Group

Participants for this program are chosen consistent with CPUC direction for downstream behavioral programs. SCG’s commercial Behavioral Program adopts an existing conditions baseline with the following requirements to provide ample historical consumption data:

- Eligible projects must have at least 12 months of baseline energy consumption data in the form of hourly gas consumption. The baseline period selected involves the 12 months immediately before the implementation of EE measures (Baseline Period Dates)

To be eligible for SCG’s Behavioral Program, SCG will screen and continuously monitor program participants for the following:

- The project site must be located in the SCG service area
- Property must be a single-family structure with a single meter for each fuel
- The customer must have 12 months of consecutive consumption data for the same account

- Mixed-used sites are eligible if commercial space represents at least 50% of conditioned space and have received gas distribution service from SCG
- Customer must have never opted out to receive communications i.e. BERs, CARE/Low-Income Programs

Control Group

For behavior-based interventions, a control group is being used for determining savings impacts. SCG considers CPUC guidance provided in the Large Population-Level Energy Efficiency Program Design Method Checklist¹in designing the control group.

¹ California Public Utilities Commission Rolling Portfolio Guidance Website:
<https://www.cpuc.ca.gov/general.aspx?id=6442456320>