



**Ronald van der Leeden**

Director  
Regulatory Affairs

555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011

Tel: 213.244.2009

Fax: 213.244.4957

[RvanderLeeden@socalgas.com](mailto:RvanderLeeden@socalgas.com)

September 1, 2020

Advice No. 5684  
(U 904 G)

Public Utilities Commission of the State of California

**Subject: Southern California Gas Company Request for Approval of Annual Energy Efficiency Budget Filing for Program Year 2021**

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission) its 2021 Energy Efficiency (EE) Program Portfolio budget. The EE Program Portfolio, along with supporting documentation, is incorporated as Attachment A, which have been uploaded to the California Energy Data and Reporting System (CEDARS) website.<sup>1</sup>

**Purpose**

This Advice Letter is submitted in compliance with Ordering Paragraph (OP) 4 of Decision (D.) 15-10-028,<sup>2</sup> which directs Program Administrators (PAs) to submit a Tier 2 Advice Letter containing the budget for the next calendar year's EE portfolio by the first business day in September; and with OPs 41 and 43 of D.18-05-041, which directs PAs to include information identified in D.18-05-041.

**Background**

On October 24, 2014, the Commission issued D.14-10-046, which authorizes funding for EE programs until 2025.<sup>3</sup> On October 28, 2015, the Commission issued D.15-10-028, which approved the EE rolling portfolio mechanics for 2016 and beyond and explains that Annual Budget Advice Letter (ABAL) filings will propose detailed budgets for cost recovery, transfer, and contracting purposes.<sup>4</sup>

---

<sup>1</sup> <https://cedars.sound-data.com>.

<sup>2</sup> D.15-10-028, at pp. 123-124.

<sup>3</sup> D.14-10-046, OP 21, at p. 167.

<sup>4</sup> D.15-10-028, at p. 56.

On June 5, 2018, the Commission issued D.18-05-041, which approved the PAs Energy Efficiency Business Plans. D.18-05-041 directed the PAs to, beginning with the ABALs due on September 4, 2018, provide the following information in the ABAL submittals:<sup>5</sup>

- Forecasted Total Resource Cost (TRC) must meet or exceed 1.25, except during program years 2019-2022, when the forecasted TRC must meet or exceed 1.0;
- Forecasted energy savings goals must meet or exceed Commission established savings goals for each investor-owned utility (IOU);
- Forecasted budget must not exceed the PA's annual budget in the approved business plans, or (if applicable) the revised annual budget in this ABAL;
- Sector-level Metrics;
- A description of program and portfolio changes; and
- Supplemental budget information in the format of the June 12, 2017 supplemental budget filings.

On May 21, 2019, the Commission issued D.19-05-019 adopting three new cost-effectiveness analysis framework policies for distributed energy resources. OP 2 of D.19-05-019 directed all Commission filings and submissions requiring cost-effectiveness analysis of distributed energy resources, to review and consider the results of the Program Administrator Cost (PAC) Test and the Ratepayer Impact Measure (RIM) Test.

On August 23, 2019, the Commission issued D.19-08-034 which established energy efficiency savings goals for 2020-2030.

At the direction of the Energy Division, SoCalGas also includes Attachment A as part of the ABAL submittal. Attachment A has been uploaded to the CEDARS website and will be made available on <http://www.socalgas.com/regulatory/R13-11-005.shtml>. Attachment B of this Advice Letter provides the CEDARS Filing Confirmation which was printed from the confirmation dashboard upon confirmed completion of the filing through CEDARS.

### **SoCalGas' 2021 Budget and Savings**

SoCalGas' 2021 program year budget is \$106,195,000, consistent with D.18-05-041. The 2021 funding request does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program, nor the 2021 program budget for the Statewide Financing Pilots.<sup>6</sup> The Southern California Regional Energy Network (SoCalREN) and Tri-County Regional Energy Network (3C-REN) are submitting their own Advice Letters to implement programs and associated budgets for

---

<sup>5</sup> D.18-05-041, at pp. 124-129 and OP 44.

<sup>6</sup> Budgets for these programs were approved in D.19-01-005 and Resolution E-5072 respectively.

PY 2021. Table 1 lists SoCalGas' 2021 budget and the forecasted energy savings, by sector.

**Table 1: SoCalGas 2021 Budget and Savings**

Sector	Program Year (2021) Budget (000's)	SCG PY2021 FORECAST ENERGY SAVINGS (Net)		
		forecast kWh	forecast kW	forecast therms (MM)
Residential	\$40,990	5,820,511	533	15.00
Commercial	\$25,399	835,193	153	4.34
Industrial	\$12,609	-	-	4.46
Agriculture	\$5,180	71,564	-	1.11
Emerging Tech	\$1,528	-	-	-
Public	\$9,269	1,513	0	1.56
WE&T	\$4,009	-	-	-
Finance	\$650	-	-	-
OBF Loan Pool	\$0	-	-	-
<b>IOU Subtotal (does not include ESA savings)</b>	<b>\$99,634</b>	<b>6,728,781</b>	<b>687</b>	<b>26.47</b>
	<b>CPUC Savings Goal ( w/o C&amp;S)</b>	-	-	14.00
	<b>Forecast savings as % of CPUC Savings Goal (w/o C&amp;S)</b>			189%
Codes and Standards	\$2,140	-	-	21.12
<b>IOU EM&amp;V</b>	<b>\$4,421</b>			
<b>IOU PY Spending Budget Request<sup>1</sup></b>	<b>\$106,195</b>			
<b>(LESS) IOU Uncommitted and Unspent Carryover Balance<sup>2</sup></b>	<b>\$5,000</b>			
<b>IOU PY Budget Recovery Request<sup>3</sup></b>	<b>\$101,195</b>			
<b>IOU Authorized PY Budget Cap (D.18-05-041)</b>	<b>\$106,195</b>			
<b>(LESS) SoCalREN Uncommitted and Unspent Carryover Balance</b>	<b>\$6,367</b>			
<b>(LESS) 3C-REN Uncommitted and Unspent Carryover Balance</b>	<b>\$897</b>			
<b>SoCalREN PY Budget Recovery Request (excl. CCA Uncommitted/Unspent Carryover)<sup>4</sup></b>	<b>\$3,781</b>			
<b>3C-REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)<sup>4</sup></b>	<b>\$1,720</b>			
<b>Total PA (IOU+CCAs+RENs ) PY Recovery Budget<sup>5</sup></b>	<b>\$99,432</b>			
<b>IOU Forecast PY TRC (No Codes &amp; Standards)</b>	<b>1.13</b>			
<b>IOU Forecast PY PAC (No Codes &amp; Standards)</b>	<b>1.47</b>			
<b>For reference only</b>				
<b>SoCalREN EM&amp;V PY Budget</b>	<b>\$43</b>			
<b>3C-REN EM&amp;V PY Budget</b>	<b>\$19</b>			
<b>EM&amp;V PY PA Budget Total</b>	<b>\$4,359</b>			

<sup>1</sup>This is amount by which Statewide 40% requirement will be measured, and what the IOU intends to spend in the PY, including carryovers.

<sup>2</sup>The balance of unspent uncommitted must reflect the total unspent uncommitted starting Jan 1 2018 through Dec 31 of current year (PY-1). Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.

<sup>3</sup>The amount of funds to be collected (budget recovery) for the Program Year - Line 19 less line 20

<sup>4</sup>Add a separate row for each REN or CCA

<sup>5</sup>Line 25 is a mix of budget spending and budget recovery for all PAs in the IOU service area

SoCalGas' allocation of the evaluation, measurement & verification (EM&V) budget is in conformance with the direction provided in D.16-08-019,<sup>7</sup> which maintains EM&V budget levels at 4% of the portfolio budget and funding split accessible to Energy Division and PAs of 72.5% / 27.5%, respectively.

<sup>7</sup> D.16-08-019, at pp. 79-81.

### **SoCalGas Portfolio Cost-Effectiveness**

SoCalGas is proposing a portfolio cost-effectiveness based upon approved energy savings and cost-effectiveness inputs to its program and measure mixes, as shown in Table 2 below. The portfolio cost-effectiveness may change as the Commission releases measure dispositions and other key inputs which could reduce or improve portfolio savings and cost-effectiveness. SoCalGas will continue to evaluate its portfolio as cost-effectiveness inputs change.

**Table 2: 2021 EE Portfolio Cost-Effectiveness**

	<b>Cost-Effectiveness</b>		
	TRC	PAC	RIM
<b>Without Codes &amp; Standards</b>	1.13	1.47	1.47
<b>With Codes &amp; Standards</b>	1.61	3.47	3.47

The SoCalGas TRC and PAC cost-effectiveness results reflect the inclusion of the following inputs:

- Uses the updated avoided cost values for 2021 in the Cost-Effectiveness Tool (CET), version ACC\_2020\_v1a, adopted in Resolution E-5077.
- Excludes the 5% market effects adjustment from PA forecasts, as required in D.19-08-034.<sup>8</sup>
- Uses approved workpaper values based on the August 20, 2020 guidance provided by Energy Division.
- General Rate Case (GRC) loaders associated with the EE program labor, as directed by D.12-11-015, OP 39.
- A projected shareholder incentive amount associated with the approved portfolio budget and projected therm savings activity. This assumption conforms to the methodology adopted in the Efficiency Savings and Performance Incentive (ESPI) Mechanism in D.13-09-023.

D.18-05-041 requires claimed and evaluated TRC and PAC of each program and of each sector for the two most recent years for which data is available.<sup>9</sup> Claimed TRC and PAC for 2018 and 2019 are available on CEDARS. D.18-05-041 also requires a showing of forecasted, claimed and evaluated TRC and PAC at the portfolio level going back to the beginning of the Rolling Portfolio (2016).<sup>10</sup> SoCalGas provides this information in Table 3 below.

<sup>8</sup> D.19-08-034, at p. 27.

<sup>9</sup> D.18-05-041, at p. 124.

<sup>10</sup> D.18-05-041, at p. 125.

**Table 3: Forecasted, Claimed, and Evaluated TRC and PAC**

<b>SoCalGas Energy Efficiency Portfolio (without C&amp;S)</b>						
<b>Program Year</b>	<b>Portfolio-level Cost-Effectiveness<sup>1</sup></b>					
	Forecast TRC <sup>2,3</sup>	Reported TRC	Evaluated TRC <sup>4</sup>	Forecast PAC <sup>2,3</sup>	Reported PAC	Evaluated PAC <sup>4</sup>
2016	-	0.74	Not Available	-	1.07	Not Available
2017	1.22	0.81	0.67	1.58	1.12	0.87
2018	1.38	1.07	Not Available	1.77	1.25	Not Available
2019	1.19	0.69	Not Available	1.41	0.85	Not Available
2020	1.25	-	N/A	1.53	-	N/A

<sup>1</sup> Forecasted and Reported in CEDARS; TRC values exclude costs from SoCalREN, and includes non-resource program costs and forecasted/approved ESPI payments (as applicable). Starting with PY 2020, forecasted TRC/PAC values exclude market spillover effects.

<sup>2</sup> Forecasted PAC and TRC values include General Rate Case (GRC) loaders associated with the EE program labor as directed by D.12-11-015, OP 39.

<sup>3</sup> Adopted budget for 2016 was approved via D.14-10-046; no budget compliance filing was completed for 2016.

<sup>4</sup> 2017 evaluated cost-effectiveness results obtained from the current Budget Filing Detail Report available in CEDARS.

<b>SoCalGas Energy Efficiency Portfolio (with C&amp;S)</b>						
<b>Program Year</b>	<b>Portfolio-level Cost-Effectiveness<sup>5</sup></b>					
	Forecast TRC <sup>6,7</sup>	Reported TRC	Evaluated TRC <sup>8</sup>	Forecast PAC <sup>6,7</sup>	Reported PAC	Evaluated PAC <sup>8</sup>
2016	-	1.49	Not Available	-	3.72	Not Available
2017	1.50	1.74	1.71	3.45	5.42	5.18
2018	1.88	1.78	Not Available	4.70	5.00	Not Available
2019	1.64	1.62	Not Available	4.16	4.03	Not Available
2020	1.59	-	N/A	3.16	-	N/A

<sup>5</sup> Forecasted and Reported in CEDARS; TRC values exclude costs from SoCalREN, and includes non-resource program costs and forecasted/approved ESPI payments (as applicable). Starting with PY 2020, forecasted TRC/PAC values exclude market spillover effects.

<sup>6</sup> Forecasted PAC and TRC values include General Rate Case (GRC) loaders associated with the EE program labor as directed by D.12-11-015, OP 39.

<sup>7</sup> Adopted budget for 2016 was approved via D.14-10-046; no budget compliance filing was completed for 2016.

<sup>8</sup> 2017 evaluated cost-effectiveness results obtained from the current Budget Filing Detail Report available in CEDARS.

In PY 2021, SoCalGas will continue its work towards achieving a cost-effective Energy Efficiency portfolio that meets the objectives of D.18-05-041. As part of PY 2020, SoCalGas adopted significant programmatic changes (i.e., more than 40% change in funding) approved through the 2020 ABAL (Advice No. 5510) to better align program offerings, meet expected energy savings, and target a forecasted 1.25 TRC in future years.

SoCalGas' strategies for 2021 will continue to focus on cost-effectiveness to both exceed an evaluated 1.00 TRC and forecasted 1.25 TRC through the ramp years. A listing of these strategies is provided below:

- Increasing the comprehensiveness of current programs offerings and/or delivery to minimize lost energy efficiency opportunities and reduced program cost.
- Continuing the expansion of program partnerships with municipal electric utilities, water agencies, and air quality districts to drive down administrative costs, and develop more holistic program offerings that provide added benefits to customers and increase cost-effectiveness.
- Continuing with Local Government Partnerships (LGPs), while consolidating some LGPs into existing Regional Partnerships with a focus on increasing cost

effectiveness of partnerships, while better serving all segments of Public Sector customers within those Regional Partnerships.

- Eliminating or scaling of non-cost-effective programs and approaches based on program level metrics and key performance indicators.
- Continuous improvement of internal processes and program delivery strategies.
- Adding new measures and technologies as they become available.
- Leveraging expanded financing offerings to drive the conversion of energy efficiency project opportunities.

Further, focus on cost-effectiveness within SoCalGas' portfolio will be placed on the third-party solicitation process whereby SoCalGas plans to refresh market segment approaches with new cost-effective contracts.

### **SoCalGas PY 2021 Portfolio and Program Changes**

SoCalGas provides the following discussion regarding significant program changes (i.e., more than 40 percent change in funding) that are necessary to better align with programs offered, meet expected energy savings, and target a forecasted TRC of 1.25, shown in Table 4.

**Table 4: SoCalGas Program Changes for Program Year 2021**

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3705	RES-Home Upgrade Program	In late 2019, a new marketing strategy focusing on management company portfolios, instead of individual property owners, allowed for a steady project pipeline. Some of these projects will see installation completion in 2020. Property managers currently participating through the program are interested in pursuing additional upgrades in 2021 for new property locations. Further, SoCalGas and Los Angeles Department of Water and Power (LADWP) are working on expanding their marketing efforts for this program to continue providing joint projects. This effort is expected to bring in new program interest in 2021.
SCG3706	RES-Residential HVAC	New SW program to launch in 2021, SoCalGas will allocate decreased budget to fund existing local program during the transition.

SCG3764	Res-LivingWise	Due to the continued effects of the COVID-19 pandemic, SoCalGas will increase LivingWise's budget to expand customer engagement in the residential market to reach students and educate families about energy efficiency in this time of need.
SCG3765	Res-Manufactured Mobile Home	While a new local program will launch after the completion of the current third-party solicitation, this existing local program will ramp down. The decreased budget reflects this transition while funding remaining projects.
SCG3834	COM-LADWP Direct Install	SoCalGas will decrease this program budget because of the lack of bundled measures available to customers. SoCalGas hopes to increase its suite of bundled direct-install measures in the near future.
SCG3721	ET-Technology Development Support	New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.
SCG3722	ET-Technology Assessment Support	New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.
SCG3723	ET-Technology Introduction Support	New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.

SCG3714	IND-SEM	SoCalGas is increasing the SEM budget to allocate funding for years 3 and 4 of this program to allow for additional cohorts.
SCG3750	PUB- Orange County Cities Partnership	In 2021, SoCalGas will consolidate North Orange County Cities Partnership (SCG3801) into Orange County Cities Partnership. This program will expand to cover Public Sector customers throughout Orange County.
SCG3809	COM-AB793-CEMTL Program	SoCalGas is decreasing the budget and slowly ramping down this program as it has seen little participation.
SCG3831	RES-EE Kits	Based on the recent evaluation, SoCalGas will reduce this budget to focus on programs that have better installation rates such as the LivingWise program (SCG3764).
SCG3837	PUB-SW-Energy Atlas	This program will continue due to remaining funding commitments to be paid in 2021.
SCG3843	RES-SF Solicitation	Previous placeholder for program solicitation budget, funding increased due to launch of the new third party program.
SCG3845	COM-SMB Solicitation	Previous placeholder for program solicitation budget, funding increased due to launch of the new third party program.
SCG_SW_NC_Res	RES-SW-New Construction	There will be a new SW New Construction program launching in 2021. This budget increase is due to the solicitation led by PG&E.
SCG_SW_NC_Res_PA	RES-SW-New Construction-PA	SoCalGas is allocating funding to support program administrator activities for the new statewide program starting in 2021.
SCG_SW_NC_NonRes_PA	COM-SW-New Construction-PA	SoCalGas is allocating funding to support program administrator activities for the new statewide program starting in 2021.
SCG_SW_CSA_Bldg	C&S-SW-Codes and Standards Advocacy-PA	SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.

SCG_SW_CSA_Appl_PA	C&S-SW-Appliance Standards Advocacy-PA	SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.
SCG_SW_CSA_Natl_PA	C&S-SW-Federal Codes Advocacy-PA	SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.

### **SoCalGas PY 2021 Program Closures**

As part of SoCalGas' portfolio, SoCalGas plans to close the following programs in 2021, shown in Table 5. Given the dynamic changes in Energy Efficiency, these programs no longer contribute to SoCalGas' portfolio cost-effectiveness and goals. Specific justification per program is provided in Table 5.

**Table 5: SoCalGas Program Closures for Program Year 2021**

<b>Program Number</b>	<b>Program Name</b>	<b>Reason for Closure</b>
SCG3703	RES-Plug Load and Appliances - POS	To align with D.18-05-041's designation of Plug Load and Appliance (PLA) - Point of Sale (POS) - SCG3703 as a statewide program, SoCalGas will close the program as the new SW program will launch in 2021.
SCG3712	COM-NonRes HVAC	This local program will be closed due to the new SW NonRes HVAC program (SCG_SW_HVAC_Up) starting in 2021.
SCG3724	C&S-Building Codes & Compliance Advocacy	This program will be closed due to the new SW C&S-SW-Building Codes Advocacy (SCG_SW_CSA_Bldg) program in place.
SCG3725	C&S-Appliance Standards Advocacy	This program will be closed due to the new SW C&S-SW-Appliance Standards Advocacy (SCG_SW_CSA_Appl) program in place.

SCG3744	PUB - Riverside Co Partnership	In collaboration with Riverside County, SoCalGas will sunset this program at the end of 2020 and merge Riverside County Partnership into Western Riverside Energy Partnership (SCG3783) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in the region with expanded coverage of Western Riverside Energy Partnership Program (SCG3783).
SCG3745	PUB - San Bernardino Co Partnership	In collaboration with San Bernardino County, SoCalGas will sunset this program at the end of 2020 and merge San Bernardino County Partnership into San Bernardino Regional Partnership (SCG3802) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in the region with expanded coverage of San Bernardino regional Partnership Program (SCG3802).
SCG3751	PUB - SEEC Partnership	As a result of portfolio balancing processes to achieve mandated minimum cost-effectiveness thresholds, SoCalGas and the other partnering IOUs are sunsetting the Statewide Energy Efficiency Collaborative (SEEC). Over the last few years the IOUs funded the development of tools, which will remain available to local governments through the respective Non-Governmental Organizations (NGOs). Continued success in the SEEC Program requires transition of program leadership to the NGOs of ICLEI for Local Governments, Institute for Local Governments and the Local Government Commission. As of April 2020, the IOUs and NGOs began collaboratively planning on a stakeholder communication plan, program ramp-down and transition of activities that will provide support to local governments as they increase local capacity of energy efficiency practices.
SCG3762	RES-CLEO	SoCalGas will close the program as the new local third-party program (SCG3861) will be in place.

SCG3763	RES-MF Direct Therm Savings	SoCalGas will close the program as the new local third-party program (SCG3844) will be in place.
SCG3793	COM-IDEEA365-Instant Rebates! Point-of-Sale Foodservice Rebate Program	SoCalGas will close the program as the new SW program (SCG_SW_FS) will launch in 2021.
SCG3801	PUB - North Orange County Cities Partnership	In collaboration with North Orange County Partners, SoCalGas will sunset this program at the end of 2020 and merge North Orange County Cities Partnership into the Orange County Cities Partnership (SCG3750) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in North Orange County with expanded coverage of Orange County Cities Partnership Program (SCG3750).
SCG3805	COM-Direct Install Program	SoCalGas will close the program as the new local third-party program (SCG3845) will be in place.
SCG3814	COM-Midstream Water Heating	SoCalGas will close the program as the new SW program (SCG_SW_MCWH) will be in place.
SCG3817	PUB-Direct Install Program	SoCalGas will close the program as the new local third-party program (SCG3846) will be in place.
SCG3819	WE&T-SW-Career & Workforce Readiness	A new program ID is being established for the new SW program which will be in place. As a result, this program placeholder will be closed.
SCG3820	RES-Direct Install Program	SoCalGas will close the program as the new local third-party program (SCG3843) will be in place.
SCG3821	IND-Direct Install Program	SoCalGas will close the program as a new local program will be solicited in the first quarter of 2021. SoCalGas' customers (SCG3843) can utilize other Industrial Sector programs in the interim (SCG3713, SCG3714, SCG3715, SCG3716, and SCG3757).

### **SoCalGas PY 2021 New Programs**

The following programs are the new programs and solicitation placeholders in anticipation of the third-party programs that will be forthcoming through SoCalGas' solicitation efforts as well as the statewide program solicitations.

- SCG3861: Community Language Efficiency Outreach-Direct Install
- SCG3865: AG-Agricultural Solicitation

- SCG3866: COM-Large Commercial Solicitation
- SCG3867: RES-Manufactured Homes Solicitation
- SCG\_SW\_WET\_Work – WE&T Career and Workforce Readiness
- SCG\_SW\_WET\_Work\_PA – WE&T Career and Workforce Readiness-PA
- SCG\_SW\_IP\_GOV – Institutional Partnerships: DGS & DoC
- SCG\_SW\_IP\_GOV\_PA – Institutional Partnerships: DGS & DoC-PA
- SCG\_SW\_WET\_CC – WE&T Career Connections
- SCG\_SW\_WET\_CC\_PA – WE&T Career Connections-PA
- SCG\_SW\_ETP\_GAS – Emerging Technologies, Gas
- SCG\_SW\_ETP\_GAS\_PA – Emerging Technologies, Gas-PA
- SCG\_SW\_FS – Food Service Point Of Sale
- SCG\_SW\_FS\_PA – Food Service Point Of Sale-PA
- SCG\_SW\_MCWH – Midstream Commercial Water Heating
- SCG\_SW\_MCWH\_PA – Midstream Commercial Water Heating-PA
- SCG\_SW\_PLA – Plug Load and Appliance
- SCG\_SW\_PLA\_PA – Plug Load and Appliance-PA
- SCG\_SW\_HVAC\_Up – Upstream HVAC (Commercial & Residential)
- SCG\_SW\_HVAC\_Up\_PA – Upstream HVAC-PA (Commercial & Residential)

### **SoCalGas' 2021 Portfolio Budget Caps and Target**

Pursuant to OP 13 of D.09-09-047, the Commission determined that administrative costs are limited to 10% of the total authorized energy efficiency budget, and ME&O costs have a budget target of 6% of the adopted portfolio budget. SoCalGas has calculated its portfolio caps and targets for its 2021 portfolio and included them in Table 6 below.

**Table 6: 2021 EE Portfolio Budget Caps/Targets**

Budget Category	Expenditures			Cap & Target		
	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs <sup>2</sup> (including SW)	Total Portfolio	Percent of Budget	Cap %	Target %
<b>Administrative Costs</b>						
IOU <sup>1,5</sup>	\$ 8,597,481	\$ 1,323,829	\$ 9,921,310	8.6%	10.0%	
Third Party & Partnership <sup>2</sup>	\$ 1,138,960	\$ 2,592,891	\$ 3,731,851			10.0%
Target Exempt Programs <sup>3</sup>	\$ 551,029	\$ 23,889	\$ 574,918			
<b>Marketing and Outreach Costs</b>						
Marketing & Outreach	\$ 3,311,456	\$ 1,873,013	\$ 5,184,469	4.5%		6.0%
Statewide Marketing & Outreach <sup>4</sup>	\$ 1,989,981		\$ 1,989,981			
<b>Direct Implementation Costs</b>						
Direct Implementation (Incentives and Rebates)	\$ 24,260,002	\$ 18,622,544	\$ 42,882,546			
Direct Implementation (Non Incentives and Non Rebates)	\$ 16,100,028	\$ 18,798,091	\$ 34,898,119	30.3%		20.0%
Direct Implementation Target Exempt Programs <sup>3</sup>	\$ 8,783,179	\$ 2,694,953	\$ 11,478,132			
<b>EM&amp;V Costs (Investor Owned Utilities &amp; Energy Division)<sup>6,7</sup></b>	<b>\$ 4,421,000</b>		<b>\$ 4,421,000</b>	<b>4.0%</b>	<b>4.0%</b>	
<b>Total<sup>8</sup></b>	<b>\$ 69,153,117</b>	<b>\$ 45,929,209</b>	<b>\$ 115,082,326</b>			
<b>2021 Proposed Budget</b>	<b>\$ 65,766,339</b>	<b>\$ 45,929,209</b>	<b>\$ 111,695,549</b>			
Third-Party Implementer Contracts/SW Programs (as defined per D.16-08-019, OP 10)		\$ 42,573,205	\$ 42,573,205			

SoCalGas notes the following assumptions:

- Funding for the SoCalGas On-Bill Financing Program loan pool recovered in gas transportation rates is included but does not impact the calculations because the adopted level for 2021 is zero.
- Pursuant to D.13-12-038, the Statewide ME&O program costs are excluded from the marketing budget target.
- SoCalGas has calculated the IOU administrative cost cap in accordance with D.09-09-047, OP 13, which excludes associated third party and local government partnership administrative costs, as well as non-resource programs which meet the requirements as further described in D.09-09-047.<sup>11</sup> These programs include EM&V, Marketing and Outreach, Emerging Technologies, Codes & Standards, Workforce Education & Training, and programs supporting market transformation.
- SoCalGas excluded those program costs identified by Energy Division to be exempt from the cap and target calculation.
- D.14-10-046, as corrected by D.15-01-002, confirms the EM&V budget at 4% of the total budget.

<sup>11</sup> D.09-09-047, at pp. 50-51.

SoCalGas will report the status of its budget caps and targets based on actual expenditures in its quarterly reports submitted through the Commission's EESTATS website.

### **Statewide Programs**

Consistent with Energy Division direction, SoCalGas provides the budget allocation for all statewide programs in Table 8 of Attachment A. All of the third-party solicitations for statewide programs where SoCalGas is the statewide lead are in various stages of the solicitation process. These programs are expected to begin implementation in 2021, as such SoCalGas has included a budget in PY 2021 for these specific programs.

When forecasting savings for third-party programs, SoCalGas used the forecasting method used for custom projects, where possible, in compliance with D.19-08-034,<sup>12</sup> otherwise, forecasted savings are based upon available inputs and information from its third-party solicitations and historical program and sector knowledge to inform assumptions and forecasted savings. SoCalGas' savings from statewide third-party programs used the funding share method approved in the Joint IOUs Supplemental Advice Letter of the Shared Funding Mechanism Proposal submitted on November 15, 2018 (San Diego Gas and Electric Company Advice 3268-E-A/2701-G-A; SoCalGas Advice 5346-G-A; SCE Advice 3861-E-A; and Pacific Gas and Electric Company Advice 5373-E-A/4009-G-A).

### **Supplemental Budget Information**

Pursuant to OP 44 of D.18-05-041, SoCalGas must provide its PY Supplemental Energy Efficiency Business Plan Budget Information for 2021. On June 12, 2017, SoCalGas provided its initial supplemental budget information in response to the Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judge, dated April 14, 2017. The Scoping Ruling directed PAs IOUs and the non-IOU PAs, to submit supplemental budget information using the common budget template developed in consultation with The Utility Reform Network (TURN) and Public Advocates Office (PAO), as well as the PAs. For PY 2021, the supplemental budget information has been incorporated as part of Attachment A, Tables 11 through 18.

### **Metrics**

SoCalGas submitted its 2019 sector-level metrics in conjunction with its 2019 Energy Efficiency Annual Report. This information has been incorporated as part of Attachment A, Table 19. Pursuant to D.18-05-041, SoCalGas' 2019 sector-level metrics are also available through SoCalGas' website in the following link:

<https://www.socalgas.com/sites/default/files/SCG%202019%20Energy%20Efficiency%20Annual%20Report%20-%205-15-20%20Final.pdf>.<sup>13</sup>

---

<sup>12</sup> D.19-08-034, at p.30.

<sup>13</sup> D.18-05-041, at p. 127.

## **Revenue Requirements**

Table 7 below summarizes the revenue requirement impact by class of service. In addition, SoCalGas provides herein as Attachment A the Gas Bill Payer Impacts table comparing present and proposed rates associated with the inclusion of SoCalGas' proposed 2021 budget in its gas transportation rates.

**Table 7: Revenue Requirement by Customer Class**

<b>Customer Class</b>	<b>Applicable Rate Schedules</b>	<b>Increase/(Decrease) (\$000s)</b>
Core	GR, GS, GM, GO-AC, G-NGVR, GL, G-10, G-AC, G-EN, G-NGV	\$5,750
Non-Core	GT-NC, GT-TLS	\$476
<b>Total</b>		<b>\$6,226</b>

## **Protests**

Anyone may protest this Advice Letter to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made in writing and received within 20 days of the date of this Advice Letter, which is September 21, 2020. The address for mailing or delivering a protest to the Commission is:

CPUC Energy Division  
Attn: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of the Energy Division Tariff Unit ([EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)). Due to the COVID-19 pandemic and the shelter at home orders, SoCalGas is currently unable to receive protests or comments to this Advice Letter via U.S. mail or fax. Please submit protests or comments to this Advice Letter via e-mail to the address shown below on the same date it is mailed or e-mailed to the Commission.

Attn: Ray B. Ortiz  
Tariff Manager - GT14D6  
555 West Fifth Street  
Los Angeles, CA 90013-1011  
Facsimile No.: (213) 244-4957  
E-mail: [ROrtiz@socalgas.com](mailto:ROrtiz@socalgas.com)

**Effective Date**

SoCalGas believes that this Advice Letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. This submittal is consistent with D.18-05-041. Therefore, SoCalGas respectfully requests that this submittal be approved on October 1, 2020.

**Notice**

A copy of this Advice Letter is being sent to SoCalGas' GO 96-B service list and the Commission's service lists for R.13-11-005. Address change requests to the GO 96-B service list should be directed via e-mail to [tariffs@socalgas.com](mailto:tariffs@socalgas.com) or call 213-244-2837. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or via e-mail at [Process\\_Office@cpuc.ca.gov](mailto:Process_Office@cpuc.ca.gov).

/s/ Ronald van der Leeden  
Ronald van der Leeden  
Director – Regulatory Affairs

Attachments



# ADVICE LETTER SUMMARY

## ENERGY UTILITY



MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.:

Utility type:

- ELC       GAS       WATER  
 PLC       HEAT

Contact Person:

Phone #:  
E-mail:  
E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas      WATER = Water  
 PLC = Pipeline      HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type:  Monthly  Quarterly  Annual  One-Time  Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested?  Yes  No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required?  Yes  No

Requested effective date:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected:

Service affected and changes proposed<sup>1</sup>:

Pending advice letters that revise the same tariff sheets:

<sup>1</sup>Discuss in AL if more space is needed.

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:**

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102  
Email: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Name:  
Title:  
Utility Name:  
Address:  
City:  
State: Zip:  
Telephone (xxx) xxx-xxxx:  
Facsimile (xxx) xxx-xxxx:  
Email:

Name:  
Title:  
Utility Name:  
Address:  
City:  
State: Zip:  
Telephone (xxx) xxx-xxxx:  
Facsimile (xxx) xxx-xxxx:  
Email:

# **ATTACHMENT A**

**Advice No. 5684**

## **Energy Efficiency Program Portfolio**

**Table 1 - Bill Payer Impacts - Rates by Customer Class**

**Table 2b - Gas Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class**

**Table 3 - Budget and Cost Recovery by Funding Source**

**Table 4 – Budget, Spent, Unspent, Carryover Details**

**Table 5 - Total 2021 Requested and 2017-2020 Authorized Budgets (\$000)**

**Table 6 - Committed Energy Efficiency Program Funding Not Yet Spent**

**Table 7 - 2020 Authorized and Spent/Unspent Detail**

**Attachment A - Energy Efficiency Program Portfolio**  
**PA Name: Southern California Gas Company**  
**Budget Year: 2021**

**Table 1 -Bill Payer Impacts - Rates by Customer Class**

	<b>Electric Average Rate (Res and Non-Res) \$/kwh</b>	<b>Gas Average Rate (Res and Non-Res) \$/therm</b>	<b>Total Average Bill Savings by Year (\$)</b>	<b>Total Average Lifecycle Bill Savings (\$)</b>
<b>Present Rates - System Average</b>				
2018	\$ -	\$ 1.10066	\$ 71,743,456	\$ 462,464,628
2019	\$ -	\$ 1.09243	\$ 77,900,162	\$ 382,775,531
2020	\$ -	\$ 1.25947	\$ 74,096,315	\$ 480,592,413
2021	\$ -	\$ 1.38129	\$ 91,330,757	\$ 469,187,255

Notes:

1. Average first year gas bill savings is calculated by multiplying an average gas rate with first year gross therm energy savings.
2. 2021 gas average rate based on August 2020 effective rates.
3. Total Average Bill Savings by Year includes C&S and ESA Programs.
4. Total Average Lifecycle Bill Savings does not include C&S and ESA programs.
5. Average lifecycle gas bill savings is calculated by multiplying an average gas rate with lifecycle gross therm energy savings.

Attachment A - Energy Efficiency Program Portfolio  
 PA Name: Southern California Gas Company  
 Budget Year: 2021

Table 2b - Gas Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2019 Energy Efficiency Gas Annual Revenue Change \$000	2019 Percentage Change In Gas Revenue and Rates	2019 Gas Average Rate \$/therm	2019 Energy Efficiency Portion of Gas Average Rate \$/therm	2020 Energy Efficiency Gas Annual Revenue Change \$000	2020 Percentage Change In Gas Revenue and Rates	2020 Gas Average Rate \$/therm	2021 Proposed Energy Efficiency Gas Annual Revenue Change \$000	2021 Proposed Percentage Change In Gas Revenue and Rates	2021 Gas Average Rate \$/therm	2021 Energy Efficiency Portion of Gas Average Rate \$/therm
Residential	\$ 10,990	0.40%	\$ 1.36152	\$ 0.01663	\$ (3,584)	-0.1%	\$ 1.47974	\$ 2,462	0.1%	\$ 1.14514	\$ 0.01617
Core Commercial/Industrial	\$ 14,380	2.05%	\$ 0.90232	\$ 0.05193	\$ (4,690)	-0.5%	\$ 0.87096	\$ 3,221	0.4%	\$ 0.63751	\$ 0.05050
Gas Air Conditioning	\$ 21	4.87%	\$ 0.76973	\$ 0.09861	\$ (7)	-0.6%	\$ 0.67286	\$ 5	0.9%	\$ 0.36578	\$ 0.09587
Gas Engine	\$ 276	2.54%	\$ 0.68942	\$ 0.04915	\$ (96)	-0.6%	\$ 0.64318	\$ 62	0.5%	\$ 0.32838	\$ 0.04779
Non-Core Commercial/Industrial	\$ 2,126	1.73%	\$ 0.10578	\$ 0.00518	\$ (693)	-0.5%	\$ 0.12870	\$ 476	0.2%	\$ 0.12902	\$ 0.00500

Attachment A - Energy Efficiency Program Portfolio

PA Name: Southern California Gas Company

Budget Year: 2021

**Table 3a - Budget and Cost Recovery by Funding Source**

	2021
2021 EE Portfolio Budget	\$ 111,696
Unspent/Uncommitted Program Carryover Funds from 2020	\$ 5,000
Unspent/Uncommitted Program Carryover Funds from 2018-2019	\$ 7,264
<b>Total Funding Request for 2021 EE Portfolio</b>	<b>\$ 99,432</b>

**Table 3b - Budget by Funding Source**

2021 Authorized (Before Carryover)	2021 Budget	Allocation
Electric Procurement EE Funds	\$ -	\$ -
Gas PPP Surcharge Funds	\$ 111,696	\$ 111,696
<b>Total Funds</b>	<b>\$ 111,696</b>	<b>\$ 111,696</b>

**Table 3c - Revenue Requirement for Cost Recovery by Funding Source**

2021 Authorized Funding in Rates (including carryover )	2021 Revenue Requirement	Allocation after Carryover adjustment
Electric Procurement EE Funds	\$ -	\$ -
Gas PPP Surcharge Funds	\$ 99,432	\$ 99,432
<b>Total Funds</b>	<b>\$ 99,432</b>	<b>\$ 99,432</b>

**Table 3d - Unspent/Uncommitted Carryover Funds (in positive \$ amounts)**

Total Unspent/Uncommitted Funds	Electric PGC	Electric Procurement	Total Electric	Gas	Total
2020				\$ 5,000	\$ 5,000
2018-2019				\$ 7,264	\$ 7,264
<b>Total Pre-2021</b>				<b>\$ 12,264</b>	<b>\$ 12,264</b>

EM&V Unspent/Uncommitted Funds	Electric PGC	Electric Procurement	Total Electric	Gas	Total
2020				\$ -	\$ -
2018-2019				\$ -	\$ -
<b>Total Pre-2021</b>				<b>\$ -</b>	<b>\$ -</b>

Program Unspent/Uncommitted Funds	Electric PGC	Electric Procurement	Total Electric	Gas	Total
2020				\$ 5,000	\$ 5,000
2018-2019 <sup>1</sup>				\$ 7,264	\$ 7,264
<b>Total Pre-2021</b>				<b>\$ 12,264</b>	<b>\$ 12,264</b>

Notes:

1. Unspent funds from SoCalREN and 3C-REN. Breakout is located on worktab "4 Carry over."

Attachment A - Energy Efficiency Program Portfolio  
PA Name: Southern California Gas Company  
Budget Year: 2021

Table 4 - Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Main Program Name / Sub-Program Name	2020 Budget Spent as of 07/31/2020	2021 Proposed Budget	2021 Budget Offset (Expected 2020 Unspent/ Uncommitted and Any Remaining Pre-2020 Unspent/ Uncommitted Funding)	2021 Funds Requested	Program Type	New Business Sector
<b>Residential Programs</b>								
SCG3701		RES-Energy Advisor	\$ 724,163	\$ 776,000		\$ 776,000	Core - SW	Residential
SCG3702		RES-Residential Energy Efficiency Program	\$ 6,899,693	\$ 11,655,724	\$ 800,000	\$ 10,855,724	Core - SW	Residential
SCG3703	SCG3703	RES-SW-Plug Load and Appliances - POS	\$ 651,152	\$ -		\$ -	Core - SW	Residential
SCG3705		RES-Home Upgrade Program	\$ 559,910	\$ 2,193,000		\$ 2,193,000	Core - SW	Residential
SCG3706		RES-Residential HVAC	\$ 551,286	\$ 500,000		\$ 500,000	Core - SW	Residential
SCG3707		RES-SW-RNC	\$ 531,497	\$ 490,000		\$ 490,000	Core - SW	Residential
SCG3762	SCG3762	RES-CLEO	\$ 135,186	\$ -		\$ -	3P	Residential
SCG3763	SCG3763	RES-MF Direct Therm Savings	\$ 222,024	\$ -		\$ -	3P	Residential
SCG3764		RES-LivingWise	\$ 165,245	\$ 2,503,015		\$ 2,503,015	3P	Residential
SCG3765		RES-Manufactured Mobile Home	\$ 187,559	\$ 330,000		\$ 330,000	3P	Residential
SCG3810		RES-AB793-REMTS Program	\$ 63,621	\$ 828,707		\$ 828,707	3P	Residential
SCG3820	SCG3820	RES-Direct Install Program	\$ 38,097	\$ -		\$ -	3P	Residential
SCG3823		RES-SW-HVAC QI/QM	\$ 40,124	\$ 250,000		\$ 250,000	Core - SW	Residential
SCG3824		RES-Behavioral Program	\$ 3,469,181	\$ 6,721,000		\$ 6,721,000	3P	Residential
SCG3829		RES-Marketplace	\$ 1,037,250	\$ 1,417,500		\$ 1,417,500	3P	Residential
SCG3830		RES-Retail Partnering	\$ 124,877	\$ 760,000		\$ 760,000	Core - SW	Residential
SCG3831		RES-EE Kits	\$ 6,266	\$ 150,000		\$ 150,000	3P	Residential
SCG3832		RES-Pasadena Home Upgrade	\$ 27,105	\$ 447,300		\$ 447,300	3P	Residential
SCG3833		RES-Burbank Home Upgrade	\$ 39,122	\$ 374,525		\$ 374,525	3P	Residential
SCG3836		RES-LADWP HVAC	\$ 85,900	\$ 1,329,300		\$ 1,329,300	3P	Residential
SCG3843		RES-SF Solicitation	\$ 4,975	\$ 2,998,599		\$ 2,998,599	3P	Residential
SCG3844		RES-MF Solicitation	\$ -	\$ 2,042,627		\$ 2,042,627	3P	Residential
SCG_SW_NC_Res		RES-SW-New Construction	\$ -	\$ 442,411		\$ 442,411	Core - SW	Residential
SCG_SW_NC_Res_PA		RES-SW-New Construction-PA	\$ -	\$ 22,120		\$ 22,120	Core - SW	Residential
SCG3861		RES-Community Language Efficiency Outreach-Direct Install	\$ -	\$ 1,166,123		\$ 1,166,123	3P	Residential
SCG3867		RES-MH Solicitation	\$ -	\$ 2,502,450		\$ 2,502,450	3P	Residential
SCG_SW_PLA		RES-SW-Plug Load and Appliance	\$ -	\$ 606,100		\$ 606,100	Core - SW	Residential
SCG_SW_PLA_PA		RES-SW-Plug Load and Appliance-PA	\$ -	\$ 9,901		\$ 9,901	Core - SW	Residential
<b>Commercial Programs</b>								
SCG3708		COM-Energy Advisor	\$ 195,793	\$ 307,000		\$ 307,000	Core - SW	Commercial
SCG3710		COM-Calculated Incentives	\$ 873,763	\$ 3,092,000	\$ 400,000	\$ 2,692,000	Core - SW	Commercial

SCG3711		COM-Deemed Incentives	\$ 2,361,247	\$ 6,480,553	\$ 400,000	\$ 6,080,553	Core - SW	Commercial
SCG3712	SCG3712	COM-NonRes HVAC Upstream	\$ 24,202	\$ -	\$ -	\$ -	Core - SW	Commercial
SCG3793	SCG3793	COM-Instant Rebates! Foodservice POS	\$ 1,346,364	\$ -		\$ -	3P	Commercial
SCG3805	SCG3805	COM-Direct Install Program	\$ 892,637	\$ -		\$ -	3P	Commercial
SCG3809		COM-AB793-CEMTL Program	\$ 24,482	\$ 3,000	\$ -	\$ 3,000	3P	Commercial
SCG3813		COM-Savings By Design	\$ 257,643	\$ 578,000		\$ 578,000	Core - SW	Commercial
SCG3814	SCG3814	COM-Midstream Water Heating	\$ 833,987	\$ -		\$ -	Core - SW	Commercial
SCG3825		COM-HVAC QI/QM	\$ -	\$ 41,000		\$ 41,000	Core - SW	Commercial
SCG3834		COM-LADWP Direct Install	\$ 8,699	\$ 76,810		\$ 76,810	3P	Commercial
SCG3835		COM-Pasadena Direct Install	\$ -	\$ 76,470		\$ 76,470	3P	Commercial
SCG3845		COM-Small/Medium Solicitaton	\$ -	\$ 3,469,704		\$ 3,469,704	3P	Commercial
SCG_SW_NC_NonRes		COM-SW-New Construction (SCG_SW_NC_NonRes)	\$ -	\$ 167,200		\$ 167,200	Core - SW	Commercial
SCG_SW_NC_NonRes_PA		COM-SW-New Construction-PA (SCG_SW_NC_NonRes_PA)	\$ -	\$ 16,720		\$ 16,720	Core - SW	Commercial
SCG3866		COM-Large Solicitation	\$ -	\$ 5,229,547		\$ 5,229,547	3P	Commercial
SCG_SW_FS		COM-SW-Food Service Point of Sale	\$ -	\$ 2,167,870		\$ 2,167,870	Core - SW	Commercial
SCG_SW_FS_PA		COM-SW-Food Service Point of Sale-PA		\$ 216,787		\$ 216,787	Core - SW	Commercial
SCG_SW_MCWH		COM-SW-Midstream Commercial Water Heating	\$ -	\$ 2,028,446		\$ 2,028,446	Core - SW	Commercial
SCG_SW_MCWH_PA		COM-SW-Midstream Commercial Water Heating-PA		\$ 202,845		\$ 202,845	Core - SW	Commercial
SCG_SW_HVAC_Up		COM-SW-Upstream HVAC	\$ -	\$ 864,586		\$ 864,586	Core - SW	Commercial
SCG_SW_HVAC_Up_PA		COM-SW-Upstream HVAC-PA		\$ 86,459		\$ 86,459	Core - SW	Commercial
<b>Public Programs</b>						\$ -		
SCG3815		PUB-Calculated Incentives	\$ 108,220	\$ 1,320,000		\$ 1,320,000	Core - SW	Public
SCG3816		PUB-Deemed Incentives	\$ 363,487	\$ 1,501,000		\$ 1,501,000	Core - SW	Public
SCG3817	SCG3817	PUB-Direct Install Program	\$ 19,751	\$ -		\$ -	3P	Public
SCG3818		PUB-SW-Water/Wastewater Pumping Program	\$ -	\$ -		\$ -	Core - SW	Public
SCG3837		PUB-SW-Energy Atlas	\$ -	\$ -		\$ -	Core - SW	Public
SCG3846		PUB-SM Solicitation	\$ -	\$ 1,936,000		\$ 1,936,000	3P	Public
<b>Industrial Programs</b>						\$ -		
SCG3713		IND-Energy Advisor	\$ 71,722	\$ 255,000		\$ 255,000	Core - SW	Industrial
SCG3714		IND-SEM	\$ 327,270	\$ 2,032,000	\$ 100,000	\$ 1,932,000	Core - SW	Industrial
SCG3715		IND-Calculated Incentives	\$ 1,260,244	\$ 8,045,000	\$ 2,300,000	\$ 5,745,000	Core - SW	Industrial
SCG3716		IND-Deemed Incentives	\$ 568,574	\$ 1,332,000		\$ 1,332,000	Core - SW	Industrial
SCG3757		IND-Small Industrial Facility Upgrades	\$ 75,849	\$ 799,264	\$ 300,000	\$ 499,264	3P	Industrial
SCG3821	SCG3821	IND-Direct Install Program	\$ -	\$ -		\$ -	3P	Industrial
<b>Agricultural Programs</b>						\$ -		
SCG3717		AG-Energy Advisor	\$ 21,731	\$ 58,000		\$ 58,000	Core - SW	Agricultural
SCG3719		AG-Calculated Incentives	\$ 301,916	\$ 959,000		\$ 959,000	Core - SW	Agricultural
SCG3720		AG-Deemed Incentives	\$ 250,355	\$ 1,100,000		\$ 1,100,000	Core - SW	Agricultural
SCG3865		AG-Agricultural Solicitation	\$ -	\$ 3,003,422		\$ 3,003,422	3P	Agricultural
<b>Emerging Technologies Programs</b>						\$ -		
SCG3721		ET-Technology Development Support	\$ 123,037	\$ 69,357		\$ 69,357	Core - SW	ET
SCG3722		ET-Technology Assessment Support	\$ 237,532	\$ 329,015		\$ 329,015	Core - SW	ET
SCG3723		ET-Technology Introduction Support	\$ 229,970	\$ 387,329		\$ 387,329	Core - SW	ET
SCG_SW_ETP_Gas		ET-SW-Emerging Technologies, Gas	\$ -	\$ 731,500		\$ 731,500	Core - SW	ET
SCG_SW_ETP_Gas_PA		ET-SW-Emerging Technologies, Gas-PA	\$ -	\$ 10,800		\$ 10,800	Core - SW	ET
<b>Codes &amp; Standards Programs</b>						\$ -		
SCG3724	SCG3724	C&S-SW-Building Codes & Compliance Advocacy	\$ -	\$ -		\$ -	Core - SW	C&S

SCG3725	SCG3725	C&S-SW-Appliance Standards Advocacy	\$ -	\$ -		\$ -	Core - SW	C&S
SCG3726		C&S-Compliance Enhancement	\$ 67,814	\$ 582,000		\$ 582,000	Core - SW	C&S
SCG3727		C&S-Reach Codes	\$ 20,814	\$ 143,000		\$ 143,000	Core - SW	C&S
SCG3728		C&S-Planning Coordination	\$ 23,283	\$ 310,000		\$ 310,000	Core - SW	C&S
SCG_SW_CSA_Bldg		C&S-SW-Building Codes Advocacy	\$ -	\$ 470,226		\$ 470,226	Core - SW	C&S
SCG_SW_CSA_Appl		C&S-SW-Appliance Standards Advocacy	\$ -	\$ 331,024		\$ 331,024	Core - SW	C&S
SCG_SW_CSA_Natl		C&S-SW-Federal Codes Advocacy	\$ -	\$ 298,509		\$ 298,509	Core - SW	C&S
SCG_SW_CSA_Bldg_PA		C&S-SW-Building Codes Advocacy-PA	\$ -	\$ 1,553		\$ 1,553	Core - SW	C&S
SCG_SW_CSA_Appl_PA		C&S-SW-Appliance Standards Advocacy-PA	\$ -	\$ 2,507		\$ 2,507	Core - SW	C&S
SCG_SW_CSA_Natl_PA		C&S-SW-Federal Codes Advocacy-PA	\$ -	\$ 1,439		\$ 1,439	Core - SW	C&S
<b>Workforce Education &amp; Training Programs</b>						\$ -		
SCG3729		WE&T-Integrated Energy Efficiency Training	\$ 1,207,342	\$ 3,250,000	\$ 500,000	\$ 2,750,000	Core - SW	WE&T
SCG3730		WE&T-Connections	\$ 141,106	\$ 291,000		\$ 291,000	Core - SW	WE&T
SCG3760		WE&T-HERS Rater Training Advancement	\$ 140,706	\$ 308,000		\$ 308,000	3P	WE&T
SCG3819	SCG3819	WE&T-SW-Career & Workforce Readiness	\$ -	\$ -		\$ -	Core - SW	WE&T
SCG_SW_WET_Work		WE&T-SW-WE&T Career and Workforce Readiness		\$ 103,023		\$ 103,023	Core - SW	WE&T
SCG_SW_WET_Work_PA		WE&T-SW-WE&T Career and Workforce Readiness-PA		\$ 5,151		\$ 5,151	Core - SW	WE&T
SCG_SW_WET_CC		WE&T-SW-WE&T Career Connections	\$ -	\$ 48,767		\$ 48,767	Core - SW	WE&T
SCG_SW_WET_CC_PA		WE&T-SW-WE&T Career Connections-PA		\$ 2,439		\$ 2,439	Core - SW	WE&T
<b>Financing Programs</b>						\$ -		
SCG3735		FIN-On-Bill Financing	\$ 109,370	\$ 650,000		\$ 650,000	Core - SW	Finance
<b>Institutional Partnership Programs</b>						\$ -		
SCG3738		PUB-CA Department of Corrections Partnership	\$ 63,166	\$ 190,570		\$ 190,570	Govt Partnerships	Public
SCG3739		PUB- California Community College Partnership	\$ 84,639	\$ 240,103		\$ 240,103	Govt Partnerships	Public
SCG3740		PUB-UC/CSU/IOU Partnership	\$ 89,650	\$ 308,179		\$ 308,179	Govt Partnerships	Public
SCG3741		PUB-State of CA/IOU Partnership	\$ 55,364	\$ 196,139		\$ 196,139	Govt Partnerships	Public
SCG_SW_IP_Gov		PUB-SW-Institutional Partnership: DGS & DoC	\$ -	\$ 34,833		\$ 34,833	Govt Partnerships	Public
SCG_SW_IP_Gov_PA		PUB-SW-Institutional Partnerships: DGS & DoC-PA	\$ -	\$ 1,741		\$ 1,741	Govt Partnerships	Public
<b>Government Partnership Programs</b>						\$ -		
SCG3742		PUB-LA Co Partnership	\$ 69,499	\$ 180,107		\$ 180,107	Govt Partnerships	Public
SCG3744	SCG3744	PUB-Riverside Co Partnership	\$ 39,809	\$ -		\$ -	Govt Partnerships	Public
SCG3745	SCG3745	PUB-San Bernardino Co Partnership	\$ 41,839	\$ -		\$ -	Govt Partnerships	Public
SCG3746		PUB-Santa Barbara Co Partnership	\$ 68,821	\$ 127,070		\$ 127,070	Govt Partnerships	Public
SCG3747		PUB-South Bay Cities Partnership	\$ 50,693	\$ 151,554		\$ 151,554	Govt Partnerships	Public
SCG3748		PUB-San Luis Obispo Co Partnership	\$ 57,386	\$ 92,206		\$ 92,206	Govt Partnerships	Public
SCG3749		PUB-San Joaquin Valley Partnership	\$ 73,249	\$ 113,007		\$ 113,007	Govt Partnerships	Public
SCG3750		PUB-Orange County Cities Partnership	\$ 43,525	\$ 256,467		\$ 256,467	Govt Partnerships	Public
SCG3751	SCG3751	PUB-SEEC Partnership	\$ 22,000	\$ -		\$ -	Govt Partnerships	Public
SCG3754		PUB-Ventura County Partnership	\$ 75,511	\$ 202,737		\$ 202,737	Govt Partnerships	Public
SCG3755		PUB-Public Sector EE Innovation	\$ -	\$ 356,258		\$ 356,258	Govt Partnerships	Public
SCG3773		PUB-Public Sector Resource	\$ 1,838	\$ 583,424	\$ 200,000	\$ 383,424	Govt Partnerships	Public
SCG3774		PUB-LG Regional Resource	\$ 211,375	\$ 453,000		\$ 453,000	Govt Partnerships	Public
SCG3776		PUB-Gateway Cities Partnership	\$ 54,500	\$ 152,576		\$ 152,576	Govt Partnerships	Public
SCG3777		PUB-San Gabriel Valley COG Partnership	\$ 84,667	\$ 166,896		\$ 166,896	Govt Partnerships	Public
SCG3779		PUB-West Side Community Energy Partnership	\$ 85,423	\$ 151,194		\$ 151,194	Govt Partnerships	Public
SCG3783		PUB-Western Riverside Energy Partnership	\$ 61,834	\$ 245,945		\$ 245,945	Govt Partnerships	Public
SCG3801	SCG3801	PUB-North Orange County Cities Partnership	\$ 56,351	\$ -		\$ -	Govt Partnerships	Public

SCG3802		PUB-San Bernardino Regional Energy Partnership	\$ 37,598	\$ 200,994		\$ 200,994	Govt Partnerships	Public
<b>Other Programs</b>						\$ -		
SCG3771		SOL-Innovative Designs for Energy Efficiency Activities (IDEEA365)	\$ 763,982	\$ 1,080,000		\$ 1,080,000	Other	Cross Cutting
SCG3775	SCG3775	CRM	\$ -	\$ -		\$ -	Other	Cross Cutting
		<b>SoCalGas PROGRAM TOTAL</b>	<b>\$ 30,245,860</b>	<b>\$ 101,773,721</b>	<b>\$ 5,000,000</b>	<b>\$ 96,773,721</b>		
<b>EM&amp;V (SoCal Gas &amp; CPUC Portions)</b>								
SCG3772		<b>EM&amp;V (Total)</b>	<b>\$ 152,968</b>	<b>\$ 4,421,000</b>	<b>\$ -</b>	<b>\$ 4,421,000</b>		
		EM&V - CPUC		\$ 3,205,225	\$ -	\$ 3,205,225	EM&V	EM&V
		EM&V - PA		\$ 1,153,433	\$ -	\$ 1,153,433	EM&V	EM&V
		EM&V - SoCalREN		\$ 42,852	\$ -	\$ 42,852	EM&V	EM&V
		EM&V - 3C-REN		\$ 19,490	\$ -	\$ 19,490	EM&V	EM&V
		<b>SoCalGas TOTAL with EM&amp;V</b>	<b>\$ 30,398,828</b>	<b>\$ 106,194,722</b>	<b>\$ 5,000,000</b>	<b>\$ 101,194,722</b>		
<b>Regional Energy Networks (REN)</b>								
		SoCalREN	\$ 1,370,071	\$ 3,781,116	\$ 6,367,014	\$ (2,585,898)	REN	Cross Cutting
		3C-REN	\$ 529,318	\$ 1,719,711	\$ 896,566	\$ 823,145	REN	Cross Cutting
		<b>TOTAL SoCal Gas EE PORTFOLIO</b>	<b>\$ 32,298,217</b>	<b>\$ 111,695,549</b>	<b>\$ 12,263,580</b>	<b>\$ 99,431,969</b>		

Notes:

1. The requested budget for PY2021 does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program or the program budget for the Statewide Financing Pilots. The program year 2021 budgets for these programs were approved in D.13-09-044 and D.19-01-005, respectively.

**Attachment A - Energy Efficiency Program Portfolio**  
**PA Name: Southern California Gas Company**  
**Budget Year: 2021**

**Table 5 - Total 2021 Requested and 2017-2020 Revenue Collected (\$000)**

<b>Category (2017-20 Authorized<sup>1</sup> and 2021 Request)</b>	<b>Electric Demand Response Funds</b>	<b>Electric Energy Efficiency Funds</b>	<b>Natural Gas Public Purpose Funds</b>	<b>Total Energy Efficiency Funds</b>
2017 Program Funds - Utility			\$ 76,019	\$ 76,019
2017 Program Funds - SoCalREN			\$ 4,337	\$ 4,337
2017 Program Funds - 3-C-REN			\$ -	\$ -
2017 EM&V			\$ 3,348	\$ 3,348
<b>2017 Annualized Total</b>			<b>83,704</b>	<b>83,704</b>
2018 Program Funds - Utility			\$ 94,647	\$ 94,647
2018 Program Funds - SoCalREN			\$ 3,257	\$ 3,257
2018 Program Funds - 3C-REN			\$ -	\$ -
2018 EM&V			\$ 4,166	\$ 4,166
<b>2018 Annualized Total</b>			<b>102,070</b>	<b>102,070</b>
2019 Program Funds - Utility			\$ 97,696	\$ 97,696
2019 Program Funds - SoCalREN			\$ 3,473	\$ 3,473
2019 Program Funds - 3C-REN			\$ 1,193	\$ 1,193
2019 EM&V <sup>2</sup>			\$ 4,265	\$ 4,265
<b>2019 Annualized Total</b>			<b>106,627</b>	<b>106,627</b>
2020 Program Funds - Utility			\$ 99,728	\$ 99,728
2020 Program Funds - SoCalREN			\$ 3,666	\$ 3,666
2020 Program Funds - 3C-REN			\$ 1,253	\$ 1,253
2020 EM&V <sup>2</sup>			\$ 4,336	\$ 4,336
<b>2020 Annualized Total</b>			<b>108,983</b>	<b>108,983</b>
2021 Program Funds - Utility			\$ 101,774	\$ 101,774
2021 Program Funds - SoCalREN			\$ 3,781	\$ 3,781
2021 Program Funds - 3C-REN			\$ 1,720	\$ 1,720
2021 EM&V <sup>2</sup>			\$ 4,421	\$ 4,421
<b>2021 Annualized Total</b>			<b>111,696</b>	<b>111,696</b>

Notes:

1. Authorized budget excludes reductions from past unspent funds, carryover and is consistent with funding approved in D.09-09-047, D.12-11-015, D.14-10-046, and D.15-10-028.
2. Includes EM&V budgets for SoCalREN and/or 3C-REN.

**Attachment A - Energy Efficiency Program Portfolio**  
**PA Name: Southern California Gas Company**  
**Budget Year: 2021**

**Table 6 - Committed Energy Efficiency Program Funding - Funds Not Yet Spent as of 7/31/2020**

<b>Accrued funds not yet spent (\$000).</b>	<b>Electric Procurement Funds</b>	<b>Natural Gas Public Purpose Funds</b>	<b>Total</b>
<b>Category</b>			
2017 to date EM&V Funds		\$0	\$0
2017 to date Program Funds - Utility		\$2,111	\$2,111
2017 to date Program Funds - REN		\$0	\$0
2017 to date Program Funds - 3C-REN		\$0	\$0
2018 to date EM&V Funds		\$3,379	\$3,379
2018 to date Program Funds - Utility		\$8,079	\$8,079
2018 to date Program Funds - REN		\$0	\$0
2018 to date Program Funds - 3C-REN		\$0	\$0
2019 to date EM&V Funds		\$3,514	\$3,514
2019 to date Program Funds - Utility		\$3,615	\$3,615
2019 to date Program Funds - REN		\$0	\$0
2019 to date Program Funds - 3C-REN		\$0	\$0
2020 to date EM&V Funds		\$4,183	\$4,183
2020 to date Program Funds - Utility		\$67,502	\$67,502
2020 to date Program Funds - REN		\$2,296	\$2,296
2020 to date Program Funds - 3C-REN		\$723	\$723

**Attachment A - Energy Efficiency Program Portfolio**  
**PA Name: Southern California Gas Company**  
**Budget Year: 2021**

**Table 7 - 2020 Authorized Spend and Spent/Unspent Detail**

<b>Authorized, spent and unspent program funds (excludes EM&amp;V) (\$000)</b>	<b>Electric Procurement Funds</b>	<b>Natural Gas Public Purpose Funds</b>	<b>Total</b>
<b>Category</b>			
2020 Annualized Authorized Program Spending Budget		\$ 104,647	\$ 104,647
2020 Actual Spent <sup>1</sup>		\$ 32,145	\$ 32,145
2020 Unspent			
2020 Committed funds <sup>2</sup>		\$ 67,502	\$ 67,502
2020 Unspent/uncommitted - estimated available for 2021 <sup>3</sup>		\$ 5,000	\$ 5,000
2018-2019 Unspent/uncommitted - estimated available for 2021 <sup>3</sup>		\$ 7,264	\$ 7,264

Notes:

1. Actual spent means funds expensed, including accruals and payments made on previous year commitments as of July 31, 2020.
2. 2020 Commitments funds as of July 2020.
3. Funds to be amortized in 2021 rates.

**ATTACHMENT B**

**Advice No. 5684**

**California Energy Database and Reporting System  
SoCalGas Submittal Receipt**

## CEDARS FILING SUBMISSION RECEIPT

The SCG portfolio filing has been submitted and is now under review. A summary of the filing is provided below.

PA: Southern California Gas (SCG)

Filing Year: 2021

Submitted: 03:14:17 on 01 Sep 2020

By: Paul Deang

Advice Letter Number: 5684

### \* Portfolio Filing Summary \*

- TRC: 1.6124
- PAC: 3.4667
- TRC (no admin): 2.315
- PAC (no admin): 9.9764
- RIM: 3.4667
- Budget: \$106,194,721.52

### \* Programs Included in the Filing \*

- SCG3701: RES-Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Home Upgrade Program
- SCG3706: RES-Residential HVAC
- SCG3707: RES-RNC
- SCG3708: COM-Energy Advisor
- SCG3710: COM-Calculated Incentives
- SCG3711: COM-Deemed Incentives
- SCG3713: IND-Energy Advisor
- SCG3714: IND-SEM
- SCG3715: IND-Calculated Incentives
- SCG3716: IND-Deemed Incentives
- SCG3717: AG-Energy Advisor
- SCG3719: AG-Calculated Incentives
- SCG3720: AG-Deemed Incentives
- SCG3721: ET-Technology Development Support
- SCG3722: ET-Technology Assessment Support

- SCG3723: ET-Technology Introduction Support
- SCG3726: C&S-Compliance; Enhancement
- SCG3727: C&S-Reach; Codes
- SCG3728: C&S-Planning; Coordination
- SCG3729: WE&T-Integrated; Energy Efficiency Training
- SCG3730: WE&T-Connections;
- SCG3735: FIN-On-Bill Financing
- SCG3738: PUB-CA Department of Corrections Partnership
- SCG3739: PUB-California Community College Partnership
- SCG3740: PUB-UC/CSU/IOU Partnership
- SCG3741: PUB-State of CA/IOU Partnership
- SCG3742: PUB-LA Co Partnership
- SCG3746: PUB-Santa Barbara Co Partnership
- SCG3747: PUB-South Bay Cities Partnership
- SCG3748: PUB-San Luis Obispo Co Partnership
- SCG3749: PUB-San Joaquin Valley Partnership
- SCG3750: PUB-Orange County Cities Partnership
- SCG3754: PUB-Ventura County Partnership
- SCG3755: PUB-Public Sector EE Innovation
- SCG3757: IND-Small Industrial Facility Upgrades
- SCG3760: WE&T-HERS; Rater Training Advancement
- SCG3764: RES-LivingWise
- SCG3765: RES-Manufactured Mobile Home
- SCG3771: SOL-IDEEA365
- SCG3772: EM&V-Evaluation; Measurement & Verification
- SCG3773: PUB-Public Sector Resource
- SCG3774: PUB-LG Regional Resource
- SCG3776: PUB-Gateway Cities Partnership
- SCG3777: PUB-San Gabriel Valley COG Partnership
- SCG3779: PUB-West Side Community Energy Partnership
- SCG3783: PUB-Western Riverside Energy Partnership
- SCG3802: PUB-San Bernardino Regional Energy Partnership
- SCG3809: COM-AB793-CEMTL Program
- SCG3810: RES-AB793-REMTS Program
- SCG3813: COM-Savings By Design
- SCG3815: PUB-Calculated Incentives
- SCG3816: PUB-Deemed Incentives
- SCG3818: PUB-SW-Water/Wastewater Pumping Program
- SCG3823: RES-HVAC QI/QM
- SCG3824: RES-Behavioral Program
- SCG3825: COM-HVAC QI/QM
- SCG3829: RES-Marketplace

- SCG3830: RES-Retail Partnering
- SCG3831: RES-EE Kits
- SCG3832: RES-Pasadena Home Upgrade
- SCG3833: RES-Burbank Home Upgrade
- SCG3834: COM-LADWP Direct Install
- SCG3835: COM-Pasadena Direct Install
- SCG3836: RES-LADWP HVAC
- SCG3837: PUB-SW-Energy Atlas
- SCG3843: RES-SF Solicitation
- SCG3844: RES-MF Solicitation
- SCG3845: COM-SMB Solicitation
- SCG3846: PUB-SM Solicitation
- SCG3861: RES-Community Language Efficiency Outreach-Direct Install
- SCG3865: AG-Agricultural Solicitation
- SCG3866: COM-Large Solicitation
- SCG3867: RES-MH Solicitation
- SCG-ESAP: Energy Savings Assistance Program
- SCG-ESPI: ESPI Incentives
- SCG-GRCL: GRC Labor Loaders
- SCG\_SW\_CSA\_Appl: C&S-SW-Appliance; Standards Advocacy
- SCG\_SW\_CSA\_Appl\_PA: C&S-SW-Appliance; Standards Advocacy-PA
- SCG\_SW\_CSA\_Bldg: C&S-SW-Building; Codes Advocacy
- SCG\_SW\_CSA\_Bldg\_PA: C&S-SW-Building; Codes Advocacy-PA
- SCG\_SW\_CSA\_Natl: C&S-SW-Federal; Codes Advocacy
- SCG\_SW\_CSA\_Natl\_PA: C&S-SW-Federal; Codes Advocacy-PA
- SCG\_SW\_ETP\_Gas: ET-SW-Emerging Technologies Program, Gas
- SCG\_SW\_ETP\_Gas\_PA: ET-SW-Emerging Technologies Program, Gas-PA
- SCG\_SW\_FS: COM-SW-Food Service Point of Sale
- SCG\_SW\_FS\_PA: COM-SW-Food Service Point of Sale-PA
- SCG\_SW\_HVAC\_Up: COM-SW-Upstream HVAC
- SCG\_SW\_HVAC\_Up\_PA: COM-SW-Upstream HVAC-PA
- SCG\_SW\_IP\_Gov: PUB-SW-Institutional Partnership: DGS & DoC
- SCG\_SW\_IP\_Gov\_PA: PUB-SW-Institutional Partnerships: DGS & DoC-PA
- SCG\_SW\_MCWH: COM-SW-Midstream Commercial Water Heating
- SCG\_SW\_MCWH\_PA: COM-SW-Midstream Commercial Water Heating-PA
- SCG\_SW\_NC\_NonRes: COM-SW-New Construction
- SCG\_SW\_NC\_NonRes\_PA: COM-SW-New Construction-PA
- SCG\_SW\_NC\_Res: RES-SW-New Construction
- SCG\_SW\_NC\_Res\_PA: RES-SW-New Construction-PA
- SCG\_SW\_PLA: RES-SW-Plug Load and Appliance
- SCG\_SW\_PLA\_PA: RES-SW-Plug Load and Appliance-PA
- SCG\_SW\_WET\_CC: WE&T-SW-WE;&T; Career Connections

- SCG\_SW\_WET\_CC\_PA: WE&T-SW-WE;&T; Career Connections-PA
- SCG\_SW\_WET\_Work: WE&T-SW-WE;&T; Career and Workforce Readiness
- SCG\_SW\_WET\_Work\_PA: WE&T-SW-WE;&T; Career and Workforce Readiness-PA

**ATTACHMENT C**

**Advice No. 5684**

**Joint IOUs Shared Funding Allocations  
for Statewide Programs**

**Attachment C - Joint IOUs Shared Funding Allocations for Statewide Programs**

Statewide Program*	Lead IOU	Col A	Col B	Col C	Col D	Col E	Col F	Col G	Col H	Col I	Col A * Col F	Col A * Col G	Col A * Col H	Col A * Col I	Col B * Col F	Col B * Col G	Col B * Col H	Col B * Col I	Col C * Col F	Col C * Col G	Col C * Col H	Col C * Col I
		2021 Program Budget (Total for all contributing IOUs)**	2022 Program Budget (Total for all contributing IOUs)**	Maximum Annual Program Budget (Total for all contributing IOUs)****	Expected or Actual Launch Date (MM/YYYY)***	Percent Electric	Combined (Electric & Gas) Proportional Contribution per Load-Share (Target share. Actual funding may be within +/-20%)				2021 Program Forecast by IOU**				2022 Program Budget by IOU**				Maximum Annual Budget After Launch			
							PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG	PG&E	SDG&E	SCE	SCG
Workforce education, and training: Career and workforce readiness	PG&E	\$ 1,232,332	\$2,112,569	\$ 2,112,569	Jul-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 561,943	\$ 172,034	\$ 395,332	\$ 103,023	\$ 963,331	\$ 294,915	\$ 677,712	\$ 176,611	\$ 963,331	\$ 294,915	\$ 677,712	\$ 176,611
Res New Construction		\$ 5,292,000	\$8,862,000	\$ 12,000,000	Jun-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 2,413,152	\$ 738,763	\$ 1,697,674	\$ 442,411	\$ 4,041,072	\$ 1,237,135	\$ 2,842,930	\$ 740,863	\$ 5,472,000	\$ 1,675,200	\$ 3,849,600	\$ 1,003,200
NonRes New Construction		\$ 2,000,000	\$14,000,000	\$ 20,000,000	Jun-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 912,000	\$ 279,200	\$ 641,600	\$ 167,200	\$ 6,384,000	\$ 1,954,400	\$ 4,491,200	\$ 1,170,400	\$ 9,120,000	\$ 2,792,000	\$ 6,416,000	\$ 1,672,000
Codes and Standards Advocacy		\$ 13,155,000	\$13,155,000	\$ 13,155,000	Feb-2020	80%	45.60%	13.96%	32.08%	8.36%	\$ 5,998,680	\$ 1,836,438	\$ 4,220,124	\$ 1,099,758	\$ 5,998,680	\$ 1,836,438	\$ 4,220,124	\$ 1,099,758	\$ 5,998,680	\$ 1,836,438	\$ 4,220,124	\$ 1,099,758
Institutional Partnerships, DGS & Dept of Corrections	SCE	\$ 416,667	\$2,500,000	\$ 5,000,000	Aug-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 190,000	\$ 58,167	\$ 133,667	\$ 34,833	\$ 1,140,000	\$ 349,000	\$ 802,000	\$ 209,000	\$ 2,280,000	\$ 698,000	\$ 1,604,000	\$ 418,000
WE&T Career Connections		\$ 583,333	\$1,000,000	\$ 1,000,000	Jul-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 266,000	\$ 81,433	\$ 187,133	\$ 48,767	\$ 456,000	\$ 139,600	\$ 320,800	\$ 83,600	\$ 456,000	\$ 139,600	\$ 320,800	\$ 83,600
Water/wastewater pumping		\$ -	\$1,846,970	\$ 5,300,000	Sep-2022	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ 842,218	\$ 257,837	\$ 592,508	\$ 154,407	\$ 2,416,800	\$ 739,880	\$ 1,700,240	\$ 443,080
Lighting (Upstream)		\$ 8,000,000	\$12,000,000	\$ 12,000,000	May-2021	100%	44.40%	15.50%	40.10%	0.00%	\$ 3,552,000	\$ 1,240,000	\$ 3,208,000	\$ -	\$ 5,328,000	\$ 1,860,000	\$ 4,812,000	\$ -	\$ 5,328,000	\$ 1,860,000	\$ 4,812,000	\$ -
ETP, electric	SCG	\$ -	\$14,032,875	\$ 17,897,000	Apr-2022	100%	44.40%	15.50%	40.10%	0.00%	\$ -	\$ -	\$ -	\$ -	\$ 6,230,597	\$ 2,175,096	\$ 5,627,183	\$ -	\$ 7,946,268	\$ 2,774,035	\$ 7,176,697	\$ -
Institutional Partnerships, UC/CSU/CCC		\$ -	\$1,393,939	\$ 4,000,000	Sep-2022	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ 635,636	\$ 194,594	\$ 447,176	\$ 116,533	\$ 1,824,000	\$ 558,400	\$ 1,283,200	\$ 334,400
ETP, gas		\$1,750,000	\$3,000,000	\$ 3,000,000	Aug-2021	0%	50.40%	7.80%	0.00%	41.80%	\$ 882,000	\$ 136,500	\$ -	\$ 731,500	\$ 1,512,000	\$ 234,000	\$ -	\$ 1,254,000	\$ 1,512,000	\$ 234,000	\$ -	\$ 1,254,000
Food Service POS		\$8,643,819	\$10,877,696	\$ 12,227,068	Apr-2021	40%	48.00%	10.88%	16.04%	25.08%	\$ 4,149,033	\$ 940,448	\$ 1,386,469	\$ 2,167,870	\$ 5,221,294	\$ 1,183,493	\$ 1,744,782	\$ 2,728,126	\$ 5,868,993	\$ 1,330,305	\$ 1,961,222	\$ 3,066,549
Midstream Comm Water Heating	SDG&E	\$8,087,900	\$9,640,241	\$ 11,192,583	Apr-2021	40%	48.00%	10.88%	16.04%	25.08%	\$ 3,882,192	\$ 879,964	\$ 1,297,299	\$ 2,028,445	\$ 4,627,316	\$ 1,048,858	\$ 1,546,295	\$ 2,417,772	\$ 5,372,440	\$ 1,217,753	\$ 1,795,290	\$ 2,807,100
Res HVAC QIQM		\$ -	\$0	\$ 6,900,000	Apr-2023	80%	45.60%	13.96%	32.08%	8.36%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,146,400	\$ 963,240	\$ 2,213,520	\$ 576,840
Plug Load and Appliance		\$ 7,250,000	\$29,356,559	\$29,356,559	Sep-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 3,306,000	\$ 1,012,100	\$ 2,325,800	\$ 606,100	\$ 13,386,591	\$ 4,098,176	\$ 9,417,584	\$ 2,454,208	\$ 13,386,591	\$ 4,098,176	\$ 9,417,584	\$ 2,454,208
Upstream HVAC (Comm + Res)		\$ 10,341,930	\$12,652,339	\$ 12,652,339	Jan-2021	80%	45.60%	13.96%	32.08%	8.36%	\$ 4,715,920	\$ 1,443,733	\$ 3,317,691	\$ 864,585	\$ 5,769,467	\$ 1,766,267	\$ 4,058,870	\$ 1,057,736	\$ 5,769,467	\$ 1,766,267	\$ 4,058,870	\$ 1,057,736
<b>Total</b>		<b>\$ 66,752,981</b>	<b>\$ 136,430,188</b>	<b>\$ 167,793,118</b>							<b>\$ 30,828,921</b>	<b>\$ 8,818,779</b>	<b>\$ 18,810,789</b>	<b>\$ 8,294,493</b>	<b>\$ 62,536,202</b>	<b>\$ 18,629,808</b>	<b>\$ 41,601,164</b>	<b>\$ 13,663,014</b>	<b>\$ 76,860,970</b>	<b>\$ 22,978,208</b>	<b>\$ 51,506,860</b>	<b>\$ 16,447,081</b>

\*Modify rows as needed to reflect consolidation or division of a program category per solicitation approach or contracts. Ultimately there should be one line per executed 3P contract.

\*\*The budget is proportional to the anticipated launch date of the program.

\*\*\*Launch date assumes that the signed contracts filed via AL are approved by ED in 90-days, where applicable.

\*\*\*\*Maximum annual program budget subject to change with consensus across IOUs

BP Decision (D.18-05-041); OP 23. The 25 percent requirement for statewide funding articulated in D.16-08-019 shall be calculated as a proportion of the utility program administrator's total portfolio budget, including evaluation, measurement, and verification funding, but excluding funding allocated to other program administrators for other (non-statewide) programs. The percentage requirement for statewide program funding for the Southern California Gas Company shall be reduced to 15 percent, but remain 25 percent for the other utility program administrators consistent with D.16-08-019.

INPUT TABLE: DO NOT MODIFY				
IOU	Percent PPP Electric	Percent PPP Gas	Electric Proportional Share	Gas Proportional Share
PG&E	80%	20%	44.4%	50.4%
SDG&E	90%	10%	15.5%	7.8%
SCE	100%	0%	40.1%	0.0%
SoCalGas	0%	100%	0.0%	41.8%

**ATTACHMENT D**

**Advice No. 5684**

**Southern California Gas Company  
Supplemental Budget Information Pursuant to D.18-05-041**

**Appendix A - Supplemental 2021 Energy  
Efficiency Budget Information**

**Appendix B - SoCalGas Management and  
Organizational Supporting**

**Appendix C - Third-Party Program Solicitation  
Schedule**

## I. DESCRIPTION OF IN-HOUSE EE ORGANIZATIONAL STRUCTURE & ASSOCIATED COSTS

### 1. Functions conducted by each department/organization.

#### **Response:**

The following is a list of functions conducted by SoCalGas departments supporting EE programs, as shown in the organizational chart in Appendix B.

- Customer Strategy and Engagement Department – Provides support for the marketing and outreach of EE programs.
- Market Development – Manages emerging technology projects.
- Commercial and Industrial Services – Provides account executive support for energy efficiency projects with large SoCalGas nonresidential customers.
- Customer Programs and Assistance (CP&A) – Provides overall EE program management, which includes program administration, the third-party solicitation process, design, implementation, contract management, and product and channel management for all sectors. CP&A also provides overall policy, finance and accounting, strategy, compliance, audits, regulatory support, data analytics, evaluation, measurement and verification (EM&V), product review, and management of evaluation studies.

### 2. Management structure and org chart.

#### **Response:**

Please see Appendix B.

### 3. Staffing needs by department/organization, including current and forecast for 2021, as well as a description of what changes are expected in the near term or why it's impossible to predict beyond 2021, if that's the PA's position.

#### **Response:**

SoCalGas provides the requested information regarding its staffing needs, both current (2019) and estimated (2021) by function at the aggregated category in Appendix A. SoCalGas' Business Plan outlines a solicitation strategy that is to be conducted in three phases between now and 2022 to obtain new program designs based on strategies proposed in the Business Plan. It is currently unknown to what extent programs and vendor contracts developed through this effort will impact SoCalGas' organization or staffing needs.

4. Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term or why it's impossible to predict beyond 2021, if that's the PA's position.

**Response:**

SoCalGas currently utilizes consultants to provide portfolio support, including regulatory, program/process design, and solicitation management. As mentioned above, it is currently unknown to what extent SoCalGas' current organization, staffing, and reliance on consultants will continue until the solicitation strategy is fully implemented and new energy efficiency programs are designed and launched.

5. Anticipated drivers of in-house cost changes by department/organization.

**Response:**

As mentioned above, it is currently unknown to what extent SoCalGas' current organization, staffing, and reliance on consultants will continue until the solicitation strategy is fully implemented and new energy efficiency programs are designed and launched.

6. Explanation of method for forecasting costs.

**Response:**

SoCalGas' 2021 budget is based on the Commission-authorized budget set in D.18-05-041.<sup>2</sup> Method of forecasting cost for SoCalGas include evaluated historical portfolio, program, and cost category performance, as well as market sector forecasts to identify the potential goal to develop the proposed budget.

---

<sup>2</sup> See D. 18-05-041.

**B. Table showing PA EE “Full Time Equivalent” headcount by department/organization**

1. TURN and ORA like this example, taken from testimony PG&E’s 2017 GRC addressing its Energy Procurement department. We would be looking for 2018 or 2017 “recorded” positions, depending on what’s most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we’d want at least 2020.
  - Note, if PA’s FTE needs change, these changes can be made without reporting or seeking CPUC approval.

**TABLE 6-3(a)  
 EP HEADCOUNT  
 NUMBER OF PLANNED POSITIONS**

Line No.	Description	2014 Positions	2015 Forecast	2016 Forecast	2017 Forecast
1	EP Administrative Office	4	4	4	4
2	Energy Supply Management (ESM)	126	131	131	134
3	Renewable Energy (RE)	38	40	40	41
4	Energy Policy, Planning and Analysis (EPPA)	46	46	46	46
5	Value Based Reliability (VBR)	10	12	12	12
6	Energy Contract Management and Settlements (ECMS)	79	80	80	80
7	Energy Compliance and Reporting (ECR)	18	18	18	18
8	Total	321	331	331	335

(a) See WP Table 6-7, Exhibit (PG&E-5).

**Response:**

SoCalGas does not track or forecast FTEs at this granular level for EE programs or in its Business Plan. Notwithstanding, SoCalGas has made a good-faith effort to provide an approximate FTE breakdown in the manner requested. Please see the information provided in Appendix A, Portfolio Headcount (FTE) table.

**C. Table showing costs by functional area of management structure**

1. Expenses broken out into labor, non-labor O&M (with contract labor identified).

**Response:**

Please see the information provided in Appendix A.

2. Identify any capital costs.

**Response:**

SoCalGas' capital costs are not part of the EE portfolio budget.

**D. Table showing cost drivers across the EE organization**

1. TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. While this example pertains to departmental cost increases, in our case, cost increases or decreases would be attributed to major cost drivers.

TABLE 6-2(a)  
EP COST INCREASE  
2015-2017 EXPENSE BY COST DRIVER

Line No.	Description	Increase in Thousands of \$	Percent of Total Increase
1	Escalation	3,597	57
2	Portfolio Complexity	1,138	18
3	Regulatory Mandates	1,192	19
4	Process Improvements	400	6
5	Total	6,324	100

(a) See WP Table 6-6, Exhibit (PG&E-5).

**Response:**

SoCalGas does not forecast EE budgets in a manner similar or comparable to a forecast as prepared in a General Rate Case (GRC). Notwithstanding, SoCalGas makes a good faith effort to provide the information in the manner requested. The 2021 program year budget increase of \$3.9M against 2020 is attributed to new programs from solicitations and the increased focus on hard-to-reach customers, to achieve the portfolio's goal.

**E. Explanation of allocation of labor and O&M costs between EE-functions and GRC-functions or other non-EE functions**

1. When an employee spends less than 100% of her/his time on EE, how are costs tracked and recovered (e.g., on a pro rata basis between EE rates and GRC rates; when time exceeds a certain threshold, all to EE; etc.).

**Response:**

SoCalGas uses its accounting tracking system, including designated internal order numbers for each program cost category, to track the costs associated with EE programs. Using SoCalGas' time keeping system (MyTime), an employee records the actual hours of work performed on EE programs. MyTime is used to record, review, and approve the actual time spent on EE programs bi-weekly, which is reviewed for accuracy monthly.

2. Describe the method used to determine the proportion charged to EE balancing accounts for all employees who also do non-EE work.

**Response:**

As mentioned above, MyTime uses EE-designated program cost category internal order numbers to track actual hours worked on EE. The designated EE internal order numbers are then used to capture EE costs to the EE DSMBA balancing account.

3. Identify the EE functions that are most likely to be performed by employees who also do non-EE work (e.g. Customer Account Representatives?)

**Response:**

The EE functions that are most likely to be performed by employees who also do non-EE work are Information Technology, Account Management, and Marketing.

4. Are labor costs charged to EE fully loaded?

**Response:**

Only labor loaders for Vacation & Sick and Payroll Taxes are charged to EE.

5. How are burden benefit-related A&G expenses for employees who work on EE programs recovered (EE rates or GRC rates)? \*\*PG&E allocates these costs to EE pursuant to a settlement agreement with MCE and TURN, which was adopted in D.14-08-032.

**Response:**

SoCalGas does not forecast EE budgets in a manner similar or comparable to a forecast as prepared in a GRC. Any benefit-related A&G items outside of Vacation & Sick and Payroll Taxes are recovered through the GRC.

6. When EE and non-EE activities are supported by the same non-labor resources, how are the costs of those resources or systems allocated to EE and non-EE activities?

**Response:**

For non-labor resources supporting both EE and non-EE, the costs charged to EE program are based on the actual cost incurred associated with the approved scope of work related to the EE program.

7. Identify the EE O&M costs that are most likely to be spread to non-EE functions as well as EE, if any.

**Response:**

EE allowable O&M costs are identified in Energy Efficiency Policy Manual Version 6 and D.09-09-047. These identified costs are specific to EE program cost category in nature and therefore, they do not spread to non-EE functions.

## II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

### A. Attachment-A, Question C.8

“Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable / facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness.”

#### Response:

Please see Appendix A, Portfolio Summary table.

### B. Attachment-A, Question C.9

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

#### Response:

Please see Appendix A, Residential table and similar tables for all other sectors: Commercial, Industrial, Agricultural, Public Sector and Cross-cutting.

### C. Attachment-A, Question C.10

“Present a table akin to PG&E’s Figure 1.9 (Portfolio Overview, p 37) or SDG&E’s Figure 1.10 (p. 23) that not only shows anticipated solicitation schedule of “statewide programs” by calendar year and quarter, but also expected solicitation schedule of local third-party solicitations, by sector, and program area (latter to extent known, and/or by intervention strategy if that is more applicable). For both tables, and for each program entry on the calendar, give an approximate size of budget likely to be available for each solicitation (can be a range).”

**Response:**

Please see Appendix C. As described in SoCalGas' Business Plan, SoCalGas has planned for three phases of open solicitation. This schedule includes budget ranges for solicitations in each phase, based on current budgets for programs in these sectors. Solicitation budgets will be dependent on program designs, and thus, the budget ranges are intended to be illustrative.

**III. CONCLUSION**

This completes SoCalGas' Supplemental Energy Efficiency Business Plan Budget information in response to D.18-05-041.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

PORTFOLIO SUMMARY TABLE

Sector	2019 EE Portfolio Expenditures (\$000's)				2021 EE Portfolio Budget (\$000's)				2019 EE Portfolio Savings			2021 EE Portfolio Forecasted Savings		
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	THERMS	KWH	KW	THERMS
Residential	\$ 5,198	\$ 18,232	\$ 26,925	\$ 50,355	\$ 5,940	\$ 13,799	\$ 20,778	\$ 40,516	8,439,961	1,911	15,625,174	5,820,511	533	15,003,072
Commercial	\$ 4,070	\$ 5,712	\$ 15,237	\$ 25,019	\$ 4,843	\$ 9,914	\$ 10,348	\$ 25,105	36,234	3	3,728,184	835,193	153	4,337,273
Agricultural	\$ 894	\$ 67	\$ 275	\$ 1,236	\$ 1,086	\$ 2,147	\$ 1,887	\$ 5,120	70,365	-	249,021	71,564	-	1,110,098
Industrial	\$ 2,912	\$ 706	\$ 641	\$ 4,259	\$ 3,593	\$ 2,131	\$ 6,739	\$ 12,463	-	-	489,536	-	-	4,460,622
Public (GP)	\$ 2,418	\$ 1,052	\$ 961	\$ 4,431	\$ 2,444	\$ 3,588	\$ 3,130	\$ 9,162	1,453	-	997,521	1,513	0	1,561,638
Cross Cutting*	\$ 4,502	\$ 1,212	\$ -	\$ 5,714	\$ 3,747	\$ 5,659	\$ -	\$ 9,407	-	-	32,951,406	-	-	21,116,134
Total Sector Budget	\$ 19,994	\$ 26,981	\$ 44,040	\$ 91,015	\$ 21,652	\$ 37,239	\$ 42,883	\$ 101,774	8,548,013	1,914	54,040,842	6,728,781	687	47,588,835
EM&V-PA	\$ 205	\$ 113		\$ 318.09	\$ 125	\$ 1,091		\$ 1,216						
EM&V-ED		\$ 135		\$ 134.54		\$ 3,205		\$ 3,205						
OBF - Loan Pool**														
EE Total***	\$ 20,199	\$ 27,228	\$ 44,040	\$ 91,467	\$ 21,777	\$ 41,535	\$ 42,883	\$ 106,195	8,548,013	1,914	54,040,842	6,728,781	687	47,588,835

\* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, On-Bill Financing, and IDEEA 365 Sol.

\*\* For SCG, the loan pool is not part of the authorized EE portfolio budget and is collected and tracked through a separate account.

\*\*\*Total excludes energy savings from the Energy Savings Assistance (ESA) Program.

A. - Attachment-A, Question C.8¶

“Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable/facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness.”¶

- - TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.¶
- - Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.8 Table.¶

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

FUNCTIONS DEFINITIONS TABLE

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and regulatory support	Planning & Compliance	DSM Goal Planning; lead legislative review/positioning; policy support on reg proceedings; portfolio optimization; end use-market strategy; DSM lead for PRP, DRP, ES; locational targeting; audit support; SOX certifications; developing control plans; developing action plans; continuous monitoring; inspections; program/product QA/QC; decision compliance oversight/tracking; data requests; policies & procedures
		Company Regulatory Support	Case management for EE proceedings
Program management	Includes labor, contracts, admin costs for program design, program implementation, product and channel management for all sectors	Program Management & Delivery	Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking
		Product Management	Manage end-to-end new products and services (P&S) intake, evaluation, and launch process; develop and facilitate P&S governance teams, coordination of all sub-process owners, stakeholders, and technical resources required to evaluate and launch new products; evaluate and launch new services and OOR opportunities; develop external partnerships & strategic alliances; work with various companies and associations to help advance standards, products, and tech.; work with external experts to help reduce SCE costs to deliver new prog. and products; develop and launch new customer technologies, products, services for residential and business customers; conduct customer pilots of new technologies and programs; lead customer field demonstrations of new technologies and products; align new P&S to savings programs/incentives; develop new programs/incentives in support of savings goals
		Channel Management	
		Contract Management	Budget forecasting, spend tracking, invoice processing, and contract management with vendors and suppliers; Regulatory support for ME&O activities
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project technical reviews and design assistance	Custom project support	Management of Emerging Products projects; Customized reviews; LCR/RFO support; Ex-ante review management; Technical policy support; Technical assessments; Workpapers; Tool development; End use subject matter expertise
		Deemed workpapers	
		Project management	
Customer Application/Rebate and Incentive Processing	Costs associated with application management and rebate and incentive processing (deemed and custom)	Rebate & Application Processing	
Inspections	Costs associated with project inspections	Inspections	
Portfolio Analytics	Includes analytics support, including internal performance reporting and external reporting	Data analytics	Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients ; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support ; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance
EM&V	EM&V expenditures	EM&V Studies	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTPP and IEPR; market potential study; integration w/ procurement planning; CPUC Demand Analysis Working Group
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research
Account Management / Sales	Costs associated with account rep energy efficiency sales functions	Account Management	
IT	IT project specific costs and regular O&M	IT - project specific	Projects and minor enhancements. Includes project management/business integration ("PMO/BID"). Excluded: maintenance (which SCE defines as when something goes down, normal batch processing, verifying interfaces, etc.).
		IT - regular O&M	
Call Center	Costs associated with call center staff fielding EE program questions	Call Center	
Incentives	Costs of rebate and incentive payments to customers	Incentives	

**Attachment D**  
**Appendix A - Supplemental 2021 EE Budget Information**  
**PA Name: Southern California Gas Company**  
**Budget Year: 2021**

**PORTFOLIO HEADCOUNT (FTE) TABLE**

<b>Functional Group</b>	<b>2019 EE Portfolio FTE<sup>1</sup></b>	<b>2021 EE Portfolio FTE<sup>1</sup></b>
Policy, Strategy, and Regulatory Reporting Compliance	11.6	10.2
Program Management	86.7	80.5
Engineering Services	19.8	19.8
Customer Application/Rebate/Incentive Processing	10.6	10.5
Customer Project Inspections	2.8	2.8
Portfolio Analytics	1.0	1.0
EM&V	1.0	1.0
ME&O (Local)	13.5	13.5
Account Management / Sales	25.8	28.4
IT	3.0	2.5
Call Center	2.1	2.1
Total	177.9	172.2

Notes:

1. FTE is equal to productive labor of 1788 hours per year.

||  
**A. → Narrative description of in-house departments/organizations supporting the PA's EE portfolio**

- → Functions conducted by each department/organization
- → Management structure and org chart
- → Staffing needs by department/organization, including current and forecast for 2018, as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.
- → Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.
- → Anticipated drivers of in-house cost changes by department/organization
- → Explanation of method for forecasting costs

||  
**B. → Table showing PA EE headcount by department/organization**

- → TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. We would be looking for 2016 or 2017 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we'd want at least 2018.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

RESIDENTIAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) <sup>2</sup>
Residential	Labor <sup>1</sup>	Policy, Strategy, and Regulatory Reporting Compliance	\$ 708	\$ 1,462
		Program Management	\$ 2,725	\$ 1,874
		Engineering services	\$ 256	\$ 97
		Customer Application/Rebate/Incentive Processing	\$ 665	\$ 1,059
		Customer Project Inspections	\$ 171	\$ -
		Portfolio Analytics	\$ 47	\$ -
		ME&O (Local)	\$ 525	\$ 1,276
		Account Management / Sales	\$ -	\$ -
		IT	\$ 47	\$ 3
		Call Center	\$ 54	\$ 169
	Labor Total		\$ 5,198	\$ 5,940
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ -	\$ 11,419
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 14,551	\$ 1,355
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 792	\$ -
		Program Management	\$ 645	\$ 940
		Engineering services	\$ 195	\$ 3
		Customer Application/Rebate/Incentive Processing	\$ 940	\$ 80
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 1,008	\$ 2
		Account Management / Sales	\$ -	\$ -
		IT	\$ 102	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 26,925	\$ 9,603
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 11,175
	Non-Labor Total		\$ 45,158	\$ 34,577
Residential Total			\$ 50,355	\$ 40,516
	Other (collected through GRC) <sup>3</sup>	Labor Overheads	\$ 1,544	\$ 2,269

Notes:

- Labor costs are already loaded with V&S, Payroll Taxes, and Non-Labor.
- Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- The labor P&B costs are collected through GRC.

C. - **Table showing costs by functional area of management structure**

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. - **Attachment A, Question C.9**

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

COMMERCIAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) <sup>2</sup>
Commercial	Labor <sup>1</sup>	Policy, Strategy, and Regulatory Reporting Compliance	\$ 539	\$ 513
		Program Management	\$ 1,440	\$ 1,556
		Engineering services	\$ 837	\$ 925
		Customer Application/Rebate/Incentive Processing	\$ 114	\$ 106
		Customer Project Inspections	\$ 11	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 224	\$ 750
		Account Management / Sales	\$ 895	\$ 960
		IT	\$ -	\$ 10
		Call Center	\$ 10	\$ 22
	Labor Total		\$ 4,070	\$ 4,843
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 7,776
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 1,613	\$ 142
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 572	\$ -
		Program Management	\$ 2,380	\$ 1,397
		Engineering services	\$ 298	\$ 370
		Customer Application/Rebate/Incentive Processing	\$ 119	\$ 229
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 729	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 15,237	\$ 4,202
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 6,146
	Non-Labor Total		\$ 20,949	\$ 20,262
Commercial Total (\$)			\$ 25,019	\$ 25,105
	Other (collected through GRC) <sup>3</sup>	Labor Overheads	\$ 1,263	\$ 1,856

Notes:

- Labor costs are already loaded with V&S, Payroll Taxes, and Non-Labor.
- Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- The labor P&B costs are collected through GRC.

C. -> **Table showing costs by functional area of management structure**

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. -> **Attachment A, Question C.9**

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- > TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- > Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

INDUSTRIAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) <sup>2</sup>		
Industrial	Labor <sup>1</sup>	Policy, Strategy, and Regulatory Reporting Compliance	\$ 132	\$ 189		
		Program Management	\$ 651	\$ 736		
		Engineering services	\$ 703	\$ 794		
		Customer Application/Rebate/Incentive Processing	\$ 56	\$ 44		
		Customer Project Inspections	\$ 2	\$ -		
		Portfolio Analytics	\$ -	\$ -		
		ME&O (Local)	\$ 174	\$ 540		
		Account Management / Sales	\$ 1,187	\$ 1,264		
		IT	\$ -	\$ 1		
		Call Center	\$ 8	\$ 26		
		<b>Labor Total</b>		<b>\$ 2,912</b>	<b>\$ 3,593</b>	
		Non-Labor		Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 290
				Local/Government Partnerships Contracts	\$ -	\$ -
				Other Contracts	\$ -	\$ -
Program Implementation	\$ 78			\$ 87		
Policy, Strategy, and Regulatory Reporting Compliance	\$ 173			\$ -		
Program Management	\$ 284			\$ 1,595		
Engineering services	\$ 38			\$ 112		
Customer Application/Rebate/Incentive Processing	\$ 110			\$ 48		
Customer Project Inspections	\$ -			\$ -		
Portfolio Analytics	\$ -			\$ -		
ME&O (Local)	\$ 23			\$ -		
Account Management / Sales	\$ -			\$ -		
IT	\$ -			\$ -		
Call Center	\$ -			\$ -		
Facilities	\$ -	\$ -				
Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 641	\$ 6,305				
Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 434				
<b>Non-Labor Total</b>		<b>\$ 1,347</b>	<b>\$ 8,871</b>			
<b>Industrial Total</b>		<b>\$ 4,259</b>	<b>\$ 12,463</b>			
	Other (collected through GRC) <sup>3</sup>	Labor Overheads	\$ 1,055	\$ 1,551		

Notes:

- Labor costs are already loaded with V&S, Payroll Taxes, and Non-Labor.
- Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- The labor P&B costs are collected through GRC.

C. → Table showing costs by functional area of management structure

- - Expenses broken out into labor, non-labor O&M (with contract labor identified)
- - Identify any capital costs

B. → Attachment A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

AGRICULTURAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) <sup>2</sup>
Agricultural	Labor <sup>1</sup>	Policy, Strategy, and Regulatory Reporting Compliance	\$ 41	\$ 92
		Program Management	\$ 278	\$ 308
		Engineering services	\$ 179	\$ 216
		Customer Application/Rebate/Incentive Processing	\$ 34	\$ 20
		Customer Project Inspections	\$ 1	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 120	\$ 179
		Account Management / Sales	\$ 233	\$ 260
		IT	\$ -	\$ -
		Call Center	\$ 8	\$ 11
	Labor Total		\$ 894	\$ 1,086
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 1,802
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 6	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 38	\$ -
		Program Management	\$ 0	\$ 267
		Engineering services	\$ 9	\$ 57
		Customer Application/Rebate/Incentive Processing	\$ 2	\$ 22
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 12	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Program	\$ 275	\$ 689
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 1,198
	Non-Labor Total		\$ 342	\$ 4,035
Agricultural Total			\$ 1,236	\$ 5,120
	Other (collected through GRC) <sup>3</sup>	Labor Overheads	\$ 325	\$ 477

Notes:

- Labor costs are already loaded with V&S, Payroll Taxes, and Non-Labor.
- Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- The labor P&B costs are collected through GRC.

C. → **Table showing costs by functional area of management structure**

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → **Attachment A, Question C.9**

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

- TURN and ORA invite the PAs to propose a common table format for this information. We don’t have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

PUBLIC SECTOR BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) <sup>2</sup>
Public Sector	Labor <sup>1</sup>	Policy, Strategy, and Regulatory Reporting Compliance	\$ 133	\$ 152
		Program Management	\$ 1,863	\$ 2,078
		Engineering services	\$ 146	\$ 72
		Customer Application/Rebate/Incentive Processing	\$ 2	\$ 1
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 38	\$ 30
		Account Management / Sales	\$ 236	\$ 83
		IT	\$ -	\$ 27
		Call Center	\$ -	\$ -
	Labor Total		\$ 2,418	\$ 2,444
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 415
		Local/Government Partnerships Contracts	\$ 700	\$ 3,173
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 95	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 131	\$ -
		Program Management	\$ -	\$ -
		Engineering services	\$ 22	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 2	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 102	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Program	\$ -	\$ 1,510
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 961	\$ 1,620
	Non-Labor Total		\$ 2,013	\$ 6,718
Public Sector Total			\$ 4,431	\$ 9,162
	Other (collected through GRC) <sup>3</sup>	Labor Overheads	\$ 809	\$ 1,188

Notes:

- Labor costs are already loaded with V&S, Payroll Taxes, and Non-Labor.
- Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- The labor P&B costs are collected through GRC.

C. → **Table showing costs by functional area of management structure**

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → **Attachment A, Question C.9**

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Attachment D  
Appendix A - Supplemental 2021 EE Budget Information  
PA Name: Southern California Gas Company  
Budget Year: 2021

CROSS-CUTTING BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) <sup>2</sup>
Cross Cutting	Labor <sup>1</sup>	Policy, Strategy, and Regulatory Reporting Compliance	\$ 3	\$ 166
		Program Management	\$ 4,008	\$ 3,299
		Engineering services	\$ 26	\$ 23
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 159	\$ -
		ME&O (Local)	\$ 297	\$ 250
		Account Management / Sales	\$ -	\$ 2
		IT	\$ 9	\$ 7
		Call Center	\$ -	\$ -
	Labor Total		\$ 4,502	\$ 3,747
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 1,983
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 428	\$ 1,178
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ 639	\$ 2,499
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 133	\$ -
		ME&O (Local)	\$ 11	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ 1	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ -	\$ -
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ -
	Non-Labor Total		\$ 1,212	\$ 5,659
Cross Cutting Total (5)			\$ 5,714	\$ 9,407
	Other (collected through GRC) <sup>3</sup>	Labor Overheads	\$ 1,240	\$ 1,822

Notes:

- Labor costs are already loaded with V&S, Payroll Taxes, and Non-Labor.
- Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- The labor P&B costs are collected through GRC.

**C. → Table showing costs by functional area of management structure**

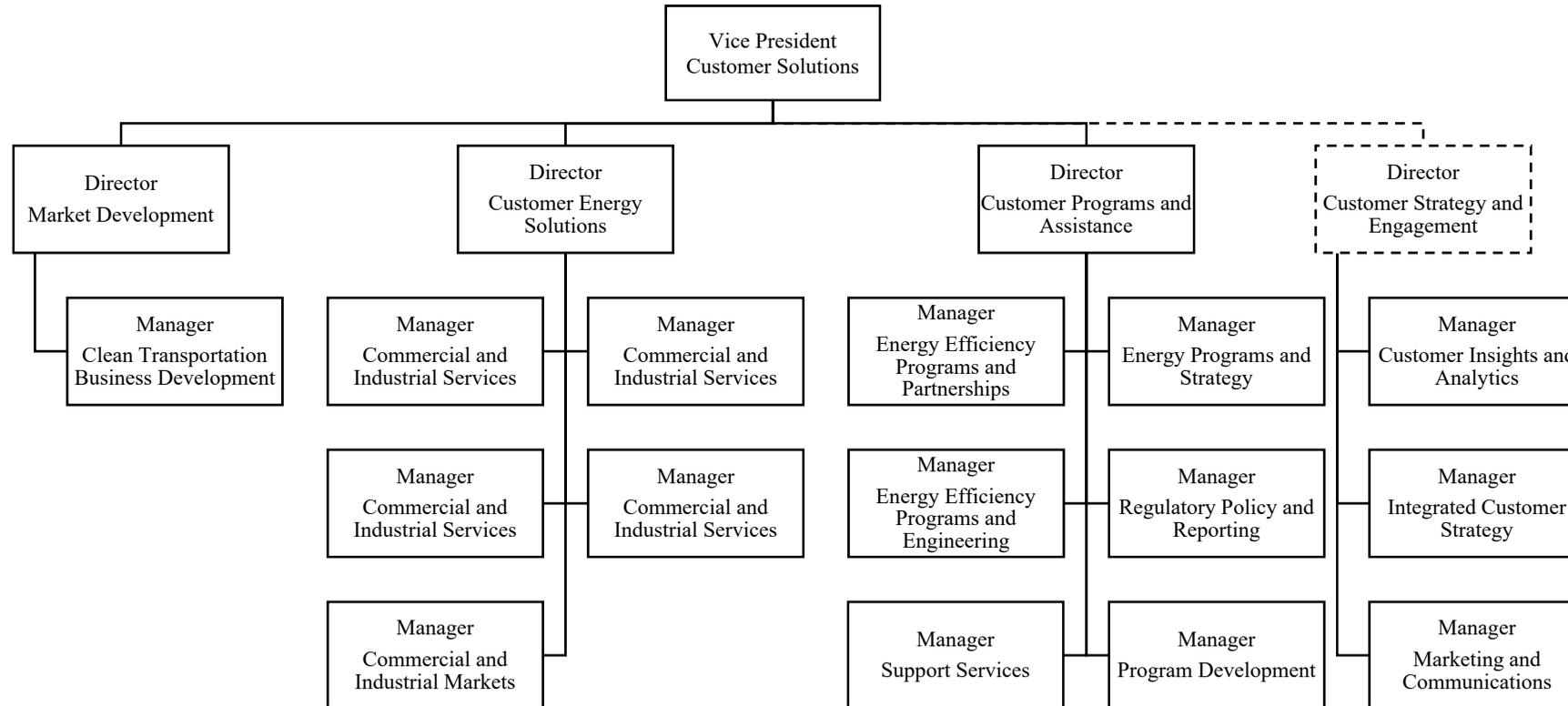
- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

**B. → Attachment A, Question C.9**

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

- → TURN and ORA invite the PAs to propose a common table format for this information. We don’t have anything specific in mind.
- → Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table

## Appendix B - SoCalGas Management Structure Supporting Energy Efficiency



## Appendix C - SoCalGas Third-Party Program Solicitation Schedule

SoCalGas Energy Efficiency Solicitation Schedule		Schedule as of 08/01/2020 (Schedule may be subject to change at IOU's discretion)																																																																																			
Year		2019												2020												2021												2022																																															
Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4																																																		
Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec																																				
Local - Residential	Residential Single Family	RFP Prep						RFP						Contract Negotiation																																																																							
Local - Residential	Residential Multifamily	RFP Prep						RFP						Contract Negotiation																																																																							
Local - Commercial	Small & Medium Commercial	RFA			RFP Prep			RFP						Contract Negotiation																																																																							
Local - Public	Small & Medium Public	RFA			RFP Prep			RFP						Contract Negotiation																																																																							
Statewide - Commercial	Point of Sale Food Service	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																																																				
Statewide - Commercial	Midstream Water Heating	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																																																				
Statewide - Cross Cutting	Gas Emerging Technologies							RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																																														
Local - Residential	Manufactured Housing (Re-issue RFA)										RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																														
Local - Commercial	Large Commercial										RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																														
Local - Agricultural	Agricultural Sector										RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																														
Local - Cross Cutting	Behavioral Strategies													RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																											
Local - Cross Cutting	Outreach (Tenative, If Necessary)																RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																								
Local - Cross Cutting	Marketplace																RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																								
Local Public	Public Sector Segments (i.e., LGPs)																RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																								
Local - Industrial	Industrial Segment Solutions																			RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																																																					